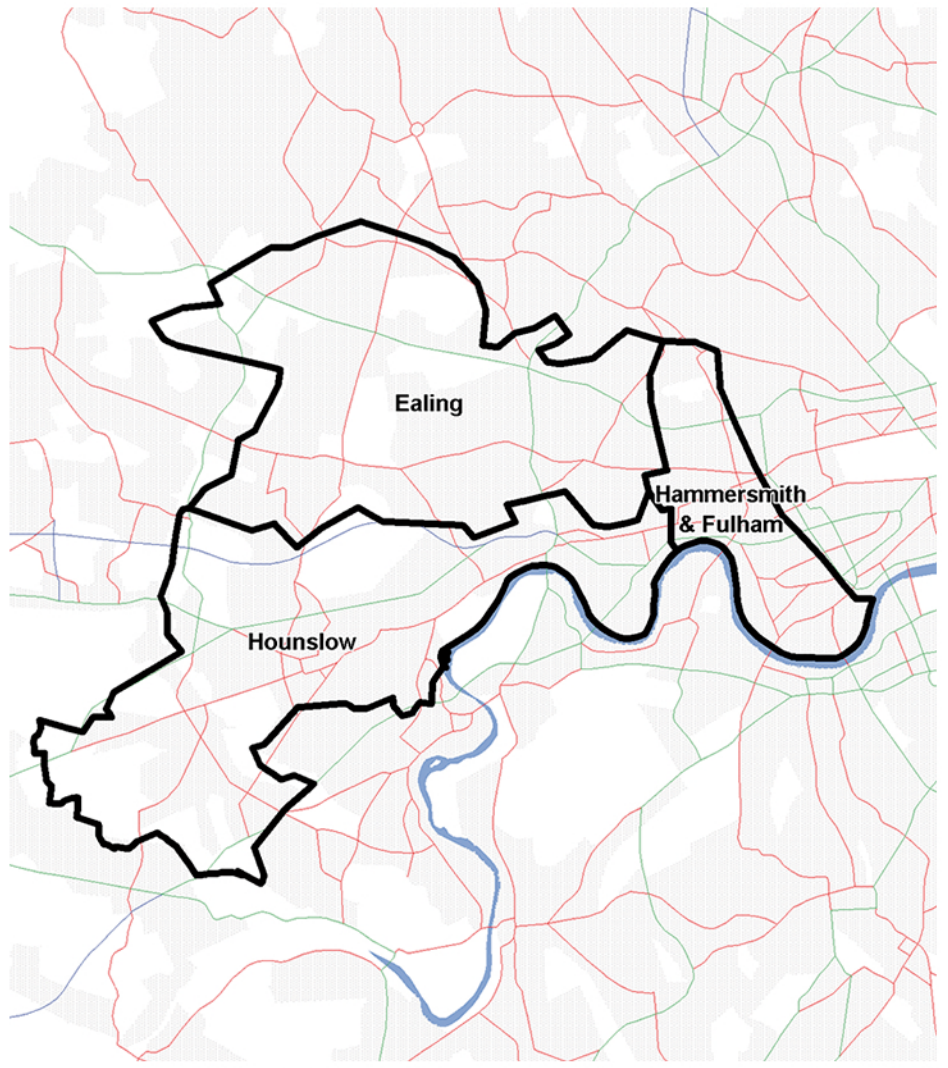


WEST LONDON RETAIL NEEDS STUDY 2006

London Boroughs of Ealing, Hounslow and Hammersmith & Fulham



CONTENTS

| | |
|--|----|
| 1. CENTRE AUDITS AND ASSESSMENT: BACKGROUND..... | 1 |
| 2. EALING TOWN CENTRE | 4 |
| 3. GREENFORD | 11 |
| 4. ACTON | 15 |
| 5. HANWELL | 19 |
| 6. SOUTHALL | 22 |
| 7. EALING'S OTHER CENTRES..... | 27 |
| 8. HAMMERSMITH..... | 37 |
| 9. FULHAM..... | 42 |
| 10. SHEPHERDS BUSH..... | 47 |
| 11. HAMMERSMITH & FULHAM'S OTHER CENTRES..... | 51 |
| 12. HOUNSLOW..... | 69 |
| 13. CHISWICK..... | 73 |
| 14. FELTHAM..... | 77 |
| 15. BRENTFORD..... | 81 |
| 16. HOUNSLOW'S OTHER CENTRES | 84 |

1. CENTRE AUDITS AND ASSESSMENT: BACKGROUND

1.1 GVA Grimley has undertaken health checks of the Metropolitan, Major, District, Local and Neighbourhood centres across the West London Authorities of Ealing, Hammersmith & Fulham and Hounslow. The purpose of these is to stand as appendix to the West London Retail Needs Study 2006.

1.2 Full health checks of the 12 main study centres have been undertaken. These are based on the indicators set out in PPS6. PPS6 states that in order to measure the vitality and viability of town centres local authorities should collect information on a range of key indicators. PPS6 set out these indicators and are summarised below:

- **Diversity of main town centre uses:** To assess this we have drawn on Experian Goad surveys as well as the Council's own audits where available. Where neither are available we have undertaken our own audits. It should be noted that all surveys and audits are based on the relevant UDP town centre boundary (as illustrated in volume 3 of the appendices). Therefore floorspace figures may not fully accord with published Goad figures due to discrepancies between Goad survey areas and town centre boundaries.
- **Retailer representation:** This looks at the types of retailers in a centre, for example the proportion of multiple retailers. A multiple retailer is defined as being part of a network of nine or more outlets and can be an indicator of the attraction of the retail offer in a centre.
- **Vacancies:** Vacancies can arise even in the strongest town centres and this indicator should be used with care. Conversely, the absence of any vacancies can be a symptom of an under provision of space, restricting new and existing retailers in the centre from securing new or enhanced representation.
- **Retailer demand:** Focus Property Intelligence provides a database of retailers with a requirement to locate in a specific town centre. The figures, although are a useful guide should be treated with a degree of caution as some retailers (food retailer particularly) do not publish their requirements due to commercial sensitivities. While the data gives a good indication of the attractiveness of a centre at the

present time, it is certainly possible for a centre to stimulate retailer interest through appropriate proposals and commitments coming forward. Requirements can also increase significantly where new development proposals emerge.

- **Shopping rents:** The level of rent which retailers are prepared to pay is an indication of the strength of a centre, although other factors such as the availability of floorspace may impact on rental value. Rents are published by Colliers CRE.
- **Commercial yields:** These demonstrate the confidence of investors in the long-term profitability of a centre for retail, office and other commercial developments. The Valuation Office Agency publishes yields.
- **Accessibility:** This should look at the ease and convenience of access by a choice of means of travel, including - the quality, quantity and type of car parking; the frequency and quality of public transport; and the quality of provision for pedestrians, cyclists and disabled people. We have also drawn on Public Transport Accessibility Level (PTAL) Maps, which are published by Transport for London.
- **Pedestrian flows:** Site visits we have undertaken allow us to make a judgement as to the parts of a centre with the highest footfall. Footfall surveys were not commissioned for this study.
- **Customer and residents views and behaviour:** We have drawn on in-centre surveys to establish people's attitudes, likes and dislikes of a centre. In this case we commissioned in-centre surveys in the twelve main centres across the three authorities. NEMS Market Research undertook 100 face-to-face interviews in each of the 12 centres between Thursday 7th and Saturday 30th September 2006. Interviews were split between weekdays and weekends. Full results of these surveys can be found in Volume 4 of the appendices.
- **Perception of safety and occurrence of crime:** There is limited published data available on crime and safety in the West London town centres. The in-centre surveys can be used to highlight people's perception of crime and safety in a town centre. We have drawn on data published by the Council's where available.
- **Environmental quality:** This includes information on problems such as noise, litter and graffiti as well as positive factors such as trees and landscaping.

1.3 For the local and neighbourhood centres much of the above information is not available. Therefore assessment of these centres is based on GVA Grimley on-site surveys and

audits which are provided in Volume 3 of the appendices. Therefore we have been able to draw conclusions to the role and health of each centre.

- 1.4 Summaries and conclusions of all of these assessments can be found in sections 6 –8 of the main report.

2. EALING TOWN CENTRE

- 2.1 Ealing is the principle focus for shopping in the Borough of Ealing and is defined as a Metropolitan Centre in the London Plan. The centre of Ealing consists of Ealing Broadway and West Ealing, which although classified as one centre, comprises two main shopping locations. Ealing Broadway is the dominant centre with a range of national multiples. West Ealing, approximately two miles to the west of Ealing Broadway along the Uxbridge Road, has some lower quality multiple retailers but also a range of independent and ethnic retailers and serves a more local catchment.
- 2.2 Based on our observations the highest pedestrian footfall in Ealing is in Ealing Broadway where there are high flows around Ealing Broadway station, along the Uxbridge Road and the Ealing Broadway Shopping Centre. The highest flows in West Ealing are along Uxbridge Road and around Sainsbury's. Flows are low on the edge of the centre and also along the Uxbridge Road between Ealing Broadway and West Ealing.

Diversity of Uses & Retailer Representation

- 2.3 Ealing has a total retail floorspace of 130,170 sqm comprising 630 units.

Table 2.1: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average over the 12 West London Study Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 54 | 8.5 | 11.0 |
| Comparison | 236 | 37.4 | 33.7 |
| Service | 306 | 48.6 | 47.2 |
| Vacant | 34 | 5.4 | 8.1 |
| Total | 630 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

- 2.4 Ealing Broadway has a selection of mainstream fashion retailers such as River Island, Wallis, Top Shop and Warehouse. West Ealing has lower quality multiple retailers such as Bhs, Woolworths, Peacocks, 99p Stores, Wilkinsons, Ethel Austin and New Look. Although the overall offer of national multiples in Ealing is good, the department and variety store offer is relatively limited. Beales is the only department store with a limited

number of ladieswear concessions, including Jacques Vert, Windsmore and Mexx. West Ealing has an independent department store called Daniels, which is currently being refurbished. The limited range of comparison retailers was highlighted in the centre survey where 8% of respondents stated that they disliked the poor range of comparison retailers in Ealing and only 9% of respondents were visiting Ealing with the main purpose of clothes shopping.

Table 2.2: Managed Shopping Centres

| <i>Shopping Centre</i> | <i>Date of Opening</i> | <i>Retail Floorspace</i> | <i>Anchor Retailers</i> |
|------------------------|-------------------------|--------------------------|---------------------------|
| Ealing Broadway Centre | 1981 (Refurbished 2002) | 25,548 sqm gross | Marks and Spencer, Beales |
| Arcadia Centre | 1986 (Refurbished 1998) | 7,061 sqm gross | HMV, Mothercare, TK Maxx |
| <i>Source: EGI</i> | | | |

2.5 Ealing Broadway has two managed shopping centres. The Arcadia Centre (formally known as the Waterglade Centre) which is occupied by retailers including HMV, Mothercare and TX Maxx and the larger Ealing Broadway Centre, which opened in 1984 accommodating many national multiples within its 25,000 sqm retail floorspace. The Ealing Broadway Centre is anchored by Beales and Marks & Spencer with other large users including Currys and Waterstones. It is also home to a Virgin Active gym and Ealing central library. Legal and General own the centre and we understand that they are looking to reconfigure the floorspace. This is illustrated by the fact that Morrisons has recently closed and several other units have become vacant at the eastern end of the centre.

2.6 Existing convenience offer consists of Tesco Express, several small Budgens stores, Sainsbury's Local, Marks and Spencer's Foodhall, two Organic foodstores and an Iceland in a secondary area of the centre. The former Safeway/Morrisons store in the Broadway Centre is also being reconfigured for a new Tesco Metro store. West Ealing has a Sainsbury's supermarket in the heart of the centre and a recently refurbished Waitrose next to West Ealing station as well as a weekly Saturday farmers market in Leeland Road. There is also an annual French Market on Ealing Green. West Ealing has a wide range of convenience and service provision serving its local residential catchment. In the in-centre survey, when asked what was the main purpose of your visit to Ealing, the most popular response was 'food shopping', mentioned by 27% of respondents.

- 2.7 Ealing Broadway has several clusters of food and drinks outlets. There is a range of restaurants by the station which have outdoor seating areas overlooking Haven Green. There is also a variety of pubs and restaurants along the Uxbridge Road and on Ealing Green. In West Ealing, the food and drinks outlets are dispersed along Uxbridge Road. Despite this provision, the in-centre survey results highlighted that 82% of respondents never visit Ealing in the evening for eating and drinking and almost half of respondents do not use the cafés and restaurants during the day, although when asked how often they visit the centre for daytime eating and drinking, 30% of respondents stated at least once a week. 7% of respondents stated that they visited Ealing for night time restaurants and bars at least once a week.
- 2.8 Ealing Broadway has a range of other services including a squash club, Ealing Studios, Thames Valley University, Pitshanger Manor Museum and Gallery, Questors Theatre, Ealing and West London College and a three screen cinema. Ealing also has a substantial quantum of office floorspace and 16% of respondents to the in-centre survey stated that their main purpose for visiting the centre was for work/business. The large offices are located along the Uxbridge Road between Ealing Broadway and West Ealing. West Ealing also has a library.
- 2.9 Ealing Broadway has several ethnic retailers. There are several operators catering for the Polish population including two Polish deli's and a Polish travel agents. West Ealing has more independent retailers, many of which sell ethnic goods such as Polish food shops, Halal butchers, Indian, West Indian, Iranian, Arab and middle eastern convenience stores and Afro hairdressers. West Ealing also has a variety of ethnic restaurants and takeaways such as a Turkish and Lebanese restaurant. 11% of respondents to the in-centre survey stated that they used Ealing for specialist ethnic food products and the most popular ethnic shops were Halal retailers.
- 2.10 The telephone survey results show that when visiting Ealing for clothing and footwear shopping, 45% of people undertake a linked trip. These are broken down as follows:
- Meeting Friends – 4.4%
 - Food Shopping – 7.5%
 - Other non-food shopping – 12.9%
 - Leisure Activity – 1%
 - Pubs/clubs – 1.7%

- Restaurants – 10.5%
- Cafés – 11.6%
- Financial Services - 8.5%

Rents & Yields

- 2.11 Rents in Ealing have been constant since 2004. Current rental levels are £1,991 per sqm. Yields in both Ealing Broadway and West Ealing have fallen since 2001, which indicates that both centres are fairly healthy. In January 2006 yields in Ealing Broadway were 6% and 7% in West Ealing.

Retailer Requirements

- 2.12 Current retailer demand in Ealing is strong with requirements from a good range of comparison and service operators including Debenhams department store, which would add significantly to the vitality and viability of the centre. Although several retailers have recently closed in Ealing Broadway, new occupiers are taking space including Monsoon and Fat Face, indicating that retailer confidence in the centre is still strong.

Table 2.3: Retailer Requirements

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Min. Floorspace sq m Gross</i> | <i>Max. Floorspace sq m Gross</i> |
|------------------------|---------------------|-----------------------------------|-----------------------------------|
| Comparison | 29 | 11,464 | 21,214 |
| Convenience | 3 | 1,833 | 2,358 |
| Service | 16 | 3,874 | 7,135 |
| TOTAL | 48 | 17,171 | 30,707 |

Source: Focus

Transport & Accessibility

- 2.13 Ealing benefits from excellent transport connections. Ealing Broadway station is served by mainline trains between London Paddington and the South West, as well as Heathrow airport. The District and Central underground lines also run from the station. Ealing Broadway could also be a station on the proposed Cross Rail scheme. Ealing station concourse is out dated and would benefit from improvements to enhance the gateway into the centre.

- 2.14 West Ealing also has a train station with less frequent train services into London Paddington and Heathrow. Frequent bus services connect Ealing Broadway and West Ealing to Ruislip, Northolt, Brent Cross, Wembley, Golders Green, Neasden, Acton, Shepherds Bush, Chiswick, Richmond and Kingston. The most popular mode of transport used by respondents to Ealing's in-centre survey was buses (45%). The West London Tram will also run through Ealing if this scheme goes ahead. The Public Transport Accessibility map (PTAL) shows that Ealing Broadway has an excellent level of accessibility to public transport. West Ealing has a lower PTAL score but still has good accessibility to public transport.
- 2.15 Ealing Broadway and West Ealing both have several shopper car parks. The Ealing Broadway Centre has a 600 space multi-storey car park and the Spring Bridge multi-storey has 500 spaces. West Ealing has less car parking provision and comprises several small car parks including the Sainsbury's multi-storey with 150 spaces and car parks behind the Uxbridge Road. There are also cycle racks throughout the centre including a cluster of racks on Haven Green by Ealing Broadway station.
- 2.16 Results from the in-centre survey should that respondents used the following modes of travel to get to Ealing:
- 12% by car
 - 45% by bus
 - 13% by train
 - 5% by taxi
 - 21% walked
 - 4% cycled

Environmental Quality

- 2.17 The environment quality of Ealing varies. A large proportion of Ealing Broadway is designated as a Conservation Area. Many of the streets consist of traditional three storey town houses which are attractive and well maintained buildings, although there is more in-fill development along the Uxbridge Road. West Ealing also has several Listed Buildings and buildings or facades with architectural value. There are several Listed Buildings and buildings or facades identified as having architectural value in the UDP such as Natwest bank, Ealing Town Hall and the Church of Christ the Saviour. In general, the majority of

the building facades and shopfronts are well maintained in Ealing Broadway. In West Ealing, the shopfronts appear more tired looking and are less well maintained.

- 2.18 The main thoroughfare through Ealing, along the Uxbridge Road, is often congested with traffic. Pavements are narrow in places and are separated from the road with large areas of railings. At peak times, pedestrians waiting to cross the road block the pavements creating queues and adding to the congestion. Ealing Broadway and West Ealing both have rubbish on the streets, although this problem is worse in West Ealing. West Ealing also has more graffiti than Ealing Broadway. 14% of respondents to the in-centre survey stated that the main reason that they disliked Ealing was the dirty and poorly maintained streets and the most popular improvement that respondents would like to see in the centre was cleaner shopping streets.
- 2.19 Ealing Broadway and West Ealing have minimal amounts of open space. The Ealing Broadway Centre has an open space leading from the centre to the Uxbridge Road along Oak Road, as well as an outdoor square in the middle of the centre. Both are well maintained with modern street furniture, public art and lighting. The Ealing Broadway Centre Management often holds seasonal events in the centre's main square and there are facilities for market stalls along Oak Road. West Ealing has a small area of open space along Melbourne Avenue, where there are often market stalls.
- 2.20 Ealing Broadway has several parks and green spaces adjacent to the centre. Haven Green is an attractive space opposite Ealing Broadway station with landscaped gardens and seating. Ealing Green to the south of the centre is also an area of green space and Walpole Park is close by. Dean Gardens is situated at the junction of the Uxbridge Road and Northfield Avenue in West Ealing. It consists of a green area with seating and a children's play area.

Crime and Safety

- 2.21 Ealing has a town centre manager and a Centre Partnership who work in partnership with the Council and the Police to improve crime and safety in Ealing town centre. Current management initiatives include Pubwatch, Responsible Host Award Schemes and Town Centre Rangers. Businesses in Ealing have also voted in favour of a Business Improvement District (BID) for the town centre.
- 2.22 Like all big centres, Ealing has problems with its evening economy including drunken youths and environmental damage. In October 2004 a report was published looking at the cumulative impact of pubs, clubs and restaurants in Ealing town centre. The findings of

the report highlighted that there is a nighttime 'hotspot' of crime and public disorder in the eastern area of Ealing town centre. A residents survey also revealed that people are concerned with the impacts of the evening economy and their preference is to restrict growth rather than encourage it. The London Borough of Ealing's licensing section have undertaken measures to tackle these problems.

Proposals/Commitments

- 2.23 Dickens Yard is a major potential development site in Ealing Broadway. Ealing Council selected their preferred development partner in December 2005 as St George and a development brief has been prepared. We understand that the redevelopment will provide a mixed-use scheme of c. 8,000 sqm of commercial floorspace including 3,556 sqm of retail as well as residential units, a new public realm, health, leisure and community facilities and a new car park.
- 2.24 Daniels department store in West Ealing is currently operating from a smaller store whilst its main site is redeveloped to house a two storey department store with approximately 140 flats above. Planning permission was also granted in 2003 to redevelop the cinema in Ealing to provide a 16 screen multiplex. Planning permission has been granted to extend Ealing Squash Club to provide 2,750 sqm of leisure floorspace incorporating a swimming pool and additional squash courts.

3. GREENFORD

- 3.1 Greenford is defined as a District Centre within the London Plan. It is located to the south of the A40 in an established residential area consisting mainly of 1930s and 1950s properties. The centre is located at the crossroads with Greenford Road and Ruislip Road/The Broadway. The prime retail area extends along Ruislip Road, which gently slopes upwards towards the junction with Oldfield Lane South where there is an area of public open space and Greenford Hall.
- 3.2 The highest area of pedestrian footfall in Greenford is in the middle of the centre where the Broadway meets Greenford Road. There are also high flows at the top of the Broadway around the VB supermarket.

Diversity of Uses & Retailer Representation

Table 3.1: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average over the 12 West London Study Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 26 | 16.9 | 11.0 |
| Comparison | 48 | 31.2 | 33.7 |
| Service | 72 | 46.8 | 47.2 |
| Vacant | 8 | 5.2 | 8.1 |
| Total | 154 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

- 3.3 Greenford has a total of 25,260 sqm of retail floorspace comprising 154 units. The in-centre survey results reveal that the most popular reasons for visiting Greenford are food shopping (30%) and financial services (12%) and most people visit the centre at least once a week, although just over half of respondents spent less than 30 minutes in the centre.
- 3.4 Key retailers in Greenford include Boots, Woolworths, Greggs, Tesco and several High Street banks. Greenford has a large number of independent retailers, these include several convenience retailers such as VB Supermarket, the Stall Greengrocer, Greenford Butcher and Greenford Wholesale Fish Market Fishmonger.

- 3.5 Greenford Hall is situated to the north of the centre. It is a community facility operated by Ealing Council and includes a nursery and rooms available to hire for events. Greenford also has a library along Oldfield Lane South and the Cardinal Wiseman Secondary School occupies a large site to the south of the centre along Greenford Road.
- 3.6 Greenford has a range of ethnic retailers including Turkish, continental, West Indian, Indian, Irish and Polish foodstore, as well as several Halal butchers. VB's supermarket is a large independent Asian supermarket. There is also a Caribbean food takeaway and an Afro-Caribbean takeaway. Comparison ethnic retailers are limited to an Afro Hair Accessories Shop. 51% of respondents to the in-centre survey used Greenford for specialist ethnic food. The most popular ethnic shops were Tesco and VB's.

Rents & Yields

- 3.7 Rental information is unavailable for Greenford. Retail yields have fallen in Greenford since their peak at 10% in 2002, which is a potential sign of growing investor confidence in the centre. In January 2006 retail yields stood at 9.5%.

Retailer Requirements

- 3.8 Current retailers demand in Greenford includes requirements from a good range of comparison, convenience and service operators including Peacocks, the Early Learning Centre, Iceland, and Superdrug.

Table 3.2: Retailer Requirements

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Min. Floorspace sq m Gross</i> | <i>Max. Floorspace sq m Gross</i> |
|------------------------|---------------------|-----------------------------------|-----------------------------------|
| Comparison | 14 | 3,261 | 6,642 |
| Convenience | 4 | 372 | 883 |
| Service | 10 | 6,670 | 12,913 |
| TOTAL | 28 | 10,303 | 20,438 |

Source: Focus

Transport & Accessibility

- 3.9 Greenford town centre is not within walking distance of any train or underground stations. Greenford station, on the Central line and with mainline rail services into London

Paddington, is located to the north of the A40. South Greenford mainline station is located to the north east of the centre. Greenford is well served by bus services to Ruislip, Wembley, Hayes, Southall, Heathrow Airport, Ealing and Acton. The Public Transport Accessibility map (PTAL) shows that Greenford has an average level of accessibility to public transport. There are limited cycle racks in Greenford and bikes are attached to the railings.

3.10 Greenford also has several car parks. There is a small car park to the rear of the Tesco Metro supermarket and there is a 200 space surface car park behind VB's. The in-centre survey results revealed that 25% of respondents used the Tesco car park and 33% parked on street. 30% of respondents stated that they did not find it easy to find a parking space in Greenford.

3.11 The in-centre survey results revealed how respondents travelled to the centre:

- 12% by car
- 53% by bus
- 1% by taxi
- 34 walked

Environmental Quality

3.12 Overall, Greenford is an attractive district centre that is well maintained, although litter and graffiti are a problem. The majority of the buildings in the centre date from the 1930s and many have art deco features and are noted as having architectural merit in the local plan. Several of the buildings have been sympathetically converted including Tesco Metro. The majority of the buildings are two to three storeys high with commercial units on the ground floor and residential units above. Retail fascias are well maintained although some of the upper floors could be improved. The Red Lion Public House on the corner of Greenford Road and Ruislip Road is a key landmark building in the centre.

3.13 Ruislip Road has wide pavements with some seating and street furniture, although this is sporadically distributed, out of date and often close to the road. There are also several mature trees lining the road. The road opens out at the junction with Oldfield Lane South where there is a paved area with large flower planters on one side and small memorial gardens on the other with attractive seating. There are also several planting beds distributed throughout the centre, however at the time of the site visit, these were empty but had been prepared for replanting. 7% of respondents to the in-centre survey stated

that the aspect that they liked most about Greenford was its nice place and attractive environment.

Crime and Safety

- 3.14 There is no specific crime and safety information available for Greenford town centre, however, we understand that Ealing Council are actively working with the Police to prevent crime and anti-social behaviour in the centre.

Proposals/Commitments

- 3.15 Lidl has planning permission to open a new store on a site to the east of the centre along Ruislip Road East. The site is currently boarded up. 8% of respondents to the in-centre survey stated that Greenford has a poor range of foodstores and the opening of a Lidl store could remedy this dislike.

4. ACTON

4.1 Acton is defined as a District Centre within the London Plan. It is located on the Uxbridge Road to the east of Ealing Broadway and extends from the junction of the Uxbridge Road at Twyford Crescent in the west to the Railway Bridge by Acton Central Station in the east.

Diversity of Uses & Retailer Representation

4.2 Acton has a total of 29,510 sqm of retail floorspace. Acton has a good provision of convenience goods floorspace and service operators including several supermarkets, various cafés and takeaways, reflecting its role as a District Centre. 44% of respondents to the in-centre survey visit Acton for food shopping with only 4% using the centre to buy clothes, shoes and fashion items.

4.3 The strongest pedestrian flows in Ealing are along the Uxbridge Road and around the Oaks Shopping Centre and the Morrisons entrance onto the Town Square.

Table 4.1: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average over the 12 West London Study Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 38 | 12.9 | 11.0 |
| Comparison | 69 | 23.5 | 33.7 |
| Service | 163 | 55.4 | 47.2 |
| Vacant | 24 | 8.2 | 8.1 |
| Total | 294 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

4.4 Acton has one managed shopping centre, The Oaks Centre that is situated along the Uxbridge Road. It is a fairly small centre and is anchored by Netto, Iceland, £-Stretcher and 99p Stores. The centre opened in 1995 and has 7,107 sqm of retail floorspace. Other key retailers in Acton include Boots, Peacocks, McDonalds and several High Street banks. Acton has a large number of independent retailers selling both convenience and comparison goods.

Table 4.2: Managed Shopping Centres

| <i>Shopping Centre</i> | <i>Date of Opening</i> | <i>Retail Floorspace</i> | <i>Anchor Retailers</i> |
|------------------------|------------------------|--------------------------|-----------------------------|
| Oaks Shopping Centre | 1995 | 7,107 sqm gross | Netto, Iceland, £-Stretcher |
| <i>Source: EGI</i> | | | |

- 4.5 Acton has a good range of convenience retailers. In addition to the retailers in the Oaks Centre, there is a large Morrison's supermarket situated on the edge of the centre with its own car park and with good pedestrian links through to King Street and the Market Square. Acton Town Square has recently been refurbished with new paving and landscaping, where weekly open air markets are now held, as well as successful speciality markets such as Christmas markets, farmers markets, French, African and international food markets. There are also several independent convenience retailers such as the Acton Cash and Carry Supermarket, as well as ethnic retailers.
- 4.6 Acton has ethnic convenience retailers selling Polish, Russian and Eastern European, Iranian, Middle Eastern and Halal food. There is also a Polish Café and several Halal takeaways. Other ethnic retailers include an Afro and European Hair Accessories and skin care shop and a Japanese Letting Agency. 26% of respondents in the Acton in-centre survey use the centre for specialist ethnic food products.
- 4.7 Acton also has a several community facilities including the Acton Swimming Baths and a Fitness First gym. West London College has a campus on the edge of the centre with a gym and Twyford School approximately five minutes to the west of Acton has a sports centre and holds fitness classes. Acton also has a Gala Bingo and a library.

Rents & Yields

- 4.8 Rents in Acton were £646 per sqm in 2005. Rents rose sharply between 2004 and 2005 from £484 to £646 per sqm. At the beginning of 2006, yields were 6.5% and have remained around 6% for the last five years.

Retailer Requirements

- 4.9 Requirements for Acton include a good range of comparison, convenience and service operators, which would add to the vitality and viability of the centre.

Table 4.3: Retailer Requirements

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Min. Floorspace sq m Gross</i> | <i>Max. Floorspace sq m Gross</i> |
|------------------------|---------------------|-----------------------------------|-----------------------------------|
| Comparison | 12 | 5,295 | 8,983 |
| Convenience | 3 | 545 | 901 |
| Service | 7 | 608 | 975 |
| TOTAL | 22 | 6,448 | 10,859 |

Source: Focus

Transport & Accessibility

- 4.10 Acton town centre is served by various bus routes including the express 607 route linking Uxbridge with Shepherd's Bush. Buses also run to Chiswick, Hammersmith, Park Royal, Kensington and Cricklewood. Acton Tram Depot is located on the western edge of the centre. Acton Central station is located to the north of the station and provides train links across London to Stratford, Camden and Richmond. Acton Town underground station is located approximately 10 minutes to the south of the centre and is served by the Piccadilly and District lines. The Public Transport Accessibility map (PTAL) shows that Acton has a very good level of accessibility to public transport. There are cycle racks along Uxbridge Road on the pavements and by Morrisons.
- 4.11 Acton has several car parks including Morrisons, Churchfield Road, Salisbury Street and The Oaks Shopping Centre. There is controlled parking on surrounding residential streets. Results from the in-centre survey show how respondents had travelled to the centre:
- 19% by car
 - 45% by bus
 - 5% by train
 - 29% walked
 - 2% cycled

Environmental Quality

- 4.12 Acton has a variety of building types. There are several Listed Buildings including the Public Baths and a cluster of houses at the junction with Steyne Road opposite the Police Station. The majority of the other buildings are in-fill developments.

- 4.13 The quality of the environment is average, there is some graffiti and litter and the narrow pavements are cluttered with advertisement hoardings. Efforts to improve the cleanliness of the centre are evident such as chewing gum boards, however 18% of respondents stated that the streets were dirty and poorly maintained. The environmental quality deteriorates towards the eastern end of the centre, which appears to be secondary to the main retail area. CCTV cameras were introduced into the town centre in January 2002 and at the time of the site visit, one shop unit was boarded up. The in-centre survey results revealed that 6% of respondents felt unsafe in Acton and improved policing and security measures was one of the key improvements that would persuade respondents to visit the centre more often.
- 4.14 The main area of open space in Acton is a public square outside Morrisons, which benefits from modern paving and street furniture and provides a pedestrianised link to King Street and Horn Lane. Acton is a fairly busy centre and there are sufficient pedestrian crossings.

Crime and Safety

- 4.15 Crime and disorder offences in Acton town centre is fairly high compared to the other centres in the Borough. Ealing Council are working with police to improve crime and safety in Acton town centre. There is a Town Centre Task Group which have been fundamental in getting CCTV and new street lighting in the centre. Acton town centre also has a controlled drinking zone.

Proposals/Commitments

- 4.16 We are not aware of any proposals or commitments in Acton.

5. HANWELL

5.1 Hanwell is defined as a District Centre in the London Plan. Hanwell is situated along the Uxbridge Road in the west of the Borough, less than one mile from West Ealing to the east and Ealing Hospital to the west. The centre runs along Uxbridge Road and down Boston Road. The strongest pedestrian flows in the town centre are around the Clock Tower in the middle of the centre.

Diversity of Uses & Retailer Representation

Table 5.1: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average over the 12 West London Study Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 16 | 8.7 | 11.0 |
| Comparison | 52 | 28.4 | 33.7 |
| Service | 95 | 51.9 | 47.2 |
| Vacant | 20 | 10.9 | 8.1 |
| Total | 183 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

5.2 Hanwell has a total retail floorspace of 18,757 sqm. Hanwell has a good provision of convenience and service outlets with a high proportion of cafés and takeaways. Hanwell's retail composition is consistent with its function as a local shopping function. However, Hanwell lacks key services such as a High Street bank, although there is a privately operated cash-point outside Gold's Gym.

5.3 Hanwell mainly consists of independent retailers occupying small units, however there is a purpose built Lidl and Poundstretcher store on the edge of the centre off the Uxbridge Road and there is a Wickes store to the south along Boston Road.

5.4 Hanwell also has Golds Gym and Health Club on the edge of the centre. Hanwell has a high vacancy rate, the majority of vacant units are distributed along Boston Road, which appears to be the secondary area of the centre. Many other takeaway and restaurant units appear vacant during the day, as they are shut-up with metallic roller shutters.

- 5.5 A high proportion of the retailers in Hanwell are ethnic retailers including Halal butchers, Halal takeaways and a number of Arabic and Middle Eastern convenience stores as well as Polish and Eastern European convenience stores. 33% of respondents to the in-centre survey use Greenford for specialist ethnic food products, whilst 4% travel to Southall.

Rents & Yields

- 5.6 Rental and Yield data is not available for Hanwell.

Retailer Requirements

- 5.7 Requirements are extremely low in Hanwell and are limited to Farmfoods and Better Bookmakers.

Table 5.2: Retailer Requirements

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Min. Floorspace sq m Gross</i> | <i>Max. Floorspace sq m Gross</i> |
|------------------------|---------------------|-----------------------------------|-----------------------------------|
| Comparison | 1 | 465 | 743 |
| Convenience | 0 | 0 | 0 |
| Service | 1 | 70 | 139 |
| TOTAL | 2 | 535 | 882 |

Source: Focus

Transport & Accessibility

- 5.8 Hanwell offers several off-road car parks. Lidl, Poundstretcher and Wickes have their own car parks and there is a car park behind the Uxbridge Road. Hanwell is served by frequent bus services along the Uxbridge Road. Hanwell train station is approximately 15 minutes walk from the centre with services to London Paddington. 19% of respondents to the in-centre survey like Hanwell as it is easily accessible from home and 70% of respondents travelled less than 20 minutes to reach the centre. The Public Transport Accessibility map (PTAL) shows that Hanwell has a low level of accessibility to public transport. Cycle racks are limited in the town centre with racks along Boston Road and by the Clock Tower.
- 5.9 Result from the in-centre survey show how respondents travelled into the centre:
- 33% by car

- 20% by bus
- 3% by train
- 2% by taxi
- 39% walked
- 2% cycled

Environmental Quality

- 5.10 The overall environmental quality of Hanwell is considered to be poor. Piles of litter and rubbish bags on the streets are a common occurrence and make the streets feel untidy and uncared for. Litter also collects around trees and planting and there is some graffiti. One of the most popular improvements to the centre that respondents to the in-centre survey would like to see in Hanwell was cleaner streets (11%).
- 5.11 The variety of the buildings in Hanwell is variable, there are some attractive three storey Victorian terraces but there is also a significant amount of in-fill development, which detracts from the character of the centre. There are signs of investment in the public realm around the Broadway, there is an area of public space around a clock tower with seating, traditional signage, cycle racks and some trees. The surrounding buildings include an attractive half-timbered building and a three storey red brick building. The open space creates some sense of place and identity for Hanwell, although at the time of the site visit the space was not well used. Despite this open space, Hanwell remains dominated by the Uxbridge Road, which is busy and congested with limited pedestrian crossings.

Crime and Safety

- 5.12 We understand that Ealing Council are aware of the need to reduce crime and deal with street drinking problems in Hanwell town centre.

Commitments/Proposals

- 5.13 We are not aware of any commitments or proposals in Hanwell.

6. SOUTHALL

- 6.1 Southall is defined as a Major Centre in the London Plan. It is located in the west of the Borough of Ealing and is well known as a vibrant multi-cultural centre with a strong Asian background and emerging Somali and Afghani communities. Southall town centre is divided into two parts north and south of the railway line. The prime part of the centre lies to the north of the railway line and extends along the Uxbridge Road (The Broadway) and along South Road towards the station. The area to the south of the railway line extends along The Green and King Street. It takes approximately 15 minutes to walk between the two parts of the centre.
- 6.2 Pedestrian flows are highest in the north part of the centre with strong flows along the Uxbridge Road and between the station and the Uxbridge Road. The southern half of the centre is much quieter with weaker pedestrian flows.

Diversity of Uses & Retailer Representation

- 6.3 Southall has a total floorspace of 55,846 sqm. 42% of respondents to the in-centre survey in Southall stated that the main purpose for their visit was for food shopping. A further 23% stated that their main reason was for ethnic food shopping.
- 6.4 Southall's vacancy rate is 5.5%, there are several clusters of vacant units along the eastern section of the Broadway and in the south of centre at the southern end of King Street.

Table 6.1: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average over the 12 West London Study Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 67 | 14.6 | 11.0 |
| Comparison | 172 | 37.6 | 33.7 |
| Service | 194 | 42.4 | 47.2 |
| Vacant | 25 | 5.5 | 8.1 |
| Total | 458 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

- 6.5 Independent retailers dominate the retail offer in Southall, although there are some national multiples located in the northern half of the centre including Iceland, Somerfield, Woolworths, Superdrug, Shoe Zone and McDonalds, as well as several High Street banks. The majority of the independent retailers in Southall are ethnic retailers selling a wide range of convenience and comparison goods including saris, textiles, sewing machines, jewellery, CD's and DVD's, musical instruments, bookshops as well as a variety of Asian food including Indian, Pakistani and Bangladeshi goods. There are also specialist travel agents, banks, communication shops, foreign currency exchanges and hair and beauty salons. The ethnic retailer offer varies in quality and size. Units vary in size from small corner shops to large purpose built units, there are several shopping centres and arcades/bazaars, as well as some large ethnic supermarkets such as Quality Foods. 21% of respondents to the in-centre survey like the shops in Southall and 13% like the ethnic shops.
- 6.6 83% of respondents stated that they used Southall for specialist ethnic food products but respondents also travelled to Hounslow and Greenford for these products. Quality Food and Sira were the two most popular ethnic retailers used by respondents followed by Dokal and Gifto's.
- 6.7 Southall has markets on Tuesday, Wednesday, Thursday and Saturdays, which sell various goods ranging from antiques and bric-a-brac on Thursdays, Poultry on Tuesdays and a general market on Saturdays.
- 6.8 Southall has a large number of Indian restaurants, as well as cafés and takeaways. The results of the in-centre survey in Southall indicated that approximately half of respondents to the in-centre survey visited Southall for bars and restaurants at night, although most visits were infrequent, once a month or more and the range of entertainment/restaurants and pubs was one of the reasons cited by respondents when asked what they liked about the centre.
- 6.9 Southall also has a three screen Bollywood cinema, the Dominion Arts Education and Community Centre as well as several Temples. Southall and West London College is located along Beaconsfield Road and has recently benefited from £10 million of investment to improve the range of facilities on the site. There is also a Business Support Centre in the Town Hall, which is partly funded by the LDA.

Rents & Yields

- 6.10 Retail rents in Southall are currently around £968 per sqm. Rents have been rising since 2001 and have almost doubled in the last five years. Yields have been constant at 9.25% since 2004.

Retailer Requirements

- 6.11 Southall has a strong demand from a range of convenience, comparison and service operators including Tesco, Clarks, 99p Stores, Nandos and Dominos Pizza.

Table 6.2: Retailer Requirements

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Min. Floorspace sq m Gross</i> | <i>Max. Floorspace sq m Gross</i> |
|------------------------|---------------------|-----------------------------------|-----------------------------------|
| Comparison | 14 | 2,104 | 3,428 |
| Convenience | 3 | 511 | 1,951 |
| Service | 15 | 6,661 | 12,309 |
| TOTAL | 32 | 9,276 | 17,688 |

Source: Focus

Transport & Accessibility

- 6.12 Southall train station is situated in the middle of the centre and has train services into London Paddington. Southall does not have an underground station. Buses run to Northolt, Uxbridge, Shepherds Bush, Heathrow and Hounslow, Greenford, Ealing and Acton. The Public Transport Accessibility map (PTAL) shows that Southall town centre has a good low level of accessibility to public transport. There are cycle racks in the northern part of the centre and by the station.
- 6.13 Southall has several car parks including a 270 space multi-storey car park to the rear of the Himalaya Shopping Centre along Herbert Road and 80 spaces adjacent to Iceland. The most popular car park used by respondents to the Southall in-centre survey was Herbert Road (54%), followed by Quality Food/Iceland (19%). 65% of respondents stated that they did not find it easy to find a car parking space in Southall and when asked what they disliked about the centre, 20% of respondents stated that it was difficult to park by the shops.

6.14 Results to the in-centre survey show how respondents travelled to Southall:

- 37% by car
- 24% by bus
- 1% by train
- 38% walked

Environmental Quality

6.15 Southall is a heavily congested centre, particularly in the north of the centre and 36% of respondents to the in-centre survey stated that they disliked the traffic congestion. The environmental quality of the centre varies. There are several attractive and well-maintained buildings such as the Town Hall, however, there are many buildings and shopfronts that are run down and are in a state of disrepair. The poorest quality area is to the east of the centre along the Uxbridge Road where the Victory Public House is boarded up and there is a run down and under used market area.

6.16 Despite poorly maintained shops fascias, uneven paving, litter, illegal advertisements and graffiti, there are signs of investment in Southall such as the colourful festive lights that are used to celebrate ethnic festivals such as Divali and Eid and provide a recognisable symbol of Southall's multi-faith community.

6.17 Southall lacks public open space. The area in front of the Town Hall is one of the few areas of open public space, this area has been improved with new paving and seating with funding from the Southall Regeneration Partnership. There is a park on the outskirts of the centre along the Uxbridge Road. Many of the pavements are congested and space for pedestrians is reduced with shops with large outdoor trading areas.

6.18 54% of respondents to the in-centre survey stated that they disliked the dirty and poorly maintained streets in Southall and 65% stated that it is too busy/crowded. 12% also stated that they felt unsafe. Popular improvements that respondents would like to see in Southall include larger retailers (38%), cleaner shopping streets (11%), improved policing and security measures (10%), more parking spaces (7%) and less overcrowding (5%).

Crime and Safety

- 6.19 There are no specific crime statistics available for Southall town centre, however we understand that the centre is covered by CCTV and there is a active regeneration partnership in the town centre.

Proposals/Commitments

- 6.20 A development brief has been prepared for a large site known as the Southall Gas Works outside of Southall town centre adjacent to the railway line. An application is currently under consideration by the Council for the Gas Works Site for a mixed-use scheme comprising retail and leisure floorspace as well as a large residential element and community facilities.

7. EALING'S OTHER CENTRES

EAST ACTON

7.1 East Acton straddles the Boroughs of Ealing and Hammersmith and Fulham. The local centre is predominantly located on the northern side of the A40, although there is a cluster of uses to the south. Several bus routes run along the A40 and East Acton tube station on the central line is located approximately five minutes walk away along Erconwald Street. On-street parking in the centre is limited due to the presence of several busy main roads. The surrounding area is residential with a mix of properties from high rise flats to traditional 1930s terraced housing.

Table 7.1: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Ealing's Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 14 | 18.4 | 14.5 |
| Comparison | 21 | 27.6 | 26.2 |
| Service | 35 | 46.1 | 54.1 |
| Vacant | 6 | 7.9 | 5.2 |
| Total | 76 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

7.2 The centre has a good range of local services including a post office, convenience stores, chemists and dry cleaners. It does not have a bank although there is a privately operated cash machine along Old Oak Common Lane. There are also several specialist shops such as the Acton Angling Centre. The centre has several large units occupied by Dreams and Iceland. There is also a Homebase store surrounded by mature landscaping and with a small car park for its customers. There is a presence of ethnic retailers in East Acton. There are several small convenience shops specialising in Arabic, Afghani, Iranian, Turkish, Greek and Polish foods and Halal meat, as well as a Polish coffee shop and Internet café. There is also an Ukrainian deli and an Eastern European Deli, however these were shut at the time of the site visit.

7.3 The environmental quality of the centre is poor. This is partly due to the presence of the A40, which carries eight lanes of traffic, creating noise, pollution and congestion. Despite

pedestrian crossings to facilitate movement, the A40 segregates the centre in half and there are a lot of railings, ensuring the safety of pedestrians. Shops along the western side of Old Oak Common are raised up from the road with a wide pedestrianised area. The centre has a lot of shops and businesses with metal shutters, particularly along the Western Avenue and on the east side of Old Oak Common Lane, which create dead frontages and create a perception of insecurity and high crime. There is also litter and graffiti and a lack of good quality street furniture such as seating. At the time of the site visit, streetscape improvements were being carried out in the area at the junction of Erconwald Street with Old Oak Common Lane.

- 7.4 The centre consists of a mix of building types from traditional red brick to mock Tudor buildings ranging from two to four storeys high with commercial units on the ground floor and residential units above. In general the buildings are not well maintained.

NORTHFIELDS

- 7.5 Northfields is located to south of Ealing metropolitan centre and to the west of South Ealing. Northfields underground station is located in the south of the centre and is on the Piccadilly line. Frequent bus services run along Northfields Avenue linking the centre with Chiswick, West Ealing and Ealing Broadway. There is limited on-street parking and cycle parking, although there appears to be a shortage of cycle parking with cycles attached to railings.

Table 7.2: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Ealing's Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 18 | 12.0 | 14.5 |
| Comparison | 34 | 22.7 | 26.2 |
| Service | 82 | 54.7 | 54.1 |
| Vacant | 16 | 10.7 | 5.2 |
| Total | 150 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

- 7.6 Northfields is a long linear centre with a good range of shopping facilities. It has a total retail floorspace of approximately 13,234 sqm. The centre has a good representation of convenience and service retailers. It also has a good representation of comparison retailers for a centre of its size. The majority of retailers are independent although there is

a Tesco Express, Ladbrokes and Threshers. There is a high proportion of specialist retailers including a butchers, bakers, book shop, gift shop, shoe shop, a Thai Cookery School and various local cafés.

- 7.7 There is no bank or financial services, although there is a cash machine outside of Tesco Express. There are 18 vacant units distributed throughout the centre, which results in a vacancy rate of 16%. Northfields also provides a range of other services for the local community including a nursery, a small public library, the Ealing Christian Centre, the Navasartian Centre (a centre for the Armenian community) and the Western International College. Northfields has several small local offices throughout the centre including a cluster at the northern end, which creates footfall for the centre.
- 7.8 The centre has a limited representation of ethnic retailers. Several of the convenience stores stock Polish goods and there are two dedicated Polish delicatessens. There is also an Irish and continental convenience store and a Lebanese café.
- 7.9 Northfields has a pleasant feel to it and is set within a residential area. Northfields Avenue is a fairly wide tree lined street with a mix of traditional and purpose built buildings. The upper floors of the buildings are mainly residential. The environmental quality of the centre is average, although there is some litter. Lammas Park is located off Northfields Avenue in the middle of the centre. There is also a smaller green space adjacent to the underground station, a small planted area at the junction with Seaford Road, the allotments, and some seating and sparse planting at the north of the centre.

NORTHOLT

- 7.10 Northolt is situated to the north of the A40. It is essentially a linear centre but with two distinct character areas at each end. To the east, there is a cluster of shops around the old village green, close to Northolt underground station and to the Northolt Swimarama. The traditional village green is an attractive and well maintained open space. There are attractive flowerbeds, an old clock, mature trees, landscaping and seating.
- 7.11 Northolt has a total floorspace of 3,671 sqm. The centre has a large number of services and a higher than average number of convenience stores. Along Ealing Road, there is a parade of units comprising a mixture of uses and the Plough Public House is housed in a traditional half-timbered building overlooking the Green. There is limited on-street parking outside of the shops on Ealing Road. To the west, there is a wider variety of shops and commercial premises along Mandeville Road up to the junction with the A40. Occupiers include Co-Op, Barclays bank and Costcutter.

Table 7.3: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Ealing's Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 5 | 11.6 | 14.5 |
| Comparison | 7 | 16.3 | 26.2 |
| Service | 28 | 65.1 | 54.1 |
| Vacant | 3 | 7.0 | 5.2 |
| Total | 43 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

- 7.12 The buildings along Mandeville Road are three storeys high and mainly have residential units on the upper floors. The buildings themselves are made up of a mix of styles, are poorly maintained and do not add any character to the centre. The quality of the environment at this end of the centre is poor, with graffiti and litter. There are some mature trees along Mandeville Road but the environment is blighted by heavy traffic flows. There were no ethnic retailers within Northolt apart from Chinese and Indian takeaways. There is a small area of residential uses between the east and west ends of the centre, as well as a church, Veterinary hospital, doctors and dentists.

PERIVALE

- 7.13 Perivale local centre is situated in the north of the Borough of Ealing. The area surrounding the centre consists of 1930s suburban residential housing and there is an industrial park to the south of the centre. Perivale has an underground station on the central line, which is located approximately 15 minutes walk to the south of the centre. Buses run along Bilton Road and there is restricted on-street parking during the day.
- 7.14 Perivale consists of a two-storey parade of flat roofed buildings with similar sized commercial units at ground floor level with residential units above. The units are separated from the road by a wide expanse of footpath. Perivale has a total floorspace of 2,913 sqm consisting of a mix of convenience, comparison and service retailers.

Table 7.4: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Ealing's Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 9 | 22.5 | 14.5 |

| | | | |
|------------|----|------|------|
| Comparison | 7 | 17.5 | 26.2 |
| Service | 21 | 52.5 | 54.1 |
| Vacant | 3 | 7.5 | 5.2 |
| Total | 40 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

- 7.15 There are several ethnic retailers trading from Perivale including a Polksi Sklep and local convenience stores selling Polish and Sri Lankan groceries. There is also a Lebanese deli, a Lebanese Halal butcher and grocers and a Halal butcher specialising in Sri Lankan cuts of meat. On the edge of the local outside of the designated boundary there is an art deco building providing office accommodation and an Internet café.
- 7.16 Perivale does not have any distinguishing features. The centre is of an average environmental quality. The footpaths are wide and there is some mature trees lining the road. However, on the day of the site visit, the centre appeared untidy with piles of rubbish dumped on the streets. The centre has recycling facilities. Perivale appeared to be quite quiet during the day with a low pedestrian footfall.

PITSHANGER

- 7.17 Pitshanger is located to the north of the metropolitan centre of Ealing. The surrounding area consists of a mix of residential units many of which were originally built as a garden suburb. There are frequent bus services to Ealing Broadway, which is the closest station. There is limited on-street car parking.
- 7.18 Pitshanger has a total floorspace of 5,452 sqm. The centre has a large number of services, but also has several convenience and comparison uses.

Table 7.5: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Ealing's Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 12 | 18.5 | 14.5 |
| Comparison | 11 | 16.9 | 26.2 |
| Service | 39 | 60.0 | 54.1 |

| | | | |
|--------|----|-----|-----|
| Vacant | 3 | 4.6 | 5.2 |
| Total | 65 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

- 7.19 Pitshanger has the feel of a traditional British High Street with a host of independent retailers including a butcher, bakers, fishmongers and a bookshop, although there are a few national multiple retailers such as the Co-Op and Robert Dyas. Pitshanger also has a good range of cafés and restaurants, as well as several other specialist occupiers including the Ealing Dance Centre and Pitshanger public library. There are no ethnic retailers in Pitshanger although there is a Japanese restaurant. Pitshanger has a community association that fosters close links with local traders. There is a strong sense of community spirit amongst traders and there is an annual event to switch on the Christmas lights.
- 7.20 Pitshanger is a vibrant centre with a good environment quality. The pavements are wide which allow cafés to have outdoor seating and shopfronts and building facades are well maintained. There are also several buildings with a unique architectural quality adding to the general interest of the centre. There is some seating and there is an interactive information point, however there is some graffiti. Pitshanger is a tree-lined street, however it is congested with traffic, particularly at peak times.

SOUTH EALING

- 7.21 South Ealing lies to the south of the Borough of Ealing. It is a linear centre running along South Ealing Road. South Ealing tube is on the Piccadilly line and there is a twenty-four hour bus service through the centre between Ealing Broadway and Kingston. Commercial uses extend north beyond the boundaries of South Ealing centre along St Mary's Road towards Ealing Broadway. There is a public car park to the north of the centre outside of the centre's boundary and there is restricted on-street car parking.

Table 7.6: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Ealing's Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 14 | 14.1 | 14.5 |
| Comparison | 24 | 24.2 | 26.2 |
| Service | 52 | 52.5 | 54.1 |

| | | | |
|--------|----|-----|-----|
| Vacant | 9 | 9.1 | 5.2 |
| Total | 99 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

- 7.22 South Ealing has a total floorspace of 11,853 sqm. South Ealing has a mix of convenience and service uses with some comparison stores. There is a large Wickes set back from the main street and a small Co-Op supermarket. The area surrounding the centre is residential and the upper floors of the units are mainly residential with some office space. The centre has a high representation of takeaways, particularly to the south of Popes Lane. These uses create environmental nuisances such as litter and motorcycle delivery vehicles parked on the pavements.
- 7.23 South Ealing Road carries a fairly large volumes of traffic, particularly at peak times connecting Ealing Broadway with the A4. Popes Lane also links South Ealing to the North Circular and the M4.
- 7.24 The environmental quality of the centre is average. There is litter on the streets, graffiti and the street furniture is sparse and tired looking. In addition, many of the frontages, particularly to the south of the centre are dated and in need of investment. Many of the shops use shutters in the evenings and at weekends, which reduces active frontages and creates a feeling of insecurity. There is also quite a lot of street clutter, such as stand-alone signs on the pavements.

SUDBURY HILL

- 7.25 Sudbury Hill is on the northern edge of the Borough of Ealing with the Local Borough of Harrow. The centre spans either side of Sudbury Hill underground station, which is on the Piccadilly line. Sudbury Hill mainline station is also close to the local centre. There are bus services running along Greenford Road and there is on-street car parking. Surrounding uses are residential and there are some industrial and office uses.

Table 7.7: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Ealing's Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 4 | 23.5 | 14.5 |
| Comparison | 4 | 23.5 | 26.2 |
| Service | 9 | 52.9 | 54.1 |

| | | | |
|--------|----|-----|-----|
| Vacant | 0 | 0.0 | 5.2 |
| Total | 17 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

- 7.26 Sudbury Hill is a linear centre running along the western edge of Greenford Road. The centre is set back from the main road with a lay-by road. Sudbury Hill has a total floorspace of 2,090 sqm, which consists of mainly service and convenience retailers. There is a David Lloyd Health Club situated in parkland to the rear of the centre with extensive indoor and outdoor health and fitness facilities. The centre is well used, particularly at lunchtime by workers from surrounding businesses. The environmental quality of the centre is fairly poor with no seating or open spaces, although there are some established trees lining the road.

PARK ROYAL

- 7.27 Park Royal local centre is located to the north of the A40 and close to the North Circular. It is situated within the Park Royal Industrial Estate, which is the largest industrial estate in Europe, covering a large area to the north and south of the A40 and consisting of a mix of units from modest workshops to flagship corporate offices. It also includes the Park Royale Leisure Centre which is a leisure complex including a Vue cinema, Acton Mega Bowl and a range of restaurants.
- 7.28 Park Royal local centre is located on the northern edge of the Borough of Ealing. The wider Park Royal Industrial Estate includes land under the control of the London Borough of Brent and Hammersmith and Fulham. A Park Royal Partnership exists to manage and promote the wider Park Royal area and consists of representatives from the private, public and not-for-profit sectors.
- 7.29 Park Royal underground station is on the Uxbridge branch of the Piccadilly line and the Central line. The Grand Union Canal also runs through the Park Royal Estate.

Table 7.8: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Ealing's Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 1 | 10.0 | 14.5 |
| Comparison | 1 | 10.0 | 26.2 |
| Service | 8 | 80.0 | 54.1 |

| | | | |
|--------|----|-----|-----|
| Vacant | 0 | 0.0 | 5.2 |
| Total | 10 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

- 7.30 Park Royal has a total floorspace of 12,923 sqm. It consists of a large Asda hypermarket surrounded by three high street banks, cafés and a few industrial units. The Central Middlesex hospital is situated on the north east edge of the local centre boundary. The current Asda store opened in 2003 on a site adjacent to the former Asda store, which has now been reverted to car parking. It is open 24 hours a day and offers a wide variety of services including an opticians, pharmacy and photo processing, as well as stocking jewellery, ethnic foods, clothing and other non-food goods. The local centre is served by the large Asda car park. The environmental quality of the local centre could be improved. Asda is the focal point of the centre and uses on the surrounding streets feel detached from the centre as the centre is bisected by a busy road interchange. There is heavy traffic congestion, which detracts from the environment. There is some seating and a piece of public art outside HSBC along Park Royal Road.
- 7.31 Several large development schemes are under construction in the Park Royal area ensuring that the area continues to thrive. The Central Middlesex Hospital is also being regenerated.

WESTWAY CROSS

- 7.32 Westway Cross is located to the north of the Borough of Ealing, in close proximity to Greenford and Sudbury Hill. It is accessed from the A4127 which connects with the A40. The park benefits from open A1 (non-food) consent. Westway Cross has a total floorspace of 11,569 sqm and consists of predominantly comparison retailers. All of the units are let and occupiers include Boots, WH Smith, Hobbycraft, Next, Brantano and McDonalds.

Table 7.9: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Ealing's Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 0 | 0.0 | 14.5 |
| Comparison | 10 | 76.9 | 26.2 |
| Service | 3 | 23.1 | 54.1 |
| Vacant | 0 | 0.0 | 5.2 |

| | | | |
|-------|----|--|--|
| Total | 13 | | |
|-------|----|--|--|

Source: *Appendices Volume 3: Centre Audits & Boundaries*

- 7.33 The centre is also home to a Boots Wellbeing Centre, which combines health and beauty treatment services with a gym, swimming pool, exercise studios, sauna and spa, as well as a hairdressers, café and crèche. There is a paved courtyard with seating and a limited amount of landscaping and the centre has modern covered walkways. The centre benefits from a large surface car park and is located close to Greenford railway station. The surrounding area consists of a park and sports fields and various offices, warehouses and industrial units.

8. HAMMERSMITH

8.1 Hammersmith is designated as a Major Centre in the London Plan and is the largest centre in the Borough. The town centre's main axis is along King Street and also includes parts of Hammersmith Road and Shepherds Bush Road. The prime retail frontage (as defined in the Local Plan) includes the Broadway Shopping Centre and the eastern end of King Street, which incorporates Kings Mall Shopping Centre.

Diversity of Uses & Retailer Representation

8.2 The town centre has a total floorspace of 59,080 sqm for retailing and services, comprising 285 units. Key retailers include Marks and Spencer, Habitat and Primark. Hammersmith has two managed shopping centres; Kings Mall and The Broadway Shopping Centre. Kings Mall opened in October 1979 and comprises 31,866 sqm gross of retail floorspace. Anchor retailers in the centre are Habitat, Primark and WH Smiths. Kings Mall has a very dated and worn exterior façade with the interior also appearing dated. With the exception of the Habitat store frontage, there is little sign of recent investment in the centre.

Table 8.1: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average over the 12 West London Study Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 18 | 6.3 | 11.0 |
| Comparison | 100 | 35.1 | 33.7 |
| Service | 148 | 52.0 | 47.2 |
| Vacant | 19 | 6.7 | 8.1 |
| Total | 285 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

8.3 Broadway Shopping Centre opened in August 1993 and comprises 10,219 sqm gross retail floorspace. Key anchors in the centre are Boots and Tesco Metro. Hammersmith Underground Station is accessed through the centre resulting in a high pedestrian footfall. The centre does appear dated and shows no signs of recent investment.

Table 8.2: Managed Shopping Centres

| Shopping Centre | Date of Opening | Retail Floorspace | Anchor Retailers |
|-----------------------------|------------------------|--------------------------|--------------------------------------|
| Broadway Shopping Centre | 1993 | 10,219 sqm gross | Boots, Tesco Metro |
| King's Mall Shopping Centre | 1979 | 31,866 sqm gross | Habitat, Primark, Morrisons, WHSmith |
| <i>Source: EGI</i> | | | |

- 8.4 Key foodstore retailers include Tesco Metro in the Broadway Centre, Iceland and Sainsbury's Central, both on King Street. Hammersmith has no specialist ethnic retail provision. Results from the in-centre survey show that only 10% of people use the centre to purchase specialist ethnic goods.
- 8.5 Results from the in-centre survey show that the most popular response (45%) when asked what they liked most about Hammersmith was "good shops". However, 13% of people did say that they would visit Hammersmith more often if there was an improved range of independent/specialist shops.
- 8.6 In terms of leisure facilities, the centre has a four screen UGC cinema on King Street, the Hammersmith Palais nightclub on Shepherds Bush Road and the Hammersmith Carling Apollo which is a music and comedy venue. The in-centre survey showed that 54% of respondents never visit Hammersmith for night time restaurants and bars although 16% of respondents use the centre for daytime eating and drinking.
- 8.7 The telephone survey results show that when visiting Hammersmith for clothing and footwear shopping, 51% of people undertake a linked trip. These are broken down as follows:
- Meeting Friends - 3.9%
 - Food Shopping – 11.8%
 - Other non food shops – 16.7%
 - Leisure activity – 3.9%
 - Pubs/ clubs – 4.9%
 - Restaurants – 6.9%
 - Cafes – 8.8%
 - Financial service – 14.7%

- Personal service – 2%

Rents & Yields

8.8 Rents and yields in the centre have both improved in recent years. Rents currently stand at £1,829 per sqm, which is up from £1,291 in 2001. Yields have been at 9% since 2004 which is an improvement after standing at 9.25% since 2001.

Retailer Requirements

8.9 Requirements are strong and include a good range of comparison, convenience and service operators who would add to the vitality and viability of the centre.

Table 8.3: Retailer Requirements

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Min. Floorspace sq m Gross</i> | <i>Max. Floorspace sq m Gross</i> |
|------------------------|---------------------|-----------------------------------|-----------------------------------|
| Comparison | 24 | 6,066 | 12,918 |
| Convenience | 4 | 321 | 534 |
| Service | 21 | 3,970 | 8,426 |
| TOTAL | 49 | 10,357 | 21,878 |

Source: Focus

Transport & Accessibility

8.10 Accessibility into the town centre by public transport is very good. Hammersmith underground station on the Hammersmith & City, Piccadilly and District lines, serves the centre, as well as a large number of bus routes. Buses serve Hammersmith from around London including Camden, Kings Cross, Trafalgar Square, Chelsea, Wandsworth, Acton and Willesden. Public transport facilities in the town centre are very well used. There are often long queues at bus stops, which can cause pavement congestion. The Public Transport Accessibility (PTAL) map shows that Hammersmith has excellent accessibility with the town centre having the highest possible rating.

- 8.11 The town centre is very congested making access by car difficult. There are however a number of car parks including the NCP (390 spaces) and the multi-storey (1,000 spaces) on Beadon Road. The surrounding residential streets are all in Controlled Parking Zones (CPZ). Facilities for cyclists are generally good, with cycle lanes and designated cycle parking. However, heavy traffic still makes navigation of the centre on bike difficult and there does appear to be a major problem with people leaving cycles tied to railings indicating that cycle parking is insufficient.
- 8.12 Results from the in-centre survey show how respondents had travelled into the centre:
- 9% by car
 - 21% by bus
 - 40% by train
 - 3% by taxi
 - 24% walked
 - 4% cycled
- 8.13 The results go on to show that for 10% of people the thing they dislike most about the town is that traffic congestion makes it difficult to get there by car and they would visit more if road congestion was reduced.

Environmental Quality

- 8.14 Heavy vehicular traffic severely impacts on the environmental quality and the pedestrian experience in the centre. The junction between Hammersmith Road, Shepherds Bush Road and King Street is particularly busy and makes it difficult for pedestrians to cross between the Broadway Centre and King Street. King Street as a whole has very busy traffic which makes crossing the road difficult. There has been some investment in the public realm, most noticeably at Lyric Square. This area provides a focal point and meeting place in the town centre and provides an area for outside seating for the adjacent coffee shops and bars.
- 8.15 In terms of the built environment the quality of the facades are mixed, although the majority are in need of investment. There are a number of buildings of interest around the Hammersmith Broadway junction and the far east end of King Street. These lie in the town centre conservation area, which also covers a stretch along the western end of King Street and the area around Queen Caroline Street.

- 8.16 The in-centre survey results show that for 14% of respondents, the aspect they dislike most about Hammersmith is that it is too busy/crowded. For a further 10% it was dirty or badly maintained streets. 9% of people went on to say they would visit more, if the streets were cleaner.

Crime and Safety

- 8.17 There is no specific crime and safety information available for Hammersmith town centre, however, we understand that Hammersmith and Fulham Council actively work with the Police to prevent crime and anti-social behaviour in the centre.

Proposals/Commitments

- 8.18 Hammersmith and City Line Station Car Park (Site 27 in the UDP) has long been promoted for major mixed-use development. There are proposals in place to lead to an application for commercial development with active ground floor uses.

9. FULHAM

9.1 Fulham is designated as a major centre in the London Plan. The centre is situated at the southern end of North End Road and extends south to Fulham Broadway. The Prime Retail Frontages (as defined in the Local Plan) include the southern end of North End Road as well as a number of the units around Jordan Place.

Diversity of Uses & Retailer Representation

9.2 The town centre has a total floorspace of 40,250 sqm for retailing and services, comprising 279 units.

Table 9.1: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average over the 12 West London Study Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 33 | 11.8 | 11.0 |
| Comparison | 77 | 27.6 | 33.7 |
| Service | 139 | 49.8 | 47.2 |
| Vacant | 30 | 10.8 | 8.1 |
| Total | 279 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

9.3 Key retailers include Waitrose, Virgin Megastore and a wide range of leisure operators and restaurants. The town has one managed shopping centre, Fulham Broadway, which opened in October 2002. The centre has 10,000 sqm gross of retail floorspace and an additional 8,360 sqm gross leisure floorspace. Anchor retailers include Sainsbury's Central, Boots and Virgin Megastore. The centre is bright and modern with the first floor having a range of leisure operators including a nine screen Vue Cinema, Nando's, Yo! Sushi and Pizza Express. The top floor has a David Lloyd gym.

Table 9.2: Managed Shopping Centres

| <i>Shopping Centre</i> | <i>Date of Opening</i> | <i>Retail Floorspace</i> | <i>Anchor Retailers</i> |
|------------------------|------------------------|--------------------------|---|
| Fulham Broadway | 2002 | 10,000 sqm gross | Sainsbury's Central, Boots, Virgin Megastores |
| <i>Source: EGI</i> | | | |

- 9.4 The in-centre survey results show for 11% of respondents the thing they dislike most about the centre was the poor range of comparison goods retailers. Although for 33% of respondents the aspect they liked most about the centre was the 'good shops'. When asked what would make them visit the centre more, 21% of respondent's first answer was 'attract larger retailers'.
- 9.5 The centre has a good provision of convenience retailers, including Sainsbury's Central, Waitrose, Marks & Spencer Simply Food, Iceland and Somerfield. The retail provision is enhanced by the street market along North End Road. The stalls sell a range of goods from fruit and vegetables to toiletries, small household goods and clothes. The street market is focussed on discount goods and can exacerbate pavement congestion in the area.
- 9.6 Along the Northern end of North End Road there are a number of specialist ethnic convenience shops including a Halal butcher and a number of fruit and vegetable shops specialising in Asian and Afro Caribbean groceries. The in-centre survey showed that 38% of respondents purchased specialist ethnic food products in Fulham. Although 13% of people use Waitrose rather than local independent stores.
- 9.7 Fulham has a very strong leisure provision with a nine screen Vue cinema, Mecca Bingo and David Lloyd leisure. There is also a wide range of cafés, bars and restaurants including Yo! Sushi, Pizza Express, Nandos, Lloyds No 1, Costa and a range of smaller independent cafés.
- 9.8 The telephone survey results show that when visiting Fulham for clothing and footwear shopping, 42% of people undertake a linked trip.

Rents & Yields

- 9.9 Rents and yields in the centre have both improved in recent years. Rents currently stand at £1,506 per sqm, this is up from £1,076 in 2002. Although rents have remained at 9% since 2003, they have improved from 9.5% in 2002.

Retailer Requirements

- 9.10 Requirements are strong and from a good range of comparison, convenience and service operators.

Table 9.3: Retailer Requirements

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Min. Floorspace sq m Gross</i> | <i>Max. Floorspace sq m Gross</i> |
|------------------------|---------------------|-----------------------------------|-----------------------------------|
| Comparison | 23 | 4,129 | 10,210 |
| Convenience | 4 | 790 | 1,533 |
| Service | 23 | 5,126 | 10,786 |
| TOTAL | 50 | 10,045 | 22,529 |

Source: Focus

Transport & Accessibility

- 9.11 Accessibility to Fulham town centre by public transport is good. Fulham Broadway underground station is on the District Line and the centre is served by a number of bus routes. Buses serve Fulham from across London, including Waterloo, Clapham, Richmond, Chiswick and Kensington. Public transport facilities in the town centre appear very well used. The PTAL map shows that Fulham has a good level of public transport accessibility, however it is less accessible than both Hammersmith and Shepherds Bush.
- 9.12 Parking in Fulham is fairly limited and heavy traffic makes access difficult by car during the day. There is parking provision at both Waitrose (190 spaces) and Sainsbury's (180 spaces) and around 50 spaces on Heckfield Place. The surrounding residential streets are all in Controlled Parking Zones (CPZ). Provision for cyclists in Fulham is limited and the heavy traffic and relative narrow width of North End Road makes cycling dangerous. Cycle parking is also limited, what there was appeared well used with people also using railings and bollards to lock bikes up.

9.13 The in-centre survey results show how respondents had travelled to Fulham:

- 6% by car
- 24% by bus
- 14% by train
- 54% walked
- 2% cycled

9.14 When asked what they dislike most about the centre, 10% cited that traffic congestion makes it difficult to get to by car. A further 5% cited the fact that it was difficult to park near the shops.

Environmental Quality

9.15 The urban environment and quality of the public realm varies throughout the town centre. The quality is very high around Vanston Place and Market Square where there are cobbled streets, semi-mature trees and high quality street furniture. This area dominated by traditional buildings does have some more contemporary architecture that is well integrated into the street scene. Fairly up-market and specialist retailers and services dominate this area. In contrast to this, discount/lower end stores dominates North End Road. This street is very busy in terms of both vehicular and pedestrian traffic. Although many of the frontages along here are slightly dated, they are well maintained.

9.16 It is evident from the in-centre survey that a significant number of people are unhappy with the environmental quality. In terms of what respondents disliked most about the town centre, 14% cited dirty/badly maintained streets and a further 14% cited the centre being too busy/crowded. When asked what would make them visit the centre more, 21% of respondent's first answer was 'clean shopping streets'.

Crime and Safety

9.17 There is no specific crime and safety information available for Fulham town centre, however, we understand that Hammersmith and Fulham Council actively work with the Police to prevent crime and anti-social behaviour in the centre.

Proposals/Commitments

9.18 There are no commitments or proposals in Fulham town centre.

10. SHEPHERDS BUSH

- 10.1 Shepherds Bush is designated as a District Centre in the London Plan. The town centre covers the area surrounding Shepherds Bush Common, including Shepherd Bush market. The Prime Retail Frontages (as defined in the Local Plan) are confined to the stretch of retail along Uxbridge Road and the West 12 shopping centre.

Diversity of Uses & Retailer Representation

- 10.2 The town centre has a total floorspace of 40,090 for retailing and services, comprising 303 units. This includes the permanent stalls at Shepherds Bush Market.

Table 10.1: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average over the 12 West London Study Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 39 | 12.9 | 11.0 |
| Comparison | 140 | 46.2 | 33.7 |
| Service | 106 | 34.9 | 47.2 |
| Vacant | 18 | 5.9 | 8.1 |
| Total | 303 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

- 10.3 Key attractors include Argos, Peacocks, Morrisons and Shepherds Bush Market. Shepherds Bush currently has one managed shopping centre, West 12 Shopping Centre. The centre opened in 1970 and has a retail floorspace of 23,226 sqm gross. It was extended and refurbished in 2001 where the centre was interlinked into the leisure complex which has a Vue Cinema and Fitness First Gym. Anchors of West 12 are Morrisons and Argos.

Table 10.2: Managed Shopping Centres

| <i>Shopping Centre</i> | <i>Date of Opening</i> | <i>Retail Floorspace</i> | <i>Anchor Retailers</i> |
|-------------------------|------------------------|--------------------------|--|
| West 12 Shopping Centre | 1970 Refurbished 2001) | 23,226 sqm gross | Argos, Morrisons, JJB Sports, Vue Cinema |
| <i>Source: EGI</i> | | | |

- 10.4 The in-centre survey results show for 10% of respondents the thing they dislike most about the centre was a poor range of comparison goods retailers. Although for 33% of respondents the aspect they liked most about the centre was the ‘good shops’. When asked what would make them visit the centre more, 25% of respondent’s first answer was ‘attract larger retailers’.
- 10.5 Key foodstore retailers include Morrisons, Sainsbury’s Local and a wide range of independent specialist ethnic food retailers around Shepherds Bush Market. The busy and vibrant market is a mix of semi-permanent stalls and small lock-up shops. It is open Monday to Saturday and sells a wide range of goods from clothing, household goods, haberdashery, fruit and vegetables and Halal meats. With the exception of West 12 shopping centre, the town centre is predominately occupied by ethnic retailers, ranging from specialist butchers, grocers and foodstores to clothing and textiles.
- 10.6 In terms of leisure provision Shepherds Bush has a 12 screen Vue cinema, Fitness First, Rileys Snooker Club, Shepherds Bush Pavilion (event space) and Shepherds Bush Empire (music venue). The telephone survey results show that when visiting Shepherds Bush for clothing and footwear shopping, 31% of people undertake a linked trip.

Retailer Requirements

- 10.7 Shepherds Bush has requirements from a range of comparison service operators including some multiples such as TK Maxx, Clarks, which would add to the mainstream attraction in the centre.

Table 10.3: Retailer Requirements

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Min. Floorspace sq m Gross</i> | <i>Max. Floorspace sq m Gross</i> |
|------------------------|---------------------|-----------------------------------|-----------------------------------|
| Comparison | 9 | 2,313 | 5,918 |
| Convenience | 2 | 214 | 297 |
| Service | 15 | 4,761 | 9,615 |
| TOTAL | 26 | 7,288 | 15,830 |

Source: Focus

Transport & Accessibility

- 10.8 Accessibility to Shepherds Bush by public transport is good. The centre is served by four underground stations; Shepherds Bush and White City on the Central Line, and Shepherds Bush and Goldhawk Road both on the Hammersmith & City Line. Buses serve the centre from across London including, Central London, Ealing, Uxbridge, Hounslow and Clapham. As part of the White City development, the transport infrastructure is being upgraded. This will involve a new bus station, upgraded tube stations and a new railway station. The PTAL map shows that Shepherds Bush has a very good level of public transport accessibility across the whole centre.
- 10.9 Shepherds Bush suffers from very heavy vehicular traffic as it lies at the junction of a number key routes through the Borough. Car parking provision is minimal and is confined to the West 12 Shopping Centre. Pedestrian and cycle access to the centre is impacted upon by the heavy vehicular traffic. The roads around the common are multi-lane and it is difficult to cross away from the crossing facilities. A number of the junctions have provision for cyclists and there are some cycle lanes and parking around the centre. The White City development does involve additional cycle parking facilities.
- 10.10 The in-centre survey results show how respondents had traveled to Shepherd's Bush:
- 5% by car
 - 28% by bus
 - 28% by train
 - 37% walked
 - 1% cycled

Environmental Quality

- 10.11 In terms of environmental quality and the public realm the town centre is fairly diverse and fragmented. Shepherds Bush Market is a vibrant, and distinct area of the town characterised by small stalls and lock-up shops. The retail units along Uxbridge Road, Goldhawk Road and Shepherds Bush Green are all small, dated units. In-centre survey results show that for 11% of respondents the aspect they dislike most about the town centre is dirty, badly maintained streets.

Crime and Safety

- 10.12 There is no specific crime and safety information available for Shepherds Bush town centre, however, we understand that Hammersmith and Fulham Council actively work with the Police to prevent crime and anti-social behaviour in the centre.

Proposals/Commitments

- 10.13 White City is a major retail development comprising circa 147,000 sqm net of new retail floorspace. The White City Development Area comprises 43 acres extending north from Aerial Way under Westway to Shinfield Street, and east from Wood Lane to the A3220.

11. HAMMERSMITH & FULHAM'S OTHER CENTRES

Bloemfontein Road

- 11.1 Bloemfontein Road stretches to the north of Uxbridge Road. Bus route number 283 serves the area and parking possibilities exist in front of the retail units, as well as on neighbouring streets.
- 11.2 The number of retail units in the centre is relatively small. However, it seems to fulfil the needs of the surrounding residential area. All units have a relatively small floorspace and are independently operated. The mix of the units includes a betting agency and an off licence. There are also two foodstores located in the centre. None of the units are vacant and there are no specific ethnic retailers, however, Polish food can be found in one of the foodstores in the centre.

Table 11.1: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Hammersmith & Fulham Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 5 | 38.5 | 15.7 |
| Comparison | 2 | 15.4 | 23.0 |
| Service | 6 | 46.2 | 52.1 |
| Vacant | 0 | 0 | 9.2 |
| Total | 13 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

- 11.3 The retail units are separated from the main road by an island including trees, cycle racks and litter bins. This creates a spatial zone without traffic, which feels safer and quieter than the main road. There are six cycle racks within approximately 200 metres. At the time of visit, there were a few rubbish bags on the island, but the area as a whole had a clean atmosphere. Some of shops had metal shutters, which were shut down and covered with graffiti at the time of the site visit.

Uxbridge Road West

- 11.4 Uxbridge Road is one of the main roads connecting Central London and West London. Several bus routes (207, 260, 607, partly 283) including night services serve the area (N207). On street parking is limited due to the presence of heavy traffic. However, there is a cycling lane running on the northern side of the road.

Table 11.2: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Hammersmith & Fulham Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 14 | 16.1 | 15.7 |
| Comparison | 19 | 21.8 | 23.0 |
| Service | 47 | 54.0 | 52.1 |
| Vacant | 7 | 8.0 | 9.2 |
| Total | 87 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

- 11.5 The main shopping axis in the area is Uxbridge Road, where most of the retail units are located. The retail structure mainly consists of independent retailers occupying small units. In the western part of the centre there is Co-Op foodstore and a KFC take-away. The total number of retail units in the centre is 87. Uxbridge Road West benefits from a steady flow of pedestrians.
- 11.6 The concentration of DIY shops on Uxbridge Road West is high with a significant cluster containing four units in the western part of the centre. There are no banks on Uxbridge Road West, however there is a privately operated cash-point in the western part of the centre. A high proportion of the retailers on Uxbridge Road West are ethnic retailers. Most foodstores in the area offer Eastern European products.
- 11.7 The overall environmental quality of Uxbridge Road West is considered to be poor mainly due to heavy traffic. In addition, the centre lacks pedestrian crossings. However there are cycle racks on both sides of the street. All along the road there is graffiti on the shutters. Although there are some attractive terraced Victorian buildings along the road the area lacks a sense of place, trees and traditional signage. At the time of visit, there was litter on the street, which made the centre feel neglected and untidy.

UXBRIDGE ROAD EAST

- 11.8 Uxbridge Road East joins the centre of Uxbridge Road West at Bloemfontein Road. Both centres, Uxbridge Road East and Uxbridge Road West, are served by the same bus services (207, 260, 607, 283, N207), there are limited parking possibilities on the road due to heavy traffic.
- 11.9 The number of retail units on Uxbridge Road East is smaller than on Uxbridge Road West, 59 compared to 87. Their structures are very similar with a focus on convenience goods such as foodstores and newsagents. The concentration of take-away stores is high, which can be partly attributed to the proximity of Shepherd's Bush, which is the major transport hub of the area. Although most of the retailers on Uxbridge Road East are independent, there are several national multiples such as Nando's, Domino's and Blockbusters.

Table 11.3: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Hammersmith & Fulham Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 15 | 23.7 | 15.7 |
| Comparison | 9 | 15.3 | 23.0 |
| Service | 34 | 59.3 | 52.1 |
| Vacant | 1 | 1.7 | 9.2 |
| Total | 59 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

- 11.10 The ethnic retailers on Uxbridge Road East include a Polish foodstore, Halal butchers and Chinese medicine retailer. It is important to stress that on Uxbridge Road East as well as on Uxbridge Road West, the mix of ethnic retailers is predominantly Middle Eastern with a strong Eastern European representation.
- 11.11 The overall environmental quality of the centre is dominated by the busy Uxbridge Road, which appears congested especially towards the eastern end, close to Shepherd's Bush. The cycle racks on both sides of Uxbridge Road seem to be unused and almost all of them were empty at the time of the site visit. Although there are some attractive buildings located along Uxbridge Road such as St. Stephen's Church in the East and the Telephone Exchange and Bush Hall in the West, the area as a whole lacks a sense of place. In addition, with the exception of St. Stephen's Church, there are no trees in the area. In

some parts of the centre the surface of pavements are damaged. There is also some graffiti. At the time of visit, there was litter on the streets, which can evoke a negative impression.

EDWARD WOODS ESTATE

- 11.12 Edward Woods Estate is situated between St. Ann's Road and West Cross Route (A3220), which is one of the main traffic arteries in West London. The area is served by bus number 295 running on St. Ann's Road and is located in walking distance from Latimer Road tube station (Hammersmith & City Line) and Shepherd's Bush tube station (Central Line). Cycle racks can be found on the eastern edge of the estate at St. Ann's Road.

Table 11.4: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Hammersmith & Fulham Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 6 | 40.0 | 15.7 |
| Comparison | 2 | 13.3 | 23.0 |
| Service | 6 | 40.0 | 52.1 |
| Vacant | 1 | 6.7 | 9.2 |
| Total | 15 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

- 11.13 The main retail axes stretch along St. Ann's Road in the East and Swanscombe Road in the South. However, the whole Estate only contains 15 retail units. The retail composition of Edward Wood Estate is consistent with a centre serving a relatively small residential area. There are three foodstores in the area. Other retail units offering grocery products include a burger take-away, a bakery and butchers. Edward Woods Estate also contains retail units selling car parts, carpets and a post office. One of the foodstores at Edward Wood Estate offers a large variety of ethnic products mostly of East African and Middle Eastern origin.
- 11.14 The overall environmental quality of Edward Wood Estate is lower than the environmental quality of the neighbouring Notting Hill. The area is dominated by three 1960s high-rise buildings, which look grey and overshadow the whole area. However, a playground with several trees and lawns has been built at the centre of the estate, which provides open public space. In addition, outdoor seating is located in front of the bakery on the southern

edge of the estate facing Swanscombe Road. At the time of visit, some rubbish bins were full but in general the area appears to be relatively clean. There is also some graffiti on the shutters of several shops and on the street furniture.

ASKEW ROAD

- 11.15 Askew Road connects Uxbridge Road in the north with Goldhawk Road in the south. The area is served by bus route number 266 but is also accessible by foot from the above mentioned streets, which are covered by frequent bus services.

Table 11.5: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Hammersmith & Fulham Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 11 | 16.4 | 15.7 |
| Comparison | 12 | 17.9 | 23.0 |
| Service | 37 | 55.2 | 52.1 |
| Vacant | 7 | 10.4 | 9.2 |
| Total | 67 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

- 11.16 There are 7 vacant units on Askew Road and the majority of them appear to be abandoned for the long term. The centre contains a high proportion of betting shops, pubs/bars, off-licences and take-aways. The centre has a limited number of ethnic retailers. Two of the foodstores belong to larger chains (Costcutter and Co-Op) and one is specifically focused on Lebanese groceries.
- 11.17 The northern half of the centre is predominantly occupied by brown terraced buildings. Although it also contains a public centre and a library, this part of Askew Road has a rather unpleasant industrial look strengthened by the presence of several vacant units. On the other hand, the southern half of the centre seems to be more relaxed with white Victorian terraced buildings and several trees. On the day of visit there were no rubbish bags or litter on the streets. However, there was some graffiti on the metal shutters of several units evoking a feeling of high crime and insecurity.

GOLDHAWK ROAD

- 11.18 Goldhawk Road is an important traffic artery running south-west from Shepherd's Bush towards Chiswick. The centre is served by frequent bus services (route 94 and 237) and the Hammersmith & City Line (Goldhawk Road tube station). Shepherd's Bush tube station on the Central line is located within walking distance from the centre.

Table 11.6: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Hammersmith & Fulham Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 9 | 21.9 | 15.7 |
| Comparison | 3 | 7.3 | 23.0 |
| Service | 27 | 65.9 | 52.1 |
| Vacant | 2 | 4.9 | 9.2 |
| Total | 41 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

- 11.19 All retailers on Goldhawk Road conduct their business independently. There are multiple retailers in the centre. All retailers tend to benefit from a strong flow of pedestrians from the close proximity of Shepherd's Bush, the main transport hub of the area. There is an above average concentration of retailers offering convenience goods such as foodstores and newsagents. In addition, there is also a high concentration of hairdressers and beauty/nail shops.
- 11.20 Goldhawk Road is strongly influenced by ethnic retailers, mostly by Caribbean and African origin. There are several foodstores offering Caribbean and African products and even an African hairdresser. However, there are also Halal and Irish butchers.
- 11.21 The overall environment of the centre is dominated by the busy Goldhawk Road. On the day of the visit, parts of the road were closed because of construction works. The road was therefore heavily congested with long delays. It is notable that there are no trees or architecturally attractive buildings on Goldhawk Road and the centre lacks identity. At the time of the visit there were several piles of rubbish bags and litter on the pavement. There was also some graffiti on the shutters and walls. The overall environment of the centre therefore felt untidy and neglected.

SHEPHERD'S BUSH ROAD

11.22 Shepherd's Bush road connects Shepherd's Bush in the north with Hammersmith in the south. The centre has very good bus connections (routes 72, 220, 283 and 295). Hammersmith tube station (Hammersmith and City, Piccadilly and District line) is in walking distance from the southern part of the centre and Shepherd's Bush tube station from the northern part (Hammersmith and City and Central line).

Table 11.7: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Hammersmith & Fulham Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 7 | 11.1 | 15.7 |
| Comparison | 14 | 22.2 | 23.0 |
| Service | 37 | 58.7 | 52.1 |
| Vacant | 5 | 7.9 | 9.2 |
| Total | 63 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

- 11.23 The majority of the retail units are located on the western side of Shepherd's Bush Road. The properties on the eastern side of the street are mainly residential or residential units converted into small hotels. The structure of the retail mix has a different character in the north and south parts of the centre. Although there are approximately the same number of units within each half of the centre, a border seems to exist created by a residential block inserted between the retail blocks on the western side of the road.
- 11.24 The northern part of Shepherd's Bush Road tends to gravitate towards Shepherd's Bush. The mix of retailers is similar as on other main roads originating at Shepherd's Bush such as Goldhawk Road and Uxbridge Road. The retailers in this part of the centre include several foodstores, takeaways and dry cleaners.
- 11.25 The structure of retail in the southern part of the centre appears similar to Hammersmith offering a high proportion of comparison goods such as furniture, mirrors, interior design items, etc. The number of estate agents located at the southern end of the centre is also high.
- 11.26 The number of retailers offering ethnic products is notably higher at the northern end of the centre. They include a dedicated Eastern European and a Thai foodstore. There were no ethnic retailers in the southern part of Shepherd's Bush Road.

11.27 The environmental quality varies between the north and south of the centre. At the time of the visit there was more litter on the pavements at the northern end of the centre and some of the metal shutters in the north were shut-up during the day. In addition, there was more graffiti in the northern part of the centre. However, almost the whole of Shepherd's Bush Road is lined with mature trees adding a positive element to the centre. The buildings surrounding the centre are built in similar architectural styles from brown brick. There are no attractive properties creating a sense of place.

BLYTHE ROAD

11.28 Blythe Road stretches from Shepherd's Bush Road in the west to Kensington Olympia in the east. There are no bus services directly on Blythe Road but the area is very well served by the neighbouring main arteries such as Hammersmith Road and Shepherd's Bush Road. At Kensington Olympia, there is also National Rail and Underground stations. The parking possibilities in the area seem to be limited as a result of narrow streets and high residential density.

Table 11.8: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Hammersmith & Fulham Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 3 | 15.7 | 15.7 |
| Comparison | 5 | 26.3 | 23.0 |
| Service | 9 | 47.3 | 52.1 |
| Vacant | 2 | 10.5 | 9.2 |
| Total | 19 | | |

Source: *Appendices Volume 3: Centre Audits & Boundaries*

11.29 The centre contains 19 retail units, two of which are multiple retailers (Threshers and Costcutter). The number of restaurants on Blythe Road is above average and there are two vacant units, however, at the time of the visit they had been refurbished.

11.30 Blythe Road seems to be a local retail centre hidden within the neighbouring residential area. The eastern end is dominated by the majestic Blythe House and the western part by attractive brown-brick terraces. However, the streets lack open space and feel a little narrow. At the time of the visit, there were no rubbish bags on the streets and they felt neat and tidy. In addition, no graffiti was seen in the area. There are also trees planted

along the streets, which creates a pleasant natural atmosphere. At the western end of the centre several bicycles had been locked to the railings indicating that more cycle racks are needed. On the day of the visit, there was virtually no traffic on Blythe Street and it seems that this type of transport has no adverse effect on the centre.

NORTH END ROAD (WEST KENSINGTON)

- 11.31 North End Road is one of the main traffic arteries in the western part of Hammersmith and Fulham. It stretches from Hammersmith Road in the north to Fulham Broadway in the South. There are several bus routes running on North End Road (28, 391 and N28). The area is served also by the District line (West Kensington tube station).

Table 11.9: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Hammersmith & Fulham Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 17 | 18.8 | 15.7 |
| Comparison | 16 | 17.7 | 23.0 |
| Service | 46 | 51.1 | 52.1 |
| Vacant | 11 | 12.2 | 9.2 |
| Total | 90 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

- 11.32 The number of units on North End Road is 90. Several larger supermarket chains are situated in the centre (Tesco, Costcutter, and Co-Op) as well as Greggs bakery and Carphone Warehouse. The only bank serving the centre is Barclays which is located in the northern half of the centre. The concentration of electronics shops in the centre is high, with most of them selling mobile phones. The only ethnic retailer is a Russian foodstore located at the northern end of the centre.
- 11.33 At the time of the visit, North End Road was heavily congested and some parts of the road surface appeared damaged. There are very few trees or open spaces in the area. However, North End Road is lined with attractive Victorian buildings, especially in the northern part. The continuity of the centre seems to be interrupted by the crossroads with the underground tracks for the District and Piccadilly lines and Talgarth Road (part of the A4 road). The crossroad with Talgarth Road hosts a large Bloomberg screen, which

displays real time financial data, attracting the attention of passers-by and providing a distinguishing feature to the urban landscape. On the day of the visit, there was litter and several rubbish bags on the pavements making the street look untidy and neglected.

GREYHOUND ROAD

- 11.34 Greyhound Road is a side street running to the east from Fulham Palace Road. There is no bus service running on Greyhound Road but there are frequent routes on Fulham Palace Road. There is no tube station within walking distance.

Table 11.10: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Hammersmith & Fulham Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 4 | 9.5 | 15.7 |
| Comparison | 7 | 16.6 | 23.0 |
| Service | 21 | 50.0 | 52.1 |
| Vacant | 10 | 23.8 | 9.2 |
| Total | 42 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

- 11.35 The structure of retail units facing Fulham Palace Road differs from the structure of Greyhound Road. The retail units on Fulham Palace Road benefit from a strong flow of pedestrians and there are also national multiple retailers including Boots and Sainsbury's. On the other hand, pedestrian and traffic flows on Greyhound Road seem to be minimal. Approximately 15% of the units are vacant and more than 10% have been converted into offices. There are no ethnic retailers on Greyhound Road.
- 11.36 The majority of the buildings on Greyhound Road are built from brown bricks and look identical. There are no dominant architectural elements, open spaces or trees. At the time of the site visit there were some rubbish bags and litter on the pavements. In addition, graffiti was seen in the eastern part of the centre. On the day of the site visit the centre had a nice pleasant feel. However the high number of vacant and converted retail units indicates low levels of retail demand.

MUNSTER ROAD/FULHAM CROSS

11.37 The two main retail axis of Fulham Cross are Lillie Road running from the east to the west and Munster Road stretching from the north to the south. There are several bus routes running on Lillie Road (route numbers 74, 190, 430, N74 and N97).

Table 11.11: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Hammersmith & Fulham Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 4 | 6.1 | 15.7 |
| Comparison | 29 | 43.9 | 23.0 |
| Service | 19 | 30.3 | 52.1 |
| Vacant | 13 | 19.7 | 9.2 |
| Total | 66 | | |

Source: *Appendices Volume 3: Centre Audits & Boundaries*

11.38 The structure of retailers on Munster Road and on Lillie Road is noticeably different. More than half of the retailers on Lillie Road offer Antiques such as furniture, lighting and art items. There is also a significant proportion of vacant units, around 13% of total units on Lillie Road. On the other hand, Munster Road offers a more balanced mix of retailers including a Budgens supermarket and a shop selling fine wines. There are also several shops selling contemporary household goods such as interior design items, lighting, furniture and bathrooms. No ethnic retailers have been identified in the centre.

11.39 The environmental quality of Lillie Road and of Munster Road also differs. There is a small park on the northern side of Lillie Road and new trees have been planted along the street. On the other hand, there are very few trees along Munster Road. At the time of the visit, many of the metal shutters on Lillie Road were shut down. There was also some litter on the pavements and plastic bags and beer cans in the park on Lillie Road. However, both streets were feeling quiet and pleasant. Some bicycles were locked to the pedestrian barriers on the crossroad of Lillie Road and Munster Road, which indicates a lack of cycle racks.

FULHAM PALACE ROAD NORTH

11.40 Fulham Palace Road runs south of Hammersmith, however the Hammersmith Flyover divides it from the centre of Hammersmith. Frequent buses serve the area including routes 190, 211, 220, 295, N10, N11, N97. There is no tube station on Fulham Palace Road itself but it can be easily reached by foot from Hammersmith (Hammersmith and City, Piccadilly and District lines).

Table 11.12: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Hammersmith & Fulham Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 4 | 8.7 | 15.7 |
| Comparison | 6 | 13.0 | 23.0 |
| Service | 33 | 71.7 | 52.1 |
| Vacant | 3 | 6.5 | 9.2 |
| Total | 46 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

11.41 The retail mix is dominated by restaurants and cafés. There are no foodstores or larger chains located in this part of Fulham Palace Road. In addition, no specialist ethnic foodstores are located in the centre.

11.42 Fulham Palace Road is a linear centre surrounded predominantly by terraced buildings. There are no open spaces or attractive buildings, which would provide a sense of place. There are also no trees in the centre. At the time of visit, there was construction work on Fulham Palace Road. Parts of the road were therefore closed and the centre was heavily congested. There was some litter on the pavements but no graffiti. In front of some take-aways motorcycles were parked on the pavement blocking the pedestrian flows.

FULHAM HIGH STREET

11.43 The Fulham High Street retail centre includes the retail axes of Fulham High Street and the southern end of Fulham Road. Putney Bridge tube station (District Line) is in walking distance from the centre and several bus routes run through the area.

Table 11.13: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Hammersmith & Fulham Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 4 | 5.9 | 15.7 |
| Comparison | 24 | 35.3 | 23.0 |
| Service | 35 | 51.5 | 52.1 |
| Vacant | 5 | 7.3 | 9.2 |
| Total | 68 | | |

Source: *Appendices Volume 3: Centre Audits & Boundaries*

- 11.44 There are several medical practices located in the area such as a cosmetic surgery, a chiropody clinic and a dentist. There are also four beauty salons located in the centre. The number of clothes shops is high, as well as the concentration of units offering household goods such as furniture, interior design items and bathrooms. There is only one ethnic retailer located in the centre specialising in Chinese medicine.
- 11.45 Fulham High Street and Fulham Road are relatively wide streets with some trees. Pavements around the trees are finished with gravel. At the time of the visit, there was no litter on the streets. The majestic Parkview Court Building dominates the southern side of Fulham High Street. There are no open spaces in the centre. In the eastern half of Fulham High Street there are two vacant units covered with posters and graffiti. In addition, the Wharf Study Centre on the crossroad of Fulham High Street and New King's Street has some windows covered with wooden boards and graffiti on the walls.

FULHAM ROAD

- 11.46 Fulham Road originates at Fulham Broadway and stretches south-west towards Fulham Palace Road. The centre is in walking distance from Fulham Broadway and Parson's Green tube stations (District line). There are also several bus routes running on Fulham Road including the 424, 414 and 14.

Table 11.14: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Hammersmith & Fulham Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 7 | 7.2 | 15.7 |
| Comparison | 42 | 43.2 | 23.0 |

| | | | |
|---------|----|------|------|
| Service | 42 | 43.2 | 52.1 |
| Vacant | 6 | 6.1 | 9.2 |
| Total | 97 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

11.47 Fulham Road is a large linear centre with 97 retail units. There are several national multiple retailers located in the area such as Starbucks, Café Nero and Carphone Warehouse. Two of the foodstores in the centre are focused specifically on organic food. There is also a branch of Natwest bank and several niche retailers in the centre. There are no ethnic retailers on Fulham Road.

11.48 Fulham Road is a busy road with an attractive curved street pattern. However, there are no open spaces or trees along the road. At the time of the visit some of the units were under construction with scaffolding erected on the pavement. However no litter or graffiti was seen in the area.

PARSON'S GREEN/ NEW KINGS ROAD

11.49 The retail units in Parson's Green/New Kings Road centre are located predominantly on New Kings Street but also on New Parson's Lane in the proximity of the railway tracks. Parson's Green tube station is located in the northern part of the area (District line) and there are several bus routes running on New King's Street (22, 424, N22).

Table 11.15: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Hammersmith & Fulham Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 10 | 11.9 | 15.7 |
| Comparison | 30 | 35.7 | 23.0 |
| Service | 36 | 42.8 | 52.1 |
| Vacant | 8 | 9.5 | 9.2 |
| Total | 84 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

11.50 The number of retail units offering household goods such as furniture, interior design items and lighting in Parson's Green is above average. The concentration of shops selling clothes and shoes is also high. There are also several restaurants and a shop specialising

in fine wines. Starbucks café and Budgens supermarket represent the only multiple retailers situated in the area. In addition, the number of estate agents in the centre is high indicating a high demand for residential housing. There are no ethnic retailers in the centre.

- 11.51 The centre is dominated by an attractive open space with mature trees - Parson's Green. There are several parking spaces and parking meters around the square. New King's Street contains several attractive Victorian buildings. At the time of the visit, there was no litter on the streets. However, the traffic on New King's Street seemed to be busy and pedestrians had difficulty to cross the road. No graffiti has been seen in the area. Although there is a construction site on the western side of Parson's Green Lane, there was no noise pollution on the day of the visit.

WANDSWORTH BRIDGE ROAD (NORTH)

- 11.52 Wandsworth Bridge Road (North) stretches to the south from New King's Road towards Wandsworth Bridge. The bus routes number 28, 295 and N28 operate in the area.

Table 11.16: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Hammersmith & Fulham Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 3 | 10.3 | 15.7 |
| Comparison | 12 | 41.4 | 23.0 |
| Service | 13 | 44.8 | 52.1 |
| Vacant | 1 | 3.4 | 9.2 |
| Total | 29 | | |

Source: *Appendices Volume 3: Centre Audits & Boundaries*

- 11.53 Wandsworth Bridge Road (North) is relatively small with 29 units in total. The dominant type of retailing in the area are shops selling wooden products such as furniture, sofas and antiques. Most of the other shops in the area seem to serve the local community (e.g. a convenience store, butchers and a pharmacy). There is also an off-licence belonging to the Threshers chain. There are no ethnic retailers in the centre.
- 11.54 The overall environment of the centre feels quiet with mature trees lining the street. The street pattern is linear and there are no dominant buildings in the area. At the time of the visit, there was no litter on the street.

KING STREET WEST

11.55 King Street West is a part of the important retail axis starting with Kensington High Street and continuing further west towards Chiswick and Brentford. King Street West is frequently served by buses including night services (routes 27, 190, 267, 391, H91, N9 and N11). Stamford Brook and Ravenscourt Park tube stations are located to the north of King Street (both on the District line). Parking is limited due to the heavy traffic on the main road and due to the presence of bus lanes. However, there are several short-term parking spaces at Tesco and Kings Court.

Table 11.17: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Hammersmith & Fulham Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 12 | 12.0 | 15.7 |
| Comparison | 21 | 21.0 | 23.0 |
| Service | 60 | 60.0 | 52.1 |
| Vacant | 7 | 7.0 | 9.2 |
| Total | 100 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

11.56 In regards to the number of retail units, King Street West is the largest neighbourhood retail centre in the Borough of Hammersmith and Fulham with a total of 100 units. There is a notably higher proportion of restaurants on King Street. On the southern side of King Street is Tesco with a car park. Further to the West is Allied Irish Bank, the only bank in the centre. At the time of the visit, seven of the retail units were vacant, for sale or to let following refurbishment. There was also in-fill construction activity at the western end of the centre.

11.57 In addition, King Street West seems to be the retail hub of the Polish community. The majority of ethnic Polish retailers seem to be concentrated in the eastern part of the area around the Polish centre. Polish retailers include several foodstores, two money-transfer/cheques cashing shops, two travel agents, an electronics shop and even a Polish bookstore. There are also other ethnic retailers on King Street West such as Thai and Halal foodstores.

11.58 The architectural quality on King Street West varies from attractive Victorian buildings to pre-war in-fill development with mansard roofs. Mature trees are planted on both sides of the street. Ravenscourt Park touches the northern side of King Street and provides limited open public space. At the time of visit, there were several rubbish bags on the pavements. However, the streets looked generally clean without litter and there was little graffiti in the area as a whole. The number of cycle racks seems to be sufficient. No bikes have been seen locked on the street lamps or pedestrian barriers. The overall environmental quality of the centre appears to be good with the only adverse effects created by the busy main road.

Dawes Road

11.59 Dawes Road runs north-west from Fulham Broadway towards Fulham Cross. The area is served by several bus routes (211, 295, N11) and is in walking distance from Fulham Broadway tube station (District line).

Table 11.18: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Hammersmith & Fulham Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 3 | 12.7 | 15.7 |
| Comparison | 5 | 17.8 | 23.0 |
| Service | 12 | 42.8 | 52.1 |
| Vacant | 8 | 28.5 | 9.2 |
| Total | 28 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

11.60 Dawes Road is a linear retail centre containing 32 units. One quarter of them are vacant and almost 20% per cent have been converted into offices. The remaining units include an Internet café, two dry cleaners and two foodstores. The centre has a noticeably high share of ethnic retailers including two African hairdressers, a Polish foodstore and a Polish courier.

11.61 The overall environmental quality of the centre seems to be extremely poor. The shopping windows of several vacant units are covered by a thick layer of old posters and some of the walls and metal shutters are sprayed with graffiti. There are no trees, open spaces or interesting architectural buildings in the centre. The pavements seem to be narrow and at the time of the site visit, there was also a lot of litter on the street.

WHITE CITY MEDIA VILLAGE

11.62 White City Media Village is located along Wood Lane close to White City tube station on the Central line. The Media Village officially opened in 2004 and consists of a modern complex of buildings which includes state-of-the-art broadcast facilities and offices for the BBC and other media companies, as well as shops, cafes centred around a landscaped public boulevard. The complex has won several awards for its architecture and energy efficiency and has been praised for its integration with the local community.

11.63 All of the units are let in the village and occupiers include Tesco Express, Starbucks, Mangiare café, Davys Wine Bar and Restaurant, Crussh Juice Bar, Relax Hair and Beauty, a hairdressers and a Hallmark Card Shop which has a Post Office.

Table X: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total (%)</i> | <i>Average of Hammersmith & Fulham Smaller Centres (%)</i> |
|------------------------|---------------------|--------------------------------|--|
| Convenience | 1 | 12.5% | 15.7 |
| Comparison | 1 | 12.5% | 23.0 |
| Service | 6 | 75% | 52.1 |
| Vacant | 0 | 0% | 9.2 |
| Total | 8 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

11.64 The village is well used by both BBC staff and local residents. There are large open spaces that provide opportunities to sit outside, the landscaping is of a good quality and there are several pieces of commissioned public art. There are also plenty of cycle racks.

12. HOUNSLOW

12.1 Hounslow is designated as a Metropolitan Centre in the London Plan. The town centre extends for the length of High Street as well as parts of Staines Road and London Road. The boundary also encompasses the Treaty Centre and the Blenheim Centre (which is under construction). The primary shopping frontage (as defined in the Local Plan) just runs along High Street.

Diversity of Uses & Retailer Representation

12.2 The town centre has a total floorspace of 76,868 sqm gross for retailing and services, comprising 319 units. These figures exclude the Blenheim Centre, which was not open at the time of the telephone survey, in-centre surveys or audits.

Table 12.1: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average over the 12 West London Study Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 23 | 7.2 | 11.0 |
| Comparison | 133 | 41.7 | 33.7 |
| Service | 146 | 45.8 | 47.2 |
| Vacant | 17 | 5.3 | 8.1 |
| Total | 319 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

12.3 Hounslow has a good range of key retailers include Debenhams, Marks & Spencer, Top Shop, Primark and Boots. However, the in-centre survey results show that when asked what would make people visit Hounslow more, 41% said 'attract larger retailers'. Hounslow currently has one managed shopping centre, the Treaty centre. The Treaty Centre has a total retail floorspace of 26,023 sqm gross and opened in 1987. The centre is anchored by Debenhams and there are also a good range of high street fashion stores such as Top Shop, River Island and Clarks. The Treaty Centre is bright and modern and provides a pleasant shopping environment with plenty of seating. The upper floors of the centre house the Paul Robeson Theatre and Hounslow library.

Table 12.2: Managed Shopping Centres

| <i>Shopping Centre</i> | <i>Date of Opening</i> | <i>Retail Floorspace</i> | <i>Anchor Retailers</i> |
|------------------------|------------------------|--------------------------|-------------------------|
| Treaty Centre | 1987 | 26,013 sqm gross | Debenhams, Wilkinsons |
| Blenheim Centre | October 2006 | 12,588 sqm gross | Asda |

Source: EGI

- 12.4 There are no major foodstores in the town centre, although Asda is soon to open (Due to open October 2006). However, there is a good range of smaller convenience operators and there are a number of fruit & veg stalls along High Street. The household survey results highlight the lack of foodstores in centre as only 3% of respondents in Hounslow were there for food shopping.
- 12.5 There is little specialist ethnic retail provision along High Street. In-centre survey results show that only 7% of respondents use the centre for specialist ethnic food products. 25% of respondents in Hounslow travel to Southall for these goods instead.
- 12.6 In terms of leisure facilities Hounslow has two bingo halls (Gala and Mecca) and a theatre.
- 12.7 The household telephone survey results show that 37% of respondents who use Hounslow for most of their clothing or footwear shopping undertake linked trips. Those who do, undertake the following activities:
- Meeting friends – 2.1%
 - Food shopping – 2.5%
 - Other non food shopping – 9.1%
 - Leisure activity – 2.1%
 - Pubs/ clubs – 2.1%
 - Restaurants – 5.8%
 - Cafes – 8.7%
 - Financial service – 7%
- 12.8 There are currently a number of large vacant units in the centre, however these are currently under alteration/ reconfiguration. The reoccupation of these prime units will have

a strong beneficial impact on the centre. Overall vacancy rates are below the national average.

Rents & Yields

- 12.9 Rents have improved in recent years and currently stand at £1,076 per sqm. This is up from £915 since 2001. Yields have been stable at 9% since 2001 until they rose to 9.5% in 2006. This is a sign of a potential lack of investor confidence in the centre.

Retailer Demand

- 12.10 Requirements in Hounslow are strong and from a good range of comparison, convenience and service operators who would add to the vitality and viability of the centre.

Table 12.3: Retailer Requirements

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Min. Floorspace sq m Gross</i> | <i>Max. Floorspace sq m Gross</i> |
|------------------------|---------------------|-----------------------------------|-----------------------------------|
| Comparison | 22 | 4,849 | 6,875 |
| Convenience | 5 | 664 | 2,202 |
| Service | 18 | 4,789 | 8,324 |
| TOTAL | 45 | 10,302 | 17,401 |

Source: Focus

Transport & Accessibility

- 12.11 The In-centre survey results show that the aspect respondents liked most about the centre was that it was 'easily accessible from home'. Hounslow has excellent public transport provision with Hounslow Central and Hounslow East underground stations on the Piccadilly Line being a short walk from the town centre. South West trains also serve Hounslow Railway Station. A number of bus routes serve the centre to areas such as Richmond, Twickenham, Staines, Uxbridge, Southall and Shepherds Bush. As the Public Transport Accessibility (PTAL) map shows, Hounslow town centre has the highest level of public transport accessibility in the Borough. There are high levels of accessibility along the length of High Street and beyond.
- 12.12 There are a high number of car parks in the centre including the Treaty Centre (700 spaces), School Road (250 spaces) and in-front of the Blenheim Centre (400 spaces).

- 12.13 Provision for pedestrians and cyclists in the centre are very good. The pedestrianised stretch of High Street makes for a safe shopping environment, and the stretch where buses are allowed is still very safe for shoppers. There is ample cycle parking around the centre, although it does not appear to be very well used.
- 12.14 The in-centre survey results showed that 49% travelled to Hounslow by car, 44% by bus and 6% walked.

Environmental Quality

- 12.15 The environmental quality and urban environment is mixed and has undergone improvements in recent years. High Street has had a range of environmental improvements, with high quality paving, seating, lighting and railing along with semi-mature trees. However, when shoppers were asked what they disliked most about Hounslow town centre 25% said that the streets were too dirty/ badly maintained and a further 40% said it was too busy/ crowded.
- 12.16 In terms of buildings, styles vary throughout the centre and are of varying architectural merit. Along High Street buildings and frontages are generally well maintained, although the standards decline rapidly around the eastern part of High Street and London Road.

Crime and Safety

- 12.17 There is no specific crime and safety information available for Hounslow town centre, however, we understand that Hounslow Council actively work with the Police to prevent crime and anti-social behaviour in the centre.

Proposals/Commitments

- 12.18 The Blenheim Centre is a major mixed-use development in the centre of Hounslow. The complex will comprise retail, leisure, offices, both private and affordable housing and additional community facilities. Phase 1 of the centre which involves a 6,435 sqm gross Asda store is due to open in October 2006. It is intended that Phase 2 of the scheme will involve a further circa 13,000 sqm of comparison goods floorspace and 1,112 sqm of A3 floorspace.

13. CHISWICK

13.1 Chiswick is designated as a Major Centre in the London Plan. The town centre incorporates Chiswick High Road and Turnham Green Terrace as well as Turham Green and Chiswick Common. The Primary Shopping Frontage (as defined in the Unitary Development Plan) covers the western end of Chiswick High Road.

Diversity of Uses & Retailer Representation

13.2 The town centre has a total floorspace of 57,566 sqm gross for retailing and services, comprising 384 units.

Table 13.1: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average over the 12 West London Study Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 28 | 7.3 | 11.0 |
| Comparison | 144 | 37.5 | 33.7 |
| Service | 183 | 47.7 | 47.2 |
| Vacant | 29 | 7.6 | 8.1 |
| Total | 384 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

13.3 Key attractors include Waterstones, Marks & Spencer and Whistles. The centre has no department stores or shopping centres. Chiswick has an upmarket retail provision with many niche, boutique style shops such as Spa NK, Oliver Bonas and Whistles. The café and restaurant provision is also upmarket although there are also high street chain cafes such as Café Nero and Starbucks. Many of these have outside seating.

13.4 Key foodstores in the centre are Sainsbury's, Marks & Spencer and Tesco Express. There are also a number of fruit & veg stalls along Chiswick High Road. The in-centre survey results show that 32% of respondent's main purpose in Chiswick was for food shopping. Only 2% were primarily there for clothing and footwear shopping. Towards the eastern end of Chiswick High Road, Adamou and Sons Greengrocers sells a wide range of specialist

ethnic food products. 20% of in-centre survey respondents use Chiswick to purchase specialist ethnic food products use this store.

- 13.5 Leisure provision in Chiswick is confined to bars and restaurants. The in-centre results show for 7% of respondents the primary reason for visiting Chiswick that day was for socialising. This highlights the important role cafés, bars and restaurants play in the health of the town centre.
- 13.6 The telephone survey results show that 33% of respondents using Chiswick for their main clothing and footwear shopping undertake a linked trip. The majority of these linked trips were to visit cafes and restaurants.

Rents & Yields

- 13.7 Rents have improved in recent years and currently stand at £1,453 per sqm. This is up from £915 since 2001. Yields have been stable at 7% since 2001. This is strong and the healthiest in the Borough.

Retailer Demand

- 13.8 Requirements in Chiswick are strong and from a good range of mid range and upmarket comparison, convenience and service operators. There is also a requirement from Debenhams which could potentially increase the attraction of Chiswick.

Table 13.2: Retailer Requirements

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Min. Floorspace sq m Gross</i> | <i>Max. Floorspace sq m Gross</i> |
|------------------------|---------------------|-----------------------------------|-----------------------------------|
| Comparison | 23 | 6,289 | 12,662 |
| Convenience | 4 | 516 | 771 |
| Service | 22 | 5,577 | 10,414 |
| TOTAL | 49 | 12,382 | 23,847 |

Source: Focus

Transport & Accessibility

- 13.9 Chiswick is well served by public transport. The London underground stations of Chiswick Park and Turnham Green are a short walk from the centre and are both on the District

Line. A number of bus routes serve the centre from areas including Hounslow, Richmond, Hammersmith, Piccadilly Circus, Camden and Acton. The PTAL map shows Chiswick has good public transport accessibility along its entire length, which permeates out towards the tube stations. The main car park serving the centre is behind Sainsbury's, which has 330 spaces.

13.10 Chiswick High Road is very busy with vehicular traffic that impacts upon pedestrians and cyclists, and it is difficult to cross the road away from crossing points. There is no cycle lane on the main road although there are on some of the side streets. There is ample cycle parking outside of shops which is well used, although cyclists are also using railings to secure the bikes.

13.11 The in-centre survey results show how respondents had travelled to Chiswick:

- 20% by car
- 9% by bus
- 8% by train
- 51% walked
- 12% cycled

Environmental Quality

13.12 Chiswick is an attractive and well maintained town centre and the built environment is interesting with a range of architectural styles. On the whole the frontages are very well maintained and in character with the centre.

13.13 However, the traffic congestion undermines the quality of the centre and negatively impacts on its appeal. When asked what they disliked most about the centre, 11% said it was the traffic congestion. 43% said there was nothing they dislike about the centre, which is a very positive sign.

Crime and Safety

13.14 There is no specific crime and safety information available for Chiswick town centre, however, we understand that Hounslow Council actively work with the Police to prevent crime and anti-social behaviour in the centre.

Proposals/Commitments

13.15 There are no major retail proposals or commitments in Chiswick town centre.

14. FELTHAM

14.1 Feltham is designated as a District Centre in the London Plan. The retail element of the town centre runs along the north side of High Street and within the 'The Centre' shopping centre.

Diversity of Uses & Retailer Representation

14.2 The town centre has a total floorspace of 36,897 sqm for retailing and services, comprising 95 units.

Table 14.1: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average over the 12 West London Study Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 15 | 15.7 | 11.0 |
| Comparison | 27 | 28.4 | 33.7 |
| Service | 38 | 40.0 | 47.2 |
| Vacant | 15 | 15.7 | 8.1 |
| Total | 95 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

14.3 Feltham has recently benefited from significant investment with the extension of 'The Centre'. 'The Centre' now has a retail floorspace of 27,871 sqm gross and is an open air precinct that houses the vast majority of retail and service units in Feltham. 'The Centre' is anchored by a 7,446 sqm gross Asda with other retailers being Next, Matalan, Brantano, Peacocks and New Look. The extension to 'The Centre', which opened in June 2006, provides large modern retail units in a pedestrainised shopping environment. 'The Centre' development also comprises 800 apartments, a hotel and new library and medical centre. There are still a number of vacant units in the 'The Centre' although this is to be expected given how recently it has opened and is not a cause for concern.

Table 14.2: Managed Shopping Centres

| <i>Shopping Centre</i> | <i>Date of Opening</i> | <i>Retail Floorspace</i> | <i>Anchor Retailers</i> |
|------------------------|-------------------------|--------------------------|-------------------------|
| The Centre Feltham | 1963 (Refurbished 2006) | 35,303 sqm gross | Asda, JJB Sports, Next |

Source: EGI

- 14.4 The shopping centre also includes a number of the original smaller units fronting onto High Street. These are very dated compared to the new units and are occupied by retailers including Dorothy Perkins, Specsavers and Londis. Retailers not in the shopping Centre include Aldi, Tesco and 10 small units along Cavendish Parade which are occupied predominately by service uses.
- 14.5 It is clear from the in-centre survey that convenience provision plays an important role in the centre with 46% of respondents being in the centre for food shopping. Specialist ethnic food shops in Feltham are limited, although 21% of in-centre survey respondents did use the centre to purchase these goods. However, 30% of these people used Asda rather than local independent stores.
- 14.6 A high proportion (20%) were also in the centre for clothing and footwear shopping. When asked, 42% of respondents to the in-centre survey stated the aspect they liked most about the town centre was 'good shops'. When asked what would persuade them to visit Feltham more, the highest response (16%) was 'attract larger retailers'.
- 14.7 The telephone survey results show that 31% of respondents using Feltham for their main clothing and footwear shopping undertake a linked trip to another shopping, leisure or service use.

Rents & Yields

- 14.8 Rental data is not available but yields have stood at over 10% since 2001.

Retailer Demand

- 14.9 Retailer demand is strong for a centre of this size and from a number of stores that would contribute to the overall vitality and viability of the centre such as TK Maxx, Jessops and Savers.

Table 14.3: Retailer Requirements

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Min. Floorspace sq m Gross</i> | <i>Max. Floorspace sq m Gross</i> |
|------------------------|---------------------|-----------------------------------|-----------------------------------|
| Comparison | 11 | 1,979 | 3,214 |
| Convenience | 3 | 483 | 2,118 |
| Service | 12 | 6,011 | 11,696 |
| TOTAL | 26 | 8,473 | 17,028 |

Source: Focus

Transport & Accessibility

- 14.10 Feltham is not on the London Underground but has public transport access by bus and train. Trains run frequently to London Waterloo taking around 30 minutes. Buses serve Feltham from across London including Heathrow, Hounslow, Richmond, Staines and Bedfont. The PTAL map shows that the town centre has fair levels of public transport accessibility, which permeates out from the train station.
- 14.11 The in-centre survey results show how respondents had travelled to Feltham:
- 26% by car
 - 46% by bus
 - 2% by train
 - 25% walked
 - 1% arrived by taxi
- 14.12 The pedestrianised layout of the shopping centre makes for a safe pedestrian environment away from the traffic. 'The Centre' has cycle parking which is well used. However, none of the respondents to the in-centre survey had cycled to Feltham. Feltham has ample parking provision with 'The Centre' having over 2,000 spaces as well as well as around 300 spaces at Tesco. However, in the in-centre survey, the highest response(13%) in terms of what respondents disliked most about the centre what that traffic congestion makes it difficult to get there by car.

Environmental Quality

- 14.13 The environmental quality and urban environment is generally good and has improved significantly with the redevelopment of 'The Centre'. The redevelopment is of a high standard, as are the surrounding residential developments that are currently under construction.
- 14.14 The south side of High Street has The Green and pond, which do add to the environmental quality of the area. 'The Centre' has high quality street furniture and when the planting has matured slightly this will soften the views.

Crime and Safety

- 14.15 There is no specific crime and safety information available for Feltham town centre, however, we understand that Hounslow Council actively work with the Police to prevent crime and anti-social behaviour in the centre.

Proposals/Commitments

- 14.16 There are no proposals or commitments in Feltham town centre.

15. BRENTFORD

15.1 Brentford is designated as a District Centre in the London Plan. It is a linear centre which stretches along the length of High Street. The primary shopping frontage only runs along the stretch between Market Place and Half Acre.

Diversity of Uses & Retailer Representation

15.2 The town centre has a total floorspace of 13,440 sqm gross for retailing and services, comprising 69 units.

Table 15.1: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average over the 12 West London Study Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 6 | 8.7 | 11.0 |
| Comparison | 21 | 30.4 | 33.7 |
| Service | 35 | 50.7 | 47.2 |
| Vacant | 7 | 10.1 | 8.1 |
| Total | 69 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

15.3 National multiple retailer representation in Brentford is limited and only account for 13% of the units. Clothing and footwear provision is very limited in the centre. This is reflected in the in-centre survey results which show that only 2% of respondents were in the centre for clothing and footwear shopping. When asked what they disliked most about Brentford, the highest response (14%) stated it was the poor range of comparison retailers. However, there is a good representation of services such as high street banks and cafes. There is a high proportion of vacant units in the centre.

15.4 There is limited specialist ethnic retail provision and 33% of in-centre survey respondents who use Brentford for these goods, purchase the goods from Somerfield rather than local independent stores.

Retailer Demand

- 15.5 Retailer demand is high given the size of the centre. Requirements are from a range of retailers that have the potential to increase the attraction of Brentford such as Superdrug, Clarks, Tesco, Wetherspoons and Subway.

Table 15.2: Retailer Requirements

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Min. Floorspace sq m Gross</i> | <i>Max. Floorspace sq m Gross</i> |
|------------------------|---------------------|-----------------------------------|-----------------------------------|
| Comparison | 14 | 4,390 | 8,268 |
| Convenience | 2 | 1,254 | 2,090 |
| Service | 14 | 3,354 | 6,522 |
| TOTAL | 30 | 8,998 | 16,880 |

Source: Focus

Transport & Accessibility

- 15.6 Brentford is not on the London Underground but does have a national rail station around a 5 to 10 minute walk from the town centre which is served by South West trains. There is a regular train service to London Waterloo. Buses also serve Brentford from Ealing, Chiswick, Kingston, Hounslow and Hanwell. The PTAL map shows that Brentford has poor public transport accessibility when compared to the other District Centre of Feltham.
- 15.7 The main parking provision in the centre is at Somerfield which has around 110 spaces and Albany Parade which has around 60 spaces. The High Street is very busy with vehicular traffic which impedes pedestrians wanting to cross the road.
- 15.8 The in-centre survey results show how respondents had travelled to Brentford:
- 14% by car
 - 33% by bus
 - 5% by train
 - 42% walked

- 3% cycled

Environmental Quality

- 15.9 The urban environment is mixed in Brentford. A number of large derelict buildings detract from the environmental quality of the centre, as do the run down shop frontages. However, there are areas with high environmental quality and visual interest. The Brentford Lock development is very high quality mixed use scheme comprising riverside town houses and apartments with a Piazza, a wine bar and a Coffee shop. Some parts of High Street also have visual interest such as Market Place adjacent to the Magistrates Court.

Crime and Safety

- 15.10 There is no specific crime and safety information available for Brentford town centre, however, we understand that Hounslow Council actively work with the Police to prevent crime and anti-social behaviour in the centre.

Proposals/Commitments

- 15.11 There are no proposals or commitments in Brentford town centre.

16. HOUNSLOW'S OTHER CENTRES

Hounslow West

- 16.1 Hounslow West is situated along the A3006 Bath Road to the west of Hounslow town centre and south of the A4. It is served by Hounslow West underground station on the Piccadilly line and by bus services to Hounslow, Heathrow Airport, Slough, Staines, Uxbridge, Southall and Hammersmith. There is a large NCP car park located adjacent to Hounslow West station and Somerfield has a customer car park to the rear of its store. There is also on-street pay and display parking throughout the centre for a maximum of two hours. There are cycle racks outside the station and in the western part of the centre, however bikes are also secured to railings.
- 16.2 Hounslow West is a long linear centre. All of the retail units are located along the south side of the Bath Road and the station is located on the northern side. There are several crossings enabling pedestrians to access the centre from the station. Most of the pavements are set back from the road. The surrounding area is predominately residential.

Table 16.1: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Hounslow's Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 18 | 30.9 | 19.4 |
| Comparison | 13 | 23.6 | 14.4 |
| Service | 24 | 43.6 | 58.2 |
| Vacant | 1 | 1.8 | 7.8 |
| Total | 55 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

- 16.3 Hounslow West has a total floorspace of 13,440 sqm. It has a large proportion of convenience and service retailers reflecting its role serving the everyday shopping needs of its local population. There are several multiple retailers in the centre including Woolworths, Bakers Oven, Blockbuster, Boots, Somerfield, Iceland, KFC and Ladbroses. There are two high street banks in the centre – Barclays and Abbey. There is also a weekly car boot sale held in the station car park on Sundays. The size of units varies in

the centre, several units have been amalgamated to create wider frontages and many of the units extend backward creating deep units. The centre has a low vacancy rate of 2%.

- 16.4 There is a high proportion of independent ethnic convenience retailers in the centre including an Indian deli, a middle eastern convenience store, an Asian, Sri Lankan and Afro-Caribbean store, a Halal butchers and an Asian Meat Mart. Many of these retailers have outdoor display areas. There is also an ethnic jewellery shop, two Sari shops, an ethnic travel agent, an Indian and Hindu Music and DVD shop and several Indian restaurants.
- 16.5 The built environment in Hounslow West feels neglected and there are no signs of recent investment. The centre has a mixture of building types including several terraces and a significant amount of in-fill development with flat roofs. The Karahi Palace building is a landmark building but it is in a poor state of repair and appears tired. Paint is peeling off many of the buildings and there is quite a lot of graffiti. Somerfield is fairly well concealed behind the Karahi Palace and does not have active frontages. Although the entrance through to Somerfield is undercover, it is dark and un-welcoming. In addition, several other shopfronts have metal shutters, reducing active frontages.
- 16.6 The centre also has uneven paving, old and tired looking street furniture and there are areas where the pavements feel cluttered. At the time of the site visit, there were piles of litter on the streets next to litter bins. The environment of the centre is affected by the noise of planes landing at Heathrow airport. There are no areas of open space and no plants or soft landscaping although there are a few trees. Overall, Hounslow West is well used with constant pedestrian flows.

Bedfont

- 16.7 Bedfont Shopping Centre is located to the west of the London Borough of Hounslow, north of Feltham and to the south of Heathrow airport. Separate cycle lanes have been marked for cyclists across the whole centre. The nearest train stations are Feltham, Hatton Cross and Heathrow airport. Buses connect the centre to Hatton Cross and Feltham.

Table 16.2: Retail Composition

| Retail Category | No. of Units | Percentage of total Floorspace (%) | Average of Hounslow's Smaller Centres (%) |
|------------------------|---------------------|---|--|
| Convenience | 7 | 12.9 | 19.4 |
| Comparison | 15 | 27.7 | 14.4 |
| Service | 30 | 55.5 | 58.2 |
| Vacant | 2 | 3.7 | 7.8 |
| Total | 54 | | |

Source: *Appendices Volume 3: Centre Audits & Boundaries*

- 16.8 Bedfont is a linear centre stretching along both sides of Staines Road. It has a total floorspace of 5,417 sqm. The convenience offer consists of a Budgens store and several small independent convenience stores. The centre also has several specialist comparison retailers including a soccer shop, a hardware store and a picture framers. There is also a strong service offer including various takeaways, restaurants and cafes as well as a Barclay's bank with a cash-point at the eastern end of the centre. There are no ethnic retailers in Bedfont.
- 16.9 Bedfont benefits from wide pavements, which are separated from the main road by pedestrian barriers and trees. There are no architecturally interesting buildings in the centre. There are several benches facing Staines Road.
- 16.10 The overall environment in the centre appears cultivated and clean. However, the busy Staines Road creates a natural barrier and pollutes the area with noise and fumes and there is also some noise pollution from Heathrow airport. There is some graffiti and evidence of crime such as glass lying on the ground from a broken phone booth window.

Old Isleworth

- 16.11 Old Isleworth is located in the east of the London Borough of Hounslow close to the River Thames. The centre is not served by a train or tube station and there is one bus service running through the centre connecting it to Hammersmith, Brentford and Twickenham. There is a car park at the northern end of South Street and several on-street parking spaces. There are several cycle racks around the lawn at Shawsbury Walk.

16.12 Old Isleworth is a linear centre located along South Street with an open space at the southern end - Upper Square. The centre has a strong convenience and service offer including a post office, a Londis convenience store, a travel agents, a hairdressers and a pharmacy. The number of comparison retailers in the centre is limited and mainly consists of a hardware and ironmongers store. There are a variety of ethnic retailers in the centre including a Beijing restaurant, an Afro Caribbean foodstore and an Armenian travel agent.

Table 16.3: Retail Composition

| Retail Category | No. of Units | Percentage of total Floorspace (%) | Average of Hounslow's Smaller Centres (%) |
|------------------------|---------------------|---|--|
| Convenience | 6 | 20.6 | 19.4 |
| Comparison | 3 | 10.3 | 14.4 |
| Service | 16 | 55.1 | 58.2 |
| Vacant | 4 | 13.7 | 7.8 |
| Total | 29 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

16.13 The environmental quality in Old Isleworth is good. In the centre of Upper Square, there is a green island with a white stone water fountain and an antique street lamp. In addition Shawsbury Walk, on the western side of the centre, has a lawn with several mature trees surrounded by single storey buildings with retail units on the ground floor. There was also evidence of new trees planted along the northern end of South Street. There is a bench in front of the Isleworth Public Hall on the eastern side of South Street and there is also a café with outdoor seating. There was some litter in the centre and graffiti and posters, particularly around a boarded up public house.

16.14 The architectural quality of the buildings in the centre vary from attractive Victorian buildings at the southern end to brown-brick terraces at the northern end. Traffic in the centre appeared to be very light.

Heston

16.15 Heston is located in the north of the London Borough of Hounslow to the south of the M4 motorway and north of the A4. Bus services run to Northolt, Hounslow, Kingston and Twickenham. There is a small car park in front of the vicarage as well as restricted on-street parking. There are no cycle racks.

Table 16.4: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Hounslow's Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 6 | 16.2 | 19.4 |
| Comparison | 4 | 10.8 | 14.4 |
| Service | 24 | 64.9 | 58.2 |
| Vacant | 3 | 8.1 | 7.8 |
| Total | 37 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

- 16.16 Heston has a range of local shops and services including a Best One and Londis convenience stores, a post office, a pet shos, an off-licence and hairdressers. There is also an Indian restaurant and a Halal meat shop and grocers. In addition, one of the convenience stores sells Polish foods.
- 16.17 The centre is fairly well maintained with little litter or graffiti. There is an area of green space surrounding the war memorial, this is situated in the middle of the junction opposite St Leonard's Church and as a result is not very accessible. Moreover, the space is planted and there are limited opportunities for sitting. St Leonard's Church is an attractive landmark building in the centre creating a distinct identity. The Cornerstone building which houses the Seventh Day Adventist Church is also a unique building. The majority of buildings are two and three storey with residential units above the commercial units. Buildings and fascias are well maintained. There are also a few old half timbered buildings in the south of the centre.
- 16.18 At the time of the site visit, pedestrian footfall in the centre was fairly low although there was a lot of traffic moving through the centre.

Cranford

- 16.19 Cranford is located in the west of the London Borough of Hounslow along the A4 road and is in close proximity to Heathrow airport. The centre runs along the south side of the A4.

On the northern side of the A4 there is the Jarvis Ramada hotel and offices within Heathrow House. Bus services run through Cranford on the A4 and there is restricted street parking along Berkeley Avenue, Waye Avenue and in front of some of the units facing the A4. There is some cycle parking in the west of the centre.

- 16.20 The centre is based around a triangle of uses at the junction with Berkeley Avenue and the Bath Road and extends along Bath Road to Waye Avenue. It is anchored by Costcutter at the eastern end and Tesco Express is opening at the western end. Other uses include an off-licence, pharmacy, an Indian hotel and restaurant, a bookmakers, a café, chiropractor and a dentist. There is also a car wash situated in the middle of the triangle, which appears to be well used. The only ethnic retailers are a Polish convenience store, a Mongolian takeaway and a Mediterranean café.

Table 16.5: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Hounslow's Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 7 | 18.1 | 19.4 |
| Comparison | 3 | 9.1 | 14.4 |
| Service | 20 | 60.6 | 58.2 |
| Vacant | 3 | 12.1 | 7.8 |
| Total | 33 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

- 16.21 Cranford suffers from noise pollution from very low flying planes passing over head at frequent intervals to reach Heathrow airport and noise from traffic along the A4. There are few trees in the centre and no plants. There is an area of green open space at the western end of the centre, however, this is poorly maintained and overgrown. There are some seats along the pavements. Several stretches of the pavements have oddly positioned railings in the middle of the pavement.
- 16.22 The quality of the built environment in Cranford varies. The buildings around the triangle are very distinctive and give Cranford a unique identity. The rest of the buildings are two and three storey in-fill developments. The quality of fascias vary, several of the units have recent signs of investment and look quite smart, whereas others look tired with peeling paint.

Hanworth

16.23 Hanworth local centre is located along Hampton Road West to the north of Hampton and to the south of Feltham in the south west of the London Borough of Hounslow. The centre is not served by a tube or train station but there are regular buses between Kingston, Hampton and Hounslow. There is a car park outside of Rex House and there are no cycle racks.

Table 16.6: Retail Composition

| <i>Retail Category</i> | <i>No. of Units</i> | <i>Percentage of total Floorspace (%)</i> | <i>Average of Hounslow's Smaller Centres (%)</i> |
|------------------------|---------------------|---|--|
| Convenience | 4 | 13.3 | 19.4 |
| Comparison | 4 | 13.3 | 14.4 |
| Service | 18 | 60.0 | 58.2 |
| Vacant | 4 | 13.3 | 7.8 |
| Total | 30 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

16.24 Hanworth is a linear centre running alongside the busy Hampton Road West. The main occupiers in the centre are Londis, Subway, Ladbrokes, Greggs and a Moss chemist. The centre also has a post office, dry cleaners and a hairdressers. The only ethnic retailer is an Indian takeaway.

16.25 Hampton Road West divides the centre into two halves polluting the area with noise and fumes and making it difficult for pedestrians to cross the road. On the day of the site visit, there was some litter and rubbish bags on the pavements and there was also some graffiti. There were no trees or benches in the area, further detracting from the environmental quality of the centre.

Isleworth

16.26 Isleworth is located to the south of the A4 Great West Road and to the north of Twickenham. Isleworth is served by a train station and there are also frequent bus services connecting the centre to Hammersmith, Shepherds Bush, Brentford, Hounslow, Richmond, Twickenham and Staines. There are several cycle racks located in the centre.

16.27 Isleworth consists of a T-shaped centre on the crossroad of St John's Road and London Road. London Road is one of the main traffic arteries in the area whereas St. John's Road is quieter. The centre's retail offer is predominantly based around service and convenience retailers. The only comparison retailers are a computer shop and a cycle retailer. There are several multiple retailers in the centre including Spar, Threshers, Londis and William Hill as well as several high street banks. There is a low proportion of ethnic retailers in Isleworth, the ethnic offer consists of a Chinese and Indian takeaway.

Table 16.7: Retail Composition

| Retail Category | No. of Units | Percentage of total Floorspace (%) | Average of Hounslow's Smaller Centres (%) |
|------------------------|---------------------|---|--|
| Convenience | 12 | 24 | 19.4 |
| Comparison | 3 | 6 | 14.4 |
| Service | 34 | 68 | 58.2 |
| Vacant | 1 | 2 | 7.8 |
| Total | 50 | | |

Source: Appendices Volume 3: Centre Audits & Boundaries

16.28 The architectural styles on London Road and St John's Road are also different. London Road contains several attractive Victorian buildings such as Barclays and Natwest bank, whilst the western end has more modern building including the glass-covered Odeon Parade building. There are several large trees on London Road but there are no open spaces in the centre.