Old Oak and Park Royal
Retail and Leisure Needs Study

On behalf of **Old Oak and Park Royal Development Corporation**

OPDC
OLD OAK AND
PARK ROYAL
DEVELOPMENT
CORPORATION

Project Ref: 34416 | Final Report | Date: November 2016

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Document Control Sheet

Project Name: **GLA Old Oak and Park Royal**

Project Ref: **34416**

Report Title: **Retail and Leisure and Needs Study**

Date: **November 2016**

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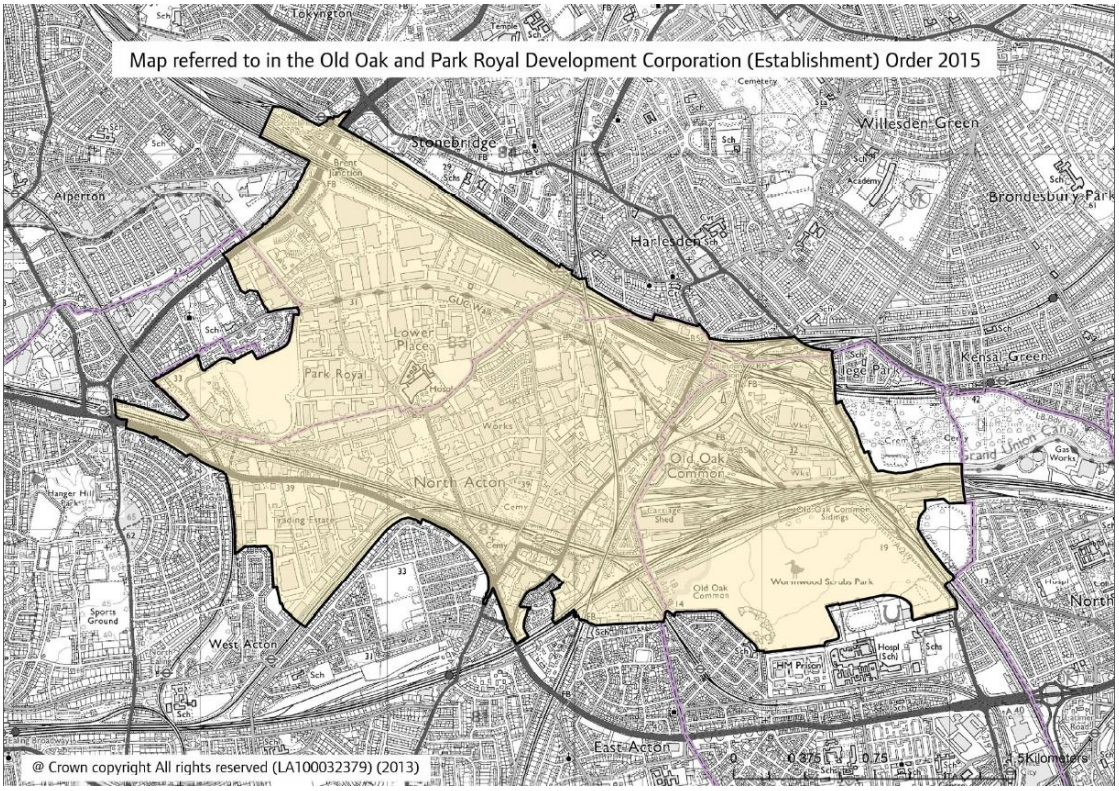
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1 Introduction and terms of reference

1.1.1 Peter Brett Associates LLP (PBA) was instructed in May 2015 by the Old Oak and Park Royal Development Corporation (OPDC) to prepare an Old Oak and Park Royal Retail and Leisure Needs Study (RLNS) in respect of the Old Oak and Park Royal Opportunity Area. The OPDC came into force on 1 April 2015 and has taken on specific powers of planning (preparing the local plan, community infrastructure levy, determining planning applications); regeneration; compulsory purchase orders; and the ability to adopt and manage streets and spaces. The OPDC is managed by a Board, chaired by Sir Edward Lister, the Mayor of London's Chief of Staff and Deputy Mayor for Policy and Planning. The OPDC area is set out in Figure 1-1.

Figure 1-1: OPDC Area



1.1.2 The primary purpose of this study is to provide evidence on the magnitude of need for retail and leisure uses within the OPDC area over the next 20 years as generated by planned development in order to inform the OPDC's Local Plan. PBA have reported to a steering group that includes representatives from the OPDC, GLA and surrounding boroughs (including the London Boroughs of Brent (LBB), Ealing (LBE), Hammersmith and Fulham (LBHF) and the Royal Borough of Kensington & Chelsea (RBKC)).

1.1.3 Old Oak and Park Royal cover an area of 650 hectares of land in north-west London. Today, Old Oak comprises 155 hectares of industrial and railway land. The area has limited public transport access and is occupied primarily by railway depots, rail lines, waste sites, a second-hand car dealership, light industrial premises and a small number of residential units. Park Royal constitutes Europe's largest industrial estate housing approximately 1,200 workspaces, employing over 30,000 people in over 2.1 million sqm of gross floor area.

1.1.4 The scale of development opportunity in Old Oak and Park Royal is set out in the London Plan, which identifies the OPDC area as having the potential to deliver 24,000 new homes and 55,000 new jobs over the next 20 to 30 years and Park Royal having the potential to deliver an

additional 1,500 homes and 10,000 jobs. Further guidance is set out in the Mayor's Old Oak and Park Royal Opportunity Area Planning Framework (OAPF), adopted in November 2015.

1.1.5 By 2027, the construction of a new High Speed 2 and Crossrail interchange station (Old Oak Common station) coupled with new London Overground stations, and improvements to existing stations at Willesden Junction and North Acton, will dramatically transform public transport accessibility. Old Oak Common station will be one of the busiest stations in the country with an interchange capacity of over 250,000 people. It will serve as a significant catalyst for regeneration of the wider area.

1.1.6 The objectives, as agreed with the Steering Group[1], are as follows:

- To identify the quantum and phasing of types of retail and leisure provision in Old Oak and Park Royal to support the needs of the new resident and worker community in Old Oak and Park Royal and those interchanging within the Old Oak Common HS2, Crossrail and Great Western Main Line station.
- To advise on the potential future designation of existing and new town centres within Old Oak and Park Royal.
- To form evidence to support Local Plan policies developed by the OPDC.

1.1.7 The study includes three distinct tasks, as follows:

- **Evidence:** consider the policy context, retail and leisure trends and undertake a review of the existing supply of floorspace within the OPDC area and outside
- **Quantitative assessment:** assess the potential retail and leisure need arising from development in Old Oak and Park Royal, its phasing, location and centre designations
- **Qualitative assessment:** consider potential retail niches, affordable retail space, potential high level design and advice on spatial distribution of floorspace

1.1.8 To respond to these three tasks, the RLNS is structured as follows:

- Section 2 sets out the policy context for Old Oak and Park Royal
- Section 3 explains the market context for retail and leisure uses and highlights some key economic trends facing retailing and town centres today
- Section 4 summarises the existing network of centres
- Section 5 explains the findings from our analysis of case studies
- Section 6 includes our quantitative analysis of the needs generated by the development and the consequences for existing centres
- Section 7 sets out our recommendations, taking into account the findings in Sections 2 to 6 in order to respond to the terms of reference

1.1.9 The study has been subject to a period of consultation between February and March 2016 and has been revised in August 2016 to take into account comments from consultees, alongside further minor refinements as agreed with the OPDC.

[1] Comprising officers from LBHF, LBB, LBE and RBKC, alongside the OPDC as commissioning authority

2 Policy context for Old Oak and Park Royal

2.1 Introduction

2.1.1 The Localism Act (2011) granted the Mayor the power to establish Mayoral Development Corporations (MDC); the OPDC was formally launched as the MDC for Old Oak and Park Royal in April 2015. It is a functional body of the Greater London Authority and acts as the designated local planning authority for the Old Oak and Park Royal Opportunity Areas. Therefore, it will be responsible for all planning functions including the production of a Local Plan.

2.1.2 This section provides a summary of the National Planning Policy Framework (NPPF) and Planning Policy Guidance (PPG) as it applies to the NPPF. At a regional level, the relevant London Plan policies and guidance is reviewed, including the OAPF. Finally, the relevant polices contained in the development plans of the LBHF, LBB and LBE which currently make up the development plan for the OPDC area.

2.2 National Planning Policy Framework

2.2.1 The NPPF was published by the Government in March 2012 and replaces all previous Planning Policy Statements and Planning Policy Guidance notes. At the heart of the NPPF is a presumption in favour of sustainable development, which for plan-making this means that:

- *'local planning authorities should positively seek opportunities to meet the development needs of their area;*
- *Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless:*
    - *Any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole; or*
    - *Specific policies in this Framework indicate development should be restricted.'* (paragraph 14)

2.2.2 In order to be considered sound, local plans should be positively prepared (i.e. based on a strategy which seeks to meet objectively assessed development and infrastructure requirements), justified (i.e. the most appropriate strategy, when considered against the reasonable alternatives), effective (i.e. deliverable and based on joint working) and consistent with national policy (paragraph 182).

2.2.3 Paragraph 23 states that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres. There is a requirement for local authorities to recognise town centres as the heart of their communities and to define a network and hierarchy of centres that is resilient to anticipated future economic changes. Finally, there is an important requirement that *'needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability'*.

2.2.4 The NPPF also requires Local Plans to be based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. In terms of a retail evidence base, paragraph 161 states that they should assess:

- the needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development;

- the role and function of town centres and the relationship between them, including any trends in the performance of the centres;
- the capacity of existing centres to accommodate new town centre development;
- locations of deprivation which may benefit from planned remedial action.

2.3 National Planning Policy Guidance

2.3.1 The Government produced the PPG in order to provide further guidance on and support to the policies contained within the NPPF. Matters associated with town centre uses are set out in the section *'Ensuring the vitality of town centres'*. This section states that a positive vision or strategy for town centres, articulated through the Local Plan, is key to ensuring successful centres which enable sustainable economic growth and provide a wider range of social and environmental benefits. It also states that any strategy should be based on evidence of the current state of town centres and opportunities to meet development needs and support their viability and vitality. Strategies should also identify changes in the hierarchy of town centres, including where a town centre is in decline. In these cases, strategies should seek to manage decline positively to encourage economic activity and achieve an appropriate mix of uses commensurate with a realistic future for that town centre.

2.4 London Plan

2.4.1 The London Plan is the overall strategic plan for Greater London, and it sets out a fully integrated economic, environmental, transport and social framework for the development of the capital to 2036. The London Plan was adopted in July 2011 and the Revised Early Minor Alterations were adopted in 2013. In March 2015, the Mayor adopted the Further Alterations to the London Plan ('the London Plan'). The purpose of these alterations was to respond to housing and employment issues stemming from the projected increase in London's population since the publication of the 2011 London Plan. The scope of these alterations include: accommodating changes in national policy and making clear links to the NPPF.

2.4.2 Policy 2.13 states that in Opportunity Areas and Areas of Intensification, the Mayor will provide proactive encouragement, support and leadership for partnerships preparing and implementing opportunity area planning frameworks, ensure that his agencies (including Transport for London) work collaboratively and with others to identify those opportunity and intensification areas that require public investment and intervention to achieve their growth potential, encourage boroughs to progress and implement planning frameworks to realise the potential of intensification areas. The policy requires boroughs to develop more detailed policies in their Local Plans.

2.4.3 In terms of decision making, development proposals within opportunity and intensification areas should, inter alia:

- *'seek to optimise residential and non-residential output and densities, provide necessary social and other infrastructure to sustain growth, and, where appropriate, contain a mix of uses*
- *contribute towards meeting the minimum guidelines for housing and employment*
- *realise scope for intensification associated with existing or proposed improvements in public transport accessibility*
- *support wider regeneration and integrate development proposals to the surrounding areas.'*

2.4.4 Policy 2.15 seeks to coordinate the development of a network of town centres across London. Town centres are designated as areas of commercial intensification and residential development. As such, development proposals in town centres should *'sustain and enhance the viability and vitality of town centres'*, accommodate economic and/ or housing growth, support and enhance the competitiveness, quality and diversity of town centre retail, leisure, arts, cultural and other consumer services and public services.

2.4.5 In preparing their development plans, the London Plan explains that boroughs should identify town centre boundaries, primary and secondary shopping frontages. Furthermore, local authorities should, in coordination with neighbouring authorities, identify other smaller centres that cater to the day-to-day needs of residents and establish themselves as the focus of local neighbourhoods. Local authorities should also proactively manage declining town centres by encouraging a wider range of services, diversification and improving environmental quality.

2.4.6 Policy 2.16 states that the Mayor, in conjunction with the boroughs and other stakeholders, will promote strategic development centres in outer London or adjacent parts of inner London with one or more strategic economic functions of greater than sub-regional importance. In this regard, the Mayor will work with boroughs and other partners to develop and implement planning frameworks or other appropriate spatial planning and investment tools that can effect positive change to realise the potential of strategic outer London development centres.

2.4.7 Policy 4.6 focuses on the provision and enhancement of sports, cultural and entertainment uses. The Mayor seeks to support London's arts, cultural, professional sporting and entertainment enterprises. In developing planning policy, local authorities should designate and develop cultural quarters and identify, manage and coordinate local and evening and night-time entertainment activities.

2.4.8 Policy 4.7 deals with retail and town centre development. It explains that the Mayor supports a 'strong partnership approach' to assessing the retail, commercial, cultural and leisure capacity in town centres. It states that in developing LDFs, local authorities should:

- *'Identify future levels of retail, leisure and other commercial floorspace need in light of integrated strategic and local assessments;*
- *Undertake regular town centre health checks to inform strategic and local policy and implementation;*
- *Take a proactive partnership approach to identify capacity and bring forward development within or, where appropriate, on the edge of town centres; and*
- *Firmly resist inappropriate out of centre development; manage existing out of centre retail and leisure development in line with the sequential approach; seeking to reduce car dependency; improve public transport, cycling and walking access; and promote more sustainable forms of development.'*

2.4.9 Policy 4.8 seeks to develop successful and diverse retail centres. It explains that these centres should meet the needs of Londoners and should be easily accessible. This includes supporting additional comparison goods shopping in international, metropolitan and major centres and convenience retailing in smaller centres. The policy also provides a framework for maintaining and enhancing local shopping and specialist shops. Boroughs should also identify areas under served by convenience goods and support local markets.

2.4.10 Policy 4.9 is concerned with the provision of affordable shop units suitable for small or independent retailers. The policy advises that *'in considering proposals for large retail developments, the Mayor will, and Boroughs should, consider imposing conditions or seeking contributions through planning obligations where appropriate, feasible and viable, to provide or support affordable shop units'.* Therefore, the boroughs are expected to develop local policies to support the provision of affordable shop units.

2.4.11 Annex Two identifies the existing role and function of town centres in the London area and provides a broad overview of each centres growth potential over the Plan period.

2.4.12 The London Plan classifies town centres according to their existing role and function. The five broad categories of town centres, as well as indicative floorspace ranges, are shown in Table 2-1 below:

Table 2-1: Town Centre Classifications

Classification	Floorspace Threshold	Types of Uses
International Centres	-	Globally renowned retail destinations with a wide range of high-order comparison goods.
Metropolitan Centres	100,000 sq m	Significant proportion of high order convenience goods in addition to leisure and service floorspace
Major Centres	50,000 sq m	Retail, leisure and service floorspace with a relatively high proportion of comparison goods
District Centres	10,000 – 50,000 sq m	Retail, leisure and service floorspace with some specialist retail.
Neighbourhood and Local Centres	-	Small supermarket (around 500 sq m), sub-post office, pharmacy, laundrette and other local services

Source: London Plan 2015

2.4.13 The Annex classifies each town centre as a High, Medium or Low growth areas using the following criteria:

- **High growth** centres are described as town centres that are '*likely to experience strategically significant levels of growth with strong demand and/ or large scale retail, leisure or office development in the pipeline.'*
- **Medium growth** centres are *'town centres with moderate levels of demand for retail, leisure or office floorspace and with physical and public transport capacity to accommodate it.'*
- **Low growth** centres are encouraged to '*pursue a policy of consolidation by making the best use of existing capacity, either due to physical, environmental or public transport accessibility constraints, or low demand.'*

2.5 Town Centres SPG

2.5.1 The Town Centres Supplementary Planning Guidance (SPG) was published by the GLA in July 2014 to provide guidance to Policies 2.15 (Town Centres) and 2.16 (Strategic Outer London Development Centres) of the London Plan. Chapter 5 of the SPG is concerned with the renewal and regeneration of town centres. The SPG states that when planning for town centre investment in regeneration areas local authorities should

- *'co-ordinate action across a broad front of economic, education and training, housing, social, transport, security, heritage, development and environmental measures to support town centre renewal.*

- *Identify under-served areas and develop strategies to address these.'*

2.5.2 In relation to OAs, the SPG states that town centre strategies and planning frameworks should:

- *'Consider the potential to regenerate and accommodate growth in commercial and residential development in these centres, appropriate to their role and function in the town centre network.*
- *Indicate the potential for new neighbourhood and local centres to serve existing and new development and, in particular, to be the focus for local place shaping in new large residential developments.'*

2.5.3 SPG Implementation 5.1 encourages boroughs and town centre partners to work together to develop policies and policies and proposals to secure investments in regeneration areas by identifying opportunities for growth and intensification. Boroughs are also encouraged to secure new neighbourhood retail and service provision in large residential developments.

2.6 Park Royal OAPF

2.6.1 The Park Royal OAPF was adopted in 2011 and provided supplementary guidance to the development of the Opportunity Area. The Park Royal OAPF focused on a broad range of strategic planning issues and therefore intended to bridge strategic and local planning policies. The Park Royal OAPF has now been superseded by the recently adopted Old Oak and Park Royal OAPF.

2.7 Old Oak and Park Royal OAPF

2.7.1 The Old Oak and Park Royal OAPF ('the OAPF') provides guidance for the development of the OAs. The OAPF was adopted in November 2015. The OAPF contains supplementary detail to the policies contained within the London Plan. As an adopted SPG to the London Plan, the Old Oak and Park Royal OAPF supersedes the Park Royal OAPF. The OAPF also forms the basis of the OPDC's Local Plan for Old Oak and Park Royal.

2.7.2 Section 1.18 of the OAPF covers a number of areas, including:

- *'guidance on desired land uses, infrastructure requirements and urban design measures to support the Mayor's aspiration to develop a quality new part of the London across both Old Oak and Park Royal;*
- *ways to maximise the considerable investment presented by the delivery of a significant new HS2/Crossrail interchange, to facilitate large scale regeneration of this area;*
- *how the Old Oak Common High Speed 2 station and surrounding development could be properly integrated with surrounding neighbourhoods, communities and town centres; and*
- *how to foster new and improved partnership working between the Mayor, local Councils, transport providers, central Government, land owners, local residents and businesses and potential investors to ensure the preparation of a robust and deliverable plan.'*

2.7.3 Chapter 5 of the OAPF sets out the strategy for Old Oak. The land use section on town centre uses and retail spaces states that *'town centre uses should be located close to areas with the greatest pedestrian flows and accessibility namely around public transport hubs, along main streets and at key destinations'.* The OAPF goes on to state that:

- *'Old Oak Common station and its surroundings will form the core location for town centre uses. It is anticipated that this area will be a focal point for office accommodation in order that workers are able to get to and from work as easily as possible. It will also be a focal point for a large portion of the retail space, Catering for local residents and workers as well as interchanging passengers and there will also be potential here for hotel accommodation.*

- *The existing stations of Willesden Junction and North Acton along with the future London Overground stations present great opportunities for clustering retail and other town centre uses. Town centre uses along Old Oak High Street must connect to Willesden Junction Station and on into Harlesden Town Centre. This is required to improve connections between Harlesden and Old Oak.*

- *The main pedestrian thoroughfare through the Opportunity Area will be Old Oak High Street. Active frontages should be provided along its length, where both retail and social infrastructure would be appropriate in order to provide for the day to day needs of residents and workers in the development. There will also be some other locations within Old Oak where active frontages and town centre uses may be appropriate, such as along the Grand Union Canal, around public transport hubs, along busy streets such as on Grand Union Street/Hythe Road. It is important that buildings along streets have high levels of either active frontage or residential front doors (with defensible space where appropriate) on to the street. It is equally important that uses providing active frontage are viable, to avoid units remaining vacant for long periods.'*

2.7.4 The strategy goes on to state that any retail provision within the Opportunity Area should '*cater for the needs of the development and should complement and enhance nearby retail centres*'. *The Retail Needs Study will assess the impact of retail provided in Old Oak and Park Royal on the surrounding hierarchy of town centres, including Harlesden, East Acton, Shepherd's Bush and Portobello Road and Ealing and Southall which will be in close proximity by virtue of Crossrail. It is anticipated that future retail would have a high proportion of convenience retail. However, there will be potential for comparison retail within the Old Oak Common Station area and along Old Oak High Street'* (para. 5.24).

2.7.5 The OAPF also recognises the important role that retail can play in creating a place, stating that '*the type, function and spatial distribution of retail will play an important role in place-making in Old Oak. The ways that retail can help deliver a vibrant and successful new place in Old Oak will be considered as part of the Retail Needs Study and this would inform OPDC's retail policies in its Local Plan.'*

2.7.6 Chapter 6 sets out the land use strategy for Park Royal. Park Royal is designated primarily as a Strategic Industrial Location (SIL). The strategy states that *'within the Heart of Park Royal, development should deliver a range of services and amenities to support the local business, residential and medical communities'* and that *'development within the Heart of Park Royal should ensure that it does not inhibit the function of the surrounding SIL'.*

2.7.7 The Heart of Park Royal is the only existing 'town centre' within the Opportunity Area and will be enhanced in order to provide a range of services and amenities to support local businesses and residents. The strategy therefore seeks to support a range of retail, leisure and business uses on the main roads in park Royal including Abbey Road, Acton Lane, Park Royal Road and Coronation Road.

2.8 Local Planning Policy

2.8.1 The OPDC area is within the boundaries of the LBHF, LBB and LBE and, prior to the establishment of the OPDC, the land fell within the planning jurisdiction of these boroughs. Given the geography, this section summarises the relevant adopted planning policies from each of the three boroughs.

Hammersmith and Fulham Core Strategy

2.8.2 The Core Strategy was adopted in October 2011 and forms part of the LBHF's development plan. Strategic Policy - Park Royal seeks to deliver a mixed-use regeneration scheme in the Opportunity area including 1,600 homes and 5,000 jobs. The policy states that:

'The Council will continue to promote Old Oak Common sidings and North Pole Depot sites as a location for a major rail interchange between the proposed High Speed 2 line, Crossrail, the Great Western line and West and North London lines.'

Brent Core Strategy

2.8.3 LBB adopted its Core Strategy in July 2010. Policy CP2 states that LBB will work with LBE and LBHF, the GLA and the Park Royal Partnership to secure the OA objectives for Park Royal. LBB will therefore plan for:

- *'The development or redevelopment of 50 hectares of land for employment uses between 2007 - 2017*
- *4,400 new jobs created between 2007 and 2017*
- *Development contributing to 'Heart of Park Royal' implemented*
- *Significant public transport improvements in relation to First Central secured*
- *The introduction of improved orbital public transport links to Wembley*
- *New restaurants, bars, cafes to support the business area*
- *4,000 trees as Brent's contribution towards 10,000 trees in Park Royal as a whole*
- *New children's nursery*
- *Expansion of existing primary school*
- *1 new GP surgery'*

London Borough of Ealing Core Strategy

2.8.4 LBE adopted its Core Strategy in April 2012. Policy 3.1 is concerned with realising the potential of the A40 Corridor and Park Royal.

- *'By 2026, seek the development of over 3,000 additional homes (25 per cent of the boroughs' net gain in housing).*
- *To achieve an appropriate balance in localities within the corridor between regeneration objectives and the conservation of the built and natural environment.*
- *To enhance greening opportunities along the A40 corridor, develop two cycle hubs in Greenford and Northolt73 and create new cycle/pedestrian routes parallel to the A40 but separated by trees and shrubs where opportunities exist (e.g. Pitshanger, Perivale, Acton).*
- *To further explore opportunities for creating a district energy network at Southern Gateway and Greenford town centre.*

- *To further explore opportunities to reduce exposure to air and noise pollution for existing residents.'*

2.8.5 Policy 3.3 seeks to promote business and industry in Park Royal by:

- *'Retaining business and industry throughout the Park Royal industrial estate, encouraging sustainable, economic development and improvements to access and amenity.*
- *Promoting Park Royal as a centre for green industry in the borough.*
- *Improving cycle access to employment, including one-way exemptions, off-road routes and better towpath access.*
- *Promoting the use of the Grand Union Canal for freight transport.'*

2.8.6 Policy 3.4 deals with the Southern Gateway in Park Royal and seeks to:

- *'Create an improved southern gateway to Park Royal, with efficient movement to and from the strategic industrial location and a clear, safe relationship and routes between the tube, the buses, heavy goods vehicles and the surrounding area and an important focal point for business in its own right, with up to 2,000 potential office jobs. This could lead to 1,500 residential units in a place where residents choose to live, because it is convenient and has good facilities and a decent environment.*
- *Redevelop North Acton station and environs with a mix of commercial development and in a setting at Victoria Road with shops, restaurants, cafés and leisure to support the gateway and the wider Park Royal area.*
- *Create a network of green space, with safe, attractive footpaths and featuring at least two new public open spaces.*
- *Further explore opportunities for creating a district energy network.'*

2.8.7 Policy 3.7 deals with the neighbourhood shopping centres in East Acton, Park Royal, Perivale and Northolt and seeks to:

- *'To promote retail and other appropriate development in the neighbourhood shopping centres at East Acton, Park Royal, Perivale and Northolt, together with improvement packages to facilitate walking and cycling from their neighbourhoods.*
- *To promote Park Royal neighbourhood shopping centre and enhance the area around the ASDA superstore by creating a new pedestrian square, junction improvements development offices, restaurants and associated uses.*
- *To promote Northolt Village centre including extending the boundary to include a new leisure and housing development, and south to Target Roundabout and make improvements to the centre especially at Eastcote Lane & Mandeville Road junction.'*

2.9 Summary

2.9.1 National planning policy supports positive growth and encourages local authorities to seek opportunities to meet the development needs of the area. There is a requirement to recognise town centres as the heart of communities and for a network and hierarchy of centres to be defined. National planning policy makes it clear that sites should be allocated to meet needs for town centre uses in full.

2.9.2 The London Plan supports the redevelopment of Old Oak and Park Royal and identifies the sites as OAs such that the area is set to accommodate substantial growth. The devolution of planning powers to the Mayor as summarised in the Localism Act paves the way for new planning tools to deliver growth, namely through the MDC. The Old Oak and Park Royal OAPF and the London Plan lay the strategic planning groundwork for the Old Oak and Park Royal OA (the OPDC area).

2.9.3 The development plans of LBHF, LBB and LBE all support regeneration in the OPDC area. It is clear that Park Royal's strategic importance as an employment area will be enhanced. Furthermore, provision will be made to encourage improvements to the retail provision and a number of complementary uses at both Park Royal and North Acton.

2.9.4 Finally, the OAPF provides broad guidance on desired land uses, infrastructure requirements and urban design measures necessary to deliver a quality new neighbourhood. The retail strategy within the OAPF explains that the aim is to provide for the needs of the area's residents and should not negatively affect existing centres including Harlesden and Shepherd's Bush.

3 Context and key trends

3.1 Introduction

3.1.1 This study is being prepared in the midst of renewed focus on the changing role and function of town centres. It is widely accepted that the traditional role of town centres has been undermined by the continued attraction of out-of-town retail locations, the growth in popularity of multi-channel shopping, the recent economic downturn and associated decline in expenditure growth.

3.1.2 This section summarises published industry research on the future role and function of town centres and review the available evidence on retail capacity across London and more specifically for the three boroughs within the OPDC area. This is followed by a review of key trends which are likely to influence the demand for new retail and commercial leisure floorspace over the study period as well as a review of key national forecasts, including expenditure growth, floorspace efficiency growth and growth in e-commerce/m-commerce.

3.2 Research

3.2.1 Since the recent economic downturn a considerable number of independent studies have been published considering the future role and function of town centres. Most notable of these are:

- The Portas Review (2011), Mary Portas
- The Grimsey Review (2013), Bill Grimsey
- Beyond Retail: Redefining the Shape and Purpose of Town Centres (2013), British Council of Shopping Centres
- 21st Century High Streets (2013), British Retail Consortium
- Accommodating Growth in Town Centres (2014), Greater London Authority
- Digital High Street 2020 Report (2015), Digital High Street Advisory Board

3.2.2 The key messages and recommendations from each of these studies are set out in the following paragraphs below. In summary, the wide-ranging recommendations proposed in the these reports have two overall aims, namely:

- To increase footfall and expenditure in town centres - to increase store turnover and to improve vitality and viability of town centres.
- To reduce costs of operating and investing in town centres – to improve store turnover and to level the playing field between physical ‘bricks and mortar’ and online retail businesses.

The Portas Review

3.2.3 In May 2011, retail expert Mary Portas was appointed by the Coalition Government to lead an independent review into the future of the high street in response to the decline of town centres nationally, seen as a consequence of reduced spending on the high street. The report supported the call to strengthen planning policy in favour of ‘town centre first’ and includes 27 separate recommendations to tackle the further decline of the high street.

3.2.4 The core recommendations included measures to strengthen the management of high streets, improvements to the business rates system, reducing car parking charges, placing greater onus on landlords proactively manage their assets or face the use of compulsory purchase powers by local authorities, and to increase community involvement in town centres.

3.2.5 The Coalition Government published its formal response to the Portas Review in 2012, which accepted virtually all of the recommendations and secured funding for 24 'Portas Pilot' towns to trial the recommendations. The Coalition Government established the future High Street Forum to implement Portas's recommendations and provided funding to establish business improvement districts (BIDs) and a 'Future High Street X Fund' (renamed the High Street Renewal fund) to reward towns delivering innovative plans to rejuvenate their town centres.

The Grimsey Review

3.2.6 Bill Grimsey, the former managing director of DIY chain Wickes and food retailer Iceland, published his report as an 'alternative response' to the recommendations of the Portas Review. The report made a total of 31 wide-ranging recommendations, including encouraging more people to live in town centres, appointing a High Streets Minister, and freezing car parking charges for a year.

Beyond Retail

3.2.7 Following the Portas Review, the Government supported the establishment of an industry task force to analyse retail property issues relating to town centres. The findings of the task force's report were presented in the Beyond Retail report.

3.2.8 One of the report's key observations was that the trend towards market polarisation has resulted in three broad types of town centre offer: strong centres with a wide retail and leisure offer; convenience food and service-based centres with an element of fashion and comparison goods; and, localised convenience and everyday needs-focused centres. The report makes a number of recommendations, including:

- Strong and dynamic leadership, led at the local authority level also including business and community involvement, to bring about long-term change in town centre functions;
- Undertake bold, strategic land assembly, to assemble redevelopment opportunities of scale and worth;
- Provide greater flexibility in the planning system to enable redundant retail premises to be converted to '*more economically productive uses'*;
- Consider the mechanisms to address funding gaps to encourage local authorities to commit to long-term planning for town centres;
- Town centres must take advantage of technology to assist in marketing, driving footfall, and assisting independents and SMEs; and,
- Review of the business rate system and publishing of new retail valuation guidance.

21st Century High Streets

3.2.9 In 2013, the British Retail Consortium published the second '21st Century High Streets' report as an update to the original report published in 2009. This sets out key policy recommendations to help secure 'flourishing 21st Century high streets' under six key topics:

- A unique sense of place: Local partnerships, authorities and retailers must create a brand for the town centre to engender consumer loyalty through differentiation and informative marketing.

- An attractive public realm: Local partnerships and authorities must actively manage the public realm creating attractive public spaces.

- Planning for success: Local authorities should develop a clear strategic vision focused on the role of the town centre and cooperate with neighbouring authorities to maintain viable and complimentary retail destinations.

- Accessibility: Local authorities should manage accessibility holistically and responsively and should provide adequate parking to assist in driving footfall.

- Safety and security: Local police should work with retailers to better understand the impacts of retail crime to promote town centres as safe, secure and effectively managed trading locations.

- Supportive regulatory and fiscal regimes: Central government should reform the Business Rate Multiplier to reduce the cost of operating and investing in town centres.

Accommodating Growth

3.2.10 The GLA jointly commissioned PBA, Maccreanor Lavington architects and Graham Harrington to investigate how London town centres can be successfully intensified to accommodate the growing demand for housing.

3.2.11 The report explains that fundamental structural changes in the retail sector have had the effect of reducing demand for retail floorspace in some of London's town centres. These structural changes are explained in detail in Section 3.3 and include: a shift towards value retailers at the expense of established retailers; a shift towards small convenience stores and away from large hypermarkets; growth in online retailing; polarisation in the performance of between large and small centres; and the increasingly important role of commercial leisure.

3.2.12 This trend presents an opportunity for London's town centres to accommodate growing demand for housing in two ways: firstly by creating more capacity and secondly by enhancing rates of housing delivery. The London SHLAA identified 54% of housing capacity on larger sites in and around town centres although the report explains that residential capacity can be further increased by:

- Including sites currently excluded from the SHLAA and boroughs' development plans due to fragmented ownership constraints could generate an additional 3,000 dwellings pa.

- Increasing yields on currently identified town centre sites by increasing densities could provide an estimated 1,900 dwellings per annum.

3.2.13 This opportunity is crystallised in London Plan Policy 2.15 'Town Centres' Part A which states that London's Town Centres should provide:

'the main foci beyond the Central Activities Zone for commercial development and intensification, including residential development' (emphasis added)

Digital High Street

3.2.14 The Digital High Street Advisory Board was established following the work of the Future High Streets Forum to consider the revolutionary impact of digital technologies on future success of high streets. The report makes four principal wholly interrelated recommendations that are

critical to the revitalisation of high streets in the impending digitally dominated world. These include the following:

- **Internet infrastructure:** raise connectivity standards for residences and business by 2020 and provide clear consistent public access WiFi standards for consumers between venues and providers to increase deployment of digital technology.
- **Digital skills:** eliminate 'digital skills gap' in communities among residents, employees and business owners.
- **High street digital lab:** a platform for digital consumer services which functions as a central resource for digital training programmes and provides widely available digital technology.
- **High street digital health index:** adopt the index concept as a method for the Government to assess the competitiveness of high streets, measure the economic value creation from digital developments, set goals for digital integration and inspire local governments and enterprises to adopt digital technologies.

3.3 Key trends

3.3.1 The market context for town centres, and retail in particular, is evolving. The role of the town centre is not as clearly defined as it has historically been, and indications are that the town centres which have best weathered the recent economic downturn are those which have a diverse range of uses. In this section the key changes in the retail and leisure market which are considered likely to have the most significant implications on town centres over the study period are discussed. These include:

- Polarisation to higher-order centres
- Restructuring of the convenience goods sector
- Growth of commercial leisure sector
- Effects of digital technology

Polarisation to higher-order centres

3.3.2 The 'polarisation trend' refers to the restructuring of the comparison sector and the preference for these retailers to concentrate trading activities within larger retail centres. Since the economic down turn a number of factors have created a need for retailers to rapidly adapt their business strategies, store formats and requirements to changing circumstances. These factors include:

- Reduced consumer expenditure growth
- Changes in customer requirements
- Growth of internet and multi-channel retailing

3.3.3 Retailers recognise that greater efficiency can be achieved by having a strategic network of large stores in larger retail centres offering a full range of their products, rather than a network of smaller-format stores which are only able to offer a limited range of products. Many retailers have sought to alter their business model in this way in order compete with internet based retailer (which have significantly lower overhead costs) and to provide larger show-room type stores in attractive retail destinations or easily accessible out of centre retail park

locations. As a result the share of non-food retail sales conducted through town centre shops has declined; from 64% in 2002 to just over 40% by 2013[2].

3.3.4 For example, key anchor retailers such as Next, Mothercare, John Lewis and Marks & Spencer are actively searching for new large-format stores in out-of-centre locations to accommodate new retail formats such as John Lewis at Home and Next Home to display their full range of products and which provide click and collect facilities.

3.3.5 National retailers are becoming increasingly concentrated within the larger regional 'top 100' centres which benefit from large catchment areas and are able to meet the demand for larger modern premises. As a result of this trend, according to Deloitte, retailers will require less physical stores in future:

'The increasing costs of operating stores, changes in consumer behaviours, and the growing online opportunity, coupled with the rise of shopping centres with larger catchment areas and improvements in infrastructure facilitating travel suggest that retailers will need fewer stores in the future'[3]

3.3.6 Deloitte estimate that portfolio reductions of between 30 to 40% are foreseeable in the short to medium term in certain retail categories. The implications of this trend for many small- and medium-sized town centres may mean that centres are required to refocus their role and function away from solely being shopping destinations to incorporate a much broader retail, leisure, culture and residential offer.

Restructuring of the convenience sector

3.3.7 During the economic downturn the convenience goods sector was a key driver of growth. This sector has traditionally been dominated by the 'Big Four' supermarket operators of Asda, Morrisons, Tesco and Sainsbury's and large foodstores (2,300 sqm net) have historically been the primary driver of growth in the sector. However, over the last decade, structural changes have taken place in the sector, including:

- **Discount food operators:** operators such as Aldi and Lidl have increased market share of the grocery market significantly during the economic downturn and are continuing to expand.
- '**C-format' stores:** to increase market shares major grocery retailers have expanded their network of small in-centre convenience stores (such as Tesco Express, Sainsbury's Local and Little Waitrose) as large stores become increasingly unprofitable to operate.
- **Online shopping:** the 'race for space' over the last decade has resulted in major operators investing in online grocery shopping in order to increase market shares.

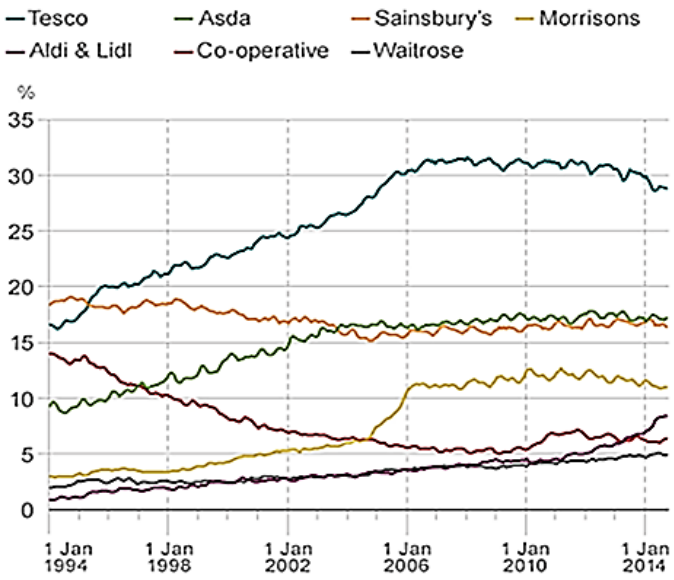
3.3.8 Discount retailers have posted significant year-on-year growth in recent years and are now important forces in the convenience goods market. Data from Kantar shows that between January 2014 and January 2015, Aldi's and Lidl's market shares increased by 0.8% and 0.4% respectively, while the market shares of the Big Four all reduced. In 2015 Aldi overtook Waitrose as the sixth largest retailer with a market share of 5.3% up from 4% in 2014. These discount retailers are expected to continue to take market share from the Big Four supermarket operators in future years[4].

[2] Peter Brett (2013) Investing in the High Street: Town Centre Investment Management

[3] Deloitte LLP (2011) The Changing Face of Retail

[4] Kantar (2015) Kantar World Panel

Figure 3-1: UK Major Grocery Operators Growth 1994-2014



Source: Kantar (2014) Kantar World Panel

3.3.9 Verdict forecasts that within the convenience sector, the proportion of floorspace accounted for by 'smaller stores' will increase from 37.6% in 2007 to 41.6% by 2017. Verdict explains this trend as follows:

'The second dip of the double-dip recession in 2012 has knocked consumer confidence and shoppers are sticking more tightly than ever to their budgets. They are shopping little and often … increasing fuel prices, deterring out-of-town trips, and the move towards online food shopping each feed into this trend towards top-up shopping. Out-of-town space is increasingly difficult for grocers to make profitable'.

3.3.10 Both Sainsbury's and Tesco now have more c-stores than large supermarkets and in January 2015 Tesco announced they would be closing 43 unprofitable stores, the majority of these were large foodstores. Operators are now favouring expansion of these smaller stores and in the same month Tesco announced that they would abandon the development of 49 'very large' foodstores. Added to this, both Sainsbury's and Morrison's have sought to rein in their development pipeline and to this end have withdrawn from a number of large store format development schemes over the last year.

3.3.11 Verdict predict that 53% of floorspace will continue to be accounted for by 'superstores' by 2017 with the market share accounted for by 'food specialists' and off-licences to continue to reduce. Industry body IGD predicts that the convenience goods market will grow by 29% between 2012 and 2017, from £33.9bn to £43.6bn, and the main retail operators are responding quickly by opening new format stores.

Growth of the commercial leisure sector

3.3.12 Most commentators predict that commercial leisure, such as cafes, bars, restaurants and cinemas, will constitute a growing share of town centre floorspace. This is partly a replacement activity generated as a consequence of the reduced demand for traditional retail space, and partly driven by the increase in leisure expenditure as discretionary household expenditure rises. Although the RLNS will only assess the potential expenditure on Class A3, A4, and A5 leisure uses in the OPDC area, this section includes a review of key trends in the wider leisure sector since these trends have an impact on the wider uptake of town centre floorspace. These key trends include:

- **Cinema sector** will continue to expand via acquisition and diversification of the market despite falling attendance figures over the last two years[5]. The main three operators in the market are primarily opting to focus on larger markets where there is limited competition, whereas the second tier and boutique operators are focusing on the qualitative difference in their offer to enable them to create specialist different markets.

- **Restaurant sector:** new brands contributing to increase demand for A3 space in London and established brands expected to continue with regional expansion as a result of increased competition. The restaurant sector has contributed significantly to the recent exponentially growth of the leisure sector supported by increased tourism spending.

- **Kids' play/D2 use:** resurgence from the large space D2 market consumers offering increasingly diverse activities with operators from abroad seeking space in the UK (e.g. laser combat and trampolining) as a result of consumer's spending more disposable income on leisure-based activities.

- **Health and fitness:** continued growth in market value with annual memberships increased from 12.6% to 13.2% and 177 new facilities opened in the year up to 2014 predominantly in the budget sector.

3.3.13 When considering leisure expenditure available to households, spending on food and drink typically accounts for more than 50% of total leisure spending, compared to around 15% on 'cultural services' (e.g. going to the cinema, theatre, art galleries or live music) and under 10% on hotels, games of chance and recreation/sporting services.

3.3.14 According to Savills[6], overall leisure spending overall is forecast to grow at 2.2% in 2015 which is stronger than the sector's 1.8% estimated growth in 2014. This strong performance has been supported by improving labour markets and a recovery in real household incomes for the first time since 2008 due to the slow rate of inflation. Accordingly strong demand for space from the sector is expected to continue beyond 2015 and the supply of prime stock is expected to remain constrained.

3.3.15 There is scope for town centres to capitalise on this trend, redefining their function as leisure 'destinations' in their own right. The development of a strong commercial leisure offer can help to increase footfall, particularly outside of retail hours, and visitors undertaking 'linked trips' between retail, leisure and other uses also spend increased dwell-time in centres.

Effects of digital technology

3.3.16 Digital technologies, facilitating increased online sales, have altered how retailers utilise physical retail floorspace. These technologies have already had a noticeable impact on the ways in which retailers utilise physical floorspace. Some of the key trends witnessed to date include:

- Growth multi-channel retailing such via smart phones

- Shift towards national retailers operating fewer larger 'show room' stores

- Increase in-store ordering and collection points

- Incorporation of multi-channel retailing within retail stores

[5] Savills (2015) UK Commercial Market in Minutes, Savills World Research

[6] Ibid

3.3.17 Examples of multi-channel retailing being incorporated within stores include online in-store ordering points and special promotions advertised to shoppers via smart phone devices.

3.3.18 In the future it is expected that digital technology will alter the way in which retailer utilise space. One such way is the introduction of 3D printing technologies which is expected to be increasingly utilised by both retailers and manufacturers, further blurring the divide between traditional A1 and B2/8 activities. Data from Report Buyer market research indicates that the worldwide demand for 3D printing across all sectors is projected to increase by over 20% per annum up to 2017.[7]

3.3.19 It is expected that 3D printing will have mixed impacts on the retail sector. Retailers with bricks and mortar stores may benefit from being able to offer 3D printing as an in-store service, creating highly customised products and adding value. Additionally new retailers may emerge in the market offering new products. Alternatively, retailers selling products that are cheap and easy to print at home, such as simple plastic items, will be most vulnerable to a reduction in their market shares.

3.3.20 The forecast impact will see a shift in the type of floorspace required by retailers; most notably retailers may begin seeking 'makerspaces' i.e. small workshop spaces combined within retail stores. There is scope for retailers to capitalise on this trend by incorporating multi-channel modes of shopping and digital technologies. The provision of in-store online ordering and collection points as well as highly customised products has the potential to support in-store retail sales and, depending on location, generate footfall in town centres.

3.4 Forecasts

3.4.1 This section provides an overview of key retail and leisure forecasts, including expenditure growth, floorspace efficiency growth, growth in e-commerce/m-commerce and floorspace efficiency growth. These forecasts will inform our retail requirements up to 2051 set out in Section 6.

Retail and leisure trends

3.4.2 During the economic downturn the pipeline of retail developments slowed and shopping centre proposal levels fell by 37% from a peak of 30 million square metres in March 2009 to 19 million metre square in June 2013 (CBRE data). Data from the British Council of Shopping Centres[8] confirmed that no new floorspace opened in 2012; however, in the two years following, the development pipeline has started to pick up. Since 2012, a number of major retail schemes have opened including Trinity Shopping Centre in Leeds owned by Land Securities (2013), Old Market in Hereford owned by British Land (2014) and Grand Central in Birmingham owned by Birmingham City Council in late 2015.

3.4.3 There are further positive signs that UK-based and international funds seeking assets in prime and secondary locations with potential for growth are increasingly investing in the UK shopping centre market. Recent research from Savills reveals that net inflows into institutional and retail property funds in 2014 reached the highest levels since 2006 at £4.5 billion with similar levels expected in 2015.

3.4.4 The research from the BCSC forecasts the quantum of new retail development coming forward will continue to decline up to 2016 with owners focusing on expanding or refurbishing existing shopping centres to increase value and turnover rather than developing new centres. As the supply of suitable units to meet modern retail and leisure operator requirement in existing centres become increasingly scarce this lack of supply will result in an increase in

[7] Report Buyer (2014) https://www.reportbuyer.com/business_government/printing/world_3d_printing_market.html

[8] BCSC (2013) Shopping Centre Development Pipeline Report

new out-of-centre applications and applications to lift trading restrictions on bulky goods warehouse units on existing retail parks.

3.4.5 Consumer spending on leisure remained comparatively resilient compared to spending on other goods and services throughout the economic downturn. Between 2007 and 2011 total household spending contracted by 0.2% per annum; however, spending on recreational and cultural services increased by 0.2% per annum. The leisure sector continues to perform well and growth in spending is forecast to be around 2.2% in 2015 which is stronger than the sector's 1.8% estimated growth in 2014.

Retail expenditure growth

3.4.6 The onset of the economic recession in 2007/08 had a dramatic impact on consumer spending following an unprecedented period of growth in spending since the mid-90s. Public sector cuts, increasing unemployment and the rising cost of living all effectively reduced disposable income, thereby reducing retailers' margins and market demand for retail space.

3.4.7 The table below shows the forecast growth in both convenience and comparison goods spending per capita for 2015 to 2035 published by Experian in the latest Retail Planner Briefing Note 13 (October 2015). For comparison the table also shows the actual growth in retail spending from 2009-2014.

Table 3-1: Annual Retail Growth

Growth per capita	Actual growth (%)							Forecast growth (%)				
Year	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018-2022	2023-2035
Convenience	-4.9	-5.2	-0.8	-2.7	-0.4	-0.7	-1.8	-0.2	0.1	0.3	0.1	0.1
Comparison	4.5	-2.6	1.8	0.6	2.5	4.2	5.5	5.3	3.2	2.9	3.0	3.2
Total retail spend	1.6	-3.3	0.9	-0.6	1.4	2.3	2.7	3.2	2.1	2.0	2.0	2.4

Source: Experian Retail Planner Briefing Note 13 (October 2015) Figures1a and 1b

3.4.8 According to Experian forecasts, convenience growth rates are steadily recovering from a low of -5.2% in 2009; however, positive growth will not resume until 2016. The forecasts for convenience goods show positive growth at 0.1% per annum between 2016 and 2035 which is higher than the medium-term historical trend of -1.1% from 1997-2014.

3.4.9 Comparison growth rates are recovering from a low of -2.6% in 2009 rising continuously to a strong rate of 5.5% in 2014. The forecast for comparison goods shows a positive growth rate at 3.2% per annum between 2016 and 2035; however, this is somewhat lower than the medium-term historical trend of 5.8% from 1997 to 2014.

Leisure expenditure growth

3.4.10 The economic downturn also affected leisure operators, experiencing a particularly pronounced decline in 2009. Whilst spending growth has recovered since then, this recovery has been somewhat lumpy, with leisure spending declining again in 2012 after a couple of years of growth. It should be noted however that before the recession, leisure spending growth was negative (-0.7%) over the period in the ten years to 2007. Table 3.2 below sets

out the actual growth in leisure spending per capita from 2008 to 2014 and the forecast growth for all Experian leisure sub-categories[9].

Table 3-2: Annual Leisure Growth

Growth per Capita	Actual Growth each Year (%)							Forecast Growth per Year (%)				
Year	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018-2022	2023-2035
Leisure	-2.8	-9.6	0.2	1.9	-0.6	0.2	1.4	2.7	1.6	1.6	1.3	1.4

Source: Experian Retail Planner Briefing Note 13 (October 2015) Figures1a and 1b

3.4.11 According to Experian, leisure spending is positive over the short- to medium-term, with growth forecast at 1.4% per annum between 2015 and 2035. This is in contrast to spending over the period 1997 to 2014 which experienced an overall decline in leisure spending of -1%.

Growth in e-commerce

3.4.12 Special Forms of Trading (SFT) data is collected by the ONS and includes all non-store retail sales made via the internet, mail order, stalls and markets, door-to-door and telephone sales. Based on this data, Experian estimate that the current value of internet sales is £42bn and other non-internet SFT sales are £8bn (2011 prices).

3.4.13 Overall, the market share of SFT as a proportion of total retail sales has increased from 5.6% in 2006 to 12.5% in 2014. The growth of SFT sales has been fuelled by internet shopping which increased its share of total retail sales from 4.7% in 2008 to 11.7% in mid-2015.

3.4.14 The table below sets out Experian's 'adjusted' SFT market share growth forecasts between 2015 and 2035 based on assumptions on retail spending growth and future expansion of internet shopping. Experian estimate that 25% of all comparison goods SFT sales and 70% of all convenience goods SFT sales are sourced from retail stores rather than distribution warehouses. To account for this the 'adjusted' SFT market shares discount the proportion of SFT sales sourced from retail stores from the total SFT market share.

Table 3-3: Adjusted Special Forms of Trading Market Shares

	2017	2022	2027	2032	2035
Total SFT	9.8%	11.9%	12.2%	12.4%	12.5%
Comparison	13.1%	15.2%	14.9%	14.5%	14.3%
Convenience	3.3%	4.6%	5.2%	6.0%	6.4%

Source: Experian Retail Planner Briefing Note 13 (October 2015) Appendix 3

3.4.15 Experian forecast that growth of non-store retailing will outperform traditional forms of spending; however, it will only do so moderately after mid-2020. The rapid growth forecast in

[9] Recreational and sporting services; cultural services; games of chance; restaurants, cafes and bars; accommodation services; and, hairdressing and personal grooming.

the short term (2015 to 2019) is expected to be sustained by the increased uptake of new technology, such as purchasing through mobile phones but this is expected to slow after 2020.

3.4.16 The growth in online sales has, mainly impacted on certain sectors in the past such as electrical goods, books and music and as a result the number of retailers selling these products on the high street has reduced over recent years. Successful integration of multi-channel shopping into retailers' business strategies will drive demand for 'bricks and mortar' stores due to the need for click-and-collect facilities in accessible locations and large 'showroom' type stores where customers can test products before purchasing online.

Floorspace efficiency growth

3.4.17 Floorspace efficiency growth, or sales density growth, represents the ability of retailers to achieve higher than inflation increases in their turnover. It is important for retail assessments to take into account this growth since it allows for a certain amount of expenditure growth to be 'ring-fenced' to be spent within existing businesses. Conventionally, retail assessments make an allowance for the year-on-year growth in average sales densities of existing floorspace as a claim on expenditure growth.

3.4.18 The level of this growth allowance is largely dependent on the quality of the retail floorspace and its ability to achieve increased efficiencies. Larger stores with regular footprints will have a greater ability to absorb growth than small, constrained or irregular units. The level of growth allowed for needs to assume constant total floorspace and take into account the quality of the floorspace in the area and the scale of annual expenditure growth (under constant prices) being forecast elsewhere in the assessment. The latter point is important, since the quantum of spending available will have a direct bearing on the ability of existing retailers to increase their turnover vis-à-vis the base position.

3.4.19 It is necessary for the allowance to be reasonable and there is limited evidence on changes in turnover of retailers over time and, for this reason, limited evidence on the likely growth in turnover on an annual basis going forward. It is noted that the Experian Retail Planner Briefing Note 13 seeks to quantify the expected growth in retail sales density under two scenarios: constant floorspace to obtain a pure measure of changing efficiency; and including additions to floorspace.

3.4.20 Experian, excluding non-store sales, estimates the following levels of growth:

- Comparison goods (2018-2022, 2023-2035): 3.1% and 3.9% under constant floorspace scenario; 1.9% and 2.0% under changes to floorspace scenario
- Convenience goods (2018-2022, 2023-2035): 0.9% and 1.1% under constant floorspace scenario; -0.1% and 0% under changes to floorspace scenario

3.4.21 Normally, in retail assessments, it is the constant floorspace approach that is being considered in order to understand how much more floorspace spending growth can support. However, the Experian constant floorspace approach is calculated by assessing total growth in spending and dividing it by the floorspace. This means it is not possible to assess how much of that total spending growth should reasonably be ring-fenced to support the turnover of existing floorspace. Similarly, the scenario that includes 'additions to floorspace' projects increases in floorspace, which means that there is no understanding of what a 'reasonable' growth assumption should be for existing floorspace.

3.4.22 An alternative data supplier, Pitney Bowes, includes narrative on the floorspace efficiency growth within its 'Retail Expenditure Guide' (November 2014). This references research from 2008 that showed that recommended assumptions for future sales density growth were to be '*0.6% and 2.2% per year for convenience and comparison goods respectively*'. But the note expresses caution over the one-off effect of Sunday trading, which is now seen to have

peaked (notwithstanding the potential effects if recent consultation proposals are taken forward), the 'weighting effect' where new space replaces old and the limited availability of floorspace data. Pitney Bowes state:

'the Blake et al (2008) projections can be revised down to give projected sales density increases of 0.4% for convenience goods space and to 1.8% for comparison goods space. Furthermore, as the aggregate figures are heavily dependent on the rapid growth in sales volumes of audio-visual equipment including personal computers and mobile phones, it is possible to justify a lower rate of increase for comparison sales densities in areas with a below average share of stores selling these items.'

3.4.23 Given the lack of credible research and the uncertainties outlined above, PBA have considered the available data and formed its own assumptions on a reasonable level of growth to 'ring-fence' for existing retailers. PBA use Experian supplied expenditure data and forecasts and Experian are more cautious over expenditure growth forecasts than Pitney Bowes (for example Experian project comparison expenditure growth of 3.3% per annum between 2015 and 2025 whilst Pitney Bowes project comparison expenditure growth of 3.9% between 2013 and 2024). PBA have taken account of these considerations in applying the following standard blanket assumptions for all floorspace:

- 1.5% per annum efficiency growth rate for comparison floorspace
- 0.3% per annum efficiency growth rate for convenience floorspace

3.4.24 Whilst these are slightly lower than suggested by Pitney Bowes, these are considered to be reasonable given the reservations they set out and the fact that the Experian growth rates are more cautious than them. Plainly, if these assumed levels were to be greater than the assumptions set out above, then the expenditure capacity to support additional floorspace would be reduced. But if they were less than those assumptions, then the expenditure capacity for floorspace would be increased.

3.4.25 In applying these standard assumptions, PBA have regard to the local circumstances identified above, namely the quality of existing floorspace and the forecast level of expenditure growth; in certain circumstances it may therefore be necessary to consider higher or lower efficiencies.

3.5 Summary

3.5.1 This section has reviewed published industry research on the future role and function of town centres and reviewed the key trends, recognised in these studies, which are likely to influence the demand for new retail and commercial leisure floorspace over the study period. In these sections, the two main challenges to town centres have been identified as competition from online retail and reduced consumer expenditure growth.

3.5.2 Competition from online retailers will impact disproportionately on smaller centres, as this threat acts in combination with the polarisation trend whereby many comparison retailers are seeking to restructure their portfolios with a focus on providing large 'showroom' type stores in the larger centres and withdraw from smaller centres. Although domestic spending power across the UK has reduced compared to pre-recession levels, London will be insulated to some extent by the imported spending power of international tourism and business. These two challenges can be seen as driving factors behind each of the key trends identified.

3.5.3 There is a role for local authorities to ensure that the strategy adopted for each new and existing centre is appropriate: for example by achieving the right balance of retail and leisure provision in each centre to enable it to fulfil its role and meet the needs of its catchment. At a national level, the NPPF provides the framework for these strategies but the Government continues to emphasise the importance of local issues in formulating local policy. In light of

the recent raft of permitted development changes (GPDO 2015) which introduced further flexibility within A Class Uses, having a robust and up-to-date evidence base on retail and leisure matters is particularly important in order to support locally-formulated policy solutions.

KEY FINDINGS

This report has identified a number of market trends which are likely to influence the demand for new retail and commercial leisure floorspace over the study period:

- **Polarisation to higher-order centres**: National comparison retailers are increasingly rationalising their property portfolios with a fewer large stores concentrated in high order centres shopping malls and regional centres.
- **Restructuring of the convenience goods sector:** Since the economic downturn major retailers have increased their network of small in-centre stores and invested in online shopping while discount food operators such as Aldi have increased market shares significantly.
- **Growth of commercial leisure sector:** Commercial leisure uses will constitute a growing share of town centre floorspace driven in part by the increase in household leisure expenditure and reduced demand for retail space in secondary centres.
- **Effects of digital technology:** Digital technologies facilitating online sales have altered the ways in which retailers utilise physical floorspace and in the future new technologies such as 3-D printing may create demand for new types of mixed use sales/workshop floorspace.

This report has also identified a number of quantitative forecasts which will inform our retail requirements up to 2051 set out in Section 6:

- **Retail expenditure growth:** Experian forecasts growth rate of 3.2% per annum between 2016 and 2035 for comparison goods. Convenience expenditure is expected to grow extremely modestly over the same period (0.1% pa).
- **Leisure expenditure growth:** Experian forecasts growth rate at 1.4% per annum between 2016 and 2035 for leisure. This is reversal of the historic trend of declining per capita expenditure on leisure.
- **Floorspace efficiency growth:** PBA forecast a 1.5% pa efficiency growth rate for comparison floorspace and 0.3% per annum for convenience floorspace.
- **Growth in e-commerce/m-commerce:** Experian forecast that growth of non-store retailing will outperform traditional spending although only moderately after mid-2020. Rapid growth forecast in the short term (2015-2019) will be sustained by new technology, such as purchasing through mobile devices.

4 Existing network of centres

4.1 Introduction

4.1.1 Appendix A provides desktop review of the network of centres within and surrounding the OPDC area based on available evidence. The table below summarises the total floorspace in each centre (where data is available) in addition to its London Plan or local plan classification and Venuescore ranking.

Table 4-1: Network of Centres

Centre	Classification	FALP growth aspiration	Total town centre floorspace (sqm)	Total retail floorspace (sqm)	Venuescore Rank
Park Royal	Neighbourhood	-	-	-	2306
North Acton	Not designated	-	-	-	-
Shepherd's Bush	Metropolitan	Medium R	196,414	146,367	367/ 25*
Ealing	Metropolitan	Medium	126,015	28,663	119
Harlesden	District	Medium R	30,508	21,029	1,021
Wembley (inc. London Designer Outlet)	Major	High	64,427[10]	50,997	494/ 456*
Kensington High Street	Major	Medium R	82,701	62,310	39
Willesden Green	District	Medium	25,271	17,277	1,361
Acton	District	Medium R	38,672	22,630	746
Portobello Road	District	Medium	27,147	17,744	388
Southall	Major	Medium R	39,260	28,663	1,021
Brent Cross	Regional	-	-	-	102

Source: London Plan, Experian GLA Data (2012) and Javelin Venuescore (2014). **Please note that Javelin Venuescore ranks Shepherd's Bush and Westfield London as separate centres. It also does the same for Wembley and the London Designer Outlet, Wembley.*

4.1.2 In the remainder of this Section, a summary of the key niche roles of each of the existing centres is provided, drawing on the findings of the more detailed reviews set out in Appendix A. This provides an understanding of the function of each centre within the hierarchy and how new retail and leisure floorspace within the OPDC area might fit within this hierarchy. The destinations within the OPDC area itself are first considered before looking at the wider network.

4.2 Existing destinations within the OPDC area

4.2.1 A set out in Section 3, there is only one allocated centre within the OPDC area: the neighbourhood centre at the Heart of Park Royal. In addition, there are some out-of-centre town centre uses located at North Acton and Royale Leisure Park.

[10] Floorspace area includes 16,477 sq m of the London Designer Outlet opened in October 2013

Park Royal

4.2.2 Park Royal one of London's most important industrial locations with an area at its centre identified as a Neighbourhood Centre in the LBE Core Strategy. The centre is anchored by a large Asda store which provides a number of the town centre functions including a pharmacy, an opticians and a travel money shop. The centre also includes a number of smaller convenience stores. The centre is served by the local bus network with Park Royal Underground station located about a mile to the south west of the centre and Harlesden Underground station located about a mile to the north of the centre. Park Royal has a Venuescore rank of 2,306.

4.2.3 The Old Oak and Park Royal OAPF sets out an aspiration of providing enhanced services for the local residential and business communities. These enhancements include improvements to the public realm, additional local levels of retail and leisure uses to support local business operations and better connectivity between the area and rest of Park Royal. Recent developments in adjacent to the centre include a 99-unit residential care home being developed by Asra Housing on a site opposite Central Middlesex Hospital on Acton Road. The approved plans include 754 sqm of A1/A3 floorspace on the ground floor level.

4.2.4 Despite recent developments, PBA consider in its current form the centre does not perform well in terms of viability and vitality.

North Acton

4.2.5 North Acton is not designated as centre in the London Plan or in local planning policy. North Acton lies within the OPDC area. It is not anchored by a major retailer. Instead, retail provision in North Acton is limited to a handful of small convenience stores. The centre is relatively accessible by public transport with North Acton Underground station serving the area. A number of bus routes also serve the development.

4.2.6 North Acton has been identified as the Southern Gateway to park Royal in the LBE Core Strategy. Regeneration plans in the area include new commercial developments, new shops and restaurants as well as improved bus, pedestrian and cycle routes.

Atlas Road / Old Oak Common Lane

4.2.7 The area is located to the north of the OPDC area, near to the boundary of LB Hammersmith and Fulham and LB Ealing. The site is located at the intersection between Old Oak Lane (A4000), Atlas Road and Old Oak Common Lane. The surrounding area includes some limited small-scale retail facilities, including a café, pub and a new restaurant at 'The Collective Old Oak' (Nash House) development[11]. The area is not currently designated as a centre within the London Plan or in local planning policy. However, planning permission has been granted for a development that includes 3,500 sqm of new flexible commercial floorspace, including a maximum of up to 1,500 sqm of A1 retail and 600 sqm of A3/A3 food and drink uses (15/0091/FULOPDC) alongside 605 residential units.

Royale Leisure Park

4.2.8 Royale Leisure Park is located on Western Avenue, a short distance from Park Royal Underground station. It includes a nine-screen cinema, a gym and a bowling alley, in addition to a number of restaurants including KFC, Nando's, Pizza Hut, Subway and Costa. Royale Leisure Park is ranked 2,146 by Venuescore.

[11] P/2013/5460

4.3 Wider network of centres

Shepherd's Bush

4.3.1 Shepherd's Bush is identified as a Metropolitan Centre in the London Plan. The centre consists of Shepherd's Bush 'traditional' centre and Westfield London shopping centre. The centre is well connected in terms of public transport. Shepherd's Bush station is served by the Central line (London Underground), London Overground and Southern mainline services. The Hammersmith and City line serves Shepherd's Bush Market Station and Wood Lane.

4.3.2 The vacancy rate in the centre is 5% (Experian GOAD, November 2012). Whilst Westfield London performs well in the Venuescore, leading the shopping mall rankings and placing 25th in the overall rankings; the traditional part of Shepherd's Bush is ranked 367th.

4.3.3 There are two major retail schemes planned for Shepherd's Bush. The first proposal includes the redevelopment and expansion of Westfield London including 61,000 sqm of additional retail space. The increased retail space will include a John Lewis department store, leisure uses, office floorspace and up to 1,347 new homes. Permission was granted in September 2014 and a recent Section 73 application has been submitted to vary the mix of uses.

4.3.4 The second is for the redevelopment of Shepherd's Bush Market to include 212 flats, food and beverage uses and a new market building. The Secretary of State confirmed the Compulsory Purchase Order (CPO) for the proposed development site in October 2014. In addition, the Television Centre redevelopment, located to the North of the Shepherd's Bush Metropolitan Centre, includes up to 5,825 sqm of retail and leisure floorspace of which 1,726 sqm is allocated to A1 use. The mixed-use scheme also includes 943 residential units, offices, a hotel, a members club, television studios and a cinema. The redevelopment is part of the White City OA as identified in the London Plan.

4.3.5 Shepherd's Bush appears to be performing well in terms of viability and vitality. Significant regeneration schemes within the centre and in nearby areas such as White City could further bolster its position within London's retail hierarchy with potential to be reclassified as an International Centre in future reviews of the London Plan. The London Plan identifies medium growth potential for Shepherd's Bush.

Brent Cross

4.3.6 Brent Cross is an out-of-town shopping centre and is identified as a regional shopping centre in the London Plan. The shopping centre is anchored by John Lewis and Fenwick department stores. Brent Cross is also designated as an OA as part of the Cricklewood/ Brent Cross OA. The centre is largely accessible by car and has extensive car parking facilities. The centre can also be accessed by trains and local buses.

4.3.7 The vacancy rate at Brent Cross shopping centre is low at 2% (Experian GOAD, November 2012) and far below the national average. The shopping centre has a Venuescore mall ranking of 17 behind Westfield London (1) and Westfield Stratford (3).

4.3.8 Planned regeneration work in the Cricklewood/ Brent Cross OA includes transforming Brent Cross into a new town centre, 7,500 new homes, three new schools, a new railway station at Cricklewood and new parks and playing fields.

4.3.9 Brent Cross performs well as a regional shopping centre. Significant new investment in transport links, as well as an expanded retail offer, will bolster Brent Cross's position in the North London. The London Plan indicates potential to reclassify the centre as a Metropolitan Centre within its plan period.

Ealing

4.3.10 Ealing is identified as a Metropolitan Centre in the London Plan, with potential for medium growth. It consists of two main shopping areas: Ealing Broadway and West Ealing. The centre has good access to public transport. Both Ealing Broadway and West Ealing stations are currently being upgraded for Crossrail with services set to commence in 2018.

4.3.11 Ealing has a vacancy rate of 12% which is among the highest vacancy rates amongst London's Metropolitan Centres (Experian GOAD, November 2012). Ealing has a Venuescore rank of 119.

4.3.12 A number of redevelopment schemes are anticipated to come forward in the town centre. This includes the former Empire Cinema site where plans include a new cinema, leisure uses, mixed commercial floorspace and up to 161 new homes; the CPO was confirmed at the end of 2015. Other proposals include: 9-42 Broadway, which includes a new pedestrian link between Ealing Station and the Broadway lined with shops and 200 new homes; and the refurbishment of Ealing Broadway Shopping Centre, town square and 55 homes.

4.3.13 In spite of the relatively high vacancy levels, Ealing appears to be doing well in terms of vitality and viability. The redevelopment of its retail offer will further strengthen the centre's position in West London.

Harlesden

4.3.14 Harlesden is classified as a District Centre in the London Plan. The centre consists of two streets: the High Street and Craven Park Road. Harlesden is fairly accessible by public transport with a number of bus routes serving the centre. Both Harlesden and Willesden Junction stations are in close proximity to Harlesden District Centre.

4.3.15 Harlesden is geared to serving the day-to-day needs of the local community and has a high proportion of independent retailers. The vacancy rate in the centre is 11% which indicates that the centre is fairly successful when compared with other district centres in London.

4.3.16 LBB recently completed a series of public realm improvements to upgrade the shopping environment, including the partial pedestrianisation of the High Street and introduction of a new traffic circulation system. The improved public realm could help diversify the centre's offer by encouraging pavement cafes, restaurants and speciality markets.

4.3.17 Harlesden appears to be functioning well in terms of meeting a largely locally-generated retail need. Improvements to the public realm could enable diversification of the centre's offer; however, there have yet to be clear signs that these public infrastructure investments have translated into private investment in the retail and leisure offer of the centre. This is likely to require careful monitoring and an appropriate planning policy context. The London Plan identifies Harlesden as a medium growth area with regeneration potential.

Wembley

4.3.18 Wembley is identified as a Major Centre in the London Plan and is the civic and administrative centre of the LBB. The London Plan also identifies Wembley as an OA. The centre is anchored by 'Wembley Central' and the London Designer Outlet. Wembley is well served by public transport: Wembley Central station is located within the centre and is served by the London Overground and mainline London Midlands and Southern rail services.

4.3.19 The centre has a vacancy rate of 11% (Experian GOAD, November 2012) which is about the same level as the national average. Wembley has a Venuescore rank of 494 while the London Designer Outlet has a rank of 456.

4.3.20 New development is focused around Wembley Park and includes a new theatre, an 800-room student accommodation block, a 1,000 home residential scheme, a second 699-bed student accommodation development, and a new home for the French Lycée.

4.3.21 The opening of the London Designer Outlet and Wembley Central has improved the centre's retail profile significantly. Wembley appears to be performing well in terms of viability and vitality with new developments set to significantly boost residents and visitors to the centre. The London Plan's policy direction recognises Wembley's regeneration potential and identifies the centre as a high growth area.

Kensington High Street

4.3.22 Kensington High Street is identified as a Major Centre in the London Plan and is anchored by Whole Foods and Marks & Spencer. Kensington High Street is well connected in terms of public transport: the station is served by the Circle and District London Underground lines and multiple bus routes run along the High Street.

4.3.23 The vacancy rate in the centre is 6% (Experian GOAD, November 2012) which is amongst the lowest vacancy rates within London's major centres.

4.3.24 Recent investment in a high-quality public realm by RBKC has improved the pedestrian experience as well as the setting of the historic buildings along the street. There are no major retail developments proposed for the centre. Instead RBKC's approach is to maintain the centre's niche retailing role. The RBKC Core Strategy's (2010) vision for Kensington High Street is to '*redefine its role to ensure that it distinguishes its offer from Westfield, Knightsbridge and King's Road'.*

4.3.25 Kensington High Street appears to be doing well in terms of viability and vitality. Its low vacancy rate and specialised retailing continues to attract visitors to the area. The London Plan's policy direction identifies medium growth potential for the centre.

Southall

4.3.26 Southall is identified as Major Centre in the London Plan and LBE Core Strategy. Southall is also as an OA in the London Plan. The centre is divided into two with Broadway/South Road to the north of the railway line and The Green/ King Street to the South of the railway line. The centre is served by Southall railway station (Great Western Railway) and will from 2018 be a Crossrail station.

4.3.27 Southall has a vacancy rate of 7% (Experian Goad, 2012) which is slightly below the London average for major centres. The centre has a Venuescore rank of 1,021.

4.3.28 LBE has undertaken a number of public realm improvements in Southall and just completed upgrades to the Broadway. The most significant development scheme in the centre is the regeneration of Southall Gasworks as part of the Southall OA. The proposed development includes 3,750 residential units, 14,200 sqm of comparison retail floorspace, 5,850 of convenience floorspace and 1,750 sqm of A3-A5 floorspace. The scheme also includes a hotel, a cinema and health and education facilities. Southall's town centre boundary was amended to include part of the Southall Gasworks site.

4.3.29 Southall appears to be performing well. The centre fulfils its specialist retail niche and continues to attract shoppers from a wide catchment. However, there are clear qualitative gaps in its comparison retail provision which could be addressed by the development of the Southall gasworks scheme. The London Plan identifies Southall as a medium growth centre with regeneration potential.

Portobello Road

4.3.30 Portobello Road is identified as a District Centre in the London Plan. The centre consists of two distinct areas Portobello Road and Westbourne Road. Portobello Road is renowned for its high proportion of independent, specialist shops and its markets. Westbourne Road is popular for its selection of designer shops.

4.3.31 The vacancy rate on Portobello Road is 14% (Experian GOAD, November 2012) which is higher than the national average. Westbourne Road has a significantly lower vacancy rate at 6% (Experian GOAD, November 2012).

4.3.32 RBKC provides support to the various markets and antique retailers within the centre. As such, a policy of actively managing the character and retail composition of Portobello Road has been adopted (Core Strategy Policy CP7). The policy has an emphasis on the importance of small format, affordable shop units.

4.3.33 A development proposal put forward by The Westway Trust seeks to redevelop the area of Portobello Market bordered by Portobello Road and the Westway as part of its Portobello Village redevelopment. The proposed development includes the construction of a landmark market building, public realm improvements, flexible workspaces and cultural spaces. It was awarded funding in 2015 by the Mayor as part of the High Streets Fund.

4.3.34 Portobello Road continues to perform adequately in terms of viability and vitality. Despite the area benefitting from a high number of visitors at weekends, traditional retailing in the area has continued to suffer due to high rents and changing consumer taste. The London Plan identifies the centre as a medium growth area.

Willesden Green

4.3.35 Willesden Green is identified as a District Centre in the London Plan and the LBB Core Strategy. The centre comprises Walm Lane and Willesden High Road. The centre has good accessibility to public transport. Willesden Green London Underground station is served by the Jubilee line and is well served by a number of bus routes.

4.3.36 Like Harlesden, retailing in Willesden Green is dominated by independent retailers. The vacancy rate for the centre is 8% (Experian GOAD, November 2012). Willesden Green appears to be performing comparatively better than a number of similar order centres including Harlesden.

4.3.37 There are no significant regeneration schemes planned for Willesden. However, LBB has taken the approach to actively manage the centre in order to boost the centre's vitality. A new library and cultural centre has recently been completed within the town centre which is expected to draw further footfall to the town centre.

4.3.38 Willesden Green appears to be performing relatively well as a district centre. Like Harlesden, Willesden Green caters to the day-to-day needs of a largely local population. Improvements to shop fronts and the public realm could further boost the centre's vitality. The London Plan's policy direction for Willesden Green identifies medium growth potential for the centre.

Acton

4.3.39 Acton is identified as a District Centre in the London Plan and the LBE Core Strategy. The centre is anchored by a Morrison's supermarket, located on King Street. Acton is well served by public transport. Nearby railway stations include Acton Town, South Acton and Acton Central. The centre's accessibility will be enhanced from 2018 with the opening of Crossrail.

4.3.40 Acton has a vacancy rate of 13% (Experian Goad, 2012) which is slightly higher than the average for district centres in London and has a Venuescore rank of 746.

4.3.41 A number of regeneration projects have been undertaken to revitalise Acton town centre including public realm improvements. The most significant regeneration project within the town centre is the Oaks Shopping Centre redevelopment which was granted planning permission in April 2014. The permission includes a new foodstore (4,879 sq m), four new and six refurbished retail units, 142 residential units and improved public realm. Elsewhere in the centre, the refurbished Town Hall has an improved leisure centre, library and other civic functions that seek to attract footfall to the town centre.

4.3.42 Acton caters for the day-to-day needs of the residents with scope to improve the current offer. Improvements to the town centre's environmental quality as well as the enhanced leisure and shopping offer will help to elevate the centre's position in the retail hierarchy. The London Plan identifies medium growth potential for Acton.

4.4 Summary

4.4.1 The surrounding network of centres in North and West London comprises a range of different destinations and shopping experiences, fulfilling the various tiers of London's retail hierarchy. Investment in large centres such as Shepherd's Bush, Brent Cross, Wembley and Ealing demonstrate significant commitment to additional floorspace in the area. These large centres are supported by a network of smaller, locally significant centres catering primarily to the day-to-day needs of the resident population.

4.4.2 There are two main approaches taken by local authorities in managing the viability and vitality of their centres. The first approach includes large-scale regeneration schemes such as Shepherd's Bush and Brent Cross that seek to establish new centres. The second approach involves managing and reinforcing the current retail offer as seen in Kensington High Street and Portobello Road through town centre facilities and asset management.

KEY FINDINGS

Park Royal is a small centre, serving local needs with room for improvement. Under the existing development plan, Park Royal will need significant quantitative improvements in order to fit into its new role as the Heart of Park Royal. There is existing provision at North Acton but this has no formal designation. Similarly, there is some local level provision at Atlas Road, both existing and with approval, that also has no formal designation.

The surrounding network of centres is far more established, each of them serving a distinct role within West London's hierarchy of centres:

- Significant growth: These centres which include other OAs are set to see a significant uplift in retail and leisure provision over the London Plan period. These centres are significant on a London-wide and regional scale and include **Shepherd's Bush** and **Brent Cross**. Both these centres will be monitored for potential reclassification over the London Plan's plan period.

- Medium growth: Medium growth centres are expected to maintain their position within the London hierarchy. Redevelopment of part of the centre will be used to deliver qualitative improvements to the retail and leisure offer. These centres include **Ealing**, **Wembley**, **Acton** and **Southall**.

- Managed growth: In these centres, a managed policy position will be taken to maintain or improve the centre's viability and vitality. Public realm improvements, enhancement to the quality and diversity of shops and the safeguarding of traditional retail uses will be encouraged. Centres in this category include **Kensington High Street**, **Portobello Road**, **Willesden Green** and **Harlesden**.

5 Findings from case studies

5.1 Introduction

5.1.1 A number of significant regeneration schemes across London have been reviewed in Appendix B to identify any lessons to be learnt in respect of the appropriate approach to town centre development within the OPDC area. These case studies include developments that are expected to significantly increase the amount of retail floorspace in their respective areas; it is therefore necessary in each case to consider to what extent these approaches may be appropriate to the OPDC area. In addition, particular case studies have been included where: significant amounts of retail and town centre uses have been provided at rail stations across the UK, and also where affordable retail uses and 'meanwhile' retail uses have been incorporated as part of a long-term regeneration project in order to meet retail needs.

5.2 Scale of development

5.2.1 A number of the regeneration schemes reviewed are identified as OAs in the London Plan. OAs are typically brownfield sites with capacity to accommodate large-scale developments and on average seek to create more than 5,000 jobs and deliver at least 2,500 homes. Detailed planning guidance has been prepared for each OA, outlined below, contained within area specific OAPFs.

5.2.2 Retail uses can also play an important role in creating a sense of identity within OA sites although there are differing approaches to retail across the various sites. The different approaches to the provision of retail facilities are largely determined by the level and quality of existing retail provision in the local area. Where there are existing deficiencies in retail or indeed the lack of a meaningful town centre in the OA, development will need to address this. In areas well served by existing retailers, the aim will be to meet the day-to-day needs of new residential and working communities.

5.2.3 The table below summarises the indicative job and housing needs targets and quantum of planned/committed A1-A5 retail floorspace of the ODPC area and other selected OAs.

Table 5-1: Opportunity Areas

Opportunity Area	No. of Jobs	No. of Homes	Retail (sqm)
Old Oak Common	55,000	24,000	-
King's Cross	25,000	1,900	20,000
Waterloo	15,000	1,500	36,000
Earl's Court	10,000	7,500	28,000
Vauxhall Nine Elms, Battersea	25,000	20,000	65,000
Elephant and Castle	5,000	2,900	10,000
Wembley	11,000	11,500	30,000
Royal Docks and Beckton Waterfront	6,000	11,000	4,320

Source: London Plan (2015). Note: the retail floorspace figure quoted for Wembley is over and above that granted up to July 2010 and the figure quoted for Royal Docks and Beckton Waterfront is for the Silvertown Quays development.

5.2.4 The key characteristics and the likely function of the OAs reviewed for this study are summarised as follows:

- **King's Cross:** this is transport led regeneration scheme that includes the refurbishment of King's Cross and St Pancras mainline stations alongside the development of employment floorspace to support 25,000 new jobs, 1,900 new homes and a new campus for the University of the Arts London. The King's Cross OAPF identified a lack of convenience retail floorspace in the surrounding area and as such allocated 20,000 sqm retail floorspace, although the site has outline planning permission for up to 45,925 sqm of A1-A5 retail floorspace. Retail provision outside of the station is geared to meeting the day to day needs of the resident and worker population and a new 2,700 sqm Waitrose foodstore opened in 2015. King's Cross is identified as a CAZ frontage food and beverage quarter and retail provision within the two stations provides a range of retail shops and services for commuters.

- **Waterloo:** the London Plan identifies Waterloo as an Opportunity Area with indicative plans to add 15,000 new jobs to the area and 1,500 new homes to the area. There are a number of development sites within the OA with planning permission for different retail schemes. The Lower Marsh and the Cut are identified as part of the CAZ and are intended to cater for local needs with a mix of independent and specialist shops. Recently, investment in Waterloo Station itself has delivered 2,500 sqm of retail and dining space geared towards meeting the needs of commuters.

  The Elizabeth House redevelopment granted planning permission in July 2015 includes 1,500 sqm of flexible A1 – A5 floorspace. The permitted redevelopment of the Shell Centre, granted by the Secretary of State in June 2014, includes up to 9,500 sqm retail floorspace and between up to 6,000 sqm of restaurant and café use. This quantum of retail and leisure floorspace planned for the Shell Centre in particular is anticipated to draw expenditure from a wider catchment beyond the local area including imported expenditure from tourism.

- **Earl's Court and West Kensington:** the OA is located on a 37.2 hectare site covering parts of both RBKC and LBHF and seeks to provide up to 7,500 new homes and 10,000 jobs. Retail provision was originally envisaged to include a new local centre to serve the day-to-day needs of the development with the Earl's Court and West Kensington OA Joint SPD, stating that comparison retail should be directed towards existing centres. The SPD expects that affordable retail units will be provided for independent retailers. Outline planning permission for the redevelopment of Earl's Court Exhibition Centre and the surrounding area was granted in November 2013. The outline approval includes approximately 6,775 new homes, office floorspace, 28,000 sqm gross retail floorspace, a hotel and 13,000 sqm gross floorspace for leisure uses. The scale of retail and associated leisure development approved for Earl's Court now means that this floorspace will draw expenditure a wider catchment beyond the local area including imported expenditure from tourism.

- **Vauxhall Nine Elms Battersea:** this is a mixed-use development encompassing 20,000 new homes and 25,000 jobs, a new stretch of CAZ frontage as well as a new District Centre at Battersea Power Station. The regeneration scheme includes the redevelopment of the Power Station and a new home for the US embassy. Approved plans include 65,000sqm gross retail, food and drink uses alongside 6,000sqm leisure floorspace at the Power Station. The OAPF also identified up to 6,000sqm additional CAZ retail frontage at Vauxhall where a new Local Centre is planned as the focal point for the redevelopment, contributing to place-making objectives while also addressing the pre-existing shortfall in retail provision in the local area. The allocation of new CAZ frontages at both Vauxhall and the Power Station will mean that new retail floorspace will draw expenditure from a wide area and will also benefit from a significant amount of imported expenditure from tourism.

- **Elephant and Castle**: the OAPF aims to create a new major town centre and proposes up to 45,000sqm of additional retail and leisure floorspace. The shopping centre is identified for redevelopment to accommodate new anchor tenants and improve links with Walworth Road District Centre. The Elephant Road scheme will deliver the new town centre. Phase 1 is expected to be delivered in spring 2016 and will include a new Sainsbury's supermarket and enhanced leisure space. A planning application for Phase 2 is timetabled for submission in 2016 and will include plans for the redevelopment of the shopping centre, new leisure opportunities and a new campus for London College of Communication alongside a new Northern line tube entrance and ticket hall.

  The Heygate regeneration scheme also includes 10,000sqm of A1-A5 retail floorspace and new commercial floorspace accommodating 6,000 new jobs. As a new major town centre the additional retail and leisure floorspace delivered will enhance Elephant and Castle as a major comparison retail destination and will draw expenditure from a wider catchment across London.

- **Wembley**: the OA includes two town centres; Wembley town centre, allocated as a Major Centre; and Wembley Park, allocated as a District Centre in the London Plan. The Wembley Area Action Plan includes the development of an additional 30,000 sqm retail floorspace above that granted planning consent up to July 2010. In September 2011 planning permission was granted for an expansion of Wembley town centre including 17,000 to 30,000sqm of A1-A5 uses. The permission includes the development of a new retail high street set back from Olympic Way with a new anchor store and a number of smaller/flexible retail units. The recent retail proposals for Wembley will enhance its role as a major comparison retail destination, building on the attraction of the Wembley Designer Outlet. As such this new floorspace will attract expenditure from residents and across London.

- **Silvertown Quays**: the development site forms part of the Royal Docks and Beckton Waterfront OA covering 1,100 hectare identified in the London Plan as an Enterprise Zone (EZ) with capacity to provide 6,000 new jobs and 11,000 new homes. Outline planning permission on the site allows for 4,320 sqm of A1/A2 retail, and 5,570 sqm of A3/A4 food and drink outlets alongside 7,600 sqm of flexible retail space. The proposals also include 'Brand Buildings' which provide space for global brands to showcase products through exhibitions and workshops; they incorporate elements of B2, B8, and A1 uses and as such have been classified as Sui Generis with permission for up to 44,500 sqm gross A1 retail floorspace. The Brand Buildings will contribute towards the broader regeneration objectives of the OA/EZ to drive business-related growth capitalising on planned infrastructure improvements. As a new home for global brands, this floorspace is anticipated to draw expenditure from a wide catchment across London and beyond benefitting from imported expenditure from both tourism and business.

5.2.5 In addition to the OAs summarised above, other development sites across London where the amount of retail floorspace is expected to significantly increase have also been considered, namely:

- **Brentford Waterside:** the 4.79 hectare redevelopment site is bound by Brentford High Street to the North and the Grand Union Canal to the South. Planning permission was granted on 27th November 2014 (00607/BA/P2) for up to 876 residential units and up to 14,503sqm gross A1-A5 retail floorspace. The majority of A1 retail floorspace is focused along the town centre with A3-A5 uses located along the canal frontage.

- **Hackney Wick:** the regeneration seeks to build on the area's Olympic legacy and established creative industries in order to deliver a new Neighbourhood Centre and improvements to the London Overground station as part of a comprehensive redevelopment of the area. The Hackney Wick and Fish Island Design and Planning Guidance estimates that together all development sites will deliver 3,537 residential units alongside 23,158sqm of mixed retail/leisure/community uses. The new Neighbourhood

Centre is focused around the Hackney Wick Overground station entrance and the parameters are defined by existing conservation area boundaries/locally Listed buildings.

- **Canning Town and Custom House:** Canning Town is recognised in the London Plan as a District Centre with the potential to achieve medium levels of growth through the regeneration of existing capacity. The Hallsville Quarter development will provide a new town centre opposite Canning Town Station, anchored by a 7,600 sqm foodstore with 20,600 sqm of additional retail and restaurant space. The Rathbone Market redevelopment includes a new market square and 3,200sqm of retail and café uses.

5.2.6 The scale of retail development in the case studies outlined above varies significantly: between 14,503sqm gross (Brentford Waterside) and 65,000sqm gross (Vauxhall Nine Elms). Although some of the developments require development to be aligned with housing and jobs growth, there are clearly wider external pressures that are taken into account when planning for floorspace including the existing local network of centres and the ability of the vision for the area to meet place-making objectives.

5.2.7 Many of the development sites assessed in the OA case studies include upgraded rail stations which have featured a significant amount of new Class A1-A5 retail floorspace. The paragraphs below summarise recent examples of station regeneration schemes in London as well as Birmingham New Street:

- **St Pancras**: St Pancras International rail station opened in 2007 and the new High Speed 1/Eurostar service became operational from 2008. According to King's Cross Central Retail Assessment, the redevelopment of St Pancras rail station included 5,273 sqm net A1 retail floorspace. This is split between of between 6,550 sqm comparison and 1,200 sqm convenience floorspace.

- **King's Cross**: the new station includes 8,210 sqm gross A1-A5 retail floorspace. The station has a significant food and drink offer with a number of branded operators offering food on-the-go such as Pret and Starbucks, as well as restaurant chains such as Giraffe, Leon, Wasabi and a number of bars.

- **Waterloo**: The redevelopment of Waterloo Station improved capacity for trains and increased the amount of retail frontage within the station. The new retail balcony opened 2012 providing 1,800 sqm additional retail floorspace creating a total 5,000 sqm retail and leisure floorspace.

- **London Bridge**: The approved redevelopment plans for London Bridge Station include an additional 6,889 sqm Class A retail floorspace set within a revised station layout with new public realm. Work on the new station began in 2012 with completion planned for 2018.

- **Birmingham New Street**: the refurbishment of New Street Station and alterations to the adjoining Palisades Shopping Centre will create a new retail destination in Birmingham. In terms of floorspace New Street station includes approximately 5,500 sqm of retail/food and drink floorspace while the refurbished shopping centre 'Grand Central Birmingham' provides a further 46,451 sqm retail anchored by a 23,225 sqm flagship John Lewis store.

5.3 Format of retail development

5.3.1 The format of retail development across London's OAs varies significantly. The main difference is the split between day-to-day convenience floorspace geared towards the local population and comparison floorspace aimed at attracting visitors from across the city. In addition, consideration must be taken for the role and function of existing centres surrounding the OAs. Four main formats of retail provision have been identified:

New town centres

5.3.2 Many of the case studies include the creation of new town centres on land not previously designated as such. These centres will act as significant new comparison retail destinations in the London-wide hierarchy while also providing local convenience and community facilities. In the case of **Elephant and Castle**, the redevelopment of the existing shopping centre will create a Major Centre incorporating the existing Walworth Road District Centre. At **Earl's Court** a new Local Centre was initially proposed to serve the day-to-day needs of new the residential/working community. Although given the scale and type of retail floorspace approved, the development will now create a new high-quality shopping destination for West London drawing expenditure from a much wider catchment area.

New local centres

5.3.3 In many cases the creation of new local centres is proposed to provide for the day-to-day retail needs of the growing community of workers and residents. A new Neighbourhood Centre is allocated at **Hackney Wick** focused around the upgraded London Overground station to meet increased local demand of the growing residential community for day-to-day convenience and community uses. At **Vauxhall Battersea Nine Elms** a new local centre is proposed at Vauxhall/Nine Elms Lane to include retail provision to meet the day-to-day convenience needs of residents and address the shortfall in such provision locally.

Regenerated town centres

5.3.4 Some of the case study schemes include the physical regeneration of existing centres to improve the range and quality of the retail offer in line with local jobs and housing growth. At **Wembley** plans include the physical expansion of the town centre and the provision of a significant amount of comparison floorspace to enhance Wembley as a retail destination building on the success of the London Designer Outlet.

5.3.5 Redevelopment plans for **Canning Town** and **Custom House** will significantly improve the convenience and comparison retail offer of Canning Town District Centre as well as providing a range of complimentary leisure and community uses for residents and workers. At **Brentford Waterside** the majority of new retail floorspace is focused on the existing High Street and will significantly enhance the retail offer of the town centre.

Station redevelopments

5.3.6 In a number of cases where station capacity has been significantly upgraded new retail floorspace has been focused on providing a range of A1-A5 uses to serve the increased number of commuters and to complement the existing local network of centres. For example at **Waterloo** redevelopment plans aim to retain Lower Marsh's District Centre status and resist larger developments, new retail development at street level is focused around Waterloo station which reinforces links with the centre.

5.3.7 **King's Cross** is a transport-led regeneration scheme which is allocated as a new CAZ food and beverage quarter. The majority of new retail floorspace is focused on the new station concourse and immediately surrounding area with a high proportion of Use Class A3-A5 food and drink uses for commuters. However, it also includes a number of higher-end comparison shops, including a bespoke John Lewis store intended for click-and-collect uses, to cater to travellers but that are also likely to attract daytime expenditure from the surrounding working population. Outside the station, retail is geared to meeting day-to-day convenience needs addressing a pre-existing under-provision in the local hierarchy.

5.4 Affordable retail floorspace

5.4.1 London Plan Policy 4.9 sets out the Mayor's position on the provision of affordable retail floorspace in new retail developments, as detailed in Section 2. PBA (trading as Roger Tym & Partners) produced the 'London Small Shops Study 2010' in support of this policy.

5.4.2 The report identified that as a general trend, the number of small shops has declined nationally and that this is particularly evident in London. Expenditure has become increasingly concentrated in larger stores in larger centres, as a result of large new retail developments such as shopping malls and superstores in suburban centres. However, the report also identified that small-scale accessible shops still provide many benefits to the local area. They can be accessed on foot, reducing carbon emissions and providing access for those without access to cars including low income groups and the elderly. They also help to retain expenditure within the local area and many independently-owned local shops help define the character of an area.

5.4.3 Having reviewed Development Plan policy across London, it is noted that both the London Borough of Southwark (LBS) and LBHF/RBKC make explicit reference to the need to provide affordable retail floorspace in the Elephant and Castle OA and Earl's Court and West Kensington OA respectively.

5.4.4 While not prescriptive on the exact number of units to be provided, Key Principal RS7 of the Earl's Court and West Kensington OA Joint SPD states that '*a number of small units will be secured as affordable shops*'. The affordable retail floorspace is likely to be occupied by small, independently run, convenience operators.

5.4.5 The Earl's Court outline planning permission allows for up to 14,000 sqm gross A1 retail floorspace, although the permission does not make any provision for affordable units via planning obligations. The detailed planning application for the new local centre, named 'West Brompton Village' (2013/05201/FUL) did not make provision for affordable retail units although this application was withdrawn and a new application for an alternative scheme is forthcoming.

5.4.6 The Earl's Court scheme has not delivered any affordable retail space to date and, therefore, this case study does not provide any practical examples of how affordable retail space can be delivered and managed.

5.4.7 Policy SPD1 of the Elephant and Castle OAPF states that '*large retail developments over 1,000 sq m should provide a range of affordable retail units*'. The LBS will require at least 10% of new retail floorspace in developments to be affordable and this will be secured either though planning conditions or Section 106 planning obligations.

5.4.8 Phase 2 of the Elephant Road scheme aims to redevelop the Elephant and Castle Shopping Centre to create a new open town centre and will deliver most of the new retail floorspace on this site. The draft plans underwent public consultation in 2015/2016 and these do not include any reference to the provision of affordable retail floorspace. A planning application for a more detailed scheme is expected in 2016. It is therefore unclear as to how affordable retail units will be delivered and managed in this scheme.

5.4.9 A range of development schemes across London delivering significant new retail floor space have been reviewed; however, no schemes to date have been identified which have delivered affordable retail space in accordance with the London Plan requirement.

5.5 Meanwhile uses

5.5.1 London has seen the emergence of a number of 'pop-up' or meanwhile uses on sites either awaiting or undergoing redevelopment. These pop-up spaces are designed to activate vacant land for a limited period, introducing new uses to obsolete spaces. In all the examples we

have reviewed there is an emphasis on the provision of affordable floorspace for independent retailers and operators. In a number of cases the meanwhile uses are located on large sites undergoing redevelopment such as at sites such as the Artworks in Elephant and Castle, Boxpark in Shoreditch and Sainsbury's in East Village, Stratford. As these development sites have long development trajectories, pop-up spaces generally have a lifespan of four to six years.

5.5.2 In recent years, pop-up retail spaces have evolved to offer a number of complementary uses including bars, restaurants, markets and particularly food markets, affordable workspaces for creative and media industries, workshops and cultural spaces. The scale of development appears to range from between 39 to 80 shipping containers which is roughly equivalent to about 930-1,860 sqm gross. We summarise the relevant components of examples across London below:

- **Boxpark Shoreditch:** this is located along Shoreditch High Street and is assembled from 60 shipping containers and has a floorspace area of about 930 sqm gross. It includes a changing mix of independent retailers alongside a number of restaurants, cafes and bars and is set to close in 2016.

- **Boxpark Croydon:** scheduled to open in 2016 on the Ruskin Square development site and is assembled from 80 shipping containers and has a floorspace of about 1,860 sqm gross. It will include 80 retailers, bars, cafes and a performance area. It is expected to occupy the site for about four to five years before making way for the final phase of Ruskin Square.

- **Pop Brixton:** the scheme was commissioned by the London Borough of Lambeth. It was assembled from 60 containers and has a floorspace of about 1,020 sqm gross. Pop Brixton includes food, drink and retail uses in addition to affordable office space for start-ups and community spaces. The scheme is aimed at testing the take-up of various types of floorspace and will influence long-term development plans for site.

- **The Artworks Elephant:** this is a temporary creative hub in Elephant and Castle supported by Lend Lease and consists of 39 shipping containers. The Artworks includes a number of restaurants, a library and work spaces aimed at the creative and media industries. The temporary space sits on the site of the now-demolished Heygate Estate.

5.6 Summary

5.6.1 There are a number of regeneration schemes currently under construction and in the pipeline. The four OAs (King's Cross, Earl's Court and West Kensington, Elephant and Castle, and Vauxhall Nine Elms Battersea) all include significant retail provision although the scale of retail development varies across each of these OAs. Both Vauxhall Nine Elms Battersea and King's Cross form part of the CAZ meaning that the retail frontage has a London-wide significance. The key messages from our analysis of other large-scale developments across London are:

- Upgrades to key transport interchanges have acted as a catalyst for redevelopment of new homes and jobs.

- In all cases there is recognition that retail development is required to fulfil a localised role, meeting the day to day convenience needs of new workers and residents.

- In many cases large-scale redevelopment also provides an opportunity to improve the retail offer where there are existing gaps in provision (Vauxhall Nine Elms Battersea) or where existing town centres require physical regeneration (Elephant and Castle).

5.6.2 In terms of policy, LBS and LBHF/RBKC have included affordable floorspace requirements in their respective OAPFs although there is no evidence of any schemes where such affordable

units have been delivered on the ground. In addition, there is a growing trend of using vacant or yet to be developed land to host pop-up shopping, leisure and cultural spaces as a means to activate an otherwise unused area.

KEY FINDINGS

This report has identified examples where new retail floorspace in OAs across London has been delivered in a range of different formats:

- **New town centres:** Elephant and Castle and Earl's Court.
- **New local centres:** Hackney Wick and Vauxhall Battersea Nine Elms.
- **Regenerated town centres**: Wembley, Canning Town and Brentford.
- **Station redevelopments/enhancements:** Waterloo and King's Cross.

When considering the appropriate scale and format of new retail development for Old Oak and Park Royal the following questions need to be addressed:

- How much retail and leisure floorspace is needed to meet the demand arising from planned housing and jobs growth?
- How much of this demand can be met by existing centres and/or through the enhancement of these centres in the local hierarchy?
- Are there quantitative or qualitative gaps in provision within the local hierarchy which need to be addressed?
- Are commercial uses required to contribute towards place-making objectives and in which locations?

6 Quantitative assessment

6.1 Introduction

6.1.1 This section comprises three elements of quantitative analysis which are drawn together to inform a conclusion on an appropriate quantum of retail and town centre uses that should be planned for within the OPDC area. The three elements are:

- Establishing the quantum of floorspace that the OPDC area development could sustain.
- Analysing existing shopping patterns to understand how new town centre uses within the OPDC area will affect the existing hierarchy of centres.
- Understanding the physical capacity of the OPDC area with regard to the design and place-making aspirations set out in the OAPF.

6.1.2 Given the rate of change in the retail sector and in terms of the way people use town centres outlined in Section 3 together with the timescale within which development is anticipated to take place within the OPDC area, capacity forecasts should, in line with the PPG, be subject to regular review throughout the plan period in order to ensure an up-to-date evidence base drawing on accurate economic and market trends. PBA also advise that longer-term quantitative forecasts set out in this assessment (post-2022) should be treated as indicative.

6.2 Methodology and assumptions

6.2.1 This section should be read in conjunction with the tables contained at Appendix D which contain all the information referred to below, together with full details of relevant data sources.

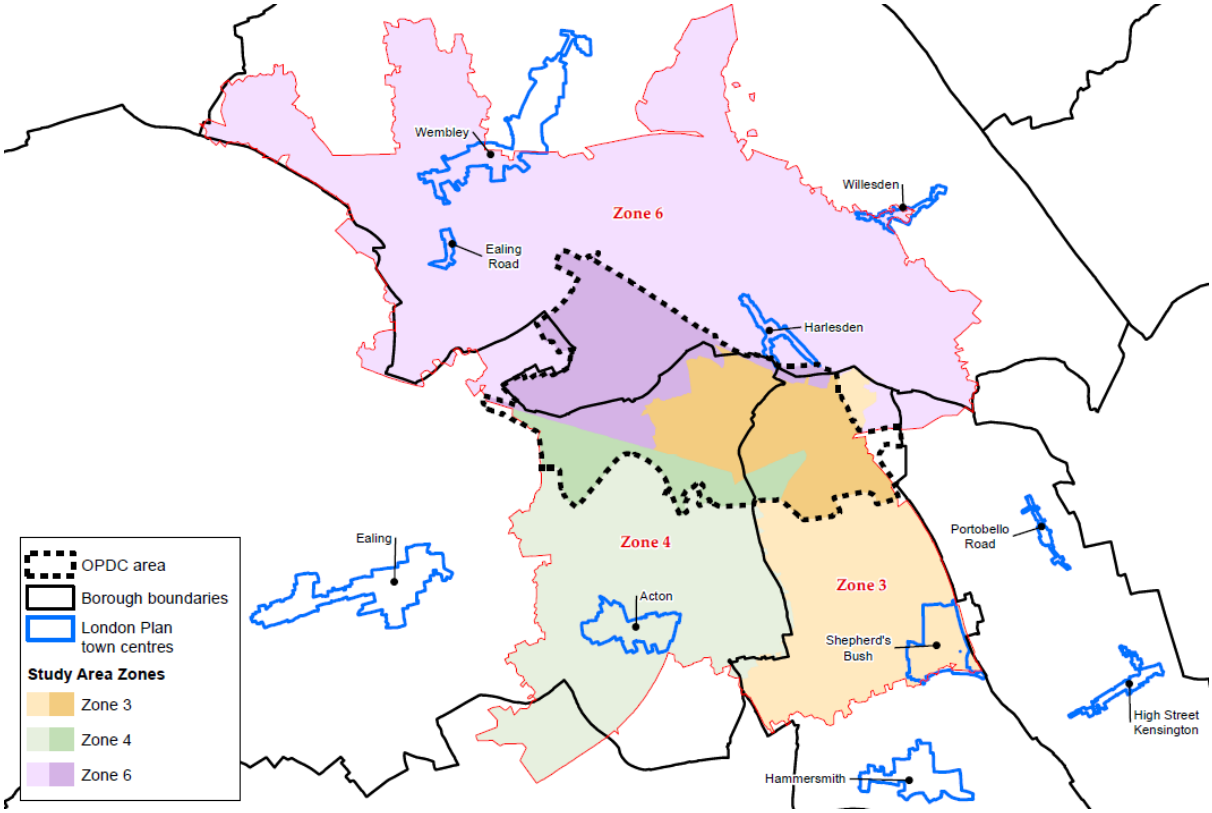
6.2.2 With regard to the different elements of the quantitative analysis identified in the introduction, there is some overlap in methodology, notably with regard to calculating potential per capita expenditure levels for future residents of the OPDC area. Appendix E summarises the methodology, including how the three elements relate to another.

Defining the study area

6.2.3 The definition of the Study Area for the purposes of this report has been informed by the household survey results (and therefore survey zones) that underpinned the LBHFRS and the WLRNSU. The zones adopted within the LBHFRS are consistent with the zones used in the WLRNSU but the area covered is less extensive i.e. the WLRNSU comprises 30 zones whereas the LBHFRS extends over only eight of these 30 zones. The former study informs shopping patterns within the Study Area; the latter informs the assumptions adopted in terms of inflow to the Study Area.

6.2.4 As shown in Figure 6-1, the OPDC area (outlined in blue) falls primarily into three zones: Zones 3, 4 and 6 (LBHFRS). A small section of the western extent of the OPDC area straddling Zone 28 (WLRNSU, and falling within RBKC) and the eastern extent into Zone 5 (WLRNSU, and falling within LBE), although neither zone is shown on the figure.

Figure 6-1: Study Area



Source: PBA

6.2.5 Given the nature of development planned in the OA, it is not considered robust to rely on expenditure data for solely the OPDC area as a basis for forecasting future need. Accordingly, the definition of the Study Area is relevant insofar as it is used as a proxy for forecasting the future expenditure of OPDC area residents; this is explained further in Section 6.4 below. Development within the OPDC area will form part of the broader West London housing market which is subject to significant variations, with parts of RBKC commanding extremely high prices compared to part of LBB. These variations in house prices are closely linked to available expenditure levels. Whilst the Study Area could be extended to the east and west of the OPDC area this has not been done for two main reasons: firstly, the available expenditure levels in Zone 28 (west of the OPDC area) are such that they would inflate available expenditure to a level in excess of what would be expected for an area undergoing regeneration. Secondly, the majority of new housing in the OPDC area is expected to be most closely related to the norther part of LBHF and the southern part of LBB; the new OPDC housing market, irrespective of the changes to the transport network, is likely to be less well related to the existing market areas to the west i.e. Ealing.

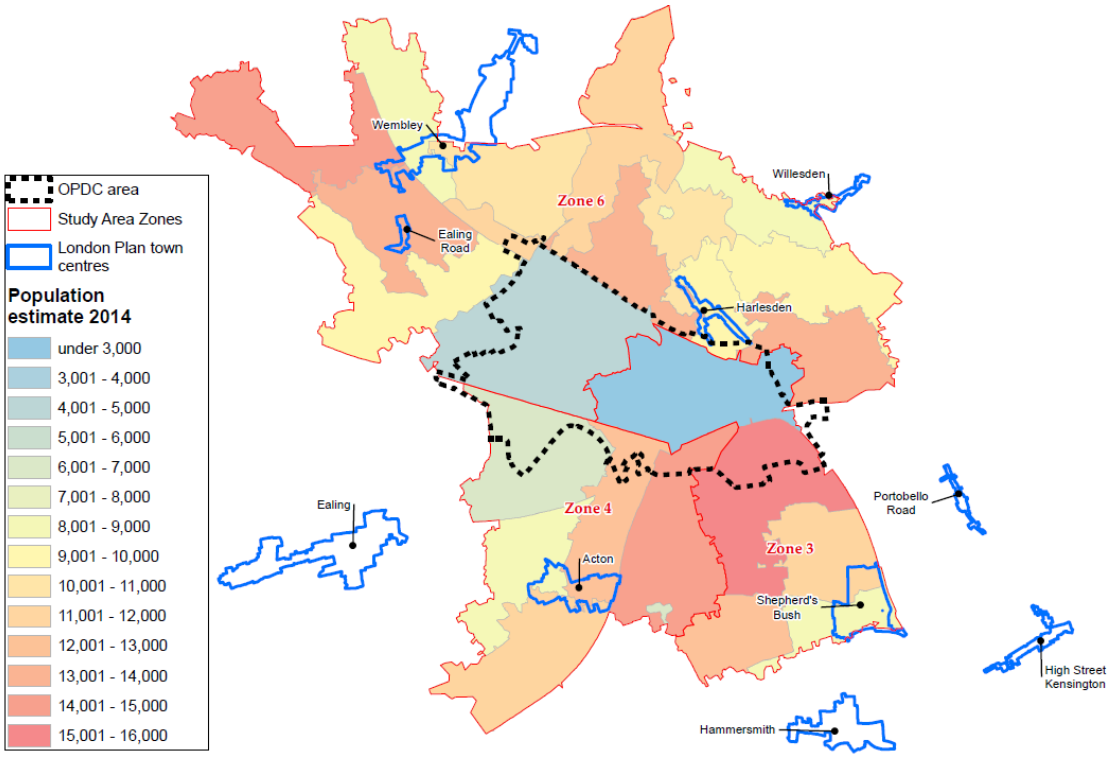
6.2.6 Given the geographical overlap, current comparison shopping patterns in Zones 3, 4 and 6 were considered in order to understand which town centres and shopping locations are likely to exert influence over the OPDC area. Having regard to the fact that no catchment is sealed, expenditure flows to those centres from other zones in the WLRNSU (including Zones 5 and 28) are taken into account in understanding the likely impact of any retail development within the OPDC area on existing centres. Accordingly, the limitation of the Study Area to Zones 3, 4 and 6 does not mean that impacts of the OPDC development on adjoining areas has not be assessed. This is explained in further detail in Section 6.5.

6.3 Existing and future Study Area

Population

6.3.1 Figure 6-2 below shows the existing population in the Study Area by postcode sector. Given the nature of Old Oak and Park Royal, the sectors most closely correlated with the OPDC area (outlined in black) unsurprisingly comprise relatively limited population. Accordingly, whilst the Experian data provides an appropriate baseline position, using Experian-based projections would fail to capture the scale and location of growth the Study Area, particularly within the OPDC area.

Figure 6-2: Existing study area population



Source: Experian MMG3 Retail Planner

6.3.2 GLA population projections have been used to inform growth over the plan period within the OPDC area. A growth rate for each zone has been derived from ward-level projections and applied to the baseline population. Forecast growth is shown in Table 6-1 below.

Table 6-1: Population growth in the Study Area

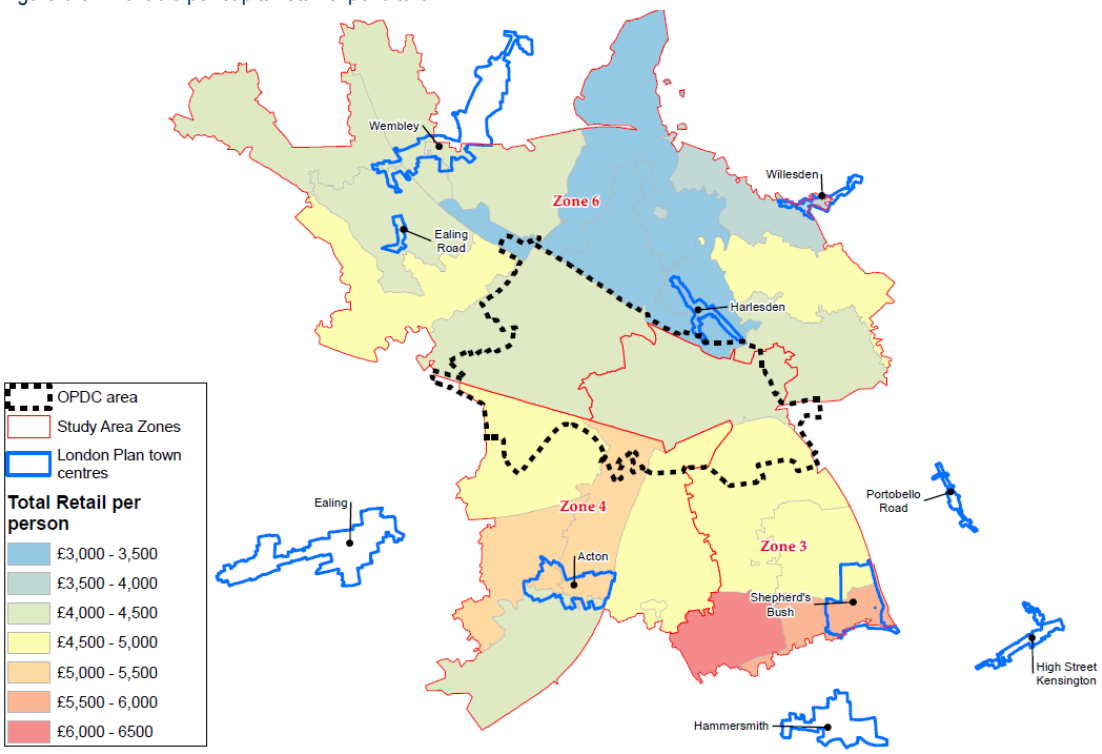
	Zone 3	Zone 4	Zone 6	Total
2014	50,902	53,765	137,616	242,283
2017	52,628	55,493	144,259	252,381
2022	58,169	57,794	156,341	272,304
2027	72,735	59,826	169,455	302,015
2032	82,857	61,037	176,525	320,419
2037	92,864	61,965	178,490	333,319

Source: Table 1 Appendix D

Expenditure

6.3.3 Figure 6-3 below shows the disparities in per capita retail expenditure figures across the Study Area, with postal sectors contained in Zone 6, located to the north of the OPDC area having notably lower levels of expenditure than those sectors in the south of the Study area near Shepherd's Bush.

Figure 6-3: Available per capita retail expenditure



Source: Experian MMG3 Retail Planner 2014

6.3.4 Per capita annual comparison expenditure in the Study Area is £3,007, £3,128 and £2,547 in zones 3, 4 and 6 respectively. When allowances are made, in line Experian Retail Planner Briefing Note 13 to exclude expenditure on SFT, per capita expenditure is revised to £2,670, £2,778 and £2,262 across the same zones. Over the course of the plan period, these figures (excluding and allowing for growth in SFT) are forecast to grow to £6,292, £6,547 and £5,331 respectively.

6.3.5 With regard to per capita convenience expenditure (excluding and allowing for growth in SFT), it is anticipated that it will grow from £1,963 to £1,968 in Zone 3, £1,950 to £1,955 in Zone 4 and £1,723 to £1,728 in Zone 6.

6.3.6 Table 6-2 below summarises what this means in global terms across the Study Area for convenience and comparison goods expenditure growth over the plan period.

Table 6-2: Retail expenditure growth in the Study Area

	Convenience goods (£M)	Comparison goods (£M)
2014	£442.11	£596.84
2017	£458.94	£701.16
2022	£545.69	£959.41

	Convenience goods (£M)	Comparison goods (£M)
2027	£542.43	£1,133.37
2032	£574.00	£1,440.14
2037	£597.36	£1,796.11
Growth 2017-2037	£138.43	£1,094.95

Source: Tables CN2 and CM2 Appendix D

Relationship between Study Area and OPDC growth

6.3.7 It should be noted that the forecast expenditure figures summarised in Table 6.3 include the forecast available expenditure for the OPDC area. This is because the population projections used to inform growth in the Study Area as a whole include the population growth forecast within the OPDC area. This is relevant when considering the level of expenditure that should be met by new retail and main town centre use floorspace within the OPDC area and to what extent existing town centres could absorb this expenditure.

6.4 OPDC area

Future resident population

6.4.1 The resident population of the OPDC area and anticipated phasing has been derived from the Old Oak and Park Royal Development draft Strategic Housing Land Availability Assessment[12] (SHLAA). The forecast population in the OPDC is set out in Table 6-3 below.

Table 6-3: OPDC area population projections

Year	Cumulative population
2022	4,391
2027	21,773
2032	34,931
2037	48,088
2037 onwards	56,890

Source: Tables A-C Appendix D

Expenditure

6.4.2 As set out in Section 6.2, given the limited population levels within the OPDC area at present and the scale of change anticipated within the OA, the current levels of available retail expenditure are not considered to represent a robust basis upon which to project future expenditure availability in the OPDC area. Given the nature of the OPDC area as effectively creating a new place within this part of West London, it is difficult to predict how available expenditure for new residents is likely to relate to expenditure of existing residents in neighbouring areas.

6.4.3 To take account of the range of values within the Study Area, as shown in Figure 6-4, and the nature of the OPDC area as being located between the more affluent postal sectors in Zones 3 and 4 (LBHF) and the less affluent sectors including Willesden Junction and Harlesden to the north (LBB), an average for the Study Area as a whole has been established for both retail and leisure expenditure.

[12] OPDC (November 2015)

6.4.4 The figures below show the 2014 expenditure levels, as set out in Figure 6-3, once they have been converted into a zonal-basis. The table below then splits these overall zonal expenditure levels into convenience and comparison goods expenditure, expenditure on A3 to A5 uses and other leisure goods expenditure.

Figure 6-4: 2014 per capita expenditure for retail and leisure goods across the Study Area

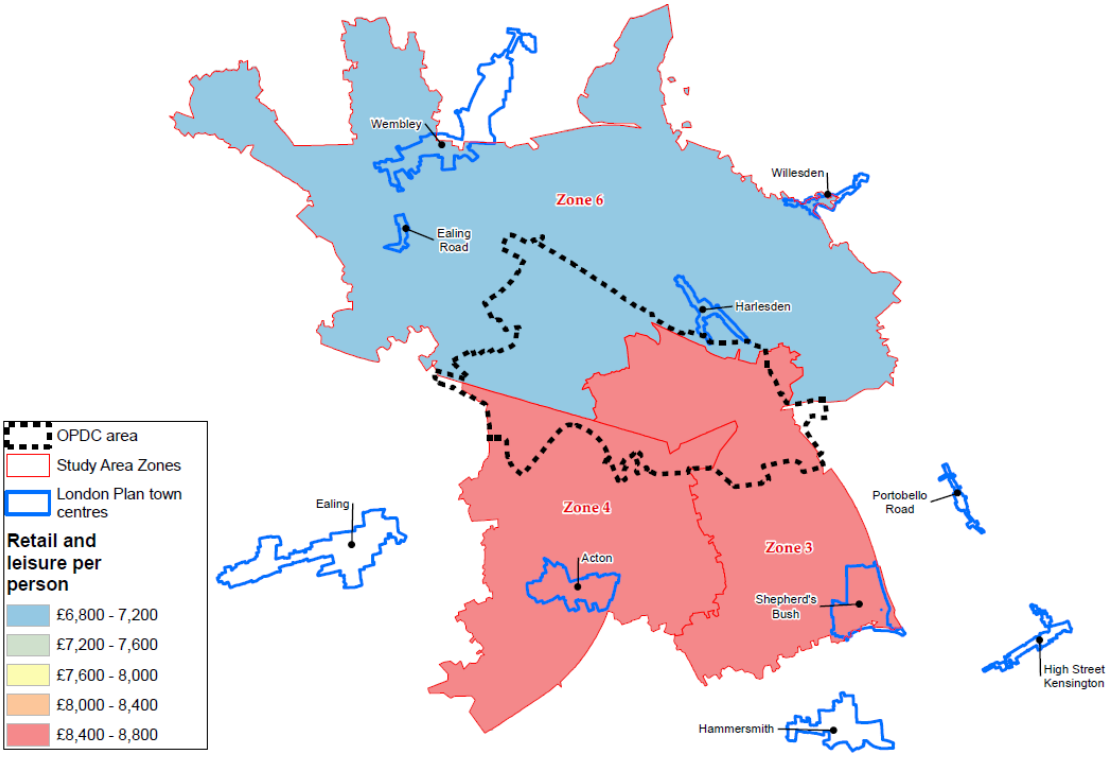


Table 6-4: 2014 per capita expenditure for retail and leisure goods across the Study Area

Zone	Convenience goods	Comparison goods	A3-5 uses	Other leisure uses	Total expenditure
3	£2,013	£3,007	£1,495	£1,945	£8,460
4	£2,000	£3,128	£1,488	£2,007	£8,624
6	£1,768	£2,547	£1,024	£1,488	£6,827
Study Area average	£1,871	£2,773	£1,226	£1,699	£7,569

Source: Tables CM1 and CN1, Appendix D

6.4.5 These baseline per capita figures have then been grown in line with Experian Retail Planner Briefing Note 13 projections across the plan period, as summarised in Table 6-5 below.

Table 6-5: Per capita expenditure in OPDC area

	Convenience goods	Comparison goods	A3-5 uses
2022	£1,804	£3,065	£1,387
2027	£1,793	£3,621	£1,486

	Convenience goods	Comparison goods	A3-5 uses
2032	£1,786	£4,320	£1,593
2037	£1,783	£5,153	£1,708
2041	£1,780	£6,146	£1,806

Source: Tables A & D Appendix D

6.4.6 Table 6-5 allows for growth in SFT but excludes it at source i.e. the figures set out above are exclusive of SFT. Further detail on this is provided at Tables CN1 and CM1 (Appendix D).

6.4.7 By applying per capita expenditure figures to the forecast population within the OPDC area, a resident capacity has been generated, as summarised in Table 6-6.

Table 6-6: Resident retail and leisure expenditure within the OPDC area

	Convenience goods	Comparison goods	A3-5 uses
2022	£7.92	£13.46	£4.88
2027	£39.05	£78.84	£52.39
2032	£62.39	£150.90	£68.06
2037	£85.75	£247.78	£85.73
2041	£90.83	£313.58	£94.29

Source: Tables A&C Appendix C

Workforce population and expenditure within the OPDC area

6.4.8 In addition to c.24,000 new homes, 55,000 new jobs are planned within Old Oak which will result in additional daytime expenditure to support new town centre uses. Such expenditure is entirely in keeping with the planned role of the area around Old Oak Common station, Old Oak High Street, North Acton and Park Royal as meeting the development's shopping needs. It is therefore reasonable to plan for this expenditure.

6.4.9 It is acknowledged that 10,000 further jobs are also anticipated in Park Royal. Unlike the development within the Old Oak part of the OPDC area, it is envisaged that the additional Park Royal employment will be focused on industrial uses i.e. similar to the existing employment. Given the existing limited retail provision within Park Royal, it is evident that daytime expenditure amongst workers is limited; however, it is understood that the existing business community have highlighted the current lack of provision as a concern i.e. spending is limited because opportunities for expenditure are limited.

6.4.10 The phasing of the new Old Oak workforce has been derived from the Development Capacity Study. However, no similar phasing is available for the Park Royal jobs but it has been assumed that they will be delivered in the period up to 2027. In relation to comparison expenditure, in line with the 2013 Experian study, it has been assumed that the new workforce will spend 10% of their comparison expenditure near the workplace. It has been assumed that the workers will have the same spending profile as future residents.

6.4.11 There is no similar precedent established for convenience expenditure. A number of assumptions, drawing on work undertaken in King's Cross on workplace expenditure, have been adopted to generate an annual convenience expenditure per capita for each new worker, namely: every worker will spend £5 on convenience goods four times a week. Table 6-7 sets this out below.

Table 6-7: OPDC workforce population and daytime expenditure

	Population	Convenience goods	Comparison goods
2022	9,452	£7.37	£2.87
2027	13,903	£10.84	£4.80
2032	34,305	£26.76	£13.99
2037	54,707	£42.67	£26.61
2041	57,713	£45.02	£33.49

Source: Table A Appendix D

Interchange expenditure

6.4.12 Current TfL estimates indicate that 135,600 passengers will be interchanging between HS2, Crossrail and the Overground at Old Oak on a daily basis. In addition, a further 66,000 are anticipated to leave the station. For the purposes of this analysis, those leaving the station are assumed to have been included either as future residents or workers in the OPDC area. However, those interchange passengers plainly have the potential to generate substantial expenditure at Old Oak.

6.4.13 The traditional approach to retail provision within stations has been to consider it separately from that provided outside, taking the view that it is primarily catering to impulse purchases of travellers and so providing a more limited offer that focuses on lower value comparison purchases and day-to-day convenience products such as ready meals and snacks. However, recent shifts in retailing including the rise of click-and-collect shopping and the increased importance of the food and beverage sector, has meant that the role of station retailing has broadened. This is reflected in the recent investments in a number of major stations including Birmingham New Street, Waterloo, St Pancras, King's Cross, and on-going programmes at Paddington, Victoria and London Bridge which all entail a significant uplift in the amount and type of retail provision within railway stations.

6.4.14 Recent figures published by Network Rail indicate that c.25% of people visiting the stations that they manage are not travelling but instead are solely using retail and dining facilities[13]. This compares to figures cited in the King's Cross retail work[14] which referred to less than 2% of coming to the old station to shop. Furthermore, as a consequence of the type of recent expansion in retail provision, there has been an increase in like-for-like sales i.e. there has been an uplift in the sales density of station floorspace. On this basis, there is reason to expect that any retail floorspace provided as part of the station would cater to more than just interchange passengers.

6.4.15 While detail on the nature of retail provision within the London stations is limited, analysis indicates that provision in the order of 7,500 sqm gross, comprising a range of A1 and A3-A5 uses is typical of the remodelled stations[15]. On the basis that interchange expenditure is intrinsically linked to the station and would not otherwise flow to the OPDC area, any additional floorspace allowance made for interchange expenditure has not be factored into the quantitative assessment.

[13] http://www.networkrail.co.uk/property/retail/

[14] Arup 2004

[15] St Pancras, London Bridge and King's Cross

Available retail expenditure in the OPDC area

6.4.16 Table 6-8 below draws together daytime worker expenditure and residential expenditure to summarise the total available expenditure in the OPDC area. However, it should be reiterated that not all expenditure generated within the OPDC area will be retained there. For example, the corollary of allowing for workforce expenditure is that OPDC residents that work outside the OPDC area will necessarily expend a proportion of their available spending away from the OPDC area.

Table 6-8: OPDC available retail expenditure

	Convenience goods	Comparison goods
2022	£15.29	£16.01
2027	£49.89	£83.10
2032	£89.15	£163.32
2037	£128.42	£271.42
2041	£135.84	£343.31

Source: Table A Appendix C

6.4.17 Without considering the performance of existing centres, it is not appropriate to convert the above figures into floorspace requirements. The following sub-section therefore reviews how existing centres are anticipated to perform over the period to 2037; this informs the recommendations over the level of available expenditure that the OPDC should plan to retain in the OPDC area through the provision of new centre(s).

6.5 Performance of existing centres

Comparison goods

6.5.1 Drawing on the market shares established in the LBHFRS and the WLRNSU, a high-level analysis of anticipated growth in existing town centres serving the Study Area has been undertaken. In relation to the key centres, Table 6-9 summarises anticipated growth in turnover based on constant market share assumptions, drawing on the forecast expenditure growth for the Study Area set out at Table 6-2.

Table 6-9: Performance of existing town centres (comparison retail)

Centre	2014 turnover (£M)	2037 turnover (£M)	Growth (£M)
Park Royal	£19.07	£57.39	£38.32
Harlesden	£10.37	£31.19	£20.83
Wembley	£54.39	£163.67	£109.29
Acton	£46.35	£139.49	£93.14
Ealing	£135.03	£406.37	£271.33
Hammersmith	£146.38	£440.50	£294.13
High St Kensington	£165.10	£496.86	£331.75
Shepherd's Bush	£997.41	£3,001.56	£2,004.16

Source: Table CM4&5 Appendix D

6.5.2 Whilst North Acton is a location that is considered as part of this report, as set out in Section 3, it does not have any town centre designation at present, nor is there significant existing retail floorspace that would have enabled the LBHFRS to capture any substantive market share data. However, given North Acton is intended to be one of the key growth nodes within the OPDC area, this lack of data is not considered to be problematic.

6.5.3 It should be noted that Park Royal's turnover is effectively the Asda store. As a modern foodstore, it has a substantial comparison goods offer, including lower value health and beauty goods but also clothing, electricals etc. As a consequence, Park Royal appears to attract significant market share over a wide catchment, confirming that, at present, it is functioning primarily as a standalone foodstore rather than being a meaningful anchor to a Neighbourhood centre with a local-scale catchment. This is in sharp contrast to Harlesden.

6.5.4 During the plan period, there are a number of significant comparison commitments that are anticipated to come forward both within and beyond the Study Area. However, for the purposes of this study, they have not been considered in detail. This is primarily because of the scale of forecast comparison growth over study period serves to diminish their impact by 2037 and 2051.

Convenience goods

6.5.5 Table 6-10 provides a similar summary in relation to convenience goods, having regard to the existing town centres that currently meet the majority of the Study Area residents' food shopping needs. This makes provision for inflow to those centres from people living outside the Study Area. Again, Park Royal's turnover is accounted for by the Asda store, which means that in terms of attraction, it is performing substantially better than Harlesden which lacks a notable convenience anchor.

Table 6-10: Performance of existing town centres (convenience retail)

Centre	2014 turnover (£M)	2037 turnover (£M)	Growth (£M)
Park Royal	£51.99	£70.25	£18.26
Harlesden	£15.67	£21.18	£5.50
Wembley	£9.13	£12.34	£3.21
Acton	£57.97	£78.32	£20.36
Ealing	£11.50	£15.54	£4.04
Hammersmith	£18.83	£25.44	£6.61
Shepherd's Bush	£26.82	£36.24	£9.42

Source: Table CN4 Appendix D

6.5.6 It is evident that all the main centres catering to the convenience shopping needs of the Study Area residents will experience significant growth over the period to 2037 under a constant market share scenario. This is the case whether or not allowance is made for inflow expenditure.

6.6 Physical capacity

6.6.1 In determining an appropriate quantum of main town centre uses, it is also relevant to consider the way in which these uses would be accommodated across the OPDC area. The OAPF envisages focuses of town centre uses at Old Oak Common station/Hythe Road/Willesden Junction ('Old Oak High Street'), North Acton and along the main routes of Park Royal.

6.6.2 Drawing on the urban design work that has underpinned the OAPF, it is estimated that Old Oak High Street will comprise 4.9km of 'active frontages'. A further 1.1 kilometres of 'active frontages' are envisaged at Park Royal, with some further (more limited) frontages at North Acton (700m).

6.6.3 The GLA Town Centres SPG (2014) defines active frontages as 'development frontage on the ground floor where inhabited uses are located, with a visually permeable elevation and a generous distribution of entrances' (para. 2.2.4); however, there is no set definition in terms of what comprises 'inhabited uses' on the basis that the level of activity is determined more by the way in which uses are designed. As such, for the purposes of this report, active frontages are taken to comprise main town centre uses with reference to the definition set out in the NPPF, focusing on office, retail, leisure and social infrastructure uses.

6.6.4 It is acknowledged that more detailed plans would be necessary to establish anything more than indicative floor areas; however, for the purposes of this report, the following assumptions have been adopted:

- Average unit depth of 15m: this figure is intended to allow for there to be much deeper units in some locations (clusters of activity, corner plots etc.), as well as narrow units in more constrained locations;
- An allowance of 25% has been deducted from the frontages to account for development infrastructure (roads etc.);
- A net to gross ratio of 75% has been adopted;
- In terms of the mix of uses, it has been assumed that offices and social infrastructure will account for 40% of floorspace.

6.6.5 With reference to leisure floorspace, analysis of GLA indicates that the London average is 25% (as a proportion of retail and leisure uses)[16]. Having regard to different classification of centres within London, it is noted that the proportion of floorspace devoted to leisure uses increases relative to the classification of the centre. Accordingly, whilst in the International centres, leisure accounts for 12.9% of floorspace, it increases to 17.6% in Metropolitan centres, 23.6% in Major centres and finally 26.4% in District centres. Adopting 25% is therefore considered to be reasonable.

6.6.6 With regard to retail floorspace, Experian GOAD publishes on a floorspace basis UK-wide percentage averages for convenience goods, comparison goods, service retail and vacancies. These averages have been rebased to exclude vacancies and are used as a starting point in this analysis.

6.6.7 Furthermore, it should be noted that Experian do not count upper storey office floorspace. In the case of the OA, it is envisaged that there will be significant office provision, with the majority provided above ground floor. The figures below therefore only relate to active frontage office floorspace.

6.6.8 Table 6-11 below summarises indicative floorspace by different town centre uses. The retail and leisure proportions quoted above have been rebased and expressed as proportion of the overall floorspace. Convenience and comparison goods floorspace have been expressed in terms of both gross and net sales area.

[16] 2013 London Town Centre Health Check - Technical Annex (Table 1.1)

Table 6-11: Potential floorspace within OPDC area

Use	Proportion (%)	Gross (sqm)	Net (sqm)
Total commercial floorspace	*100*	*65,250*	
Office/social infrastructure	40	26,100	
Leisure	15	9,790	
Convenience retail	4	2,730	2,050
Comparison retail	23	15,300	11,480
Service retail	18	11,305	

Note: may not sum due to rounding

6.6.9 It is acknowledged that the proportion of convenience floorspace is low. This is in part a function of the fact that much of convenience retail provision is located in outwith town centres. Given OPDC provides the opportunity to comprehensively plan for new town centres it would be more appropriate to allow for a higher proportion of convenience floorspace within the new centres.

6.6.10 The above analysis is reconsidered below in the context of the quantitative impact assessment set out in the following parts of this section.

6.7 Impact of development within the OPDC area

6.7.1 Section 6.4 identified the available expenditure that the development in the OPDC area might generate. However, as set out in Section 6.5, it is reasonable to anticipate that a proportion of this spending will go to existing centres.

6.7.2 Section 6.5 illustrated growth in existing centres under a constant market share scenario i.e. assuming that no retail floorspace will be delivered within the OPDC in addition to what is already there. This section therefore provides an overview of the modelling undertaken in Appendix C in relation to the potential impact of any additional retail provision (convenience and comparison) within new centres in the OPDC area.

Comparison goods retail

6.7.3 Drawing on the work set out above in Section 6.6 in relation to the physical capacity of the site, three different levels of comparison retention have been assessed:

- Baseline: 15% (8,895 sqm net);
- Medium retention (Scenario A): 20% (10,708 sqm); and,
- Higher retention (Scenario B): 25% (12,520 sqm net).

6.7.4 Table 6-12 below summarises anticipated comparison impact on key centres in the OPDC area, Study Area and in the wider area.

Table 6-12: Impact of OPDC development on existing comparison shopping provision (2037)

Centre	Baseline Impact	Baseline Growth	Medium retention Impact	Medium retention Growth	Higher retention Impact	Higher retention Growth
Park Royal	0.46%	£57.13	0.56%	£57.07	0.65%	£57.02
Harlesden	0.82%	£30.94	0.99%	£30.88	1.15%	£30.83
Wembley	0.87%	£162.25	1.05%	£161.96	1.22%	£161.67
Acton	1.29%	£137.70	1.55%	£137.33	1.81%	£136.96
Ealing	1.03%	£402.20	1.24%	£401.34	1.45%	£400.49
Hammersmith	1.39%	£434.40	1.67%	£433.15	1.95%	£431.91
High St Kensington	0.02%	£496.77	0.02%	£496.75	0.02%	£496.73
Shepherd's Bush	1.19%	£2,965.90	1.43%	£2,958.63	1.67%	£2,951.36

Source: Tables CM5-7 Appendix D

6.7.5 The table above confirms that under every scenario considered, the existing centres are anticipating growth in turnover in the period to 2037 as a consequence of the increase in available expenditure with the Study Area and therefore including the proportion of expenditure that is not anticipated to be retained within the OPDC area.

6.7.6 This is most marginal in relation to Harlesden. This is largely a reflection of the limited role that Harlesden currently plays rather than a direct impact of any additional comparison development within the OPDC area. However, the proximity of Harlesden to the OPDC area (and two designated Opportunity Areas) means that there is some question over whether it would be reasonable to expect Harlesden to benefit from the development through increased market share. This is considered in the next section.

Convenience goods retail

6.7.7 In relation to convenience goods retail, PBA have had regard to typical food shopping patterns in terms of main food and top-up shopping patterns. In relation to the former, adopting a sustainable approach to development, it would reasonable to expect future residents to be able to meet their main food shopping needs within the OPDC area; impact has therefore been assessed on the basis of 75% of convenience shopping spending generated by future residents being retained in the OPDC area. In relation to the latter, it has been assumed that the future workforce of the OPDC area will make convenience shopping purchases near to their new workplace.

6.7.8 Table 6-13 below summarises anticipated convenience impact on key centres in the OPDC area, Study Area and beyond. The first three columns relate to the Study Area in isolation i.e. no allowance made for inflow expenditure to either existing stores in the Study Area or the OPDC (Scenario 1); the second three columns include allowances for inflow both.

Table 6-13: Impact of OPDC development on existing convenience shopping provision (2037)

Centre	Diversion to OPDC	Impact	Growth from 2014	Diversion to OPDC	Impact	Growth from 2014
	Study Area only			Including inflow		
Park Royal	£30.99	44.1%	-£12.74	£51.56	52.5%	-£26.06
Harlesden	£0.64	3.0%	£4.86	£1.06	5.0%	£4.44
Wembley	£0.01	0.1%	£3.20	£0.02	0.1%	£3.19
Acton	£19.35	24.7%	£1.01	£32.19	31.3%	-£5.45
Ealing	£0.02	0.1%	£4.02	£0.03	0.0%	£58.81
Hammersmith	£4.17	16.4%	£2.44	£6.94	3.8%	£41.02
Shepherd's Bush	£2.31	6.4%	£7.11	£3.84	5.9%	£13.19

Source: Table CN6 Appendix D

6.7.9 Under this model, impact is focused on the existing centre in Park Royal (the Asda store) as the closest existing convenience shopping provision in the OPDC area. Health check work undertaken in relation to the Park Royal centre has indicated that it is not considered to be vital and viable. This is primarily because of the deficiencies in its offer which is effectively the Asda store, two banks and a couple of sandwich shops.

6.7.10 As noted previously, there is evidence to suggest the current poor performance of the centre is linked to its poor provision; thus, any improvement in provision is likely to result in a higher level of expenditure retention which will be of overall benefit to the vitality and viability of that centre. The increase in the workforce in the wider Park Royal area will only serve to increase the likelihood of this happening. Furthermore, on the basis that a proportion of the planned floorspace will be located at Park Royal, it follows that the impact set out in the table above is overstated i.e. expenditure will be diverted within Park Royal.

6.7.11 The estimated impacts are to an extent notional because of the longer timeframes within which impact will be assessed. The OAPF for Park Royal envisages that it will provide range of services to support local business and residential communities with a range of uses to support local business operations including local levels of retail, service and leisure amenities providing active frontages around the main junction. As such, whilst the modelling suggests that there will be impact on the Asda store (and therefore the centre), it is also clear that improvements are planned for that centre. The existing Asda functions more akin to an out-of-centre foodstore; insulating that store from impact at the expense of enhancing the wider provision in the OPDC area would potentially prejudice the planned changed at the centre of Park Royal.

6.7.12 It is acknowledged that impact is forecast on Acton town centre. This is primarily focused on the Morrisons store at Rectory Road. Such an individual impact is not considered to give rise to any substantial concern in terms of the wider health of Acton town centre.

6.7.13 With regard to the other centres, it is noted that they are all forecast to experience an uplift in turnover in the period to 2037.

6.8 Retention within the OPDC area

6.8.1 It is relevant to consider the role and function of surrounding centres relative to the vision for new main town centre uses within the OPDC area. Table 6-14 below considers the major centres which serve the Study Area and sets out the level of comparison goods expenditure retention within their respective home zones

Table 6-14: Comparison goods retention in existing centres

Centre	Classification	Comparison goods expenditure retention in home zone
Park Royal	Neighbourhood	3%
Harlesden	District	3%
Acton	District	10%
Wembley	Major	21%
Hammersmith	Major	16%
Ealing	Metropolitan	44%
Shepherd's Bush	Metropolitan	27%

Source: WLRNSU

6.8.2 Given the anticipated role of any new retail and town centre uses within the OPDC area as meeting the needs of the development, it is considered that either a District or Major centre function will be most appropriate. As shown in Table 6-14 above, the level of retention in the two existing nearby District centres considered is very different. Taking into account the existing role and function of Harlesden and Acton versus the intended function of Old Oak as meeting the needs of the development, it may be more appropriate to plan for the higher level of retention in the OPDC than those existing District centres. The following analysis therefore informs the recommendations on the form/type of centres within the OPDC that are set out in the next chapter.

6.8.3 15% comparison goods expenditure retention has been adopted as a baseline level. Reflecting that there may be commercial and place-making interest in securing a higher level of comparison floorspace, two further scenarios have been modelled which consider 20% and 25% expenditure retention.

In relation to convenience goods, this type of shopping is generally more localised than comparison goods shopping. As such, it is assumed that 75% of convenience expenditure generated could be served by new floorspace within the OPDC area.

6.8.4 Table 6-15 below draws this analysis together, as well as taking accounting of workforce expenditure. These global capacity figures are then converted into net sales area floorspace requirements based on sales densities of £5,000/sqm for comparison goods and £12,500/sqm for convenience goods. Sales efficiencies of 1.5% per annum and 0.3% per annum have been applied to the respective densities in the period from 2016 onwards. All monetary values are £M and floorspace figures are net sales area.

Table 6-15: OPDC area floorspace requirements (to 2051)

	Baseline (15% comparison)	Scenario 1 (20% comparison)	Scenario 2 (25% comparison)
Resident expenditure			
Comparison	£52.45	£69.93	£87.41
Convenience	£75.95	£75.95	£75.95
Workforce expenditure			
Comparison	£37.32	£37.32	£37.32
Convenience	£47.36	£47.36	£47.36
Total retained expenditure			
Comparison	£89.76	£107.25	£124.73
Convenience	£123.32	£123.32	£123.32
Floorspace requirement			
Comparison	12,373	14,783	17,193
Convenience	9,153	9,153	9,153

Source: Tables A-C Appendix D

6.8.5 Table 6-16 sets out these requirements with regard to the plan period i.e. up to 2037, as well as converting the net sales requirements into gross floor areas (75% net to gross ratio). To reflect the two retention scenarios, the comparison figures are expressed as a range.

Table 6-16: Retail floorspace requirements

	2037	2051
Comparison		
Net	8,895-12,520 sqm	12,373-17,193 sqm
Gross	11,860-16,694 sqm	16,498-22,923 sqm
Convenience		
Net	8,037 sqm	9,153 sqm
Gross	10,716 sqm	12,205 sqm
Total		
Net	16,932-20,557 sqm	21,527-26,346 sqm
Gross	22,576-27,409 sqm	28,702-35,128 sqm

Source: Tables A-C Appendix C

6.8.6 For the purposes of understanding impact, a range has been assessed. It is considered that, in principle, the maximum of the floorspaces set out above are acceptable in impact terms; this must be read in conjunction with Section 7 which sets out the qualitative considerations that must also be factored into the determination of any planning applications for town centre uses, including how these uses might come forward as new centres within the OPDC area.

6.9 Commercial leisure uses in the OPDC area

6.9.1 The potential leisure expenditure in the OPDC area is set out at Table D (Appendix D). This quantifies future leisure spending with reference to A3 to A5 uses, cultural services (e.g. cinema, theatre, museums, TV subscriptions), games of chance (.e.g. lottery, bingo, bookmakers) and recreation and sporting services. Table 6-17 below sets out cumulative

expenditure that will be generated in the main commercial leisure categories by development in the OPDC area, totalling some £141m by 2051.

Table 6-17: Leisure expenditure generated within the OPDC area (£M)

	A3-A5 uses	Cultural services	Games of chance	Recreation services
2022	£4.88	£0.97	£0.38	£0.53
2027	£52.39	£10.45	£4.05	£5.68
2032	£68.06	£13.58	£5.27	£7.38
2037	£85.73	£17.10	£6.63	£9.29
2041	£94.29	£19.07	£7.40	£10.36
2051	£101.62	£20.55	£7.97	£11.17

Source: Table D Appendix D

6.9.2 In quantitative terms, the methodology for expressing monetary demand in floorspace terms is less well-developed. This report does not therefore provide floorspace recommendations in relation to cultural service, games of chance or recreation services, given the relatively limited demand generated.

6.9.3 With regard to A3 to A5 uses, Table 6-17 shows reflecting the national trends set out in Section 2, growth in this sector accounts for the majority of leisure spending. By applying a sales density of £6,500 per sqm and allowing for efficiency gains of 2% per annum, it is anticipated that this could indicate demand for up to 8,700 sqm of A3 to A5 floorspace 2037[17].

6.9.4 In considering the existing network of centres, it is evident that there is provision of all these types of services in surrounding centres but that the leisure offer cannot be considered to anchor any of those centres. In the absence of any leisure facilities being provided within the OPDC area, future residents and workers would utilise these facilities. Leisure expenditure is much more discretionary in nature. For example, compared to retail, food and drink spending is much more mobile, due to the trend for people to travel longer distances to socialise based on qualitative factors, and because there are no constraints connected with transporting goods to the home.

6.9.5 In the case of the OPDC area, it is considered that the planning for leisure uses, as a key element of place making as part of establishing of a new residential and business community, should not be driven primarily by quantitative analysis. The following section provides further recommendations on this.

[17] Relates solely to resident and worker generated expenditure i.e. does not include any A3-5 floorspace anticipated as part of the station. See Section 6.4 for further detail on the station.

7 Recommendations for Old Oak and Park Royal

7.1 Introduction

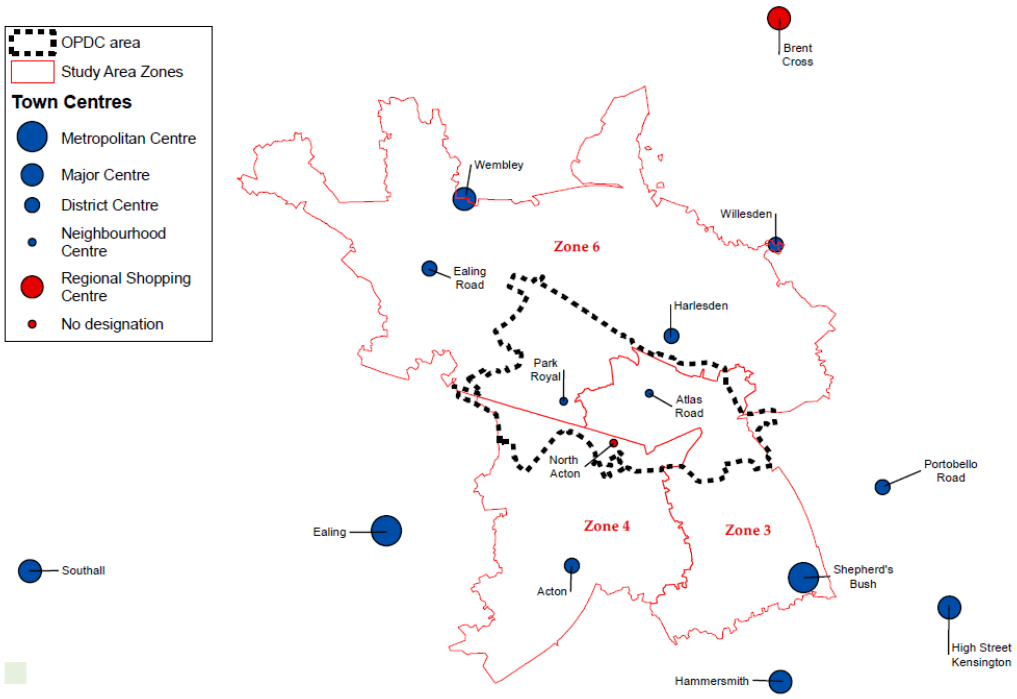
7.1.1 This section draws together the evidence in Sections 2 to 6 to provide analysis and recommendations for town centre uses in the OPDC area. Drawing on our review of the network of centres, we first consider the existing hierarchy of centres and the mechanisms to allow for a new 'centre' or 'centres' within that hierarchy. We then consider what the 'needs of the development' means, before providing a summary of the estimated quantitative need for additional floorspace and the phasing of those needs. Based on these estimates, the spatial distribution of the floorspace and the likely designations of 'centres' within the OPDC area is considered as well as the role that retail and leisure within the area can play in place-making and shaping. Our core recommendations are summarised at Section 8.

7.2 Existing hierarchy of centres

7.2.1 The existing hierarchy of designated centres is shown at Figure 7-1 and the function of these centres has been considered in detail in Section 4. This assessment considers the role of each centre in respect of the provision of main town centre uses (except for offices), defined at Annex 2 of the NPPF as follows:

'Main town centre uses: Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).'

Figure 7-1: Hierarchy of centres



7.2.2 Locally and within the OPDC area, the only existing designated centre is the Heart of Park Royal Neighbourhood Centre. However, nearby there are a large number of centres at

varying levels in the hierarchy. Each centre has its own clear identity although the larger 'centres' have a significant quantum of retail floorspace and are the attractors of expenditure (particularly Shepherd's Bush, Brent Cross, Ealing and Wembley). Within these centres, the retail niches are also different, with Shepherd's Bush benefitting from a high quality shopping centre in the form of Westfield London and Wembley benefitting from the London Designer Outlet Centre, alongside the sports stadium itself. The leisure offer across the network of centres is typically geared towards food and beverage and cinema facilities, with local commercial leisure uses such as gyms and family entertainment occasionally provided.

7.2.3 In terms of destinations for arts, entertainment, tourism and cultural uses, typically the main offer is provided elsewhere in London (such as the West End, South Bank, South Kensington and the Olympic Park). The Mayor's Cultural Strategy (Cultural Metropolis) seeks to maintain the capital's status as one of greatest world cities for culture and creativity, and addresses the need to increase the provision of arts and culture facilities in outer London, providing targeted support for the creative industries. Given this aim, it is appreciated that opportunity areas within provide scope to enhance London's culture. A good example is the planned Olympicopolis development at the Olympic Park, which is a planned education and cultural district on Queen Elizabeth Olympic Park that will bring together organisations to showcase art, dance, history, craft, science, technology and design.

7.2.4 Whilst cultural uses are provided in the hierarchy of centres that we have considered, in our view they are not recognised the principal reason for visiting each centre, both now or once planned new developments have taken place. The only exception is Wembley, which is seen as a Cultural Quarter in the Mayor's Cultural Strategy, albeit with a sports and concert focus. Therefore, it is considered that there is a gap in cultural facilities which, because of the future accessibility of the OPDC area and the wide opportunities for development, could be addressed as part of the planned developments in the area.

7.2.5 To provide a significant quantum of additional retail and leisure floorspace within the OPDC area, it is expected that a new 'centre' will need to be designated. The London Plan does not currently recognise this in Table A2.2 but includes a footnote that states that *'re-classifications are subject to capacity analysis, impact assessments, land use and accessibility, planning approvals, town centre health checks and full implementation'*. This provides us with the key considerations at the strategic level that will trigger a change to the London Plan town centre hierarchy.

7.2.6 As set out in Section 2, Policy 2.15 of the London Plan promotes the coordinated development of London's network of town centres so that they provide the main foci beyond the CAZ. This includes addressing identified deficiencies by promoting or designating new centres where necessary, affording priority to regeneration areas and areas with better access to services, facilities and employment – as will be the case with the Old Oak area in particular. Policy 2.15 also requires boroughs to identify town centre boundaries, primary shopping areas, primary and secondary frontages. Given the London Plan policies and the scale of planned development in the area, it is appropriate for the OPDC to lead on the designated of centres – co-ordinated with other authorities where necessary.

7.2.7 As explained above, whilst there is not necessarily an existing deficiency in retail and leisure uses (mainly food and beverage) in the network of centres, there is an apparent gap in the provision of centres that have a significant number of arts, cultural and tourism uses, such as theatres, museums, galleries and concert halls, hotels and conference facilities. Policy 4.6 of the London Plan provides support and enhancement for arts culture, sport and entertainment uses, whilst the Mayor's Cultural Strategy recognises the role cultural uses can plan in regeneration.

7.2.8 Therefore, we consider that the OPDC consider the extent to which the development can deliver a new cultural quarter in London to meet deficiencies and to develop and enhance London's cultural city role. The OPDC has commissioned separate evidence to explore this opportunity in further detail.

7.3 Needs of the development and existing deficiencies

7.3.1 The OAPF explains that the retail and leisure provision within the OPDC area will:

- play an important role in place-making;
- cater for the needs of the development; and
- complement and enhance nearby retail centres

7.3.2 These are broad policy requirements. It is expected that the needs of the development will change and evolve during its timescale. Therefore, it is important that the floorspace is of sufficient critical mass to deliver a range of town centre uses that will serve the needs of the residential and worker population, and interchange passengers and assist with place-making.

7.3.3 The amount of A1 comparison floorspace (i.e. non-food items) will form a large proportion of the floorspace required to meet the needs of the development. Clearly there will be some 'service' orientated comparison floorspace, which is purchased regularly including health and beauty and some household items. Other comparison goods items such as clothing and footwear, furnishings or electronic items, might be purchased less regularly but will still be required to serve the development. However, it is unrealistic to assume that all of the non-food spending from new residents will be spent in retail floorspace within the OPDC area, given the extensive choice available in existing town centres such as Shepherd's Bush, Brent Cross, Wembley and beyond into Central London.

7.3.4 A balance will need to be struck between what is desired in terms of serving the needs of the resident and workforce population and what is realistic, taking into account established centres nearby and their ability to absorb further growth. It is also necessary to consider what is spatially appropriate, taking into account the aspiration for regeneration to benefit the wider area and the scope for spin-off benefits for nearby centres. If the floorspace planned for is too small, it will either:

- not deliver place-making objectives to provide active frontages; or
- not meet the needs of the resident population and workers.

7.3.5 If the floorspace planned for is too large, it will either:

- not be fully built out (due to the extent of competition locally limiting market demand from occupiers); or
- provide a large inward facing destination that draws trade away from established centres, diluting opportunities for investment across the network of centres and undermining other planned regeneration.

7.3.6 At Section 6, our assessment of quantitative need responds to these competing tensions very carefully. It is appreciated that the aggregate spending generated by the planned housing and jobs growth, together with interchange passengers, will be significant and if translated directly to floorspace would generate a significant quantum of floorspace. However, as we know from examples of other large regeneration projects in London, relevant factors to consider when assessing the quantum of floorspace include the role of transport interchanges, the existing offer of floorspace within the wider area and place making and shaping objectives. Therefore, as explained in Section 6, when considering the role of retail and leisure floorspace within the OPDC area we have considered the following factors:

- The published policy aspiration in the OAPF is for retail floorspace to cater for the needs of development and complement and enhance nearby centres

- The choice of nearby centres that have clear opportunities to either grow through redevelopment or to improve their turnover through significant floorspace efficiency growth or the occupation of vacant units

- The likely 'no-development' turnover of the same network of centres

- The scale of the development opportunities within the OPDC area (i.e. the likely areas of active frontage) and place making objectives as set out within the OAPF.

7.3.7 Meeting the needs of the development is only part of the story, since we also need to consider existing deficiencies. This means attracting visitors and spending that is not just generated by the development. From a purely retail perspective, in the comparison sector there is no evidence of a clear deficiency that would justify drawing in expenditure to the OPDC area to support larger-scale development. However, it needs to be recognised that no development will have a wholly self-contained catchment and there will always be a degree of inflow expenditure (i.e. spending not generated by the OPDC development), as well as outflow expenditure.

7.3.8 However, we do recognise that there is scope for additional non-retail uses to meet a wider deficiency in the network of centres, which are primarily retail focused. In broad terms, the evidence suggests that this deficiency concerns the extent to which the centres cater to meeting arts, cultural and tourism needs.

7.3.9 In OAs such as OPDC, there could be a further sporadic high demand for user specific sports and leisure facilities or other anchor/catalyst uses, potentially providing high footfall generating town centre uses that will accommodate a significant quantum of floorspace. Such uses are not likely to be reliant solely on the needs of the development; nor does the evidence point to a clear deficiency in such uses. However, it is appreciated that the area will be highly accessible. Therefore, subject to ensuring a balanced mix of uses in the new development, there is no reason to preclude such uses coming forward if the aim for town centre uses to 'meet the needs of the development' is not undermined.

7.3.10 Due to the long-term nature of the development within the OPDC area, the reliance on significant infrastructure change and the dynamic nature of retailing, our response is necessarily an informed estimate of the scale of floorspace within the area in order to guide plan makers and developers. It should not be seen as a cap on floorspace as a change in the primary land uses could result in a change in the requirements for town centre uses.

7.4 Total quantitative need and phasing

7.4.1 The quantitative need for additional floorspace has been assessed in Section 6. This has included a thorough assessment of the spending available and the likely consequences for the surrounding network of centres. The table below summarises the quantitative capacity for the different A Class uses as set out in the preceding section. It should be noted that the capacity for A1 service uses and A2 floorspace has been calculated on a proportionate basis to the anticipated capacity for A1 retail floorspace.

7.4.2 As noted in Section 6.4, it is suggested that an allowance of a further 7,500 sqm gross should be made in the period to 2037 for retail and food and beverage floorspace (Use Class A1, A3, A4 and A5). Having regard to modern station developments, it has been assumed that this floorspace will be split equally between A1 (retail) and A3, A4 and A5 uses. The figures set out in Table 7-1 below include this additional floorspace within the indicative capacity for the OPDC area.

Table 7-1: Indicative capacity for A Class Uses to completion of development (gross)[18]

Use	Floorspace by 2037	Floorspace by development's completion
A1 retail	26,326-31,160 sqm	32,450-38,880 sqm
A1 service and A2	15,100-18,300 sqm	19,200-23,400 sqm
A3, A4 and A5	16,300-19,000 sqm	19,700-23,300 sqm
Total	57,700-68,400 sqm	71,300-85,600 sqm

7.4.3 The floorspace calculations balance the needs generated by the development and the requirement to ensure that the existing network of centres can also benefit from spending growth, providing wider benefits to the network of centres. It is appreciated that the anticipated floorspace requirements are sensitive to the extent spending retention within the development; furthermore, the scale of the planned new 'centre' within the development will impact on its ability to retain spending generated. But, as explained in Section 6, our approach is based on evidence of the retention level of other centres and the extent of competition locally; a balanced approach to potential expenditure retention levels has been adopted.

7.4.4 It must also be acknowledged that the floorspace set out above is somewhat higher than the physical capacity identified in Section 6.6 (c.65,000 sqm) to deliver active frontages. However, it should be noted that Section 6.6 relates only to ground floor space; a proportion of floorspace will inevitably be provided at lower or upper storey, this is particularly the case in larger format retail units and A3-5 uses. Furthermore, the active frontages do not include Old Oak Common station which will accommodate a proportion of the identified floorspace. Accordingly, that identified capacity is higher than that derived from analysis of active frontage is not necessarily out of keeping with the place-making principles set out in the OAPF; however, it must be acknowledged that the quantum of floorspace has the potential to be significantly higher under the higher retention scenario. Careful consideration of design principles will be needed to ensure that the new centres do not become lacking in focus.

7.4.5 In broad terms, there is a need for up to 31,100 sqm gross of A1 retail floorspace (both comparison and convenience goods) by 2037, increasing to up to 38,900 sqm gross by the completion of the development. The method for deriving these figures has been explained in detail in Section 6 of the report.

7.4.6 In order to provide indicative floorspace figures for non-A1 retail uses, we have adopted proportionate splits set out in Table 6-11. For that reason, the figures set out in Table 7-1 are presented as a range in the same way as the A1 retail floorspace is set out. We acknowledge that these splits of A Class Uses reflect the composition of town centres today. Having regard to forecast A3-5 spending outlined in the preceding chapter which indicated capacity for 8,700 sqm by 2037, together with a further 3,750 sqm within the station, this provides a helpful 'sense check' of these proportionate splits. The figures in Table 7-1 are higher; however, it should be noted that leisure in the context of Table 6-11 is likely to be more broadly defined than the capacity analysis; as such, there is broad alignment across the period. However, given the length of the plan period, there will therefore be a need for the OPDC to consider applications flexibly for these uses to take account of the way in which town centres may change in the future. We suggest that where there is substantial variation from these figures, applicants should be invited to make their case for the OPDC to consider on its merits. This is explained further below in our policy recommendations (see Vision Statements).

[18] All figures quoted in this table include an allowance for 7,500 sqm gross as part of Old Oak Common station

7.4.7 In terms of total A-Class floorspace, the requirement would amount to up 68,400 sqm gross by 2037, increasing to 85,600 sqm gross when the development is fully built out. We would expect the phasing to be aligned with the delivery of the homes and jobs (with much of the floorspace likely to be ground and first floor levels of large mixed-use office and residential development. The phasing should not be seen as prescriptive and it is possible that some retail floorspace could come forward as meanwhile uses (see below) to ensure that the area has adequate services for new residents and workers before the area establishes itself.

7.4.8 Meanwhile uses may be a way for town centre uses being provided early within the development to create a place at Old Oak, which the area establishes its identity and market profile. This floorspace could be provided within temporary buildings (such as shipping containers) and based on our research, such developments work well in clusters and there will need to be a critical mass of uses. In our experience, such developments will extend to approximately 5,000 sqm and will include a mix of retail and food and beverage uses. Since they are likely to be temporary and therefore available on a more flexible basis, it is expected that the businesses (particularly independents and start-ups) might seek floorspace within the permanent developments is sufficient accommodation is provided. Therefore, we recommend that the OPDC consider a policy to encourage such uses.

7.4.9 Our assessment has considered the extent to which there will be expenditure growth from the development to support retail uses and commercial food and beverage uses (Use Class A3, A4 and A5). Based on the typical diversity of uses of centres within London, we have also included other A-Class uses. However, this calculation does not allow for other town centre uses outside the A Class; principally, leisure or cultural uses, which can often include significant floorspace and could be appropriate in the OPDC area, given the regeneration benefits that cultural uses can offer opportunity areas. Subject to the tenant demand and the eventual occupiers, the floorspace of such uses could be significant and, indeed, will need to be so if the area is going to become a cultural and leisure destination within London.

7.5 Spatial distribution of floorspace

7.5.1 The quantitative need assessment is largely a technical exercise that delivers a quantum of floorspace. The aggregate need for the whole of the OPDC area over the period up to 2051 amounts to about 85,600 sqm gross of A-Class uses (if we use the higher retention scenario). The plan period is to 2037; we therefore focus on the identified need of 68,400 sqm.

7.5.2 As explained above, it will be critical to strike an appropriate balance between delivering too little floorspace to serve the needs of the new community or planning for too much floorspace that will either adversely affect nearby centres, or simply will not be occupied and thus negatively affect the street scene. The response to the spatial distribution of floorspace varies between Old Oak, North Acton, Park Royal and Atlas Road.

Old Oak

7.5.3 The OAPF sets out a vision for Old Oak, which will be a new, well-connected neighbourhood of high-quality design. The OAPF includes a number of design objectives and sets out an ambition for a new High Street that will arc from Old Oak Common station in the south to Willesden Junction in the north, crossing the Grand Union Canal and linking with a new Hythe Road station.

7.5.4 The OAPF states that the new development should include a mix of town centre uses and these should primarily be clustered around Old Oak Common station, other transport hubs and along Old Oak High Street. It explains that central to the area's success will be the development of a network or streets and amenity spaces that celebrate the canal and that enable quality connections into the surrounding area.

7.5.5 This approach is a logical response to the transport interchanges available and the likely area for development, which is significant. The proposed High Street would connect a number of transport interchanges (Willesden Junction – Bakerloo, Overground), Hythe Road (Overground) and OOC (Crossrail/HS2 and national rail). It is expected that this arrangement should generated significant footfall that will be commercially attractive to retailers. Physically, the length of the anticipated High Street will be significant (4.9 km of expected active frontage) and the evidence on the trends in town centres indicates that there should be a core – or heart of the town centre and a successful retail circuit. The term retail circuit concerns the need to connectivity and integration of the different elements of centre, with successful centres benefitting from a natural circuit.

7.5.6 It is noted that the OAPF includes an aspiration for A3 and A4-Class uses and leisure potentially being located around the canal. Subject to appropriate design and integration with the transport hubs, we consider this approach to sensible from a place making and delivery perspective, since it has been proven to be successful in place shaping.

7.5.7 In light of the above, we recommend that the majority of the retail and leisure floorspace should be directed to Old Oak High Street due to its accessibility and development opportunities, the need for place making and the excellent public transport nodes. Indicatively, this should be approximately 55,000 sqm gross of A class uses (out of the total 68,400 sqm gross of A-Class uses estimated for the OPDC area).

7.5.8 Ultimately the likely form and spatial distribution of retail floorspace will be influenced by place-making objectives, evolution of retail formats, development phasing and land ownership constraints. However, depending on phasing and delivery, we consider that the format and market profile of floorspace is likely to vary across the areas immediately surrounding Old Oak Common station and south of the Grand Union Canal and the areas to the north of the Grand Union Canal. Based on initial masterplanning ideas for the area in the OAPF, the spatial distribution of floorspace could be broadly divided into three 'quarters':

- **Old Oak Common station:** this area is likely to include high-density office and residential buildings and will include an interchange area. Based on our consideration of case studies, the area is likely to be passenger and visitor (employment) focused and may include it is expected that this area will have a mix of smaller convenience stores, sandwich shops, cafes, bars and restaurants and some selected high-quality comparison retailers to serve a transient population.

- **North and south of Grand Union canal:** subject to design considerations, there is a clear opportunity for the high street to include canal side uses to provide A3-A4 food and beverage facilities (which could become a distinct leisure and cultural quarter of the area).

- **High Street north:** it is expected that this area is likely to serve more of the residential population and will provide a mix of convenience and comparison units in a more traditional high street arrangement providing larger footprint floorspace for national multiples and independent retailers, weekend markets, outdoor seating. The potential for a physical and functional connection to Harlesden district centre to protect and enhance its vitality and viability will need to be fully explored. Furthermore, it is anticipated that the area around the new Hythe Road station may function as the retail focus of the area for a significant period while the rest of Old Oak North is built out.

7.5.9 The extent to which the total floorspace needs identified ought to be further subdivided within these areas is beyond the scope of this this study, since it will depend on the phasing of development and its alignment with the delivery of infrastructure. However, when considering the distribution of floorspace, the OPDC will need to take into account the fact that the total quantum allows for 7,500 sqm at Old Oak Station and that the Development Capacity Study is directing the vast majority of jobs to the area around Old Oak station and to the south of the Grand Union Canal. Therefore, there is a case, in terms of the phasing of development and

infrastructure for the OPDC to direct more of the total floorspace to the area around Old Oak station and south of the Grand Union Canal, subject to the necessary policy pre-conditions being satisfied (see below).

7.5.10 Irrespective of the above, modest retail and leisure provision might be appropriate outside the designated centre, particularly in areas anticipated to of high footfall and at key entrances into the Old Oak area. However, it will be important that such uses do not undermine the place-making objectives of the High Street area and therefore the potential for such uses to come forward is addressed in the advice on development management policies below.

7.5.11 As noted above, meanwhile uses may be appropriate in Old Oak to define an early sense of character and place, as well as ensuring that the first few phases of development have the necessary convenience retail to serve its needs. The location of these meanwhile uses may not be on the alignment of the High Street if provided as part of very early phases; this approach is likely to be acceptable, subject to agreeing that they will be temporary uses only as the area establishes itself and the new High Street is developed.

Park Royal

7.5.12 The existing centre in Park Royal already has a retail function, albeit dominated by a large Asda superstore alongside some service facilities (banks and cafes). The floorspace of the Asda is 9,161 sqm gross, while the other town centre uses amount to less than 1,000 sqm. The area is currently designated as a neighbourhood centre within LBE's development plan, albeit it does not have the mix of uses that is expected of such centres (see discussion below). In our view, given the centre status that the area benefits from and the growth in expenditure, it is appropriate to allow for a modest amount of floorspace to be directed to Park Royal.

7.5.13 This new floorspace will serve Park Royal's growing employment population and nearby residential communities, building upon the role Asda plays. The focus of any investment in additional floorspace should be to broaden the mix of uses and deliver public realm improvements to establish the area's intended function as the 'Heart of Park Royal'. Subject to site availability, this floorspace should be accommodated within or on the edge of the existing Neighbourhood centre at the junction of the main routes.

7.5.14 The challenge will be ensuring deliverability of this floorspace, particularly since it is unlikely that Asda, located at the junction of the main routes, will be redeveloped in the short term. This is not to say that it will be not be redeveloped; however, it is considered that designating too much additional floorspace at Park Royal could prejudice such rationalisation and intensification, as well as giving rise to the potential of boarded-up ground floor units that often blight many redevelopment schemes across London. Therefore, the extent of areas designated for potential retail uses should be carefully considered to ensure the potential benefits of additional uses are not diluted.

7.5.15 It is appreciated that Park Royal benefits from the provision of ancillary retail to industrial (including manufacturing) uses. Typically, these are trade counters and similar with the primary use being B-Class. With the increase in 3-D printing and the aspiration for Park Royal to be a demonstrator for the 'Circular Economy' given its local recycling facilities, there is an opportunity for the ancillary retail uses to increase within the area. In land use terms, such uses will remain as part of the B-Class industrial use but will attract some consumer retail expenditure and therefore theoretically could claim a small proportion of the indicative floorspace directed to Park Royal (although it will not be straightforward to quantify). Equally, given the strategic importance of Park Royal as an industrial location, it is likely that inflow expenditure from beyond the OPDC area would account for a large proportion of any retail-related turnover. This is beyond the terms of our assessment.

7.5.16 The extent to which these ancillary retail uses could contribute to place making objectives for Park Royal will depend on their design and layout, since typically they will be attached to industrial buildings and will not include frontage onto the main routes. If development plots

come forward in or around the Neighbourhood centre itself, then policies should be drafted to respond to these opportunities and guide development in terms of servicing arrangements for the ancillary retail floorspace, or frontage for the industrial uses.

7.5.17 The ability of Park Royal to accommodate additional retail floorspace will be subject to the intentions of landowners and the viability of redeveloping the existing retail floorspace to create wider mix of uses. Therefore, it is appropriate to allow for some additional retail floorspace in this area to deliver a broader mix of uses, it should be deliverable. Therefore, indicatively, it is recommended that up to 2,500 sqm gross of the A-Class uses (out of the total 68,400 sqm gross of A Class uses estimated for the OPDC area) and this should be directed to the centre itself, in accordance with the sequential approach and should aim to broaden the uses in the centre.

North Acton

7.5.18 North Acton is not currently designated as a centre, albeit some developments are coming forward with a commercial uses at ground floor. Indeed the OAPF makes provision for up to 700m of active frontage at North Acton. Given the ongoing regeneration and the influx of new population (including student population), in our view there is a clear gap in provision in this area with residents having to travel elsewhere for their day to day needs. At North Acton there is good public transport accessibility and a mandate for regeneration, we suggest that a small amount of the total floorspace need generated is directed to this area to ensure the area benefits from qualitative retail improvements.

7.5.19 Indicatively, this should be approximately 5,000 sqm gross of the A class uses (out of the total 68,400 sqm gross of A Class uses estimated for the OPDC area). This would effectively equate to a neighbourhood centre and PBA's advice is that position of North Acton in the hierarchy is confirmed (see below).

Atlas Road

7.5.20 The area around Atlas Road is not an existing centre. However, there is an existing cluster of retail and town centre uses in the area and there are proposals for these to increase with plans for additional homes and up to 3,500 sqm of additional commercial floorspace, including up to 1,500 sqm of A1 floorspace. It is separated from the planned new Old Oak High Street.

7.5.21 There is additional land suitable for further development and the new residential community being established would not have convenient access retail facilities. Given the site's location, its existing uses and the planned additional residential and retail uses for the area, there is justification to award the area neighbourhood centre status and to allocate some of the planned floorspace.

Summary

7.5.22 For ease of reference, Table 7-2 summarises the recommended distribution of floorspace across the OPDC area by use type and location. This incorporates the floorspace envisaged to come forward as part of the station and adopts the upper threshold set out in Table 7-1[19].

7.5.23 The distribution of the different types of floorspace across the centres should not be regarded as fixed or prescriptive but instead the table below sets out one way in which it could come forward, reflecting the different roles of the centres outlined above. This table includes an estimate of existing A class floorspace, before a potential breakdown of the additional A class

[19] Table 7-1 identifies need for 68,400 sqm; we have rounded this figure slightly to 68,500 sqm for the purposes of distributing the need.

uses is provided. Then a total additional column is provided alongside the total with the existing floorspace.

Table 7-2: Recommended spatial distribution of floorspace (gross, sqm)

	Existing	Additional				Total (with existing)
	Total A Class	A1 retail	A1 service and A2	A3, A4 and A5	Total Additional	
Old Oak[20]	0	27,250	14,000	16,000	57,250	57,250
Park Royal	10,000	500	1,500	1,000	3,000	13,000
North Acton	3,000	2,000	1,750	1,000	4,750	7,750
Atlas Road[21]	300	1,500	1,000	1,000	3,500	3,800
Total	**-**	**31,250**	**18,500**	**19,250**	**68,500**	**-**

7.5.24 Since the need calculations are derived from the additional housing and jobs, the additional floorspace does not take into account the existing floorspace. Additionally, the quantitative exercise does not take into account commitments in the conventional sense (i.e. the turnover is deducted expenditure generated).

7.6 Hierarchy of centres within OPDC area

7.6.1 The NPPF expects a network and hierarchy of centres to be defined (see paragraph 23 of the NPPF). Annex 2 of the glossary makes it clear that town centre or centres *'apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance'*. Therefore, there is no requirement to consider very small parades or local shops, but for the avoidance of doubt, when referring to a 'neighbourhood centre' within this study, is expected that this is a 'centre', akin to a 'local centre', for the purposes of Annex 2 of the NPPF. It will also be necessary, where possible, to define town centre boundaries and frontages. However, in the case of new centres at Old Oak and to a certain degree, North Acton and Atlas Road (albeit some built out floorspace could be designated) this will only be possible once development has come forward.

7.6.2 Since the OPDC area is tightly constrained with no recognised retail function at the moment (other than at Park Royal – which is given neighbourhood centre status within the development plan), the hierarchy needs to respond to the planned development within the area. In our view, the new hierarchy should be based on any planned new centres, subject to any necessary policy control mechanisms. This directs investment to planned locations and ensures that the scale of any town centre uses is appropriate. When considering the hierarchy, it is helpful to recognise the London Plan's (Annex 2) five broad type of town centre classification:

*'**International centres** – London's globally renowned retail destinations with a wide range of high-order comparison and specialist shopping with excellent levels of public transport accessibility.*

***Metropolitan centres** – serve wide catchments which can extend over several boroughs and into parts of the wider South East region. Typically they contain at least 100,000 sq.m of retail,*

[20] Includes 7,500 sqm station floorspace

[21] Additional floorspace aligns with permission 15/0091/FUL with judgement applied to provide a split between non-A1 retail space.

leisure and service floorspace with a significant proportion of high-order comparison goods relative to convenience goods. These centres generally have very good accessibility and significant employment, service and leisure functions.

***Major centres** – typically found in inner and some parts of outer London with a boroughwide catchment. They generally contain over 50,000 sq.m of retail, leisure and service floorspace with a relatively high proportion of comparison goods relative to convenience goods. They may also have significant employment, leisure, service and civic functions.'*

***District centres** – distributed more widely than the Metropolitan and Major centres, providing convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000–50,000 sq.m of retail, leisure and service floorspace. Some District centres have developed specialist shopping functions.*

***Neighbourhood and more local centres** – typically serve a localised catchment often most accessible by walking and cycling and include local parades and small clusters of shops, mostly for convenience goods and other services. They may include a small supermarket (typically up to around 500 sq.m), sub-post office, pharmacy, laundrette and other useful local services. Together with District centres they can play a key role in addressing areas deficient in local retail and other services.'*

7.6.3 We need to consider the planned development in the OPDC area through the lens of these definitions. Therefore, our recommendations in respect of the hierarchy of centres takes into account the definitions, as well as Policy 2,14 and 2.15 of the London Plan, which recognises the ability to designate new centres and the priority given to areas of regeneration.

Old Oak

7.6.4 In our view, there is no current evidence to support a planned International or Metropolitan centre status for Old Oak, nor would a CAZ frontage be appropriate. It is appreciated that there is very significant development planned for the OPDC area, which will generate a sizeable quantum of floorspace: based on our methodology and indicative distribution of floorspace, this would amount to c.68,400 sqm gross A-Class uses by the development's completion, plus additional leisure and cultural uses. However, given the need for Metropolitan centres to have over 100,000 sq m gross floorspace (including a large proportion of high-order comparison floorspace) and have wide catchment, a new Metropolitan centre in this location would not be considered to be complementary with the surrounding town centre network.

7.6.5 Irrespective of the need we have identified to be generated by the development, a centre of Metropolitan status or above in this location would draw trade from the wider West London catchment and, given the existing higher-order centres in the area, may cause a significant adverse impact on the existing network of centres. This would be contrary to the policy guidance set out in the London Plan and the aspirations of the OAPF. Nor does the evidence support this proposition.

7.6.6 Based on the scale of A-Class needs, plus likely cultural and other town centre uses within Old Oak, the scale of floorspace (once completed) would warrant a Major Centre designation. The fact that there is no current centre and the floorspace will take time to come forward (with the final phases of development going beyond the life of the OPDC Local Plan) mean that it will take time for Old Oak's position in the wider town centre hierarchy to be established. It is likely that the function of the centre will evolve as development comes forward. However, in the interests of proper planning and to provide policy certainty, we consider that the Local Plan should set out the intended hierarchy now, subject to policy controls to guide its function and limit its impact.

7.6.7 Setting the planned hierarchy now is beneficial since it allows for the OPDC to manage place-making and regeneration expectations and ensures that the provision of retail facilities is

aligned with the planned number of homes and jobs. It allows for local plans, both within the OPDC area and in the boroughs to plan for the consequences of a new centre.

7.6.8 The impact of the scale of floorspace recommended has been tested; although given the long timeframes being considered, the outcomes need to be treated with a degree of caution. Furthermore, for the avoidance of doubt, planning now for the area to have a designated 'centre' does not mean there will be uncontrolled retail expansion that could adversely impact on the hierarchy of centres. Indeed, to ensure that this is not the case, it is recommended that policies include a series of careful pre-conditions or controls to safeguard against this.

7.6.9 In our view, there are two main approaches that could be adopted for setting a hierarchy of centres in the Old Oak area:

- **Option 1: District Centre plus Neighbourhood/Local Centre(s):** One option is for a 'District centre' to be focused to the north of the canal and encompass the currently defined High Street and canal side in the OAPF with a focus on serving much of the new residential population. A second, smaller Neighbourhood/Local Centre could encompass the area to south of the canal and surrounding Old Oak Common in order to serve the worker and transient population associated with the transport interchange.

- **Option 2: Major Centre to encompass the whole of the area:** this would encompass the entirety of the planned active frontages and clear designation recognising the scale of floorspace that will be delivered in the development. The active frontages are significant at 4.9 km and mean that the area will need careful planning and phasing to ensure proper integration as one Major Centre.

7.6.10 Due to the scale of change envisaged in the Old Oak area, it is quite possible that the floorspace and therefore functional 'centres' comes forward incrementally. This might be a District Centre plus one or more Neighbourhood centres (i.e. Option 1 above). It was recommended at the draft stage of this report to consult upon Option 1 and the consequences considered, since the eventual planning policy approach will be influenced by place-making objectives, ownership constraints, phasing and indeed the likely levels on the site, which may impact on how the centres function and interact with each other.

7.6.11 As per the advice at draft reporting stage, the OPDC has consulted upon these options. Based on the analysis and assessment within this study, as well as the feedback through the consultation exercise, Option 2 is the preferred outcome. The reasons for this conclusion are as follows:

- The major centre designation is consistent with the scale of floorspace needs calculated in this assessment

- There is a clear gap in major centre provision and this type of centre will provide a distinct offer different from other centres in the hierarchy

- This ensures that appropriate investment and occupiers for major centres are directed to the planned new centre, rather than potentially incrementally throughout the remainder of the OPDC area, helping with place making objectives and creating a sense of place for a new community

- Planning for a major centre provides a clear policy message on how the retail floorspace will meet the needs of the development in a sustainable manner.

7.6.12 Irrespective of the above recommendations, the implications of a new centre on the hierarchy should be carefully monitored to ensure that it does not undermine the vitality and viability of existing centres, including planned regeneration initiatives. Specifically the impact of a new major centre on the role of Harlesden will need to be carefully monitored. Further explanation is provided at Section 7.7.

Park Royal

7.6.13 Park Royal already has a designated Neighbourhood centre in the development plan and we have encouraged any new floorspace to be delivered within or adjacent to this centre, consistent with the sequential approach to allocation of needs. It is appreciated that the centre is effectively the existing Asda superstore, albeit this performs an important local function in terms of retail and service facilities. However, arguably it would not fully meet the London Plan definition of a Neighbourhood Centre, due to the lack of choice given the limited number of other shops and services.

7.6.14 In our view, Park Royal requires a designated centre to serve its needs and therefore we consider the Neighbourhood or Local centre designation should be retained for the purposes of Annex 2 of the NPPF and London Plan definitions. This means the centre is protected in retail impact terms and is a sequential priority for investment. If Park Royal did not have a proper designation, new retail and leisure floorspace would have to consider the sequential test and would be directed to other established centres.

North Acton

7.6.15 There is merit in designating a new Neighbourhood centre at North Acton. This designation should be included within the Local Plan.

Atlas Road

7.6.16 There is merit in designating a new Neighbourhood centre at Atlas Road. This designation should be included within the Local Plan.

7.7 Threats and opportunities for the wider hierarchy of centres

7.7.1 The quantum of floorspace proposed within this study is comfortably generated by the planned growth. While it is appreciated that the development will not be self-contained, it is not expected that the retail floorspace will be a 'destination' that competes with the existing hierarchy. Indeed, the spending generated by new residents in this part of London is likely to provide a boost that can help support the turnover of existing centres. However, this will only occur if the centres in question have a clear vision and strategy to effectively respond to opportunities (as is expected by the PPG).

7.7.2 We have considered carefully the network of nearby centres in Section 4 and sought to identify the main characteristics and niches. In our view, if the retail development within the OPDC area is consistent with the hierarchy and the scale of development outlined above, the majority of the centres within the hierarchy will not be adversely affected. Indeed, if we consider retail alone, there are strong centres with different functions across the network; including Shepherd's Bush and Brent Cross as higher-order shopping centres and Wembley providing a designer outlet centre. These centres will no doubt be used by the new residents of the OPDC area. However, simply due to the geography of the development, we do consider that there are potential threats to Harlesden and also Ealing given the improvements to connectivity, as well as some opportunities, which will need careful management.

Threats to Harlesden

7.7.3 Harlesden is a District Centre and, based on our desktop work and site visits, appears to be functioning well in terms of meeting a largely locally-generated retail demand as indicated by the presence of specialist Afro-Caribbean, South American and other independent retailers. There are a limited number of national retailers. Recent improvements to the public realm will go a long way in improving the quality of the town centre. This is in line with the London Plan's designation of Harlesden as a medium growth area capable of taking advantage of regeneration benefits. However, the centre is typical of many in London since it is highly

constrained by its location on a major arterial route and by surrounding residential uses, and is characterised by a large number of smaller units. Furthermore, existing rail lines mean that the current linkages with the likely Old Oak High Street area are poor (pedestrian, cyclists and public transport).

7.7.4 To enable Harlesden to capture regenerative benefits from investment at Old Oak, it is critical for physical and functional linkages to be improved. If the linkages are not improved, then there is unlikely to be any significant benefit to Harlesden from development within the OPDC area and the regeneration aims in the London Plan may not materialise. It also needs to be recognised that major regeneration plans could have wider spill-out effects that result in the demographic structure and retail composition of Harlesden changing overtime. Therefore, it is important to ensure that the benefits of improved linkages are properly captured. When addressing linkages, we need to consider the following points:

- **Type of link:** to understand how Harlesden can capture these benefits, it will be important to carefully consider whether the links are just for cyclists and pedestrians, or will also take into account public transport (buses) and private vehicles.

- **Attractiveness of link:** where pedestrian and cycle links are proposed, the extent to which these are safe and convenient needs to be considered in order to ensure that it is used and the benefits properly captured.

- **Function of link:** this concerns the extent to which the two destinations are complementary, rather than in direct competition. Therefore, it will be important that Harlesden still meets the needs of its own catchment, yet attracting new spending from the Old Oak development.

7.7.5 As explained above, the planned development will generate need for significant additional retail and other town centre uses. It is our judgement that a proportion of these uses should be provided within the OPDC area in order to support the creation of a sustainable community. The impact of this additional floorspace is acceptable, although due to the long term approach a degree of caution must be applied (see policy conditions below). It is recommended that the OPDC should plan for the area to be a Major centre.

7.7.6 The centre's designation is a planning function, rather than any indicator of commercial demand. However, it is expected that the type of Major Centre that will come forward would function at a higher level in the hierarchy than Harlesden and therefore not directly complete with the type of retailers and businesses that currently trade in the centre. Therefore, in our view, Old Oak is capable of trading alongside Harlesden in a complementary manner.

7.7.7 The challenge will be to ensure that Harlesden properly benefits from the development and is distinct from any floorspace at Old Oak. The advice from this study is that the centre should build upon its strengths as a niche retail offer and seize the opportunities delivered from the new developments at Old Oak and Park Royal to enable the centre to benefit from the additional spin-off spending to support its viability. Therefore, where feasible, improved linkages should be achieved in conjunction with committed plans to ensure that the centre is regenerated in line with the London Plan expectations. Therefore, we advise that:

- A working group is established between LBB the OPDC to ensure that the benefits from linkages with Harlesden are fully realised

- Ensure planning policy requires a commitment that planning applications that propose a substantial amount of retail floorspace will deliver an enhancement strategy for Harlesden with LBB in order to maximise benefits for the centre and avoid the risks outlined above and maximise the benefits available.

- Retain a requirement for retail impact to be assessed as part of a planning application for retail floorspace

Threats to Ealing

7.7.8 Ealing is a Metropolitan Centre. The threats from Old Oak are straightforward and concern competition and the extent to which a new centre could provide modern commercially attractive floorspace that directly competes with Ealing. In our view, the scale of floorspace allowed for in this development will limit this risk since it is based on development needs. However, phasing of retail floorspace is rarely entirely consistent with the rate of residential and employment development. This could introduce a risk to Ealing in terms of the competition with its current role and threat to planned investment. To overcome this risk, we advise that:

- Require a vision statement for large developments
- Require impact to be assessed as part of a planning application for retail floorspace

7.8 Advice on Local Plan development management policies

Policy pre-conditions

7.8.1 As explained above, we have advised that a hierarchy be established. However, other than the centre in Park Royal, the planned centres at Old Oak, North Acton and Atlas Road do not currently exist and will be subject to significant change and redevelopment. In the interests of proper planning as explained above, we consider the areas should be awarded centre status now. But it should be recognised that they are not established centres and London Plan policy means that designation at a strategic level will only follow subject to *'capacity analysis, impact assessments, land use and accessibility, planning approvals, town centre health checks and full implementation'*. Planning for these centres now should be combined with a set of policy pre-conditions that need to be satisfied before planning permission should be granted for any significant quantum of retail floorspace that meets the needs set out in this study.

7.8.2 According to the London Plan are a number of hurdles to achieve centre status and we therefore need to consider the following points:

- The potential for unchecked retail growth to draw trade from a wider area as a consequence of awarding centre status to an area and the retail impact on the existing hierarchy of centres
- The likely consequences for Harlesden as the nearest existing designated centre
- The aspirations for a balanced mix of uses providing a vibrant centre that serves the needs of the development
- The scope for piecemeal development that would not properly interact with neighbouring sites and fail to coalesce as a functional centre

7.8.3 To address these points and to allow the OPDC to guide in policy terms the likely retail and leisure development that comes forward, we recommend that policy pre-conditions are introduced that obliges the applicant to address certain tests for retail floorspace to be approved. Four suggested pre-conditions are suggested, along with a trigger for their requirement, its justification and expected contents and the key criteria to be addressed. .

Pre-condition 1: Vision statement:

- Trigger for requirement: over relevant impact threshold (see below)

- Justification and expected contents: in order to allow for greater certainty over the type of retail and leisure development that will come forward and the inter-relationship between uses within the OPDC area, and centres outside, a vision statement will be sought that explain the rationale and intended market profile of the development, including plans for how it will be presented to the market and its long-term management (for example, there might be a single entity managing the asset in a similar way to Covent Garden, Marylebone High Street or Regent Street).

- Key criteria: the statement will include (but not be limited to) evidence on (1) target market, (2) details of unit specification (i.e. size, height, depth), (3) likely mix of retail/non-retail uses (4) examples of comparable tenants the scheme will target (5) planning conditions or obligations on offer from the applicant

Pre-condition 2: Retail impact assessment

- Trigger for requirement: over relevant impact threshold (see below)

- Justification and expected contents: due to the long-term development programme and due to the fact that the centres are not yet established, for those applications that are caught by the relevant threshold, a full retail impact assessment will be provided to address the requirements of paragraph 26 of the NPPF, specifically ensuring that the scale of the development is appropriate within the wider hierarchy of centres. Where necessary, this will need to take into account the cumulative effect of permissions.

- Key criteria: it will assess the likelihood of a significant adverse impact on planning, existing and committed investment within existing centres, and on their vitality and viability, taking into account the health of the existing centres, and the contents of any vision statement that accompanies an application (as per Pre-condition 2). Any mitigation being offered by the applicant should be set out clearly.

Pre-condition 3: Harlesden enhancement strategy

- Trigger for requirement: over relevant impact threshold (see below), and subject to the OPDC being satisfied there might be competition with Harlesden due to the application's location

- Justification and expected contents: for developments that are located in the northern part of the OPDC area and that may compete with Harlesden, applicants should be obliged to provide heads of terms for a potential strategy to ensure that the retail impact of any additional floorspace is adequately addressed and the benefits from linkages are effectively captured

- Key criteria: the detail of an enhancement strategy should be agreed with the OPDC and LBB prior to submission and should include (but not be limited to) (1) details of proposed linkages with Harlesden, including how this will be delivered and timescales (2) where justified, the scale of potential financial contributions to mitigate impact, including details on what these monies ought to be spent on (for example, public realm improvements, shop front initiatives, marketing strategies)

Pre-condition 4: Indicative masterplan

- Trigger for requirement: over relevant impact threshold (see below)

- Justification and expected contents: an indicative masterplan should be provided that includes areas outside the application site to ensure that sufficient consideration is given to place-making objectives across the wider OPDC area. This is to avoid a scenario where different parcels of land to not come forward in a complementary manner

- Key criteria: important for the indicative masterplan to consider areas outside the application site in respect of pedestrian movements as well as the scale of retail uses and place-making objectives. It should demonstrate how the proposed development does not provide an obstacle to the delivery of retail uses on other sites, and should demonstrate how it can deliver a mix of town centre uses alongside supporting infrastructure and connectivity between different areas of land

7.8.4 Designating areas for new centres would effectively negate the need for a sequential test for developments within that centre under paragraph 24 of the NPPF. However, as advised above, since no 'centres' are fully established and recognised in policy, we advise that an assessment of impact under paragraph 26 of the NPPF and the appropriate London Plan policies is still required for retail applications.

7.8.5 Due to the long timescales involved, the requirement for an impact assessment is an appropriate response in the circumstances. Furthermore, consistent with paragraph 24 of the NPPF, unless specifically allocated, any developments of town centre uses (irrespective of size) outside the designated centres will need to address the sequential test. The sequential test will need to consider the four centres that will be designated (namely Old Oak, Park Royal, North Acton and Atlas Road).

7.8.6 The requirement for evidenced submissions should not present an unnecessary burden to developments and will ensure that retail floorspace within the area comes forward in a sustainable manner and complements the existing hierarchy whilst meeting the needs of the development. The OPDC should consult on the thresholds suggested.

7.8.7 While the wording of the London Plan appears to require, inter alia, full implementation before changes to the hierarchy are confirmed, we consider it is appropriate to plan on the basis of new centres in the OPDC area. This approach is recognised as a solution in London Plan Policy 2.15. It will be necessary to agree this approach with the GLA, as the strategic planning authority, and any other relevant planning authorities.

Retail impact thresholds

7.8.8 The NPPF sets the default threshold at 2,500 sqm, meaning that retail, leisure and officer floorspace below this level does not require a formal assessment of impact. The PPG states that in setting a locally appropriate threshold it will be important to consider the:

- scale of proposals relative to town centres
- the existing viability and vitality of town centres
- cumulative effects of recent developments
- whether local town centres are vulnerable
- likely effects of development on any town centre strategy
- impact on any other planned investment

7.8.9 Considering other Boroughs in London, the threshold ranges between 500 sqm (LBB, LBH), 400 sqm (RBKC) and 300 sqm (Wandsworth). PBA recommended that for LBHF, the threshold should be 300 sqm. One of the main drivers for the smaller threshold has been the trend of smaller convenience stores that would normally seek trading floorspace lower than the Sunday Trading Act threshold (280 sqm net). Inevitably, these small stores would compete more readily with local centres. However, in broad terms, higher thresholds are more appropriate for sites competing primarily with larger centres, due to their scale; whereas a

smaller threshold is appropriate where sites are competing with smaller centres. It is much easier to apply a blanket threshold and this is the reason for much lower impact thresholds in some London boroughs.

7.8.10 The circumstances within the OPDC are not equivalent to established London boroughs, due to the very significant scale of development planned in the area, the scale of change and the fact that the retail floorspace coming forward is expected to meet the needs of the development. Furthermore, the level of need identified and the lack of existing centres within the OPDC means that in our judgement it is appropriate to allow for a higher impact threshold than has been adopted in other London boroughs as listed above. Therefore, it is recommended that the OPDC should base its impact threshold on the NPPF default (i.e. 2,500 sqm).

7.8.11 This evidence has assessed the impact of the planned floorspace and found it to be acceptable. However, this evidence does recognise that Harlesden could be vulnerable as a centre close to the boundary of the OPDC area. Irrespective of this point, we consider that it will be most at risk from much larger developments and it is not expected that small developments will compete significantly with Harlesden. Therefore, we remain comfortable that a threshold of 2,500 sqm is appropriate.

7.8.12 The circumstances in the OPDC are also unusual given that there are no established 'centres' (other than Park Royal). Typically, if a centre is identified in planning policies and a boundary drawn (including primary shopping areas), no impact assessment would be required if the site was either within the primary shopping area (for retail uses) or in the town centre boundary (for all other town centre uses). However, as explained above, it is recommended that some policy pre-conditions are applied for the OPDC area to guard against uncontrolled retail expansion. In our judgement, until centres are fully established, the impact of larger schemes within the designated new centres should still be assessed as part of development management. As part of the relevant thresholds put forward, we advise that for large schemes within Old Oak town centre, impact should still be assessed, although given the scale of the recommended floorspace, the impact threshold should be increased to 5,000 sqm gross. For all other areas, the OPDC should adopt the NPPF threshold.

7.8.13 Therefore, the relevant thresholds we suggest are as follows:

- Inside Old Oak 'centre': 5,000 sqm gross or above or retail or leisure uses
- Elsewhere in OPDC area (including inside Park Royal, North Acton or Atlas Road 'centres'): 2,500 sqm gross or above of retail or leisure uses

7.8.14 Inevitably, assessments of impact should be proportionate to the development proposed and it will be necessary for applicants to agree the scope of any assessment at an early stage of any pre-application engagement.

Policies addressing retail outside designated centres

7.8.15 The NPPF explains in paragraph 23 that local authorities should set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres. Within the OPDC area, all sites outside the designated centres will be subject to the sequential test and will need to assess impact if they are above the relevant threshold (see above). However, given the major change expected in the area, it is appropriate for the OPDC to include policies that consider the role of town centre uses outside these areas, particularly as part of a cluster of town centre uses.

7.8.16 When addressing such applications, the OPDC should insist on the necessary sequential test and impact assessment. However, as explained in the NPPG it ought to recognise that certain uses have particular market and locational requirements that will tie the uses to a

specific location. The OPDC should judge applications on a case by case basis, but may wish to introduce specific policies that invite the applicant to make the case as to the locational merits of town centre uses, if they are not within or on the edge of the centres designated in the Plan.

Affordable retail space

7.8.17 Our terms of reference require a consideration of affordable retail space to secure low-cost and affordable retail space. Policy 4.9 of the London Plan requires that '*in considering proposals for large retail developments, the Mayor will, and Boroughs should, consider imposing conditions or seeking contributions through planning obligations where appropriate, feasible and viable, to provide or support affordable shop unit'.* We are not aware of any examples where a contribution has been successfully secured. Other policies and developments have sought to allow for 10% of units to be 'affordable'.

7.8.18 In the case of the OPDC, we recognise the need for a mix of retailers within the planned 'centres'. However, as explained above, Harlesden is anchored by a number of independents and there are potential threats to this centre that will need to be managed and mitigated. Despite this risk, we do not expect that any large retail floorspace will be brought forward based on a business model that relies on covenants from independent retailers. Furthermore, there are place-making reasons as to why a mix of independents and national multiples will improve the vibrancy of the area.

7.8.19 Having regard to London Plan Policy 4.9, it is recognised that local plan policy could seek to introduce a minimum number of independents (which are defined by Experian as retailers with nine outlets or less), or could seek to define a possible 'affordable rent'; such controls would need to be within a Section 106 agreement. However, this approach is untested (to our knowledge) and presents a potentially unnecessary burden on occupation by interfering in commercial terms that will be agreed between a landlord and tenant through the provision of a successful mix of retailers. There is a risk that there would be units provided that would remain unlet in the longer terms, which would adversely impact upon the vitality and viability of a new centre through the blight of boarded up units. Therefore, in the circumstances at Old Oak and Park Royal, we consider that a more effective approach would be to introduce some design/layout requirements and minimum standards that will deliver affordable units within a wider development:

- Ensure that at least 10% of permitted A1 class floorspace is provided within 'small units' (defined as units 80 sq m gross or less, as defined by the London Small Shops Study 2010)
- Ensure that at least 10% of permitted A1 class floorspace is used to sell principally convenience goods (i.e. good and grocery) or is used for principally A1 service floorspace (such as dry cleaners, hairdressers, undertakers/funeral directors, domestic hire shops, travel agents)
- Where feasible and practical, seek to identify primary and secondary frontages, with the latter more suitable to affordable units for independents

7.8.20 These requirements are likely to encourage independent retailers within a development. In our view, these requirements are not onerous and are likely to benefit developers to improve the viability of the retail floorspace provided and the vitality of the new centres being created. They will still allow for a degree of flexibility in developments, given it is a long-term regeneration project.

Design and resilience

7.8.21 Finally, there is a requirement within our terms of reference to provide advice on design and resilience for the new retail floorspace within the OPDC area to support place making and accommodate future trends in retail. There needs to be a critical mass of floorspace in order for the area to be a successful retail and leisure centre in London. But since we are considering needs up to the development's completion and beyond the Local Plan period, there is uncertainty over how the market will behave over such a long period. Therefore, we suggest that policies in the Local Plan allow for flexibility in the retail formats developed. Subject to the above policy caveats, we advise the following for policy across the whole of the OPDC area:

- There should be a recognition that flexible town centre uses are appropriate when applying for permission
- Retail units should allow for double height units, to allow for the installation of mezzanines if retailers require them
- Include a range of unit sizes: from less than 80 sqm (to cover the affordable units) to 1,000 sqm for larger anchor units. If larger stores are to be promoted, a design-led approach will need to be presented to show how the floorspace fits into the wider vision for the OPDC area
- Ensuring the design of retail units, particularly in Park Royal, have sufficient space for servicing and shared servicing arrangements can support the broader objective of creating a Circular Economy

7.9 Monitoring

7.9.1 It will be necessary to carefully monitor the scale of town centre floorspace coming forward in different development plots to ensure that the aggregate amount of floorspace is consistent with the hierarchy adopted. The OPDC should monitor planning permissions for retail floorspace: by type, amount (sqm gross and net), location and retailer (where known); and completions of retail floorspace: by type, amount, location and retailer.

7.9.2 The recommendations set out in this report may need to be adjusted, in the future, due to changing market conditions, demographic changes and the impact of developments elsewhere. They may also need to be adjusted if standard assumptions, in particular those relating to expenditure growth and e-tailing, change. The role of monitoring is crucial in highlighting changes in the assumptions that underpin this study and we recommend that OPDC undertake regular monitoring.

8 Summary

8.1.1 The primary purpose of this study is to provide evidence on the magnitude of need for retail and leisure uses within the OPDC area over the next 20 years as generated by planned development in order to inform the OPDC's Local Plan. PBA have reported to a steering group that includes representatives from the OPDC, GLA and surrounding boroughs.

8.1.2 This report addresses the following matters:

- Identifying the quantum and phasing of types of retail and leisure provision in Old Oak and Park Royal to support the needs of the new resident and worker community in Old Oak and Park Royal and those interchanging within the Old Oak Common HS2, Crossrail and Great Western Main Line station.
- Advising on the potential future designation of existing and new town centres within Old Oak and Park Royal.
- Forming evidence to support Local Plan town centre, retail and leisure policies developed by the OPDC.

8.1.3 The current development plan as it applies to the OPDC area lays the foundations for new town centres to be provided as part of the large-scale comprehensive regeneration of Old Oak and Park Royal. At the heart of this is the principle articulated in the OAPF that the new town centres should meet the needs of the development whilst having regard to the role and function of the existing hierarchy of centres.

8.1.4 The role and function of town centres has changed dramatically over the last 10 years in the face of structural changes brought about by increased competition from online retailers and trend towards increasingly polarised centres. These changes are likely to continue over the course of the OPDC plan period and this will impact on the demand for new retail and leisure floorspace generally and at Old Oak specifically. The locally-formulated policy solution therefore needs to be flexible enough to respond to these changes but still deliver the strategy for the OPDC area i.e. in line with the NPPF, achieve the right balance of retail and leisure provision in each centre to enable it to fulfil its role in meeting the needs of its catchment.

8.1.5 The surrounding network of centres in north and west London comprises a number of large centres, notably Shepherd's Bush, Brent Cross, Wembley and Ealing, where significant investment is planned or is underway. These large centres are supported by a network of smaller, locally significant centres catering primarily to the day-to-day needs of the resident population. Within these existing centres, it is apparent that the Boroughs have responded to the challenges posed to town centres and approached the management of vitality and viability in different ways; either through large-scale regeneration or town centre facilities/asset management.

8.1.6 Looking more widely across London, it is evident that a number of OAs are or will be delivering significantly enhanced or new centres. We have looked specifically at King's Cross, Earl's Court and West Kensington, Elephant and Castle, and Vauxhall Nine Elms Battersea. The key messages from this analysis are:

- Upgrades to key transport interchanges have acted as a catalyst for redevelopment of new homes and jobs.
- In all cases there is recognition that retail development is required to fulfil a localised role, meeting the day to day convenience needs of new workers and residents.

- In many cases large-scale redevelopment also provides an opportunity to improve the retail offer where there are existing gaps in provision (Vauxhall Nine Elms Battersea) or where existing town centres require physical regeneration (Elephant and Castle).

8.1.7 The quantitative analysis undertaken has identified need in the order of 64,100 sqm gross in the period to 2037 arising from a combination of future resident and worker expenditure, as well as inflow expenditure to the OPDC area, primarily driven by the new transport interchange. The impact of this quantum of floorspace on existing centres has been assessed and, given the scale of growth forecast for those centres over the plan period, it is considered that based on current forecasts the impacts of this scale of development will be within the bounds of acceptability, particularly if the opportunity to harness benefits arising from the development in the OPDC area for those existing centres such as Harlesden.

8.1.8 The following hierarchy of centres and spatial distribution of floorspace within the OPDC area is recommended:

- **Major centre: Old Oak**, comprising 57,250 sqm gross A Class floorspace. Within Old Oak town centre it is envisaged that there will be different focuses of activity, namely:
  - **Old Oak Common station**: focused on meeting the needs of future high-density office development workers and interchange passengers within the OPDC area. Town centre uses provided within this part of the centre are anticipated to cater to this transient population and therefore include top-up convenience stores, cafes, bars, restaurants and some high-quality comparison retailers. A proportion of this floorspace will be provided as part of the new Crossrail/HS2 station
  - **Grand Union canal**: A3 and A4 use-focused canal-side food and beverage quarter which has potential to link into anticipated leisure and cultural uses within the OPDC area.
  - **High Street north**: focused on serving the new residential community with the capacity to provide a mix of convenience, comparison and service occupiers in both smaller and larger footprint units to accommodate independent and multiple occupiers. Given the timescale over which residential development expected to come forward, it is anticipated that new development will initially be focused on the new station at Hythe Road with connections to Old Oak Common station established over the longer term.
- **Neighbourhood centres: Park Royal (allow up to 3,000 sqm), North Acton (allow up to 4,750 sqm) and Atlas Road (allow up to 3,500 sqm)**,:
  - **Park Royal**: this is an existing centre but one that is currently not fulfilling its intended function. It is therefore important that greater diversity is introduced into the centre as part of the OPDC development. There is no certainty that the existing Asda store will come forward for redevelopment over the plan period; introducing additional floorspace at Park Royal will increase the potential for this to happen. The retention of the existing designation will ensure that future floorspace is directed to Park Royal; this new floorspace should be focused on meeting day-to-day needs, having particular regard to the increased working population expected within Park Royal over the plan period.
  - **North Acton**: this would be a new centre intended to address a gap in provision and focus activity with new active frontage around the station. As with Park Royal, the types of town centre uses at North Acton should be focused on meeting day-to-day needs but of future residents rather than workers. For these reasons, it is expected new floorspace at North Acton should be focused on small-scale convenience and service uses.

- **Atlas Road**: this would be a new centre intended to address a gap in retail provision in an area earmarked for significant new housing growth that will not be served – on a day to day basis - by the new Old Oak High Street

8.1.9 Given the long-term nature over which the OPDC development is anticipated to come forward and the scale of the development, caution must be exercised in applying the quantitative recommendations over a 20-year plan period. It is vital that appropriate development management policies are included within the new Local Plan to provide the OPDC with the necessary control to shape town centre development.

8.1.10 The recommended development control policies have been prepared in the context of the NPPF and have been formulated in order to meet the London Plan requirements for establishing new town centres. They include: the requirement for applicants to provide vision statements to demonstrate that they are compliant with the overarching town centre objectives for the OPDC area; the preparation of masterplans for phased developments to secure place-making objectives; and the provision of impact assessments for applications that comprise large-scale town centre uses to demonstrate that the effects on the existing hierarchy of centres will be within the bounds of acceptability and, where necessary, provide appropriate mitigation having particular regard to Harlesden.

8.1.11 Finally, it will be necessary to monitor of town centre development within the OPDC area is maintained so that the effects of new development can be fully understood and the recommendations of this report can be adjusted in the future if necessary.

Appendix A Available retail evidence

A.1 Available evidence on retail and leisure capacity

A.1.1 The available evidence on the magnitude of need for retail and leisure floorspace across London, and more specifically for the three boroughs that overlap with the OPDC area, is reviewed in this section. This includes a review of the London-wide evidence prepared by Experian for the GLA in 2013 and specific evidence prepared for LBHF, LBE and LBB.

A.2 Consumer expenditure and comparison floorspace need in London

A.2.1 The GLA commissioned Experian in 2013 to assess consumer expenditure and comparison goods floorspace needs in London. This study provides an update to the previous 2009 retail needs study prepared to inform the then-emerging London Plan. The report assesses the scale and nature of consumer expenditure in London for comparison goods retail from 2011 to 2036.

A.2.2 The retail needs forecast in this report are much reduced compared to the forecasts contained within the 2009 retail needs study. This is a result of reduced domestic spending power and structural retail changes, namely the shift from shop-based retail purchases to online retail. Despite these challenges, London will be insulated from the effects of reduced domestic spending power to some extent by the imported spending power of international tourism and business. London also benefits from a younger, growing, diverse population and a healthy business base that will generate greater levels of retail space needs than much of the UK.

A.2.3 The report forecasts a significant rise in comparison goods retail expenditure in London between 2001 and 2036 from £18.566 billion to £39.202 billion. This expenditure is used to calculate a baseline requirement of 370,000 sqm net additional retail floorspace across London. The baseline floorspace requirement is adjusted under four different scenario's to reflect a number of factors:

- Pipeline scenario – takes account of all retail developments with planning permission or under construction which are phased over time.
- Four nodes scenario - adds in 4 significant nodes of development (Brent Cross; Westfield London; Westfield Stratford and Croydon) and simulates the amount of growth taking into account the relative ease and availability for additional retail space in each centre.
- Eight nodes scenario – adds in 4 extra significant nodes of development in addition to the nodes above (Uxbridge, Kingston upon Thames, Bromley and Romford) and simulates the amount of growth taking into account the relative ease and availability for additional retail space in each centre.
- Quality adjustment scenario – takes account of the pipeline developments then increases the attractiveness of the major centres. This simulates an extension of the change in shopping patterns currently observed where a higher proportion of spend is being made at fewer larger and more attractive shopping centres.

A.2.4 These four scenarios provide a range of comparison floorspace needs for London between 2011 and 2036 distributed between each Borough in both net and gross terms. In this study the gross figure assumes that existing vacant floor space is not filled before making the estimate. The net floorspace requirement by contrast assumes that all existing vacant floorspace is used up before making the estimate. The two scenarios which forecast the greatest and smallest comparison floorspace requirement, rounded to the nearest 100, for each of the OPDC boroughs is set out below:

LBE

- Baseline Scenario: 40 sqm net or 30,400 sqm gross
- Eight Nodes Scenario: -27,300 sqm net or 3,000 sqm gross

LBHF

- Four Nodes Scenario: 71,300 sqm net or 108,300 sqm gross
- Pipeline Scenario: 22,800 sqm net or 59,800 sqm gross

LBB

- Baseline Scenario: -18,900 sqm net or 31,000 sqm gross
- Eight Nodes Scenario: -67,100 sqm net or -17,000 sqm gross

A.2.5 For both LBE and LBB the floorspace requirement is greatest under the baseline scenario and the requirement is lowest under the 8 nodes scenario since all of the nodes are located outside of these Boroughs. For LBHF the floorspace requirement is greatest under the four nodes scenario and smallest under the pipeline scenario. Westfield London, located in Shepherd's Bush, is one of the four nodes of development and has planning permission for a significant extension including 61,840 sqm A1 retail floorspace.

A.3 LB Hammersmith & Fulham Retail Needs Study Update

A.3.1 In 2015 PBA was instructed to provide an updated assessment of retail need for the LBHF, including updating the relevant parts of the 2010 West London Retail Needs Study (see paragraph A.4). There is a degree of overlap between the study area of the LBHFRS retail study needs update (RNSU) and the current RLNS. The table below shows the RNSU study zones with the corresponding RLNS study zones shown in brackets.

Study zone	Geography	Study zone	Geography
1	**Fulham**	**5**	**Chiswick**
2	**Hammersmith**	**6 (27)**	**LB Brent**
3 (3)	**Shepherds Bush**	**7**	**North RBKC**
4 (4)	**Acton**	**8**	**South RBKC**

A.3.2 The study forecasts needs for comparison floorspace from 2015 to 2031 under both a constant and adjusted market share scenario. Under a constant market share scenario there is no Borough-wide need in the comparison sector due to significant commitments to new floorspace at Westfield and Earls Court. Under the adjusted market share scenario the boroughs market share is increased from 26.8% to 30.9%. This results in a modest borough – wide requirement of 6,800 sqm net by 2026 with a higher indicative figure of 26,800 sqm net by 2031.

A.3.3 The study also forecasts needs for convenience floorspace under both a constant and increased market share scenario. Under the constant market share scenario at borough-level there is almost no need for additional floorspace up to 2026 (100 sqm net) and moderate

indicative need up to 2031 (1,200 sqm net). Under the adjusted market share scenario, there is modest need across the study period, as follows:

- 2021: 2,300 sqm net
- 2026: 3,000 sqm net
- 2031: 4,200 sqm net

A.3.4 In the food and drink leisure sector, the study identifies a significant amount of capacity for new Class A3-A5 floorspace; 8,300 sqm gross up to 2021 and 15,000 up to 2026. This should be considered committed food and drink floorspace. Across the borough there is between 1,077 sqm and 41,396 sqm gross of Class A3-A5 floorspace in the development pipeline as a result of flexible planning permissions being granted.

A.4 West London Retail Needs Study Update

A.4.1 In 2009 PBA (trading as Roger Tym & Partners) was commissioned to produce an update to the 2006 Joint West London Retail Needs Study (WLRNS) for LBE, LBHF and the London Borough of Hounslow. The key findings for LBE and LBHF are summarised below.

A.4.2 The quantitative assessment forecasts retail needs for comparison floorspace from 2011-2031 under three different scenarios; scenario A- constant market shares; scenario B- reduced market shares; and, scenario C- aspirational (increased) market shares. For each Borough this methodology produces a range of comparison floorspace needs up to 2031:

- LBE: 90,500-130,769 sqm gross (67,900-98,000sqm net)
- LBHF: 153,800-164,292 sqm gross (115,400-123,219sqm net)

A.4.3 The quantitative assessment also forecasts retail needs for convenience floorspace from 2011-2031 under three scenarios: A - constant market shares and accounts for commitments to new floorspace; B - accounts for overtrading and under trading of existing food stores; and, C - aspirational (increased) market shares. For each borough, this methodology produces a range of convenience floorspace needs up to 2031 based on large store formats and small store formats. The convenience needs calculated for large-store formats up to 2031 are set out below:

- LBE: 10,400-25,800 sqm gross (6,700-16,742 sqm net)
- LBHF: 9,800-25,100 sqm gross (6,300-16,343 sqm net)

A.4.4 The WLRNSU also assesses the need for food and drink uses and specifically A3, A4, A5 uses. The indicative level of quantitative need for A3, A4 and A5 floorspace for each borough is forecast up to 2031:

- LBE: 12,500 sqm gross
- LBHF:10,900 sqm gross

A.5 Brent Retail Needs and Capacity Study Update

A.5.1 In 2008 PBA (trading as Roger Tym & Partners) were commissioned to produce an update to the 2006 Retail Needs and Capacity Study (RNCSU) for LBB.

A.5.2 The quantitative assessment forecasts retail needs for comparison floorspace from 2008 to 2026 under three different scenarios; A - constant market shares; B - reduced market shares;

and C - increased market shares. This methodology produces a range of comparison floorspace needs from 1,100 to 53,900 sqm gross (800–37,700 sqm net) up to 2021.

A.5.3 The quantitative assessment also forecasts retail need for 12,500 sqm gross (8,700 sqm net) additional convenience floorspace over the study period 2008-2026.

Appendix B Network of centres

B.1 Introduction

B.1.1 Understanding existing (and competing) floorspace is an essential baseline exercise for any study of this nature. This appendix sets out the role and function of retail, leisure and other floorspace relating to main town centre uses (as defined in the NPPF) within the OPDC area and surrounding areas. This exercise enables provides insight into what is happening today in terms of land use, function, and vitality and vitality. The analysis includes:

- **Role and function:** high level review of the centre's function, including ranking of centres using Javelin Venuescore rankings and identification of any retail niches
- **Diversity of uses:** analysis of Experian Goad floorspace data using the GLA health check evidence, where available to include a complete picture of the exact quantum of existing floorspace in each centre, broken down by use and vacancy.
- **Accessibility:** review of the accessibility of the centre, particularly in respect of the future improved accessibility at OPDC and the new interchange
- **Investment:** a consideration of any pipeline and key development opportunities to deliver additional retail or leisure floorspace within the centres

B.1.2 Destinations within the OPDC area are reviewed first, before considering the network of centres, as follows:

- Destinations within the ODPC area: **Park Royal, North Acton, Atlas Road and Royale Leisure Park**
- Surrounding network of centres: **Shepherd's Bush, Brent Cross, Ealing, Acton, Harlesden, Wembley, High Street Kensington** and **Portobello Road.**

B.2 Centres within OPDC area

Park Royal

B.2.1 Park Royal is not designated as a centre in the London Plan but is identified as a Neighbourhood Centre in the LBE Core Strategy. Park Royal lies within the Park Royal Opportunity Area and is one of London's key industrial locations. The centre is anchored by a large Asda superstore. The Central Middlesex Hospital is located at edge of the centre. The hospital is the main provider of health services for residents in Brent.

B.2.2 Public transport is adequate though the centre dependent on local bus services. Park Royal Underground Station is located about a mile to the south west of the centre and Harlesden Underground station located about a mile to the north of the centre.

B.2.3 As part of the OPDC, Park Royal is set to undergo a number of changes. According to LBE Core Strategy Policy 3.4, plans include 1,500 new jobs and up to 2,000 office jobs. Core Strategy Policy 3.7 goes on to state that Park Royal Neighbourhood Centre will be promoted and enhanced through the creation of a new square, junction improvements, and the development offices, restaurants and other town centre uses in the surrounding area. New developments in Park Royal include a 99-unit residential care home being developed by Asra Housing on a site opposite Central Middlesex Hospital on Acton Road. Approved plans include 754 sq m of A1/A3 floorspace on the ground floor. The new care home is adjacent to the Victoria Care Centre.

B.2.4 While the Asda superstore effectively provides a number of neighbourhood centre functions, Park Royal suffers in terms of vitality and viability. The current retail offer does not adequately meet local needs. The centre has a Venuescore ranking of 2,306. As regeneration developments come forward, it is anticipated that there will be for the centre to cater to the varying needs of the new residents and office workers

North Acton

B.2.5 North Acton constitutes part of Acton District and is not designated as a centre by the London Plan. North Acton falls with the Old Oak Opportunity Area. The area has relatively good access to public transport. North Acton London Underground station is served by the Central Line and the area is also served by a network of local buses. North Acton is not anchored by any significant retail developments; instead there are a number of small convenience goods retailers located along Victoria Road.

B.2.6 North Acton is set to undergo a number of changes: the OPDC plans 5,000 new homes, 2,000 new jobs and improvements to North Acton station. At the same time, Policy 3.4 of LBE's Core Strategy seeks to:

'redevelop North Acton station and environs with a mix of commercial development and in a setting at Victoria Road with shops, restaurants, cafés and leisure to support the gateway and the wider Park Royal area, and improved bus, cycle and pedestrian facilities and access routes.'

B.2.7 North Acton does not serve a significant role or function at the moment. However, the regeneration of North Acton could raise the profile of the centre making it more locally significant.

Royale Leisure Park

B.2.8 Royale Leisure Park is located on Western Avenue and is a short distance from park Royal Station. The leisure park includes a nine-screen Vue cinema, a gym and a Tenpin Bowling Alley. A number of restaurants are located on the site; these include Subway, Nando's, Burger King, KFC, Pizza Hut and Costa. Royale Leisure Park has a Venuescore rank of 2,146.

B.3 Centres outside the OPDC

Shepherd's Bush

B.3.1 Shepherd's Bush is identified as a Metropolitan Centre in the London Plan hierarchy of centres. The centre consists of the Westfield London Shopping Centre which opened in 2008 and Shepherd's Bush town centre. The town centre is anchored by W12 Centre and Shepherd's Bush Market.

B.3.2 Shepherd's Bush has very good public transport accessibility. Shepherd's Bush station is served by the Central Line, London Overground services to Clapham Junction and Willesden Junction, and Southern train service to Milton Keynes, Watford, Clapham and Croydon. In addition, the Circle and Hammersmith & City lines serve Shepherd's Bush Market station to the west of the centre. Shepherd's Bush is served by an extensive bus network.

B.3.3 Shepherd's Bush has a vacancy rate of 5% (Experian GOAD, November 2012). This is significantly lower than the national average (10.4%) and compares favourably with other Metropolitan centres in London. Venuescore does not amalgamate Shepherd's Bush and Westfield London into one centre (as the London Plan does) but instead separately ranks each centre. As such, Shepherd's Bush has an overall Venuescore rank of 367 while

Westfield London is ranked 25. In the Venuescore mall rankings Westfield London is ranked number 1.

B.3.4 Shepherd's Bush continues to undergo significant changes and a number of development proposals have been put forward for the Shepherd's Bush area. Outline planning permission was granted in September 2014 for the comprehensive redevelopment of the Westfield Shopping Centre. The outline permission includes 61,840 sq m net additional retail floorspace (which will be anchored by a new John Lewis department store), 8,170 sq m of restaurant and café use, 2,065 sq m office use, 3,500 sq m of leisure use, 1,600 sq m of community use, and up to 1,347 residential dwelling units.

B.3.5 Elsewhere in Shepherd's Bush, plans to redevelop Shepherd's Bush Market have gone forward after the Secretary of State confirmed the LBHF's CPO for the market and surrounding area in October 2014. The redevelopment plan will include 212 flats, 6,000 sq m of retail and market space and 4,000 sq m of food and beverage uses.

B.3.6 Outside the centre, the redevelopment of the Television Centre in White City, located to the north of Shepherd's Bush, includes additional retail provision. While the scheme is located outside Shepherd's Bush town centre boundary, it is part of the White City Opportunity Area and includes up to 5,825 sqm of A1 to A4 retail floorspace, of which 1,726 sqm is allocated for A1 use. In addition to the retail and leisure uses, the scheme also includes residential uses, a members club, a hotel, television studios, offices, a gym and a cinema.

B.3.7 Shepherd's Bush appears to be performing well in terms of viability and vitality. The London Plan identifies a medium growth potential for the centre with opportunity to capitalise on regeneration activity taking place within the centre and the wider area. Its position as a Metropolitan centre is set to be augmented by a number of large regeneration projects including the White City regeneration scheme and the redevelopment of the BBC's Television Centre, as well as the expansion of Westfield London. These will boost Shepherd's Bush's residential population and significantly improved retail offer. As a result the GLA, in the London Plan has identified the potential to reclassify Shepherd's Bush as an International Centre over the course of the plan period.

Brent Cross

B.3.8 Brent Cross is designated as a Regional Shopping Centre in the London Plan, which also designates Cricklewood/Brent Cross as an Opportunity Area. Brent Cross is an out-of-town shopping destination and is anchored by John Lewis and Fenwick department stores.

B.3.9 The centre is fairly accessible by public transport with a number of bus routes serving the shopping centre. Stations closest to Brent Cross are Brent Cross Underground station which is served by the Northern line and Hendon station which is served by Thameslink. Because it is an out-of-centre retail location, most shoppers access it by private car, making use of the centre's extensive free parking. Similarly, the centre's location on the strategic highway network makes it easily accessible to shoppers from across the region further reinforcing the car dependence.

B.3.10 Brent Cross Shopping Centre has a vacancy rate of 2% (Experian GOAD, November 2012). This low vacancy rate compares favourably against other centres in London and the vacancy rate is far below the national average. Brent Cross is ranked 17th in the Venuescore mall ranking. This is behind two newer London shopping centres: Westfield London (ranked number 1) and Westfield Stratford City (ranked number 3).

B.3.11 As a designated Opportunity Area, there are significant plans to redevelop Brent Cross into a new town centre. Outline planning permission was granted by the LBB in October 2010, with a subsequent Section 73 permission was granted in July 2014. The development plans allocates 7,500 new homes, a 55,000 sq m extension to the Shopping Centre, a new railway station, improvements to the local highway network, a new pedestrian bridge spanning the

North Circular Road, three rebuilt primary schools and improved parks and playing fields. The ambitious plans are set to be developed over a 20-year period.

B.3.12 Brent Cross continues to perform well as a regional shopping centre in terms of vitality and viability. Plans are being brought forward to transform the shopping centre into a new town centre and expand the current shopping offer will further improve the centre's position within the London retail hierarchy while widening the centre's catchment area. A new train station and improved road access to the centre will bolster Brent Cross's regional position. The London Plan indicates that there is potential to reclassify Brent Cross as a Metropolitan centre over the course of the plan period.

Ealing

B.3.13 Ealing is identified as a Metropolitan Centre in the London Plan. The centre consists of two main shopping areas: Ealing Broadway (including the Arcadia Centre and Ealing Broadway Centre) and West Ealing.

B.3.14 The centre is well served by public transport. Ealing Broadway London Underground station is served by the District and Central lines. There are also mainline rail services to Paddington and Heathrow Airport. The station is also being upgraded for Crossrail with services set to commence in 2018. Train services to Paddington and Heathrow currently call at West Ealing. As with Ealing Broadway, plans to upgrade West Ealing station for Crossrail have been approved with services planned to start in 2018.

B.3.15 Ealing has a vacancy rate of 12% which is higher than most Metropolitan centres in London with the exceptions of Croydon and Ilford. Ealing has a Venuescore rank of 119.

B.3.16 The London Plan has identified Ealing as having medium growth potential. The former Empire cinema is the most significant development site in the centre. Since it closed in 2008, there centre has been left without a cinema. While demolition works commenced on the site in 2009, construction work has since stalled. In 2013 the LBE selected Lend Lease as the developer to bring the scheme forward. Lend Lease submitted an application a 2,503 sq m cinema (including 900 sq m of other leisure space), up to 4,935 sq m of mixed commercial floorspace and up to 161 dwellings. Permission was granted in July 2014; however, LBE have yet to have the CPO confirmed.

B.3.17 Other development sites include 9-42 The Broadway, which would include a new pedestrian rote between Ealing Broadway station and The Broadway lined with shops, cafes and boutiques and 200 homes. This would supplement redevelopment work that has taken place at the Arcadia Shopping Centre which includes a new Morrisons supermarket, TK Maxx and a McDonald's restaurant.

B.3.18 There are also plans to redevelop Ealing Broadway Shopping Centre. The redevelopment permission (granted 2015) includes a new town square and public plaza, refurbishment and upgrading of the shop units, 55 new homes and refurbishment of International House to provide high-quality office space.

B.3.19 Overall, Ealing appears to be doing well in terms of vitality and viability. The redevelopment of its retail offer will further strengthen the centre's position in the wider West London retail hierarchy.

Harlesden

B.3.20 Harlesden is classified as a District Centre in the London Plan. The centre is based around two principal streets: the High Street and Craven Park Road.

B.3.21 Harlesden is fairly accessible by public transport with a number of bus routes serving the centre. Both Harlesden and Willesden Junction stations are a short walk from the Harlesden District Centre. They are both served by the London Underground (Bakerloo line) and Overground.

B.3.22 Harlesden is geared to serving the day-to-day needs of the local community and has a high proportion of independent retailers. The vacancy rate in the centre is 11% which indicates that the centre is fairly successful when compared with other District centres around London. The centre has a Venuescore rank of 1,021 reflecting the low proportion of national multiple retailers present in Harlesden. Similarly, retailer requirements for Harlesden are also low with Aldi being the most notable retailer showing interest in the centre.

B.3.23 There are no significant development plans proposed for Harlesden. LBB recently completed a series of public realm improvements to the centre as a way of improving the shopping environment. Improvements include the semi-pedestrianisation of the High Street and a new traffic circulation system was put in place. Wider pavements could allow a variety of new town centre uses such as pavement cafes and regular markets that would improve the perception of the town centre; however, there is no certainty that these will come forward at present.

B.3.24 Harlesden appears to be functioning well in terms of meeting a largely locally-generated retail demand as indicated by the presence of specialist Afro-Caribbean and other independent retailers. Improvements to the public realm will go some way to improve the quality of the town centre. This is in line with the London Plan designation of Harlesden as a medium growth area capable of taking advantage of regeneration benefits. .

Wembley

B.3.25 Wembley is identified as a Major Centre in the London Plan and is the civic and administrative centre of the LBB. The London Plan also identifies Wembley as an opportunity area. Wembley is well known for its sporting and entertainment attractions. The centre is anchored by Wembley Central, a mixed-use retail and housing development and the London Designer Outlet. The Wembley Area Action Plan (2015) extended Wembley's town centre boundary northwards and now adjoins the Wembley Park town centre boundary.

B.3.26 Wembley is well served by public transport. Wembley Central Station is located within the centre and is served by the London Overground and main line London Midlands and Southern rain services, in addition to a number of bus routes.

B.3.27 The centre has a vacancy rate of 11% (Experian GOAD, November 2012) which is about the same level as the national average. Wembley has a Venuescore rank of 494. Venuescore ranks the London Designer Centre separately. The centre is ranked 456.

B.3.28 Wembley is identified as an opportunity area in the London Plan. Development is focused around Wembley Park and includes a new theatre, a new 800-room student accommodation scheme, a 1,000 home housing scheme bordering Wembley Park, a second 699-bed student accommodation scheme, a new home for the French Lycée for 1,100 students.

B.3.29 The opening of the London Designer Outlet and Wembley Central has improved the centre's retail profile significantly. The centre appears to be doing fairly well in terms of viability and vitality which is set to improve as regeneration schemes come forward. The London Plan's policy direction for Wembley identifies the centre as a high growth area with regeneration potential.

Kensington High Street

B.3.30 Kensington High Street is identified as a Major Centre in the London Plan. The centre is anchored by Whole Foods and Marks & Spencer. The centre includes a mix of high street

and specialist, independent retailers including concentrations of travel agents, art galleries and antique shops.

B.3.31 Kensington High Street is well connected in terms of public transport. Kensington High Street Station is served by the Circle and District lines of the London underground. A number of buses also serve the area.

B.3.32 The vacancy rate in the centre is 6% (Experian GOAD, November 2012) which is amongst the lowest vacancy rates amongst London's Major Centres.

B.3.33 Recent investment in a high-quality public realm by the Council has improved the pedestrian experience as well as the setting of the historic buildings along the street. There ae no major retail developments currently planned for the centre. RBKC's Core Strategy (2010) states that the vision for Kensington High Street is to:

'redefine its role to ensure that it distinguishes its offer from Westfield, Knightsbridge and King's Road.'

B.3.34 Kensington High Street appears to be doing well in terms of viability and vitality. Its low vacancy rate indicates that retailer requirements for shop units in the area are high. The centre also continues to fulfil its retail niche making it a popular shopping destination for locals and visitors to London. The London Plan identifies medium growth potential for the centre over the course of the plan period.

Southall

B.3.35 Southall is classified as a Major Centre in the London Plan and the LBE Core Strategy and is a designated opportunity area in the London Plan. The centre is divided into two parts - the Broadway/ South Road to the north of the railway line and The Green/ King Street to the South of the railway line.

B.3.36 Southall has adequate access to public transport. Southall Station is served by Heathrow Connect from London Paddington Station to Heathrow and First Great Western train services from London Paddington to Reading. Southall station is set to be upgraded for Crossrail, with services set to begin in 2019. A number of local buses also serve the area.

B.3.37 The vacancy rate in Southall is 7% (Experian Goad, November 2012) which is below the average vacancy rate for major centres in London. Southall has a Venuescore rank of 1,021. This relatively low rank reflects the high proportion of independent retailers in the centre.

B.3.38 LBE has undertaken improvement works to Southall including improvements to the public realm and road layout around the Broadway. As a designated Opportunity Area, there are a number of regeneration proposals for the centre. The Southall Opportunity Area Planning framework makes provision for 6,000 new jobs and 3,000 new jobs. The most significant development proposal is the Southall Gasworks development to the South West of the town centre. The redevelopment of the decommissioned gasworks was granted outline planning permission by the Mayor of London in March 2010. The mixed use scheme includes up to 3,750 residential units, 14,200 sqm of comparison retail floorspace, 5,850 sqm of convenience floorspace and 1,750 of A3-A5 floorspace. The scheme also includes a hotel, a cinema and health and education facilities. In anticipation of the development, LBE extended Southall's town centre boundary westwards to include the retail and leisure uses on the site.

B.3.39 Southall appears to be performing well in terms of viability and vitality. The current retail offer which consists of specialist shops of regional significance, attract people from a wide catchment and continue to contribute to Southall's unique draw. However, there are clear qualitative gaps in Southall's comparison shopping offer. The Southall Gasworks development

is set to further diversify the retail offer in the centre. The London Plan designates a medium policy direction for Southall with potential to benefit from regeneration.

Portobello Road

B.3.40 Portobello Road is identified as a District Centre in the London Plan. The RBKC Core Strategy identifies Portobello Road as a Special District Centre and describes it as:

'unique, with its specialist antiques sector, its world famous street market and some 300 retail units still largely in the hands of independent operators or small local chains…'

B.3.41 The centre consists of two distinct areas: Portobello Road and Westbourne Grove, which are colloquially referred to a Notting Hill. The centre is renowned for its high proportion of independent, specialist shops and has managed to retain its 'off-beat' character. The Portobello Road market, which takes place on Fridays and Saturdays, is extremely popular. The Market is divided into three sections selling antiques and bric-a-brac, fruit and vegetables and a flea market.

B.3.42 The vacancy rate on Portobello Road is 14% (Experian GOAD, November 2012) which is higher than the national average. In recent years traditional antique dealers have found it difficult to pay the higher rents in the area. This has had an impact on the overall character of the street and is a source of concern for RBKC. In this regard there does not seem to be any demand for floorspace in the centre from national multiple retailers in the centre with only Costa requiring floorspace. Portobello Road has a Venuescore rank of 388.

B.3.43 Westbourne Road has a significantly lower vacancy rate at 6% (Experian GOAD, November 2012). Westbourne Road is noted for its high-end fashion retailing and has a higher proportion of national multiple retailers. There are a number if requirements in Westbourne Grove, mostly in the food and service sector.

B.3.44 There are no major redevelopment plans proposed in the area with the RBKC looking to support the various markets and antique retailers within the centre. As such a policy of actively managing Portobello Road has been adopted (Core Strategy Policy CP7). The policy seeks to:

'Ensure the long term success of Portobello Road, with its antiques and street market, and Notting Hill as unique local and international centres by promoting their retail character and supporting small format retail units, more suitable for independent businesses and antiques arcades, and by improving wayfinding and access.'

B.3.45 There is a proposal by the Westway Trust to redevelop the part of Portobello Market (bordered by Portobello Road and the Westway) as part of its Portobello Village development. The proposed development calls for the construction of a landmark market building, public realm improvements, flexible workspaces and cultural spaces.

B.3.46 Portobello Road continues to perform adequately in terms of viability and vitality. Despite the area benefitting from a high number of visitors during over the weekend, traditional retailing in the area has continued to suffer due to high rents and changing consumer taste. The London Plan identifies Portobello Road as having medium growth potential.

Willesden Green

B.3.47 Willesden Green is identified as a District Centre in the London Plan and the LBB Core Strategy. The centre is made up of Walm Lane and Willesden High Road. The centre has good accessibility to public transport. Willesden Green station is served by the Jubilee line and is well served by a number of bus routes.

B.3.48 The vacancy rate for the centre is 8% (Experian GOAD, November 2012). This is around the average vacancy rate for District centres in London, though Willesden Green does appear to be performing comparatively better than a number of centres including Harlesden. Harlesden has a Venuescore rank of 1,361 indicating that the centre has a high proportion of independent retailers.

B.3.49 There are no significant regeneration schemes planned for Willesden. The LBB has taken the approach to actively manage the centre in order to boost the centre's vitality. A new library and cultural centre has recently been completed within the town centre which is expected to draw further footfall to the town centre.

B.3.50 Willesden appears to be performing relatively well as a District centre. Like Harlesden, Willesden Green caters to the day-to-day needs of a largely local population. Improvements to shop fronts and the public realm could further boost the centre's vitality. The London Plan identifies Willesden Green as a centre with medium growth potential.

Acton

B.3.51 Acton is identified as a District Centre in the London Plan and the LBE Core Strategy. The London Plan has identified Acton as having medium growth potential with the capacity to use existing capacity for regeneration.

B.3.52 The centre is anchored by a Morrisons supermarket, located on King Street. Acton is well served by public transport: nearby rail and Underground stations include Acton Town (Circle, District, Hammersmith & City and Piccadilly Lines), as well as South Acton and Acton Central. Both these are served by the London Overground. In addition, a number of bus routes serve the centre.

B.3.53 Acton has a vacancy rate of 13% (Experian Goad, 2012) which is slightly higher than the average for District Centres in London. The centre has Venuescore rank of 746.

B.3.54 A number of regeneration projects have been undertaken to revitalise Acton town centre. Since 2009, LBB has undertaken a number of public realm improvements. The most significant regeneration project within the town centre is the Oaks Shopping Centre redevelopment. The proposal submitted by the Acton Regeneration Company Ltd was granted planning permission in April 2014. The scheme includes a new foodstore (4,879 sq m), four new and six refurbished retail units, 142 residential units and the provision of two pedestrian accesses from the High Street. Elsewhere in the centre, the refurbished Town Hall offers an improved leisure centre, library and other civic functions that seek to attract footfall to the town centre.

B.3.55 As with other District centres, Acton primarily caters for the day-to-day needs of the residents. However, there is scope to strengthen the centre's offer. The improvement to the town centre's environmental quality as well as the improved leisure and shopping offer will help to elevate the centre's position in the retail hierarchy.

Appendix C Case studies

C.1 Introduction

C.1.1 In this section we review a number of large-scale schemes around London. These developments are expected to significantly improve the retail offer and strengthen their market positions. We also look at "pop-up" intermediate retail developments in London and undertake a review of affordable retail space policies.

C.2 Opportunity Areas

C.2.1 A number of the case study schemes reviewed are identified as OAs in the London Plan. OAs are typically brownfield sites with capacity to accommodate large-scale developments and on average seek to create more than 5,000 jobs and deliver at least 2,500 homes. Detailed planning guidance has been prepared for each OA outlined below, contained within area specific Opportunity Area Planning Frameworks (OAPFs).

C.2.2 Retail uses can also play an important role in creating a sense of identity within OA sites, although there are differing approaches to retail across OAs. The different approaches to the provision of retail facilities are largely determined by the level and quality of existing retail provision in the local area. Where there are existing deficiencies in retail and town centre provision, the OA development will need to address this. In areas well served by existing retailers the aim will be to meet the day-to-day needs of new residential and working communities.

C.2.3 The table below summarises the indicative job and housing needs targets and quantum of planned/committed A1-A5 retail floorspace of the ODPC area and other selected OAs.

Opportunity Area	No. of Jobs	No. of Homes	Retail (sqm)
Old Oak and Park Royal	55,000	24,000	
King's Cross	25,000	1,900	20,000
Waterloo	15,000	1,500	36,000
Earl's Court	10,000	7,500	28,000
Vauxhall Nine Elms, Battersea	25,000	20,000	65,000
Elephant and Castle	5,000	2,900	10,000
Wembley	11,000	11,500	30,000
Royal Docks and Beckton Waterfront	6,000	11,000	4,320

Source: London Plan (2015). Note: the retail floorspace figure quoted for Wembley is over and above that granted up to July 2010 and the figure quoted for Royal Docks and Beckton Waterfront is for the Silvertown Quays development.

King's Cross

C.2.4 King's Cross OA is a 54 hectare site bordered by York Way and Euston Road. Regeneration is focused around the refurbishment and extension of King's Cross and St Pancras mainline stations, 25,000 new jobs, up to 1,900 new homes and a new campus for the University of the Arts London (UAL).

C.2.5 Core Strategy Policy CS7 promotes the distribution of 20,000 sqm net retail space at King's Cross. The Council's retail hierarchy seeks to direct retail development to King's Cross/ St Pancras in the first instance.

C.2.6 The King's Cross Opportunity Area Planning and Development Brief (OAPDB), prepared in 2004 identified gaps in the retail offer in the area and, more specifically, a lack of local modern convenience shops. The brief identified an opportunity to attract a wider clientele to the area by offering a diverse retail and leisure offer. The OAPDB states that:

'New development should meet its needs for shopping, conveniently located for the whole development area and nearby communities, providing in particular varied retail activities appropriately located across the Area and the Triangle, allowing residents, visitors and workers easy access to a range of shops and local services and contributing to a vibrant and rich streetscape.'

King's Cross station



C.2.7 The OAPDB also identifies an opportunity to establish food and drink and entertainment uses in the OA benefitting from the upgraded transport connections.

C.2.8 Whilst the King's Cross OA is part of the CAZ, the OAPDB states that retail developments in the area should not cause unacceptable harm to the viability and vitality of other centres in Camden, Islington and the surrounding boroughs.

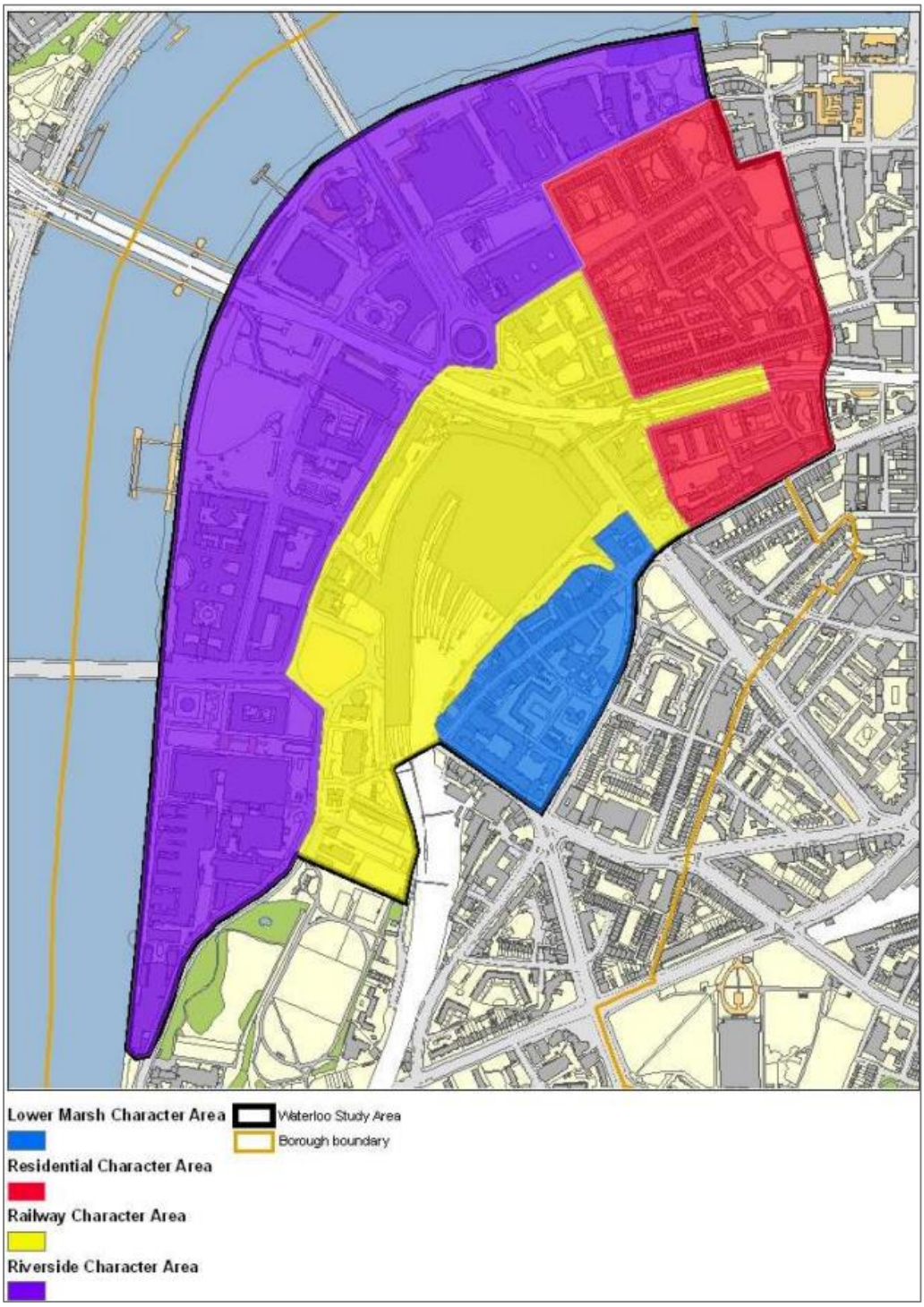
Waterloo

C.2.9 The London Plan identifies Waterloo as an OA with indicative plans to provide an additional 15,000 jobs and 1,500 homes with a 'Strategic Cultural Area' designation along the South Bank. Lower Marsh and The Cut are identified as CAZ frontage to provide the main shopping area for Waterloo.

C.2.10 The Waterloo OAPF divides the OA into a series of charterer areas. The development of new retail facilities is primarily focused around Waterloo Station and sites in the north of the Opportunity Area where development of shops at street level should reinforce links Lower

Marsh. Network Rail completed the first phase of the Waterloo Station redevelopment including the addition of 2,323 sqm retail floorspace. Lower Marsh is identified to retain its District Centre status and function providing for local needs with independent retailing, cultural and leisure uses.

Waterloo OAPF character areas



C.2.11 Further developments set to come forward include Elizabeth House and the Shell Centre. Planning permission was granted for the redevelopment of Elizabeth House in 2015 which allows for 1,500 sqm flexible A1-A5 retail floorspace, offices and 142 homes. The redevelopment of the Shell Centre, which includes approximately 8,000-9,500 sqm net retail

floorspace and 3,000-6,000 sqm net restaurant and café uses, was approved in June 2014 following a call-in inquiry.

Shell Centre



Earl's Court and West Kensington

C.2.12 The Earl's Court and West Kensington OA is a 37.2 ha site spanning two boroughs: RBKC and LBHF. The London Plan seeks to provide up to 7,500 new homes and 10,000 jobs and a new High Street.

C.2.13 The Earl's Court and West Kensington Opportunity Area Joint Supplementary Planning Document (2012) sets a number of key principles for the retail strategy as follows:

- RS1: Comparison retail demand generated by the new development should be accommodated within existing surrounding town centres. Any comparison retail that cannot be accommodated within existing surrounding town centres should primarily be provided along North End Road, as an extension to Fulham town centre.
- RS2: Retail to meet the day-to-day needs of residents and workers should be accommodated within and next to Fulham town centre; within and next to North End Road (West Kensington), key Local Centre and around public transport hubs and a new centre within the OA.
- RS4: The provision of retail floorspace should reflect the phasing of the development and be related to the day to day needs of those living and working in the OA at each phase.
- RS7: A number of small units will be secured as affordable shops to provide accommodation for retailers deemed essential for a good retail offer, but that are not able to afford full rents.

Earl's Court



C.2.14 Outline planning permission for the redevelopment of the Earl's Court Exhibition Centre and the surrounding area was granted in November 2013. The scheme includes the demolition and comprehensive redevelopment of the exhibition centre and the regeneration of the West Kensington and Gibbs Green Estates. The outline permission (2011/02001/OUT) includes approximately 6,775 new homes, office floorspace, 28,000 sqm gross retail floorspace, a hotel and 13,000 sqm gross floorspace for leisure uses.

Vauxhall Nine Elms Battersea

C.2.15 Vauxhall Nine Elms Battersea OA is a mixed-use development site is identified to provide 20,000 new homes and 25,000 jobs as well a new CAZ frontage allocation. The regeneration scheme includes the redevelopment of the Battersea Power Station and the development of a new home for the American Embassy.

C.2.16 The Vauxhall Nine Elms Battersea OAPF recognises an under provision of retail uses within a 2km radius. Approved plans include approximately 65,000 sqm gross retail, food and drink uses alongside 6,000 sqm of leisure floorspace at Battersea Power Station as part of a new CAZ frontage. The OAPF also identified the opportunity to provide about 6,000 sqm of additional CAZ retail frontage at Vauxhall to form a focal point of the area's redevelopment.

Vauxhall Nine Elms



Elephant and Castle

C.2.17 The Elephant and Castle OAPF aims to create a new major town centre by providing up to 45,000 sqm net retail floorspace. The Elephant and Castle Supplementary Planning Document (2012) outlines the retail strategy. Policy SPD1 'Shopping' seeks to consolidate Elephant and Castle and Walworth Road as a major town centre by:

- Redeveloping or remodelling Elephant and Castle Shopping Centre to support larger anchor tenants and promote a wider mix of retail uses;
- Provide strong links between the shopping centre and Walworth Road; and,
- Large retail developments over 1,000 sq m should contribute to a vibrant range of retail uses and provide a range of affordable retail units. The council will require, through planning conditions or Section 106 planning obligations at least 10% (GIA) affordable retail floorspace in new retail developments.

8.1.12 The Heygate Estate regeneration scheme includes demolition and the construction of 3,000 homes alongside 10,000 sqm of A1-A5 retail floorspace and new commercial floorspace accommodating 6,000 new jobs.

8.1.13 In terms of retail provision, the Elephant Road scheme will redevelop the Elephant and Castle Shopping Centre and also create a new shopping street with up to 50 retail units. Phase 1 includes 73 new homes and 237 student units complemented by a new Sainsbury's supermarket and enhanced leisure space. The site is located adjacent the railway station and the development is expected to be delivered in spring 2016.

Proposed Elephant and Castle Town Centre Masterplan



C.2.18 The objective of Phase 2 of the Elephant Road scheme is to integrate the new town centre with other developments in the regeneration area. Developments will include the redevelopment of Elephant and Castle Shopping Centre, new leisure opportunities and a new campus for London College of Communication alongside a new Northern line tube entrance and ticket hall. Draft plans for the redevelopment of Elephant and Castle Town Centre underwent public consultation between in 2015/2016. The draft scheme aims to redevelop Elephant and Castle Shopping Centre to create an open town centre with enhanced public spaces and the proposed layout includes:

- Convenience shops at ground level connected to the tube station.
- High street shops on the first floor, including a mix of small and large shops.
- New restaurants and leisure on the second floor.

C.2.19 The new retail floorspace is aimed at serving the day-to-day needs of the local community as well as creating a new shopping destination to attract shoppers from the wider catchment area. The redevelopment aims to improve the current retail offer and environment which is geared to the lower end of the market with the existing shopping environment being of poor quality.

Wembley

C.2.20 The Wembley OA currently includes two town centres: Wembley town centre to the south west allocated as a Major Centre and Wembley Park to the north allocated a District Centre in the London Plan. The Wembley Area Action Plan proposes the development of an additional 30,000 sqm net retail floorspace above that granted planning consent up to July 2010.

C.2.21 Wembley is allocated as a Major centre and has been recently expanded following the opening of the London Designer Outlet which provides 16,477sqm of A1 retail floorspace across 70 shops, as well as 15 restaurants and a nine-screen cinema.

C.2.22 The LBB Core Strategy, adopted in 2010, extends the defined town centre boundary of Wembley north east towards the stadium.

London Designer Outlet



C.2.23 In September 2011, planning permission was granted for an expansion of Wembley town centre including between 17,000 and 30,000sqm of A1-A5 uses (10/3032). The application includes the development of a new retail high street set back from Olympic Way with a new anchor store and a number of smaller/flexible retail units. The new high street will connect Wembley town centre in the south with Wembley Park to the north.

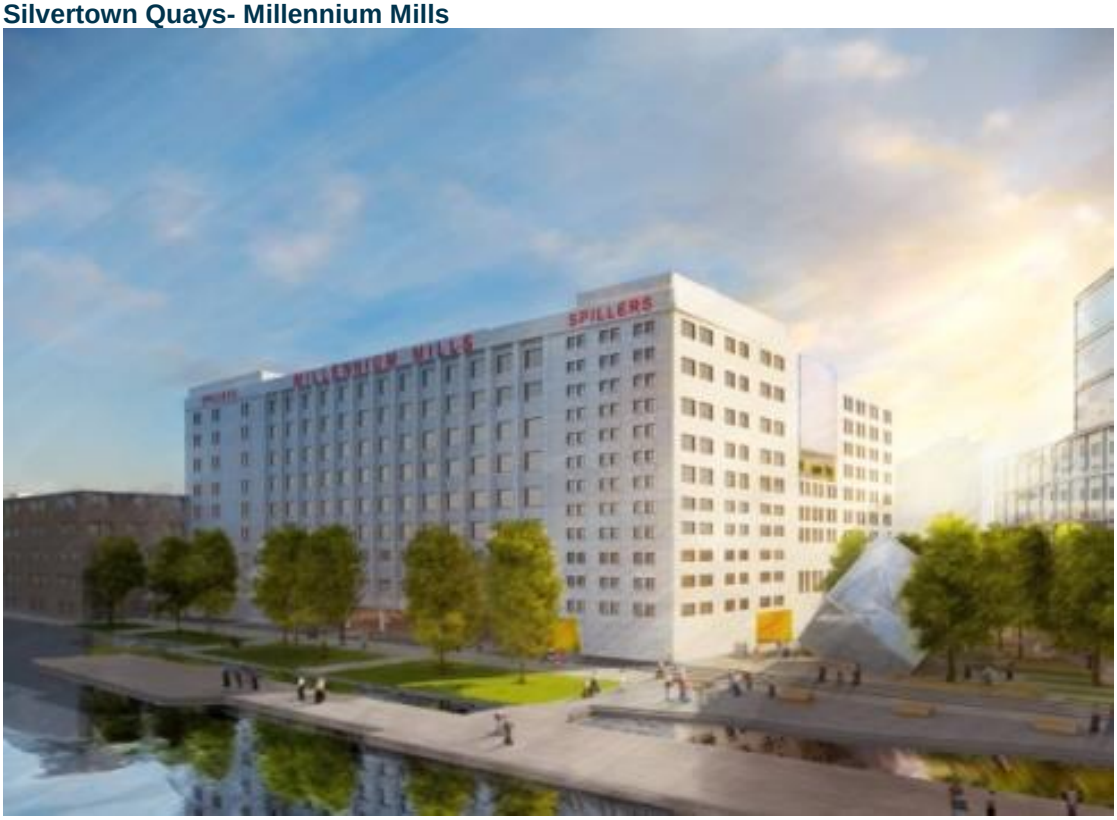
Royal Docks and Beckton Waterfront

8.1.1 The Royal Docks and Beckton Waterfront OA extends 1,100 hectares and includes three major regeneration areas: Silvertown Quays, Royal Albert Dock and Royal Albert Basin. The main objective for regeneration across the OA is to drive business related growth capitalising on planned infrastructure improvements including the new Custom House Crossrail station and London City Airport, and the success of ExCel centre.

8.1.2 LB Newham granted outline planning permission for the redevelopment of Silvertown Quays in April 2015 (14/01605/OUT).The proposed redevelopment includes 4,930 residential units, 4,320 sqm of A1/A2 retail, and 5,570 sqm of A3/A4 food and drink outlets alongside 7,600 sqm of flexible retail space. The proposals also include 'Brand Buildings' which provide space for global brands to showcase products through demonstrations, exhibitions, research and development, workshops and display. These buildings incorporate elements of A1, B2 and B8 uses and as such have been classified as Sui Generis. Additionally, 44,500 sqm of 'Brand-related' retail floorspace is also included to enable brands to provide some associated retail accommodation.

8.1.3 A pedestrian foot bridge across the Royal Victoria Dock to connect up with Custom House Cross Rail Station is proposed as a separate planning application.

Silvertown Quays- Millennium Mills



C.3 Other planned regeneration

Brentford Waterside

C.3.1 Brentford Waterside is a 4.8 hectare development site bound by Brentford High Street to the North and the Grand Union Canal to the South. A hybrid planning permission was granted on 27th November 2014 (00607/BA/P2) for up to 876 residential units and 11,821sqm of commercial floorspace including 14,503 sqm gross A1-A5 retail floorspace.

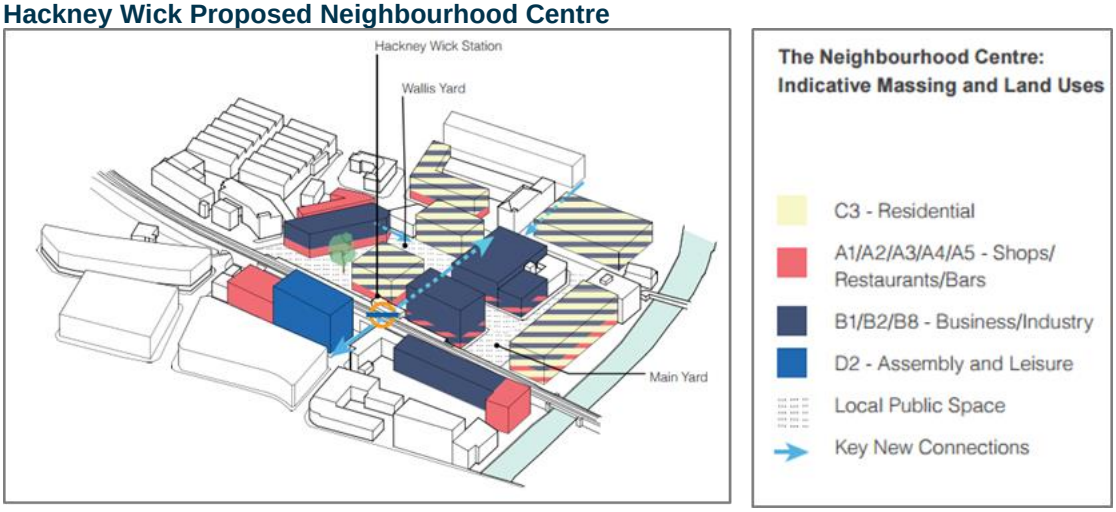
Brentford Waterside Indicative Masterplan Layout



Hackney Wick

C.3.2 The Hackney Wick regeneration seeks to capitalise on the areas creative and tech industries and to build on its Olympic Legacy. It seeks to deliver a new neighbourhood centre and alongside improvements to the London Overground station and a comprehensive redevelopment of the area surrounding the station with 800 new homes, cafes, shops and a new multi-use venue. In addition, low cost artist studios, light industrial units and offices are also proposed.

Hackney Wick Proposed Neighbourhood Centre



C.3.3 The Hackney Wick and Fish Island Design and Planning Guidance prepared by the London Legacy Development Corporation (LLDC) in 2014 estimates total capacity for new development based on all current proposals being implemented as follows:

- Residential - 3,537 units (434 of which are family houses)
- Retail/Leisure/Community - 23,158 sqm gross
- Employment – 105,567 sqm (net increase of 13,144sqm)

C.3.4 The new neighbourhood centre is proposed around Hackney Wick Station and Wallis Yard. The centre aims to provide a critical mass of mixed uses including employment, residential, retail, leisure and community service uses. The indicative layout and massing has been determined by the existing site constrains including Conservation Area boundaries and locally listed buildings.

Canning Town and Custom House

C.3.5 Canning Town is recognised in the London Plan as a district centre with the potential to achieve medium levels of growth through the regeneration of existing floorspace. The comprehensive regeneration of Canning Town and Custom House includes a series of projects that will deliver new homes, improved community facilities, improved transport links alongside the regeneration of Canning Town and Custom House and a revamped Rathbone Market.

Hallsville Quarter, Canning Town



C.3.6 At Canning Town, the Hallsville Quarter development will provide a new town centre opposite Canning Town Station. The new centre will be anchored by a 7,600 sqm Morrisons supermarket, in addition to 20,600 sqm of retail and restaurant space. Leisure facilities include a new cinema and a gym. The new town centre will also include a hotel, offices and up to 1,100 new homes.

C.3.7 The Rathbone Market redevelopment scheme includes a new market square, 650 homes, and 3,200sqm of retail and café uses. The development will also include a new library and improved access to Canning Town train station.

C.4 Completed developments

Paddington Basin

C.4.1 Paddington Basin is a 38 hectare office led mixed-use regeneration scheme identified in the London Plan as OA with potential to deliver 1,000 homes and 5,000 new jobs between 2011 and 2031.

C.4.2 Westminster City Council designated the area for redevelopment in 1988 and since then various developments around Paddington Station and the surrounding canal network have delivered 93,000 sqm office, residential, retail and leisure space.

C.4.3 Policy S3 of Westminster's City Plan (2013) emphasise the provision of new homes and employment floorspace as well as retail, social and community facilities, entertainment and arts/cultural uses to support the economic and social regeneration of the area. Retail provision should be geared towards catering for the needs of local worker and resident populations, which is likely to be in the form of predominantly convenience floorspace.

Merchant Square, Paddington Basin



C.5 Meanwhile uses

C.5.1 Pop-up malls and cultural spaces have become increasingly popular as food, retail and cultural destinations in London. Due to their temporary nature, the pop up malls are made of low-cost materials and increasingly provide affordable office space and workshops.

Boxpark Shoreditch

C.5.2 Boxpark is a pop-up shopping mall in Shoreditch. The mall was assembled from 60 shipping containers and is designed to last four years. Boxpark includes a changing mix of independent and chain retailers alongside a number of restaurants, cafes and bars.

Boxpark Croydon

C.5.3 Boxpark Croydon is set to open in 2016 in Croydon. The pop-up shopping mall will be located on the site of the mixed-use Ruskin Square development. Boxpark Croydon will be twice the size of Boxpark Shoreditch and include 80 retailers, bars, cafes and a performance area. The temporary mall is expected to occupy the development site for about 4 to 5 years before making way for the final phase of Ruskin Square.

Pop Brixton

C.5.4 Pop Brixton is a pop-up retail, food and drink hub in Brixton. Pop Brixton is similar to Boxpark in that it is built out of shipping containers. The scheme was commissioned by Lambeth Council and seeks to build on Brixton's reputation as a food destination. Alongside food, beverage and retail uses, Pop Brixton also includes affordable office space for start-ups and small businesses and community spaces.

The Artworks Elephant

C.5.5 The Artworks Elephant is a temporary creative hub in Elephant and Castle. As with Boxpark and Pop Brixton, The Artworks is built out of disused shipping containers and includes a number of restaurants, a library and work spaces aimed at the creative and media industries.

The temporary space sits on the site of the now demolished Heygate Estate and will eventually make way for the Elephant and Castle regeneration as it comes forward.

C.6 Affordable retail space

C.6.1 The London Plan seeks to provide affordable retail floorspace within new developments. Policy 4.9 advises that:

"In considering proposals for large retail developments, the Mayor will, and Boroughs should, consider imposing conditions or seeking contributions through planning obligations where appropriate, feasible and viable, to provide or support affordable shop unit."

8.1.4 We have therefore sought to identify how the London Plan requirement to provide affordable retail space has been delivered on the ground in the case study schemes outlined above. Having reviewed development plan policy across London, it is noted that both the LBS and LBHF/RBKC make explicit reference to the need to provide affordable retail floorspace in the site specific planning guidance documents.

8.1.5 Key Principle RS7 of the Earl's Court and West Kensington OA Joint SPD states that:

'A number of small units will be secured as affordable shops to provide accommodation for retailers deemed essential for a good retail offer, but that are not able to afford full rents'.

C.6.2 The proposed regeneration scheme includes a new centre for a local centre to cater to the day-to-day needs of the area's residents. Although, since the scheme has not yet been implemented it not yet clear as to how affordable retail units will be delivered and managed.

C.6.3 Policy SPD1 of the Elephant and Castle OAPF states that:

'Large retail developments over 1,000 sq m should contribute to a vibrant range of retail uses and provide a range of affordable retail units. The council will require through planning conditions or Section 106 planning obligations at least 10% (GIA) affordable retail floorspace in new retail developments.'

C.6.4 The Elephant and Castle development also includes a new local centre with up to 50 retail units of which 10% are earmarked as affordable. At the same time there are development plans to regenerate the Elephant and Castle Shopping Centre.

C.6.5 The planning application for Phase 2 of the Elephant Road scheme, which will deliver most of the new retail floorspace is yet to be submitted and therefore, again it is unclear as to how affordable retail units will be delivered and managed in this scheme.

Appendix D Quantitative analysis

OPDC Retail Needs Study

Table 1: Population projections (2014 to 2041)

Year	Zone 3	Zone 4	Zone 27	Study area total
2014	50,997	53,765	137,616	242,378
2015	50,997	54,352	138,699	244,048
Growth 2014 - 2017 (%)	3.4%	3.2%	4.8%	
2017	52,726	55,493	144,259	252,479
Growth 2017 - 2022 (%)	10.5%	4.1%	8.4%	
2022	58,278	57,794	156,341	272,413
Growth 2022 - 2027 (%)	25.0%	3.5%	8.4%	
2027	72,871	59,826	169,455	302,151
Growth 2027 - 2032 (%)	13.9%	2.0%	4.2%	
2032	83,012	61,037	176,525	320,574
Growth 2032 - 2037 (%)	12.1%	1.5%	1.1%	
2037	93,037	61,965	178,490	333,492
Growth 2037 - 2041 (%)	8.2%	1.1%	3.0%	
2041	100,677	62,652	183,787	347,116

Notes:

(1) Population per zone 2014 is obtained from Experian Retail Planner 2015 using GIS (MMG3) system. Growth in population is calculated using growth rates derived from the GLA's 2014 SHLAA-based ward-level demographic projections and making adjustments to reflect the OPDC SHLAA

OPDC Retail Needs Study

Table CM1: Per capita expenditure on comparison goods

Year	Zone 3	Zone 4	Zone 6	Study area
2014	£3,007	£3,128	£2,547	£2,773
Exc. SFT	£2,670	£2,778	£2,262	£2,462
Growth 2014 - 2017 (%)	9.5%	9.5%	9.5%	9.5%
2017	£2,923	£3,041	£2,476	£2,695
Per annum growth 2017 - 2022 (%)	2.6%	2.6%	2.6%	2.6%
2022	£3,324	£3,458	£2,816	£3,065
Per annum growth 2022 - 2027 (%)	3.4%	3.4%	3.4%	3.4%
2027	£3,927	£4,085	£3,327	£3,621
Per annum growth 2027 - 2032 (%)	3.6%	3.6%	3.6%	3.6%
2032	£4,685	£4,874	£3,969	£4,320
Per annum growth 2032 - 2037 (%)	3.6%	3.6%	3.6%	3.6%
2037	£5,588	£5,813	£4,734	£5,153
Per annum growth 2037 - 2041 (%)	3.6%	3.6%	3.6%	3.6%
2041	£6,665	£6,934	£5,646	£6,146

Notes

Prices 2014

Per capita expenditure by zone derived from Experian Retail Planner 2014 (MMG GIS)

Growth rates and SFT deductions derived from Experian Retail Planner Briefing Note 13 (2015). Held constant after 2035

OPDC Retail Needs Study
Table CM2: Total expenditure on comparison goods

Year	Zone 3	Zone 4	Zone 6	Study area total
2014	£136.17	£149.36	£311.31	£596.84
2017	£175.19	£168.75	£357.22	£701.16
2022	£275.34	£206.89	£477.18	£959.41
2027	£325.26	£244.40	£563.70	£1,133.37
2032	£442.06	£297.49	£700.59	£1,440.14
2037	£590.96	£360.23	£844.93	£1,796.11
2041	£762.74	£434.42	£1,037.70	£2,234.86
Growth				
2014-2041	£626.57	£285.06	£726.40	£1,638.02

Notes
2014 prices
Product of Table 1 and Table CM1

OPDC Retail Needs Study
Table CM3: Comparison market shares 2015

	Zone 3	Zone 4	Zone 6	Study area market share	West London trade drawn from study area	Inflow from beyond West London study area
Park Royal	2.55%	1.07%	2.18%	1.98%	62.12%	0.00%
Shepherd's Bush	31.69%	19.97%	13.97%	19.51%	27.47%	57.50%
Askew Road	0.60%	0.00%	0.00%	0.14%	82.08%	0.00%
Hammersmith	14.07%	5.15%	0.96%	5.00%	26.66%	23.50%
Harlesden	0.88%	0.00%	2.85%	1.69%	97.24%	0.00%
Acton	0.91%	8.92%	1.01%	2.97%	53.32%	28.30%
East Acton	0.05%	0.14%	0.00%	0.05%	100.00%	0.00%
Ealing	1.22%	10.28%	0.94%	3.34%	17.43%	15.30%
Wembley	0.00%	0.60%	13.64%	7.26%	79.72%	0.00%
Alperton	1.04%	1.21%	1.29%	1.21%	46.45%	0.00%
Chiswick	4.23%	2.34%	0.37%	1.74%	20.94%	5.10%
Brent Cross	5.01%	6.46%	24.36%	15.47%	54.56%	0.00%
High Street Kensington	0.45%	0.58%	0.99%	0.77%	2.77%	0.00%
Central London/West End	7.97%	8.34%	9.32%	8.76%	12.74%	0.00%
Other	29.34%	34.94%	28.12%	30.11%	563.21%	0.00%

Notes
Market shares for Zones 3,4 and 6 derived from LBHFRS. Shares for inflow from from WLRNSU

OPDC Retail Needs Study
Table CM4: Comparison summary (£M)

	2014	2017	2022	2027	2032	2037	2041	Growth 2017-2027	Growth 2027-2041	Growth 2014-41
Park Royal	£19.07	£22.41	£57.39	£36.22	£46.02	£57.39	£71.42	£13.81	£35.20	£52.34
Shepherd's Bush	£997.41	£1,171.75	£3,001.56	£1,894.02	£2,406.69	£3,001.56	£3,734.78	£722.27	£1,840.76	£2,737.37
Askew Road, Hammersmith & Fulham	£4.55	£5.35	£13.70	£8.64	£10.98	£13.70	£17.04	£3.30	£8.40	£12.49
King Street West, Hammersmith & Fulham	£146.38	£171.96	£440.50	£277.96	£353.20	£440.50	£548.11	£106.00	£270.15	£401.73
Harlesden	£10.37	£12.18	£31.19	£19.68	£25.01	£31.19	£38.81	£7.51	£19.13	£28.45
Acton	£46.35	£54.46	£139.49	£88.02	£111.85	£139.49	£173.57	£33.57	£85.55	£127.22
East Acton	£0.28	£0.32	£0.83	£0.53	£0.67	£0.83	£1.04	£0.20	£0.51	£0.76
Ealing	£135.03	£158.64	£406.37	£256.42	£325.83	£406.37	£505.64	£97.79	£249.21	£370.60
Wembley	£54.39	£63.89	£163.67	£103.28	£131.24	£163.67	£203.66	£39.39	£100.38	£149.27
Alperton (Zone 27, Brent)	£15.55	£18.26	£46.79	£29.52	£37.51	£46.79	£58.22	£11.26	£28.69	£42.67
Chiswick	£52.33	£61.47	£157.47	£99.37	£126.26	£157.47	£195.94	£37.89	£96.57	£143.61
Brent Cross	£169.17	£198.73	£509.08	£321.24	£408.19	£509.08	£633.44	£122.50	£312.20	£464.27
Kensington High Street, Kensington & Chelsea	£165.10	£193.96	£496.86	£313.52	£398.38	£496.86	£618.23	£119.56	£304.71	£453.12
Central London / West End	£410.51	£482.26	£1,235.38	£779.54	£990.54	£1,235.38	£1,537.15	£297.27	£757.62	£1,126.64
Other	£13,635	£16,018	£41,033	£25,892	£32,900	£41,033	£51,056	£9,874	£25,164	£37,421
Total	£15,861	£18,634	£47,733	£30,120	£38,273	£47,733	£59,393	£11,486	£29,273	£43,532

Notes
2014 prices

OPDC Retail Needs Study
Table CM5: Comparison impact 2037 - BASELINE

	2014 turnover		Pre-diversion turnover		Scenario 1			Scenario 2			Scenario 3			Growth from 2014 - post-OPDC		
	Study area	With inflow	Study area	With inflow	Diversion to OPDC area	Post-diversion turnover	Impact	Diversion to OPDC area	Post-diversion turnover	Impact	Diversion to OPDC area	Post-diversion turnover	Impact	Scenario 1	Scenario 2	Scenario 3
Park Royal	£11.85	£0.00	£35.65	£57.39	£0.16	£35.49	0.46%	£0.16	£57.23	0.28%	£0.27	£57.13	0.46%	£23.64	£57.23	£57.13
Shepherd's Bush	£116.46	£0.00	£350.49	£3,001.56	£21.80	£328.68	6.63%	£21.80	£2,979.76	0.73%	£35.67	£2,965.90	1.19%	£212.22	£2,979.76	£2,965.90
Askew Road	£0.82	£0.00	£2.45	£13.70	£0.00	£2.45	0.00%	£0.00	£13.70	0.00%	£0.00	£13.70	0.00%	£1.64	£13.70	£13.70
Hammersmith	£29.86	£0.00	£89.85	£440.50	£3.73	£86.12	4.33%	£3.73	£436.77	0.85%	£6.11	£434.40	1.39%	£56.26	£436.77	£434.40
Harlesden	£10.08	£0.00	£30.33	£31.19	£0.16	£30.18	0.52%	£0.16	£31.04	0.50%	£0.26	£30.94	0.82%	£20.10	£31.04	£30.94
Acton	£17.72	£0.00	£53.32	£139.49	£1.10	£52.23	2.10%	£1.10	£138.39	0.79%	£1.80	£137.70	1.29%	£34.51	£138.39	£137.70
East Acton	£0.28	£0.00	£0.83	£0.83	£0.00	£0.83	0.00%	£0.00	£0.83	0.00%	£0.00	£0.83	0.00%	£0.56	£0.83	£0.83
Ealing	£19.94	£0.00	£59.99	£406.37	£2.55	£57.44	4.44%	£2.55	£403.82	0.63%	£4.17	£402.20	1.03%	£37.51	£403.82	£402.20
Wembley	£43.36	£0.00	£130.48	£163.67	£0.87	£129.61	0.67%	£0.87	£162.80	0.53%	£1.42	£162.25	0.87%	£86.25	£162.80	£162.25
Alperton	£7.22	£0.00	£21.73	£46.79	£0.10	£21.63	0.48%	£0.10	£46.68	0.22%	£0.17	£46.62	0.37%	£14.41	£46.68	£46.62
Chiswick	£10.40	£0.00	£31.29	£157.47	£0.00	£31.29	0.00%	£0.00	£157.47	0.00%	£0.00	£157.47	0.00%	£20.89	£157.47	£157.47
Brent Cross	£92.30	£0.00	£277.78	£509.08	£1.83	£275.95	0.66%	£1.83	£507.25	0.36%	£2.99	£506.09	0.59%	£183.65	£507.25	£506.09
High Street Kensington	£4.57	£0.00	£13.76	£496.86	£0.05	£13.71	0.39%	£0.05	£496.80	0.01%	£0.09	£496.77	0.02%	£9.14	£496.80	£496.77
Central London/West End	£52.31	£0.00	£157.42	£1,235.38	£1.90	£155.52	1.22%	£1.90	£1,233.48	0.15%	£3.10	£1,232.28	0.25%	£103.21	£1,233.48	£1,232.28
Other	£179.68	£0.00	£540.72	£41,032.56	£2.91	£537.81	0.54%	£2.91	£41,029.64	0.01%	£4.76	£41,027.79	0.01%	£358.13	£41,029.64	£41,027.79
Total	£596.84	£0.00	£1,796.11	£47,732.85	£37.17	£1,758.94		£37.17	£47,695.69		£60.80	£47,672.05		£1,162.10	£47,695.69	£47,672.05

Notes
Scenario 1 - no inflow to study area stores. Only expenditure generated by future residents assessed i.e. no inflow to OPDC area
Scenario 2 - inflow to study area stores. Only expenditure generated by future residents assessed i.e. no inflow to OPDC area
Scenario 3 - inflow to study area stores. Expenditure generated by future residents and workforce assessed
2014 prices (£M)

OPDC Retail Needs Study

Table CM6: Comparison impact 2037 - SCENARIO A

	2014 turnover		Pre-diversion turnover		Scenario 1			Scenario 2			Scenario 3			Growth from 2014 - post-OPDC		
	Study area	With inflow	Study area	With inflow	Diversion to OPDC area	Post-diversion turnover	Impact	Diversion to OPDC area	Post-diversion turnover	Impact	Diversion to OPDC area	Post-diversion turnover	Impact	Scenario 1	Scenario 2	Scenario 3
Park Royal	£11.85	£0.00	£35.65	£57.39	£0.16	£35.49	0.46%	£0.16	£57.23	0.28%	£0.32	£57.07	0.56%	£23.64	£57.23	£57.07
Shepherd's Bush	£116.46	£0.00	£350.49	£3,001.56	£21.80	£328.68	6.63%	£21.80	£2,979.76	0.73%	£42.93	£2,958.63	1.43%	£212.22	£2,979.76	£2,958.63
Askew Road	£0.82	£0.00	£2.45	£13.70	£0.00	£2.45	0.00%	£0.00	£13.70	0.00%	£0.00	£13.70	0.00%	£1.64	£13.70	£13.70
Hammersmith	£29.86	£0.00	£89.85	£440.50	£3.73	£86.12	4.33%	£3.73	£436.77	0.85%	£7.35	£433.15	1.67%	£56.26	£436.77	£433.15
Harlesden	£10.08	£0.00	£30.33	£31.19	£0.16	£30.18	0.52%	£0.16	£31.04	0.50%	£0.31	£30.88	0.99%	£20.10	£31.04	£30.88
Acton	£17.72	£0.00	£53.32	£139.49	£1.10	£52.23	2.10%	£1.10	£138.39	0.79%	£2.16	£137.33	1.55%	£34.51	£138.39	£137.33
East Acton	£0.28	£0.00	£0.83	£0.83	£0.00	£0.83	0.00%	£0.00	£0.83	0.00%	£0.00	£0.83	0.00%	£0.56	£0.83	£0.83
Ealing	£19.94	£0.00	£59.99	£406.37	£2.55	£57.44	4.44%	£2.55	£403.82	0.63%	£5.02	£401.34	1.24%	£37.51	£403.82	£401.34
Wembley	£43.36	£0.00	£130.48	£163.67	£0.87	£129.61	0.67%	£0.87	£162.80	0.53%	£1.71	£161.96	1.05%	£86.25	£162.80	£161.96
Alperton	£7.22	£0.00	£21.73	£46.79	£0.10	£21.63	0.48%	£0.10	£46.68	0.22%	£0.21	£46.58	0.44%	£14.41	£46.68	£46.58
Chiswick	£10.40	£0.00	£31.29	£157.47	£0.00	£31.29	0.00%	£0.00	£157.47	0.00%	£0.00	£157.47	0.00%	£20.89	£157.47	£157.47
Brent Cross	£92.30	£0.00	£277.78	£509.08	£1.83	£275.95	0.66%	£1.83	£507.25	0.36%	£3.60	£505.48	0.71%	£183.65	£507.25	£505.48
High Street Kensington	£4.57	£0.00	£13.76	£496.86	£0.05	£13.71	0.39%	£0.05	£496.80	0.01%	£0.10	£496.75	0.02%	£9.14	£496.80	£496.75
Central London/West End	£52.31	£0.00	£157.42	£1,235.38	£1.90	£155.52	1.22%	£1.90	£1,233.48	0.15%	£3.73	£1,231.65	0.30%	£103.21	£1,233.48	£1,231.65
Other	£179.68	£0.00	£540.72	£41,032.56	£2.91	£537.81	0.54%	£2.91	£41,029.64	0.01%	£5.74	£41,026.82	0.01%	£358.13	£41,029.64	£41,026.82
Total	£596.84	£0.00	£1,796.11	£47,732.85	£37.17	£1,758.94		£37.17	£47,695.69		£73.19	£47,659.66		£1,162.10	£47,695.69	£47,659.66

Notes

Scenario 1 - no inflow to study area stores. Only expenditure generated by future residents assessed i.e. no inflow to OPDC area
Scenario 2 - inflow to study area stores. Only expenditure generated by future residents assessed i.e. no inflow to OPDC area
Scenario 3 - inflow to study area stores. Expenditure generated by future residents and workforce assessed
2014 prices (£M)

OPDC Retail Needs Study
Table CM7: Comparison impact 2037 - SCENARIO B

	2014 turnover		Pre-diversion turnover		Scenario 1			Scenario 2			Scenario 3			Growth from 2014 - post-OPDC		
	Study area	With inflow	Study area	With inflow	Diversion to OPDC area	Post-diversion turnover	Impact	Diversion to OPDC area	Post-diversion turnover	Impact	Diversion to OPDC area	Post-diversion turnover	Impact	Scenario 1	Scenario 2	Scenario 3
Park Royal	£11.85	£0.00	£35.65	£57.39	£0.16	£35.49	0.46%	£0.16	£57.23	0.28%	£0.38	£57.02	0.65%	£23.64	£57.23	£57.02
Shepherd's Bush	£116.46	£0.00	£350.49	£3,001.56	£21.80	£328.68	6.63%	£21.80	£2,979.76	0.73%	£50.20	£2,951.36	1.67%	£212.22	£2,979.76	£2,951.36
Askew Road	£0.82	£0.00	£2.45	£13.70	£0.00	£2.45	0.00%	£0.00	£13.70	0.00%	£0.00	£13.70	0.00%	£1.64	£13.70	£13.70
Hammersmith	£29.86	£0.00	£89.85	£440.50	£3.73	£86.12	4.33%	£3.73	£436.77	0.85%	£8.60	£431.91	1.95%	£56.26	£436.77	£431.91
Harlesden	£10.08	£0.00	£30.33	£31.19	£0.16	£30.18	0.52%	£0.16	£31.04	0.50%	£0.36	£30.83	1.15%	£20.10	£31.04	£30.83
Acton	£17.72	£0.00	£53.32	£139.49	£1.10	£52.23	2.10%	£1.10	£138.39	0.79%	£2.53	£136.96	1.81%	£34.51	£138.39	£136.96
East Acton	£0.28	£0.00	£0.83	£0.83	£0.00	£0.83	0.00%	£0.00	£0.83	0.00%	£0.00	£0.83	0.00%	£0.56	£0.83	£0.83
Ealing	£19.94	£0.00	£59.99	£406.37	£2.55	£57.44	4.44%	£2.55	£403.82	0.63%	£5.88	£400.49	1.45%	£37.51	£403.82	£400.49
Wembley	£43.36	£0.00	£130.48	£163.67	£0.87	£129.61	0.67%	£0.87	£162.80	0.53%	£2.00	£161.67	1.22%	£86.25	£162.80	£161.67
Alperton	£7.22	£0.00	£21.73	£46.79	£0.10	£21.63	0.48%	£0.10	£46.68	0.22%	£0.24	£46.55	0.52%	£14.41	£46.68	£46.55
Chiswick	£10.40	£0.00	£31.29	£157.47	£0.00	£31.29	0.00%	£0.00	£157.47	0.00%	£0.00	£157.47	0.00%	£20.89	£157.47	£157.47
Brent Cross	£92.30	£0.00	£277.78	£509.08	£1.83	£275.95	0.66%	£1.83	£507.25	0.36%	£4.21	£504.88	0.83%	£183.65	£507.25	£504.88
High Street Kensington	£4.57	£0.00	£13.76	£496.86	£0.05	£13.71	0.39%	£0.05	£496.80	0.01%	£0.12	£496.73	0.02%	£9.14	£496.80	£496.73
Central London/West End	£52.31	£0.00	£157.42	£1,235.38	£1.90	£155.52	1.22%	£1.90	£1,233.48	0.15%	£4.36	£1,231.01	0.35%	£103.21	£1,233.48	£1,231.01
Other	£179.68	£0.00	£540.72	£41,032.56	£2.91	£537.81	0.54%	£2.91	£41,029.64	0.01%	£6.71	£41,025.85	0.02%	£358.13	£41,029.64	£41,025.85
Total	£596.84	£0.00	£1,796.11	£47,732.85	£37.17	£1,758.94		£37.17	£47,695.69		£85.58	£47,647.27		£1,162.10	£47,695.69	£47,647.27

Notes
Scenario 1 - no inflow to study area stores. Only expenditure generated by future residents assessed i.e. no inflow to OPDC area
Scenario 2 - inflow to study area stores. Only expenditure generated by future residents assessed i.e. no inflow to OPDC area
Scenario 3 - inflow to study area stores. Expenditure generated by future residents and workforce assessed
2014 prices (£M)

OPDC Retail Needs Study

Table CN1: Per capita expenditure on convenience goods

Year	Zone 3	Zone 4	Zone 27	Study area
2014	£2,013	£2,000	£1,768	£1,871
Exc. SFT	£1,963	£1,950	£1,723	£1,824
Growth 2014 - 2017 (%)	-0.30%	-0.30%	-0.30%	-0.30%
2017	£1,957	£1,944	£1,718	£1,818
Per annum growth 2017 - 2022 (%)	-0.16%	-0.16%	-0.16%	-0.16%
2022	£1,941	£1,929	£1,704	£1,804
Per annum growth 2022 - 2027 (%)	-0.12%	-0.12%	-0.12%	-0.12%
2027	£1,930	£1,917	£1,694	£1,793
Per annum growth 2027 - 2032 (%)	-0.08%	-0.08%	-0.08%	-0.08%
2032	£1,922	£1,910	£1,688	£1,786
Per annum growth 2032 - 2037 (%)	-0.03%	-0.03%	-0.03%	-0.03%
2037	£1,919	£1,907	£1,685	£1,783
Per annum growth 2037 - 2041 (%)	-0.03%	-0.03%	-0.03%	-0.03%
2041	£1,915	£1,903	£1,682	£1,780

Notes

Prices 2014

Per capita expenditure by zone derived from Experian Retail Planner 2014 (MMG GIS)

Growth rates and SFT deductions derived from Experian Retail Planner Briefing Note 13 (2015). Held constant after 2035.

OPDC Retail Needs Study
Table CN2: Total convenience expenditure

Year	Zone 3	Zone 4	Zone 27	Study area total
2014	£100.09	£104.86	£237.16	£442.11
2017	£103.17	£107.90	£247.86	£458.94
2022	£141.45	£115.40	£288.84	£545.69
2027	£140.61	£114.71	£287.11	£542.43
2032	£159.54	£116.57	£297.90	£574.00
2037	£178.51	£118.14	£300.71	£597.36
2041	£192.85	£119.25	£309.12	£621.22

Notes
2014 prices (£M)
Product of Table 1 and Table CN1

OPDC Retail Needs Study
Table CN3: 2015 Convenience goods zonal market share (%)

	Zone 3	Zone 4	Zone 6	Study area
Shepherd's Bush				
Morrisons W1 Centre	6%	1%	0%	2%
Waitrose Westfield London	3%	1%	1%	1%
Local shops Shepherd's Bush	13%	1%	0%	3%
Hammersmith				
Sainsbury's Kings Mall	2%	0%	0%	1%
Tesco Shepherd's Bush Road	12%	0%	0%	3%
Local shops Hammersmith	3%	0%	0%	1%
Acton				
Morrisons Rectory Road	5%	38%	0%	10%
Other stores Acton	1%	12%	0%	3%
Park Royal				
Asda Western Road	15%	8%	12%	12%
Harlesden				
Iceland High Street	0%	0%	1%	1%
Local shops Harlesden	2%	0%	4%	3%
Chiswick				
Sainsbury's Local Chiswick High Road	2%	1%	0%	1%
Sainsbury's Acton Lane	2%	3%	0%	1%
Waitrose Chiswick High Street	1%	1%	0%	1%
Local shops Chiswick	1%	3%	0%	1%
Ealing				
Sainsbury's, Melbourne Avenue	0%	0%	0%	0%
Tesco Metro, Broadway Shopping Centre	0%	2%	1%	1%
Waitrose Alexandria Road	0%	3%	0%	1%
Local shops Ealing	0%	3%	1%	1%
Wembley				
Iceland Central Square	0%	0%	1%	0%
Local shops Wembley	0%	0%	3%	2%
Fulham				
Waitrose North End Road	0%	0%	0%	0%
Local shops Fulham	0%	0%	0%	0%
Greenford				
Tesco Metro Greenford Road	0%	0%	0%	0%
Local shops Greenford	0%	0%	0%	0%
LBHF neighbourhood centres	7%	0%	0%	2%
LBE neighbourhood centres	1%	1%	0%	0%
Sainsbury's Willesden Green	0%	0%	4%	2%
Out-of-centre stores				
Sainsbury's Ealing Road Alperton	0%	1%	6%	4%
Tesco Extra Brent Park	1%	0%	15%	8%
Other	22%	21%	50%	37%
Total	**100%**	**100%**	**100%**	**100%**

Notes
Market shares for Zones 3,4 and 6 derived from LBHFRS. Shares for inflow from from WLRNSU

OPDC Retail Needs Study
Table CN4: Convenience summary (£M)

	2014	2017	2022	2027	2032	2037	2041	Growth 2017-2027	Growth 2027-2041	Growth 2017-41
Shepherd's Bush										
Morrisons W1 Centre	£6.64	£6.90	£8.20	£8.15	£8.62	£8.98	£9.33	£1.25	£1.18	£2.44
Waitrose Westfield London	£5.77	£5.99	£7.12	£7.08	£7.49	£7.80	£8.11	£1.09	£1.03	£2.12
Local shops Shepherd's Bush	£14.41	£14.96	£17.78	£17.68	£18.71	£19.47	£20.24	£2.72	£2.57	£5.29
Hammersmith										
Sainsbury's Kings Mall	£2.44	£2.54	£3.02	£3.00	£3.17	£3.30	£3.43	£0.46	£0.44	£0.90
Tesco Shepherd's Bush Road	£12.52	£12.99	£15.45	£15.36	£16.25	£16.91	£17.59	£2.36	£2.23	£4.59
Local shops Hammersmith	£3.87	£4.01	£4.77	£4.74	£5.02	£5.23	£5.43	£0.73	£0.69	£1.42
Acton										
Morrisons Rectory Road	£44.72	£46.42	£55.20	£54.87	£58.06	£60.42	£62.84	£8.45	£7.97	£16.42
Other stores Acton	£13.25	£13.75	£16.35	£16.25	£17.20	£17.90	£18.61	£2.50	£2.36	£4.86
Park Royal										
Asda Western Road	£51.99	£53.97	£64.18	£63.79	£67.51	£70.25	£73.06	£9.82	£9.27	£19.09
Harlesden										
Iceland High Street	£3.04	£3.16	£3.76	£3.74	£3.95	£4.11	£4.28	£0.58	£0.54	£1.12
Local shops Harlesden	£12.63	£13.11	£15.59	£15.50	£16.40	£17.06	£17.75	£2.39	£2.25	£4.64
Chiswick										
Sainsbury's Local Chiswick High Road	£2.85	£2.96	£3.52	£3.50	£3.71	£3.86	£4.01	£0.54	£0.51	£1.05
Sainsbury's Acton Lane	£5.05	£5.24	£6.23	£6.20	£6.56	£6.82	£7.10	£0.95	£0.90	£1.85
Waitrose Chiswick High Street	£2.26	£2.34	£2.78	£2.77	£2.93	£3.05	£3.17	£0.43	£0.40	£0.83
Local shops Chiswick	£3.35	£3.48	£4.14	£4.11	£4.35	£4.53	£4.71	£0.63	£0.60	£1.23
Ealing										
Sainsbury's, Melbourne Avenue	£0.11	£0.12	£0.14	£0.14	£0.15	£0.15	£0.16	£0.02	£0.02	£0.04
Tesco Metro, Broadway Shopping Centre	£3.02	£3.13	£3.72	£3.70	£3.92	£4.08	£4.24	£0.57	£0.54	£1.11
Waitrose Alexandria Road	£3.45	£3.59	£4.26	£4.24	£4.48	£4.67	£4.85	£0.65	£0.62	£1.27
Local shops Ealing	£4.92	£5.11	£6.07	£6.04	£6.39	£6.65	£6.91	£0.93	£0.88	£1.81
Wembley										
Iceland Central Square	£1.55	£1.61	£1.91	£1.90	£2.01	£2.09	£2.18	£0.29	£0.28	£0.57
Local shops Wembley	£7.58	£7.87	£9.36	£9.30	£9.84	£10.24	£10.65	£1.43	£1.35	£2.78
Fulham										
Waitrose North End Road	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Local shops Fulham	£0.31	£0.33	£0.39	£0.39	£0.41	£0.42	£0.44	£0.06	£0.06	£0.12
Greenford										
Tesco Metro Greenford Road	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Local shops Greenford	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
LBHF neighbourhood centres	£6.88	£7.14	£8.50	£8.44	£8.94	£9.30	£9.67	£1.30	£1.23	£2.53
LBE neighbourhood centres	£2.21	£2.29	£2.72	£2.71	£2.87	£2.98	£3.10	£0.42	£0.39	£0.81
Sainsbury's Willesden Green	£10.37	£10.76	£12.80	£12.72	£13.46	£14.01	£14.57	£1.96	£1.85	£3.81
Out-of-centre stores										
Sainsbury's Ealing Road Alperton	£15.78	£16.38	£19.48	£19.36	£20.49	£21.32	£22.17	£2.98	£2.81	£5.79
Tesco Extra Brent Park	£37.10	£38.52	£45.80	£45.52	£48.17	£50.13	£52.13	£7.01	£6.61	£13.62
Other	£164.01	£170.26	£202.44	£201.23	£212.95	£221.61	£230.46	£30.98	£29.23	£60.20
Total	**£442.11**	**£458.94**	**£545.69**	**£542.43**	**£574.00**	**£597.36**	**£621.22**	**£83.50**	**£78.79**	**£162.28**

Notes
2014 prices

OPDC Retail Needs Study
Table CN5: Convenience summary (with inflow)

	2014	2017	2022	2027	2032	2037	2041	Growth 2017-2027	Growth 2027-2041	Growth 2017-41
Shepherd's Bush										
Morrisons W1 Centre	£11.78	£12.23	£14.54	£14.45	£15.29	£15.92	£16.55	£2.22	£2.10	£4.32
Waitrose Westfield London	£12.57	£13.05	£15.51	£15.42	£16.32	£16.98	£17.66	£2.37	£2.24	£4.61
Local shops Shepherd's Bush	£24.14	£25.06	£29.79	£29.62	£31.34	£32.62	£33.92	£4.56	£4.30	£8.86
Hammersmith										
Sainsbury's Kings Mall	£12.51	£12.99	£15.44	£15.35	£16.24	£16.90	£17.58	£2.36	£2.23	£4.59
Tesco Shepherd's Bush Road	£67.73	£70.31	£83.60	£83.10	£87.94	£91.52	£95.18	£12.79	£12.07	£24.86
Local shops Hammersmith	£56.33	£58.47	£69.52	£69.11	£73.13	£76.11	£79.14	£10.64	£10.04	£20.68
Acton										
Morrisons Rectory Road	£54.87	£56.96	£67.73	£67.33	£71.25	£74.14	£77.11	£10.36	£9.78	£20.14
Other stores Acton	£21.27	£22.08	£26.25	£26.09	£27.61	£28.73	£29.88	£4.02	£3.79	£7.81
Park Royal										
Asda Western Road	£72.63	£75.39	£89.64	£89.11	£94.29	£98.13	£102.05	£13.72	£12.94	£26.66
Harlesden										
Iceland High Street	£3.04	£3.16	£3.76	£3.74	£3.95	£4.11	£4.28	£0.58	£0.54	£1.12
Local shops Harlesden	£12.63	£13.11	£15.59	£15.50	£16.40	£17.06	£17.75	£2.39	£2.25	£4.64
Chiswick										
Sainsbury's Local Chiswick High Road	£46.05	£47.81	£56.84	£56.50	£59.79	£62.22	£64.71	£8.70	£8.21	£16.90
Sainsbury's Acton Lane	£13.32	£13.82	£16.44	£16.34	£17.29	£17.99	£18.71	£2.51	£2.37	£4.89
Waitrose Chiswick High Street	£23.89	£24.80	£29.49	£29.31	£31.02	£32.28	£33.57	£4.51	£4.26	£8.77
Local shops Chiswick	£19.92	£20.68	£24.59	£24.44	£25.87	£26.92	£28.00	£3.76	£3.55	£7.31
Ealing										
Sainsbury's, Melbourne Avenue	£2.51	£2.61	£3.10	£3.08	£3.26	£3.39	£3.53	£0.47	£0.45	£0.92
Tesco Metro, Broadway Shopping Centre	£80.92	£84.00	£99.88	£99.28	£105.06	£109.34	£113.70	£15.28	£14.42	£29.70
Waitrose Alexandria Road	£32.96	£34.22	£40.69	£40.44	£42.80	£44.54	£46.32	£6.23	£5.87	£12.10
Local shops Ealing	£51.15	£53.09	£63.13	£62.75	£66.41	£69.11	£71.87	£9.66	£9.11	£18.77
Wembley										
Iceland Central Square	£1.55	£1.61	£1.91	£1.90	£2.01	£2.09	£2.18	£0.29	£0.28	£0.57
Local shops Wembley	£7.58	£7.87	£9.36	£9.30	£9.84	£10.24	£10.65	£1.43	£1.35	£2.78
Fulham										
Waitrose North End Road	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Local shops Fulham	£56.92	£59.08	£70.25	£69.83	£73.90	£76.91	£79.98	£10.75	£10.14	£20.89
Greenford										
Tesco Metro Greenford Road	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Local shops Greenford	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
LBHF neighbourhood centres	£18.57	£19.28	£22.92	£22.79	£24.11	£25.09	£26.10	£3.51	£3.31	£6.82
LBE neighbourhood centres	£20.84	£21.63	£25.72	£25.57	£27.06	£28.16	£29.28	£3.94	£3.71	£7.65
Sainsbury's Willesden Green	£10.37	£10.76	£12.80	£12.72	£13.46	£14.01	£14.57	£1.96	£1.85	£3.81
Out-of-centre stores										
Sainsbury's Ealing Road Alperton	£25.59	£26.56	£31.58	£31.39	£33.22	£34.57	£35.95	£4.83	£4.56	£9.39
Tesco Extra Brent Park	£41.24	£42.81	£50.90	£50.60	£53.54	£55.72	£57.95	£7.79	£7.35	£15.14
Other	£1,354.45	£1,406.00	£1,671.79	£1,661.80	£1,758.53	£1,830.10	£1,903.18	£255.80	£241.37	£497.17
Total	**£3,654**	**£3,793**	**£4,511**	**£4,484**	**£4,745**	**£4,938**	**£5,135**	**£690.17**	**£651.24**	**£1,341.40**

Notes
2014 prices

OPDC Retail Needs Study
Table CN6: Convenience impact 2037

	2014 turnover		Pre-diversion turnover		Scenario 1			Scenario 2			Scenario 3			Growth from 2014 - post-OPDC		
	Study area	With inflow	Study area	With inflow	Diversion to OPDC area	Post-diversion turnover	Impact	Diversion to OPDC area	Post-diversion turnover	Impact	Diversion to OPDC area	Post-diversion turnover	Impact	Scenario 1	Scenario 2	Scenario 3
Shepherd's Bush																
Morrisons W1 Centre	£6.64	£11.78	£8.98	£15.92	£0.94	£8.04	10.5%	£0.94	£14.98	6.3%	£1.56	£14.35	10.9%	£1.39	£3.20	£2.57
Waitrose Westfield London	£5.77	£12.57	£7.80	£16.98	£0.56	£7.24	7.2%	£0.56	£16.43	3.4%	£0.93	£16.06	5.8%	£1.47	£3.86	£3.49
Local shops Shepherd's Bush	£14.41	£24.14	£19.47	£32.62	£0.81	£18.66	4.2%	£0.81	£31.81	2.5%	£1.35	£31.27	4.3%	£4.25	£7.67	£7.13
Hammersmith																
Sainsbury's Kings Mall	£2.44	£12.51	£3.30	£16.90	£0.35	£2.95	10.7%	£0.35	£16.55	2.1%	£0.59	£16.32	3.6%	£0.51	£4.04	£3.81
Tesco Shepherd's Bush Road	£12.52	£67.73	£16.91	£91.52	£3.62	£13.29	21.4%	£3.62	£87.90	4.1%	£6.03	£85.49	7.1%	£0.77	£20.16	£17.76
Local shops Hammersmith	£3.87	£56.33	£5.23	£76.11	£0.20	£5.03	3.8%	£0.20	£75.91	0.3%	£0.33	£75.78	0.4%	£1.16	£19.58	£19.45
Acton																
Morrisons Rectory Road	£44.72	£54.87	£60.42	£74.14	£18.61	£41.81	30.8%	£18.61	£55.53	33.5%	£30.96	£43.18	71.7%	-£2.91	£0.66	-£11.69
Other stores Acton	£13.25	£21.27	£17.90	£28.73	£0.73	£17.16	4.1%	£0.73	£28.00	2.6%	£1.22	£27.51	4.4%	£3.92	£6.73	£6.25
Park Royal																
Asda Western Road	£51.99	£72.63	£70.25	£98.13	£30.99	£39.26	44.1%	£30.99	£67.14	46.2%	£51.56	£46.57	110.7%	-£12.74	-£5.49	-£26.06
Harlesden																
Iceland High Street	£3.04	£3.04	£4.11	£4.11	£0.15	£3.96	3.6%	£0.15	£3.96	3.8%	£0.25	£3.87	6.4%	£0.92	£0.92	£0.82
Local shops Harlesden	£12.63	£12.63	£17.06	£17.06	£0.49	£16.57	2.9%	£0.49	£16.57	3.0%	£0.82	£16.25	5.0%	£3.94	£3.94	£3.62
Chiswick																
Sainsbury's Local Chiswick High Road	£2.85	£46.05	£3.86	£62.22	£0.00	£3.86	0.0%	£0.00	£62.22	0.0%	£0.00	£62.22	0.0%	£1.00	£16.17	£16.17
Sainsbury's Acton Lane	£5.05	£13.32	£6.82	£17.99	£0.00	£6.82	0.0%	£0.00	£17.99	0.0%	£0.00	£17.99	0.0%	£1.77	£4.68	£4.68
Waitrose Chiswick High Street	£2.26	£23.89	£3.05	£32.28	£0.00	£3.05	0.0%	£0.00	£32.28	0.0%	£0.00	£32.28	0.0%	£0.79	£8.39	£8.39
Local shops Chiswick	£3.35	£19.92	£4.53	£26.92	£0.00	£4.53	0.0%	£0.00	£26.92	0.0%	£0.00	£26.92	0.0%	£1.18	£7.00	£7.00
Ealing																
Sainsbury's, Melbourne Avenue	£0.11	£2.51	£0.15	£3.39	£0.02	£0.14	10.2%	£0.02	£3.38	0.5%	£0.03	£3.37	0.8%	£0.02	£0.87	£0.86
Tesco Metro, Broadway Shopping Centre	£3.02	£80.92	£4.08	£109.34	£0.00	£4.08	0.0%	£0.00	£109.34	0.0%	£0.00	£109.34	0.0%	£1.06	£28.42	£28.42
Waitrose Alexandria Road	£3.45	£32.96	£4.67	£44.54	£0.00	£4.67	0.0%	£0.00	£44.54	0.0%	£0.00	£44.54	0.0%	£1.21	£11.58	£11.58
Local shops Ealing	£4.92	£51.15	£6.65	£69.11	£0.00	£6.65	0.0%	£0.00	£69.11	0.0%	£0.00	£69.11	0.0%	£1.73	£17.96	£17.96
Wembley																
Iceland Central Square	£1.55	£1.55	£2.09	£2.09	£0.01	£2.08	0.5%	£0.01	£2.08	0.5%	£0.02	£2.08	0.8%	£0.53	£0.53	£0.53
Local shops Wembley	£7.58	£7.58	£10.24	£10.24	£0.00	£10.24	0.0%	£0.00	£10.24	0.0%	£0.00	£10.24	0.0%	£2.66	£2.66	£2.66
Fulham																
Local shops Fulham	£0.31	£56.92	£0.42	£76.91	£0.00	£0.42	0.0%	£0.00	£76.91	0.0%	£0.00	£76.91	0.0%	£0.11	£19.99	£19.99
LBHF neighbourhood centres	£6.88	£18.57	£9.30	£25.09	£0.80	£8.50	8.6%	£0.80	£24.29	3.3%	£1.33	£23.76	5.6%	£1.62	£5.72	£5.19
LBE neighbourhood centres	£2.21	£20.84	£2.98	£28.16	£0.24	£2.75	7.9%	£0.24	£27.92	0.8%	£0.39	£27.76	1.4%	£0.54	£7.08	£6.93
Sainsbury's Willesden Green	£10.37	£10.37	£14.01	£14.01	£0.17	£13.85	1.2%	£0.17	£13.85	1.2%	£0.28	£13.74	2.0%	£3.48	£3.48	£3.37
Out-of-centre stores																
Sainsbury's Ealing Road Alperton	£15.78	£25.59	£21.32	£34.57	£0.81	£20.51	3.8%	£0.81	£33.76	2.4%	£1.35	£33.22	4.1%	£4.73	£8.17	£7.63
Tesco Extra Brent Park	£37.10	£41.24	£50.13	£55.72	£1.53	£48.60	3.1%	£1.53	£54.19	2.8%	£2.55	£53.17	4.8%	£11.50	£12.95	£11.93
Other	£164.01	£1,354.45	£221.61	£1,830.10	£3.28	£218.33	1.5%	£3.28	£1,826.82	0.2%	£5.45	£1,824.64	0.3%	£54.32	£472.37	£470.19
Total	**£442.11**	**£2,157.33**	**£597.36**	**£2,914.92**	**£64.31**	**£533.05**		**£64.31**	**£2,850.61**		**£106.98**	**£2,807.94**		**£90.95**	**£693.28**	**£650.61**

Notes
Scenario 1 - no inflow to study area stores. Only expenditure generated by future residents assessed i.e. no inflow to OPDC area
Scenario 2 - inflow to study area stores. Only expenditure generated by future residents assessed i.e. no inflow to OPDC area
Scenario 3 - inflow to study area stores. Expenditure generated by future residents and workforce assessed
2014 prices (£M)

Table A: Retail capacity generated in OPDC area - BASELINE

	Units	Population
2017-22	1,996	4,391
2022-27	7,901	17,382
2027-37	11,961	26,314
2037 onwards	4,001	8,802
Total	25,859	56,890

Cumulative population	**2022**	**2027**	**2032**	**2037**	***2041***	***2051***
	4,391	21,773	34,931	48,088	*51,022*	*56,890*

Per capita spending	**2017**	**2022**	**2027**	**2032**	**2037**	***2041***
Comparison	£2,695	£3,065	£3,621	£4,320	*£5,153*	£6,146
Convenience	£1,818	£1,804	£1,793	£1,786	£1,783	£1,780

Total spending	**2022**	**2027**	**2032**	**2037**	***2041***	***2051***
Comparison capacity	£13.46	£78.84	£150.90	£247.78	*£313.58*	*£349.64*
Convenience capacity	£7.92	£39.05	£62.39	£85.75	*£90.83*	*£101.27*
Total capacity	£21	£118	£213	£334	*£404*	*£451*

Floorspace (100% retention)	**2022**	**2027**	**2032**	**2037**	***2041***	***2051***
Comparison capacity	2,462	13,386	23,783	36,250	43,224	*48,195*
Convenience capacity	622	3,022	4,758	6,441	6,742	*7,517*
Total capacity	3,084	16,409	28,541	42,692	*49,966*	*55,712*

Workforce spend	**2022**	**2027**	**2032**	**2037**	***2041***	***2051***
Population	9,452	13,903	34,305	54,707	*57,713*	*60,719*
Daytime spending						
Comparison	*£2.55*	*£4.26*	*£12.42*	*£23.63*	*£29.74*	*£37.32*
Convenience	£7.37	£10.84	£26.76	£42.67	*£45.02*	*£47.36*
Total	£9.92	£15.11	£39.18	£66.31	*£74.75*	*£84.68*

Floorspace (inc. daytime)	**2022**	**2027**	**2032**	**2037**	***2041***	***2051***
Comparison capacity	2,928	14,110	25,741	39,708	47,323	*53,339*
Convenience capacity	1,202	3,862	6,798	9,647	10,083	*11,033*
Total capacity	4,130	17,971	32,539	49,355	*57,406*	*64,372*

Floorspace (retained spend only)	**2022**	**2027**	**2032**	**2037**	***2041***	***2051***
Comparison capacity	835	2,731	5,525	8,895	10,583	*12,373*
Convenience capacity	1,046	3,106	5,609	8,037	8,398	*9,153*
Total capacity	1,881	5,838	11,134	16,932	*18,981*	*21,527*

Floorspace (gross)	**2022**	**2027**	**2032**	**2037**	***2041***	***2051***
Comparison capacity	1,114	3,642	7,367	11,860	14,110	16,498
Convenience capacity	1,395	4,142	7,478	10,716	11,197	12,205
Total capacity	2,508	7,784	14,845	22,576	25,307	28,702

Notes:
Phasing derived from OPDC emerging SHLAA
Average rate of growth applied to 2027-37 and 2037-51 to obtain population interval data
Per capita spending data assumed to be at the average level for zones 3, 4 and 27 combined
Retention: 15% comparison & 75% convenience
Net to gross ratio of 75% applied

Table B: Retail capacity generated in OPDC area - Scenario A

	Units	Population
2017-22	1,996	4,391
2022-27	7,901	17,382
2027-37	11,961	26,314
2037 onwards	4,001	8,802
Total	25,859	56,890

Cumulative population	**2022**	**2027**	**2032**	**2037**	***2041***	***2051***
	4,391	21,773	34,931	48,088	*51,022*	*56,890*

Per capita spending	**2017**	**2022**	**2027**	**2032**	**2037**	***2041***
Comparison	£2,695	£3,065	£3,621	£4,320	*£5,153*	£6,146
Convenience	£1,818	£1,804	£1,793	£1,786	£1,783	£1,780

Total spending	**2022**	**2027**	**2032**	**2037**	***2041***	***2051***
Comparison capacity	£13.46	£78.84	£150.90	£247.78	*£313.58*	*£349.64*
Convenience capacity	£7.92	£39.05	£62.39	£85.75	*£90.83*	*£101.27*
Total capacity	£21	£118	£213	£334	*£404*	*£451*

Net floorspace (100% retention)	**2022**	**2027**	**2032**	**2037**	***2041***	***2051***
Comparison capacity	2,462	13,386	23,783	36,250	43,224	*48,195*
Convenience capacity	622	3,022	4,758	6,441	6,742	*7,517*
Total capacity	3,084	16,409	28,541	42,692	*49,966*	*55,712*

Workforce spend	**2022**	**2027**	**2032**	**2037**	***2041***	***2051***
Population	9,452	13,903	34,305	54,707	*57,713*	*60,719*
Daytime spending						
Comparison	£2.55	£4.26	£12.42	£23.63	£29.74	£37.32
Convenience	£7.37	£10.84	£26.76	£42.67	*£45.02*	*£47.36*
Total	£9.92	£15.11	£39.18	£66.31	*£74.75*	*£84.68*

Floorspace (inc. daytime)	**2022**	**2027**	**2032**	**2037**	***2041***	***2051***
Comparison capacity	2,928	14,110	25,741	39,708	47,323	*53,339*
Convenience capacity	1,202	3,862	6,798	9,647	10,083	*11,033*
Total capacity	4,130	17,971	32,539	49,355	*57,406*	*64,372*

Floorspace (retained spend only)	**2022**	**2027**	**2032**	**2037**	***2041***	***2051***
Comparison capacity	958	3,401	6,714	10,708	12,744	*14,783*
Convenience capacity	1,046	3,106	5,609	8,037	8,398	*9,153*
Total capacity	2,004	6,507	12,323	18,744	*21,142*	*23,936*

Floorspace (gross)	**2022**	**2027**	**2032**	**2037**	***2041***	***2051***
Comparison capacity	1,278	4,534	8,952	14,277	16,992	19,710
Convenience capacity	1,395	4,142	7,478	10,716	11,197	12,205
Total capacity	2,673	8,676	16,431	24,993	28,189	31,915

Notes:
Phasing derived from OPDC emerging SHLAA
Average rate of growth applied to 2027-37 and 2037-51 to obtain population interval data
Per capita spending data assumed to be at the average level for zones 3, 4 and 27 combined
Retention: 20% comparison & 75% convenience
Net to gross ratio of 75% applied

Table C: Retail capacity generated in OPDC area - Scenario B

	Units	Population
2017-22	1,996	4,391
2022-27	7,901	17,382
2027-37	11,961	26,314
2037 onwards	4,001	8,802
Total	25,859	56,890

Cumulative population	**2022**	**2027**	**2032**	**2037**	***2041***	***2051***
	4,391	21,773	34,931	48,088	*50,435*	*56,890*

Per capita spending	**2017**	**2022**	**2027**	**2032**	**2037**	***2041***
Comparison	£2,695	£3,065	£3,621	£4,320	*£5,153*	£6,146
Convenience	£1,818	£1,804	£1,793	£1,786	£1,783	£1,780

Total spending	**2022**	**2027**	**2032**	**2037**	***2041***	***2051***
Comparison capacity	£13.46	£78.84	£150.90	£247.78	*£309.97*	*£349.64*
Convenience capacity	£7.92	£39.05	£62.39	£85.75	*£89.78*	*£101.27*
Total capacity	£21.38	£117.89	£213.29	£333.53	*£399.75*	*£450.91*

Floorspace (100% retention)	**2022**	**2027**	**2032**	**2037**	***2041***	***2051***
Comparison capacity	2,462	13,386	23,783	36,250	42,727	*48,195*
Convenience capacity	622	3,022	4,758	6,441	6,664	*7,517*
Total capacity	3,084	16,409	28,541	42,692	*49,391*	*55,712*

Workforce spend	**2022**	**2027**	**2032**	**2037**	***2041***	***2051***
Population	9,452	13,903	34,305	54,707	*57,713*	*60,719*
Daytime spending						
Comparison	£2.55	£4.26	£12.42	£23.63	£29.74	£37.32
Convenience	£7.37	£10.84	£26.76	£42.67	*£45.02*	*£47.36*
Total	£9.92	£15.11	£39.18	£66.31	*£74.75*	*£84.68*

Floorspace (inc. daytime)	**2022**	**2027**	**2032**	**2037**	***2041***	***2051***
Comparison capacity	2,928	14,110	25,741	39,708	46,826	*53,339*
Convenience capacity	1,202	3,862	6,798	9,647	10,006	*11,033*
Total capacity	4,130	17,971	32,539	49,355	*56,831*	*64,372*

Floorspace (retained spend only)	**2022**	**2027**	**2032**	**2037**	***2041***	***2051***
Comparison capacity	1,081	4,070	7,903	12,520	14,781	*17,193*
Convenience capacity	1,046	3,106	5,609	8,037	8,340	*9,153*
Total capacity	2,128	7,176	13,512	20,557	*23,120*	*26,346*

Floorspace (gross)	**2022**	**2027**	**2032**	**2037**	***2041***	***2051***
Comparison capacity	1,442	5,427	10,538	16,694	19,708	22,923
Convenience capacity	1,395	4,142	7,478	10,716	11,120	12,205
Total capacity	2,837	9,568	18,016	27,409	30,827	35,128

Notes:
Phasing derived from OPDC emerging SHLAA
Average rate of growth applied to 2027-37 and 2037-51 to obtain population interval data
Per capita spending data assumed to be at the average level for zones 3, 4 and 27 combined
Retention: 25% comparison & 75% convenience
Net to gross ratio of 75% applied

Table D: Leisure spending generated by OPDC area

	Units	Population
2017-22	1,600	3,520
2022-27	14,420	31,724
2027-37	6,793	14,945
2037 onwards	2,765	6,083
Total	25,578	56,272

Cumulative population	2022	2027	2032	2037	2041	2051
	3,520	35,244	42,716	50,189	52,216	56,272

Per capita expenditure		A3-5	Cultural services	Games of chance	Recreation services
	2014	£1,226	£245	£95	£133
	2017	£1,300	£259	£101	£141
	2022	£1,387	£277	£107	£150
	2027	£1,486	£297	£115	£161
	2032	£1,593	£318	£123	£173
	2037	£1,708	£341	£132	£185
	2041	£1,806	£365	£142	£198

Total expenditure (£M)		A3-5 uses	Cultural services	Games of chance	Recreation services
	2022	£4.88	£0.97	£0.38	£0.53
	2027	£52.39	£10.45	£4.05	£5.68
	2032	£68.06	£13.58	£5.27	£7.38
	2037	£85.73	£17.10	£6.63	£9.29
	2041	£94.29	£19.07	£7.40	£10.36
	2051	£101.62	£20.55	£7.97	£11.17

Notes
2014 prices
Per capita expenditure figures derived from Experian 2015 (MMG3)
Growth rates derived from Experian Retail Planner Briefing Note 13 (2015)
Expenditure levels in 2051 held constant at 2041 per capita levels

Appendix E Quantitative methodology overview

