



Nathaniel Lichfield and Partners

Planning Design Economics

**ROYAL BOROUGH OF
KENSINGTON & CHELSEA**

**RETAIL AND LEISURE NEEDS
STUDY**

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Offices also in:
Cardiff
Manchester
Newcastle-upon-Tyne

Nathaniel Lichfield & Partners Ltd
14 Regent's Wharf
All Saints Street
London
N1 9RL
T 020 7837 4477
F 020 7837 2277
[E london@nlplanning.com](mailto:E.london@nlplanning.com)
www.nlplanning.com

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GLOSSARY OF TERMS

BISL	Business in Sport and Leisure is a major leisure industry association with over 100 members including leisure operators and consultants.
Class A1	Commercial units classed as retail or shop uses within the Use Classes Order.
Class A1 Services	Non-retail uses classed as A1 within the Use Classes Order, such as hairdressers, travel agents and dry cleaners.
Class A2	Commercial units classed as financial or professional services, for example banks and building societies, within the Use Classes Order.
Class A3/A4/A5	Commercial units classed as food or drink outlets, for example pubs, restaurants and takeaways, within the Use Classes Order.
Convenience Goods	Consumer goods purchased on a regular basis, including food and groceries and cleaning materials.
Comparison Goods	Durable goods such as clothing, household goods, furniture, DIY and electrical goods.
Experian	A data consultancy who are widely used for retail planning information.
EGi	A published source of information providing known retail and leisure operators' space requirements in towns across the country.
Goad Plans	Town centre plans prepared by Experian, which are based on occupier surveys of over 1,200 town centres across the country.
Gross floorspace	Total external floorspace including exterior walls.
Higher order comparison goods	Durable goods which tend to be high value, bought on an occasional basis and/or where customers are most likely to shop around and compare products in different shops e.g. adult fashion items, high value electrical goods, jewellery, furniture etc. Customers are usually prepared to travel further to purchase these items.
Lower order comparison goods	Durable goods which tend to be lower value, bought on a regular basis and/or where customers are less likely to shop around e.g. small household goods, books, pharmaceutical and toiletries. Customers are less likely to travel long distances to purchase these items.
Market share Penetration rate	The proportion of total consumer expenditure within a given area taken by a particular town centre or shopping facility.
Multiple traders	National or regional ' <i>chain store</i> ' retailers.
Net floorspace	Retail floorspace devoted to the sale of goods, excluding storage space.
Zone A Rent	The annual rental charge per square foot for the first 20 foot depth of a shop unit, which is the most suitable measure for standardising and comparing rental levels.
PTAL	Public transport accessibility level rated from "poor" = 1 to "excellent" = 6.

EXECUTIVE SUMMARY

Purpose of the Study

1. Nathaniel Lichfield & Partners (NLP) were commissioned by the Royal Borough of Kensington & Chelsea to prepare a Borough wide retail and leisure needs study, including an assessment of the International, Major and District Centres within the authority area. The study includes:
 - health checks and audits of all the international, major, district and local centres in the Borough;
 - a survey of 1,002 households within the Borough and parts of neighbouring authorities;
 - an on-street survey of 1,400 visitors within the eleven main centres in the Borough; and
 - a postal canvas of over 300 national/regional multiple retailers and leisure operators, in order to ascertain their potential space requirements in the Borough.

Survey Results - Key Findings

- Large food stores are the primary destinations for main food shopping, and residents will visit stores near to their home.
- A relatively low proportion of respondents travel by car for both food and non-food shopping, and high proportions use buses, train/underground or walk.
- Many respondents use their local town centre for comparison shopping, but the West End and the internet were also popular choices.
- A high proportion of residents in the Borough are aware of the proposed shopping centre at White City and many suggest they will consider regularly shopping there.
- For several types of leisure activity the majority of respondents travel outside the Borough.
- Over half of visitors within the eleven main centres do not live in or near the Borough. Some centres rely heavily on tourist visitors for their trade.
- Most centres attract visitors for a range of activities. However, in most centres the main reason for visiting the centre was to shop for non-food goods.
- The highest average spend on food and groceries was achieved in King's Road (West) with the lowest being in Knightsbridge. In terms of non-food goods, the highest average spend was achieved in Knightsbridge and lowest in South Kensington.
- A high proportion of visitors to Knightsbridge, Notting Hill Gate, Portobello Road and South Kensington travelled by underground. A significant proportion of respondents walked to Westbourne Grove, Earl's Court Road, King's Road (West) and Fulham Road (East), which suggest they are a more localised catchment area.

- The majority of visitors to all eleven centres visited the centre at least 2-3 times a week. The average length of stay was relatively short in most centres, although Knightsbridge has a relatively high proportion of respondents staying for two to three hours.
- This canvas of operators identified only 8 operators with space requirements in Kensington & Chelsea, of which only 3 are comparison retailers. The limited interest identified by this canvas may reflect the imminent opening of the Westfield shopping centre, which is likely to be the prime location for new operators within the study area.

The Potential for Retail Development

Convenience Retailing (Food and Grocery)

2. An assessment of available expenditure and existing shopping patterns suggests that convenience food stores within the Borough are collectively trading about 46% above the expected levels, and in total there is surplus expenditure of £129.91 million across the Borough as a whole.
3. In qualitative terms, households in the south and central parts of the Borough have a good choice of large food stores, including at least two superstores within two kilometres of their home. There are no obvious locational areas of deficiency in large food store provision in this part of the Borough. Residents in the north of the Borough have only one food superstore and no large food stores over 1,000 sq m net. The provision of food stores at White City will improve choice for residents in this area. However, there should be scope to improve food store provision in the north of the Borough. There are no discount food retailers within the Borough.
4. Based on the high growth scenario, which assumes new development will reduce food stores' turnover to national benchmark levels, there are potential floorspace requirements for about 8,638 sq m net of food store floorspace in the Borough by 2015 and about 745 sq m net in smaller stores/shops (9,383 sq m net in total). This scale of new convenience sales floorspace is likely to be difficult to physically accommodate within the Borough's existing centres.
5. Based on the low growth scenario, which assumes food stores will trade 20% above national benchmark levels, there are potential floorspace requirements for about 2,882 sq m net of food store floorspace in the Borough by 2015 and about 745 sq m net in smaller stores/shops (3,627 sq m net in total). This 20% higher than average level of trading may be reasonable for Kensington & Chelsea given the higher than national average expenditure levels and higher property overheads.

Comparison Retailing (Non-Food Durable Goods)

6. An assessment of available expenditure and existing shopping patterns suggest that a significant amount of comparison goods expenditure comes from visitors from outside the study area, e.g. commuters, tourists and occasional shoppers. Conversely residents in the Borough shop in neighbouring authorities e.g. Westminster and Brent Cross.
7. Major retail development in the pipeline will change existing shopping patterns and will increase comparison expenditure leakage from the Borough, in particular Westfield's new shopping centre at White City will have a significant impact on

shopping centres within the Borough, and Kensington High Street is particularly vulnerable. The low growth scenario assumes major retail development in neighbouring Boroughs will reduce the Borough's market share of comparison expenditure within the study area. The second high growth scenario assumes the Borough can deliver major retail development that could help the Borough to maintain its market share of comparison expenditure within the study area. The low growth scenario appears to be the most realistic for planning purposes and the strategy should seek to accommodate these projections within designated centres. On this basis the potential for further comparison goods floorspace within the Borough is shown in the Table below.

Additional Comparison Goods Floorspace Projections

	2008 to 2012	2008 to 2015	2008 to 2020	2008 to 2028
Projected Sales Floorspace SQ M Net	4,449	20,458	52,284	108,661
South Kensington & Chelsea Main Centres (1)	8,896	19,256	39,853	76,924
Central/North Kensington & Chelsea Main Centres (2)	-4,233	493	9,928	26,347
Other in Kensington & Chelsea	-214	709	2,503	5,390
Projected Gross Floorspace SQ M	5,932	27,277	69,712	144,881
South Kensington & Chelsea Main Centres (1)	11,862	25,674	53,137	102,565
Central/North Kensington & Chelsea Main Centres (2)	-5,644	658	13,237	35,129
Other in Kensington & Chelsea	-286	945	3,338	7,186

(1) South K&C includes Knightsbridge, Kings Road, Fulham Road and South Kensington (Zone 3).

(2) North/Central K&C covers Kensington High Street, Portobello Road, Earl's Court, Notting Hill Gate and Westbourne Grove (Zones 1 and 2)

8. In qualitative terms, the Borough has a good spread of comparison shopping destinations, but there is more limited comparison provision in the north of the Borough. Portobello Road and Westbourne Grove serve the northern part of the Borough, but they are more specialist destinations and do not provide the same range and choice of comparison shopping when compare with the Major and International Centres. The Westfield Centre in White City will significantly improve the range and choice of shopping.

9. There is only one traditional large retail warehouse in Kensington & Chelsea. Retail warehouses in London are generally concentrated in outer London Boroughs. Within Kensington & Chelsea the main department stores offer an extensive range of furniture and electrical items and there is also a good provision of high street and independent furniture, carpet and electrical shops.

10. Local shopping centres and parades offer a balanced distribution of local facilities serving local communities, and complement the main centres. They have an important role in serving the day-to-day needs in their local areas. Most residential areas within the Borough are within a reasonable walking distance of a centre, but the provision of new local centres to serve areas of deficiency, particularly in the north of the Borough should be considered.

Commercial Leisure and Entertainment Facilities

11. The provision of leisure, entertainment and cultural facilities within the Borough is reasonable, and residents also have good access to facilities outside the Borough particularly the West End, which may limit potential for new facilities in the Borough. The main sector that could offer some potential for new leisure facilities are private health & fitness facilities. High land/property values in the Borough may also make large format leisure uses commercially unviable e.g. tenpin bowling and bingo clubs, despite the theoretical capacity for these uses, unless they are part of a major mixed use development.

Accommodating Growth

12. The redevelopment of Lots Road Power Station and development proposals within the Kensal area may include new retail uses to serve proposed new residential and employment areas. This development will help meet some of the identified floorspace projection.
13. Twelve potential development sites have been identified which could accommodate retail, leisure or other town centre uses, including development sites in the LDF site allocations document. Many of the sites have constraints on development and their availability for redevelopment is uncertain. Most of the sites are currently in active use and only high density development is likely to be viable. The sites most likely to deliver a significant net increase in retail, leisure or other town use floorspace are:
 - Chelsea Farmers Market (edge-of-centre – King’s Road East);
 - The Clearings, Draycott Avenue (edge-of-centre - Fulham Road East);
 - Iranian Embassy (edge-of-centre – South Kensington);
 - High Street Kensington Station (within centre – Kensington High Street);
 - Odeon Cinema/Post Office (edge-of-centre – Kensington High Street);
 - LEB Depot, Victoria Gardens (edge-of-centre – Notting Hill Gate);
 - Newcombe House (within centre – Notting Hill Gate);
 - Telephone Exchange and TA Centre, Warwick Road (out-of-centre);
 - Earl’s Court Exhibition Centre (edge-of-centre – Earl’s Court Road)
 - Portobello Court Estate (edge-of-centre – Portobello Road).

14. If implemented the sites allocated for retail use in the UDP/LDF could deliver up to 9,000 sq m gross of Class A use, 4,000 sq m gross in the south part of the Borough and 5,000 sq m gross in the north/central part of the Borough.
15. Development plan policies within Kensington and Chelsea should continue to designate centres and establish an appropriate hierarchy, which will help to guide future development. The town centre first policy advocated in PPS6 remains the most appropriate approach within Kensington & Chelsea. Development/allocations on edge of centre sites should be well connected to existing shopping frontages, and should be capable of being integrated into the centre.

Future Strategy Implementation and Monitoring

16. There are a number of broad areas of possible actions the Council could pursue in order to maintain and enhance the role of shopping centres within the Borough, as follows:
 - application of guidance within PPS6, particularly relating to need and the sequential approach in determining out-of-centre retail and other development proposals that generate significant numbers of trips;
 - improving the range and choice of shops and services in all centres (where appropriate in terms of scale) by encouraging intensification, development and the re-occupation of vacant premises, and continuing to promote the centres;
 - maintaining the generally high quality environment within each centre;
 - measures to improve accessibility and public transport to the town and local centres and important local parades in order to encourage more residents to shop in their nearest centre, which may involve maintaining an appropriate level of car parking at a competitive cost and safeguarding and improving public transport services;
 - measures to bring forward development opportunities to improve the availability of modern premises suitable for new occupiers.
17. The recommendations and projections within this study are expected to assist the Council in preparing development plan policies over the coming years and to assist development control decisions during this period.

1.0 INTRODUCTION

The Study

- 1.1 Nathaniel Lichfield & Partners (NLP) were commissioned by the Royal Borough of Kensington & Chelsea to prepare a retail and leisure needs study, including an assessment of the International, Major and District Centres within the authority area, namely Knightsbridge, Kensington High Street, King's Road (East), King's Road (West), Fulham Road (East), Fulham Road (West), Notting Hill Gate, South Kensington, Earl's Court Road, Portobello Road and Westbourne Grove in line with the requirements of PPS6: Planning for Town Centres (March 2005). Plan 1 in Appendix I shows the location of these centres and centres within and near the Borough.
- 1.2 A key objective of the study will be to provide robust evidence to support the Council in formulating policies on retail provision in the Local Development Framework, and subsequent Development Control policies and Site Specific Allocation documents. The key objectives are to:
- assess the need for retail floorspace up to 2012, 2015, 2020 and 2028, reflecting social and demographic changes; and
 - provide a qualitative assessment of the range and distribution of shopping destinations (including 1 International Centre, 2 Major Centres, 8 District Centres and 35 Local Centres).
- 1.3 The Retail Needs Assessment has taken into account the wider network of centres in London. In particular the impact of future retail development both within and outside of the Borough, such as the Westfield's development at White City.

Content of the Report

- 1.4 Section 2.0 provides an overview of retail and commercial leisure trends. Section 3.0 provides an overview of the national, regional and local planning policy context. Section 4.0 provides a description of the shopping hierarchy in Kensington & Chelsea and the surrounding area.
- 1.5 Sections 5.0 summarises the results of a household survey and Section 6.0 summarises the results of the on-street survey. Sections 7.0 to 18.0 provide an audit of main and local centres and parades.

1.6 Sections 19.0 and 20.0 set out an analysis of shopping and commercial leisure needs. Section 21.0 sets out the scope for accommodating growth and Section 22.0 sets out the recommendations and conclusions.

2.0 OVERVIEW OF RETAIL AND COMMERCIAL LEISURE TRENDS

- 2.1 An assessment of the need for retail and leisure facilities in Kensington & Chelsea is set out in Sections 19 and 20 of this report. In the section below, we provide an overview of recent trends within the retail and leisure sectors.

Retail Trends

- 2.2 Past retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future, particularly for comparison goods. In the past expenditure growth has fuelled the growth in retail floorspace, including major out-of-centre development particularly in the 1980s and 1990. Continuation of these past trends is likely to lead to a need for further retail floorspace.
- 2.3 New forms of retailing have emerged in recent years as an alternative to more traditional shopping facilities. Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the Internet. Trends within this sector may well have implications for retailing within Kensington & Chelsea. The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street.
- 2.4 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector. However, there is still uncertainty about its longer-term prospects and the potential effects on the high street.
- 2.5 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. For example, extended opening hours and Sunday trading increased significantly in the 1990s. Retailers also responded to stricter planning controls by changing their trading formats. For example, some major food operators have introduced smaller store formats capable of being accommodated within town centres, such as the Tesco *Metro*, Sainsbury *Central/Local* store and Marks and Spencer's *Simply Foods* formats. Food operators have also entered the local convenience store market, for example *Tesco Express* store and convenience stores

linked with petrol filling stations. The entrance of European discount food operators such as Aldi, Lidl and Netto has also been rapid during the last decade.

- 2.6 Food store operators have also commenced a programme of store extensions, particularly Tesco, Sainsbury's and Asda. These operators, faced with limited growth in food expenditure, have attempted to increase the sale of non-food products within their food stores, including clothing and electrical goods.
- 2.7 Comparison retailers have also responded to recent market conditions. The bulky goods retail warehouse sector has rationalised and there have been a number of mergers. For example there are fewer DIY operators, following the acquisition of Do It All, Great Mills and Wickes by Focus DIY. B&Q and Homebase developed very large '*category killer*' retail warehouses (some exceeding 10,000 sq m gross), but more recently have scaled down their stores. Other traditional high street retailers have sought large out-of-centre stores, for example Boots, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across the country. Sports clothing retail warehouses including JJB Sports and Decathlon have also expanded out-of-centre. These trends have already been evident across the country and in London. However within Inner London, where land values are relatively high and the availability of large development sites is limited, the development of low density retail warehouses/retail parks has been more restricted than in outer London Boroughs.
- 2.8 Within town centres, some high street multiple comparison retailers have also changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq m - 2,150 sq ft) with an increasing polarisation of activity into the larger regional and sub-regional centres. The continuation of these trends may also influence future operator requirements in Kensington & Chelsea, with some operators looking for larger premises in the main centres.
- 2.9 Factory outlet centres have been developed across the country as an alternative to fashion shops within town centres. These developments are usually large and can provide over 10,000 sq m of comparison retailing, focusing primarily on fashion items and clothing, offering designer clothing at discounted prices. A number of large factory outlet developments have emerged across Great Britain and draw from a wide catchment area.

Leisure Trends

- 2.10 The demand for commercial leisure facilities has increased significantly during the last 20 years. The growth in the commercial leisure sector was particularly strong during the late 1980s and again in the mid 1990s and in early 2000. Average household expenditure on leisure services increased by approximately 12% between 2001 and 2006 (source: Family Expenditure Survey). The latest (2006) average household expenditure on leisure services is over £3,450 per annum. However, many analysts consider that the commercial leisure market has now reached saturation in some sub-sectors.
- 2.11 The mid-1990s saw the expansion of major *leisure parks*. These leisure parks are generally anchored by a large multiplex cinema and offer other facilities such as ten-pin bowling, bingo, nightclubs, health/fitness clubs, themed destination restaurants, pub/restaurants, children's nurseries and budget hotels. Commercial leisure facilities have typically been located on the edge of town centres or out-of-centre, with good road access. Many leisure uses have also emerged on retail warehouse parks.
- 2.12 The cinema market remains an important sector because cinemas often anchor leisure developments, providing footfall for other uses. Growth in this sector slowed significantly in recent years, but Cinemagoing 16 published in March 2007 by Dodona Research anticipated that 2007 would be a better year. The industry is now dominated by three main operators (Odeon, Cineworld and Vue) and the emphasis is now shifting from consolidation to physical expansion. The expansion of other sectors has also slowed, including ten-pin bowling and bingo. However, other sub-sectors have remained strong in recent years, in particular the private health and fitness market, with a number of multiple operators seeking premises across the UK, e.g. LA Fitness, Fitness First and Esporta. Nevertheless, the health and fitness sector is also reaching saturation point in some areas.

3.0 PLANNING POLICY CONTEXT

National Policy

3.1 PPS6: Planning for Town Centres (March 2005) sets out the Government's policies on town centres, retail, commercial leisure and other town centre uses.

3.2 The Government's key objective for town centres (this covers city, town, district and local centres) is to promote their vitality and viability by planning for growth and development of existing centres and promoting and enhancing existing centres, by focusing development in such centres and encouraging a wide range of services in a good environment, accessible to all.

3.3 Other Government objectives that need to be taken account of in the context of the key objective are set out in paragraph 1.4:

- Enhancing consumer choice by making provision for a range of shopping, leisure and local services, which allow genuine choice to meet the needs of the entire community and particularly socially excluded groups;
- Supporting efficient, competitive and innovative retail, leisure, tourism and other sectors, with improving productivity; and
- Improving accessibility, ensuring that existing or new development is, or will be, accessible and well served by a choice of means of transport.

3.4 Regional planning bodies (RPB's) and local planning authorities (LPAs) are advised in paragraph 1.6 to implement the Government's objectives for town centres, by planning positively for their growth and development. They should therefore:

- develop a hierarchy and network of centres;
- assess the need for further main town centre uses and ensure there is capacity to accommodate them;
- focus development in, and plan for the expansion of, existing centres as appropriate, and at the local level identify appropriate sites in development plan documents;
- promote town centre management, creating partnerships to develop, improve and maintain the town centre and manage the evening and night-time economy; and
- regularly monitor and review the impact and effectiveness of their policies for promoting vital and viable town centres.

3.5 Paragraph 2.1 states that in order to deliver the Government's key objective, RPBs and LPAs should actively promote growth and manage change in town centres, define the network and a hierarchy of centres, each performing their appropriate role to meet the needs of their catchment, and adopt a pro-active, plan-led approach to planning for town centres, through regional and local planning.

3.6 The main town centre uses to which PPS6 applies are outlined in paragraph 1.8:

- retail (including warehouse clubs and factory outlet centres);
- leisure, entertainment facilities and 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, both commercial and those of public bodies; and
- arts, culture and tourism (theatres, museums, galleries and concert halls, hotels and conference facilities).

3.7 PPS6, paragraph 2.15 to 2.17 offers specific guidance to LPAs on the role of plans at local level, including the need to work in conjunction with stakeholders and the community to:

- assess the need for new floorspace for retail, leisure and other main town centre uses, taking account of both quantitative and qualitative considerations;
- identify deficiencies in provision, assess the capacity of existing centres to accommodate new development, including, where appropriate, the scope for extending the primary shopping area and/or town centre, and identify centres in decline where changes need to be made;
- identify centres within their area where development will be focused, as well as the need for any new centres of local importance, and development strategies for developing and strengthening centres within their area;
- define the extent of the primary shopping area and the town centre, for the centre in their area on their proposal map;
- review all existing allocations and reallocate sites which do not comply with this policy statement;
- identify and allocate sites in accordance with the considerations on sight selection and land assembly e.g. assessment of need, appropriate scale of development, sequential approach, impact and accessibility;
- develop spatial policies and proposals to promote and secure investment in deprived areas by strengthening and/or identifying opportunities for growth of existing centres, and to seek to improve access to local facilities; and

- set out criteria based policies, in accordance with this policy statement, for assessing and locating new development proposals, including development on sites not allocated in development plan documents.

3.8 PPS6 also indicates that in addition to defining the extent of the primary shopping area for their local centres, LPAs may distinguish between primary and secondary frontages. Primary frontages should contain a high proportion of retail uses, while secondary frontages provide opportunities for flexibility and diversity of uses. Policy should make clear which uses will be permitted in such locations.

Demonstrating Need for development

3.9 PPS6 requires Councils to undertake assessments of need for other non-retail town centre uses, i.e. commercial leisure and office development. This study assesses the retail and leisure needs of the Royal Borough of Kensington & Chelsea.

3.10 PPS6 states in paragraph 2.33 that:

'in assessing the need and capacity for additional retail and leisure development, local planning authorities should place greater weight on quantitative need for additional floorspace for the specific types of retail and leisure developments. However local planning authorities should also take account of qualitative considerations. In deprived areas which lack access to a range of services and facilities, and there will be clear and demonstrable benefits in identifying sites for appropriate development to serve the communities in these areas, additional weight should be given to meeting these qualitative needs.'

3.11 In assessing quantitative need for additional development, local planning authorities should assess the likely future demand for additional retail floorspace, having regard to a realistic assessment of the existing forecast population levels, forecast expenditure for specific classes of goods to be sold, within the broad categories of comparison and convenience goods and forecast improvements in productivity in the use of floorspace.

3.12 With regards to assessing the qualitative need for additional development, paragraph 2.35 states that a key consideration will be to provide for consumer choice, ensuring that:

- an appropriate distribution of locations is achieved, subject to the key objective of promoting the vitality and viability of town centres and the application of the sequential approach, to improve accessibility for the whole community; and

- provision is made for a range of sites for shopping, leisure and local services, which allow genuine choice to meet the needs of the whole community, particularly the needs of those living in deprived areas.

3.13 Other local issues, although not necessarily elements of 'need', can be important material considerations.

Appropriate Scale of Development

3.14 PPS6 also requires that local planning authorities ensure that the scale of opportunities identified is directly related to the role and function of the centre and its catchment. Paragraph 2.41 states:

'The aim should be to locate the appropriate type and scale of development in the right type of centre, to ensure that it fits into that centre and that it complements its role and function.'

3.15 For city and town centres, PPS6, paragraph 2.43 states that where a need has been identified, LPAs should seek to identify sites in the centre, or failing that on the edge of the centre, capable of accommodating larger format developments. Paragraph 2.42 indicates that in most cases it is likely to be inappropriate to include local centres within the search area to be applied under the sequential approach for large scale developments.

3.16 The guidance places greater emphasis on the regeneration of town centres, particularly smaller centres and the need to define a network of centres, and where appropriate to plan for the decline of some centres. Local authorities are expected to set indicative upper limits on the scale of new floorspace appropriate in different types of centres.

The Sequential Approach

3.17 PPS6 sets out the sequential approach to site selection for new retail development (paragraph 2.44), namely that first preference should be existing centres where suitable sites or buildings for conversion are, or are likely to become available, taking account of an appropriate scale of development in relation to the role and function of the centre, followed by edge-of-centre locations, with preference given to sites that are or will be well-connected to the centre and only then out-of-centre sites, with preference given to sites which are or will be well served by a choice of means of transport and which are close to the centre and have a high likelihood of forming links with the centre.

3.18 Further to this LPAs should, in consultation with stakeholders (including the development industry) and the community, identify an appropriate range of sites to allow for accommodation of the identified need. Paragraph 2.45 emphasises the need for flexibility and realism from both LPAs and developers and operators in discussing the identification of sites,

'LPAs should be sensitive to the needs of the community and stakeholders, including developers and operators and identify sites that are, or are likely to become available for development during the development plan period and which allow for the accommodation of the identified need, including sites capable of accommodating a range of business models.'

3.19 The factors that should be taken into account in considering business models are scale, format, car park provision and the scope for disaggregation.

3.20 In selecting sites for allocation, the LPA should also consider the degree to which other considerations, including specific local circumstances, may be material to the choice of appropriate locations for development, and these include physical regeneration, employment, economic growth and social inclusion.

3.21 The guidance clearly states that local planning authorities should plan positively for growth by making provision for a range and choice of shopping and services. If a 'need' for new development is established, it will be necessary to identify opportunities to meet that need. PPS6 indicates that local authorities should allocate sufficient sites to meet anticipated demand for the next five years. PPS6 also suggests that an apparent lack of sites of the right size and in the right location should not be construed as an obstacle to site allocation and development to meet this need. Local planning authorities should consider the scope for effective site assembly using their compulsory purchase (CPO) powers, to ensure that suitable sites within or on the edge of centres are brought forward for development.

3.22 This suggests the onus is placed on the Council to identify sites to accommodate the 5-year demand for development. This study provides floorspace projections up to 2028. Therefore, it may not be appropriate for the Council to seek to identify opportunities to accommodate projections up to 2028 at this stage.

3.23 PPS6 also suggests that where growth cannot be accommodated in identified existing centres, local planning authorities should plan for the extension of the primary shopping area if there is a need for additional retail provision or, where appropriate, plan for the extension of the town centre to accommodate other main town centre

uses. Extension of the primary shopping area or town centre may also be appropriate where a need for large developments has been identified and this cannot be accommodated within the centre. Larger stores may deliver benefits for consumers and local planning authorities should seek to make provision for them in this context. In such cases, local planning authorities should seek to identify, designate and assemble larger sites adjoining the primary shopping area (i.e. in edge-of-centre locations).

Planning for a Sustainable Future White Paper (May 2007)

3.24 The White Paper, Planning for a Sustainable Future was published in May 2007 and sets out a wide ranging package of reforms to streamline the town and country planning system.

3.25 In relation to town centre planning policy the White Paper states in paragraph 7.50 that:

“A crucially important aspect of creating places where people want to live and communities can flourish is to maintain and nurture the vitality of our town centres.”

3.26 The White Paper emphasises the need for local authorities to proactively manage the role and function of their town centres, including by extending the boundary where that makes sense, and to promote growth and development of their town centres by facilitating a wide range of shopping, leisure and local services to enhance consumer choice. To achieve this, local authorities need to have robust, evidence based plans and strategies that are up to date and which set out a clear and pro-active vision for town centres based on a sound understanding of both the need and demand for new facilities.

3.27 The White Paper goes on to state in paragraph 7.52 that:

“Where development outside the town centre would not impact detrimentally on the town centre, and it is otherwise acceptable in planning terms, both plans and planning decisions should reflect this.”

3.28 In relation to the ‘needs test’, the paper considers that it can have the unintended effect of restricting competition and limiting consumer choice. To address this issue, two clear objectives have been identified, firstly to support current and prospective town centre investment which contributes to economic prosperity and to national social and environmental goals. Secondly, planning should promote competition and improve consumer choice avoiding the unintended effects of the current needs test.

3.29 It is therefore proposed to review and replace the current need and impact tests with a new test which has a strong focus on national town centre policy and promotes competition and improves consumer choice avoided the unintended effects of the current needs test. Proposals for this were consulted on in late summer/early autumn 2007.

3.30 The Planning White Paper Consultation: Government Response to Consultation Replies (November 2007) outlines that most of the general responses to the proposals objected to the removal of the need test on the basis that it would weaken town centre policy. The Government response, however, reasserted that there is a need for a robust approach to assessing the impact of proposals on sites outside town centres, which is responsive to the needs of the market and also reflects particular local circumstances.

Proposed Changes to PPS6 (10th July 2008)

3.31 On 10 July 2008, the Department of Communities and Local Government published a Consultation Document on proposed changes to PPS6 Planning for Town Centres. The Consultation Paper proposes replacing the current 'need' and 'impact' tests set out in PPS6 with a new 'impact test'.

3.32 The aim of the document is to address the unintended effects of the current guidance. The key Government objective to promote the vitality and viability of town centres remains, as does much of the Government's guidance on Positive planning and the Plan-led approach.

3.33 However, other objectives which should be taken into account, or wider Government objectives that may be relevant include:

- Promotion of competition between retailers;
- Raising the productivity growth rate of the UK economy;
- Encouraging investment in deprived areas;
- Building prosperous communities by improving economic performance;
- Helping to tackle climate change; and
- Consideration of terrorism as well as crime

3.34 The need for local authorities to consider quantitative and qualitative need remains. However, Councils are also expected to have regard to the strategic objectives set out in the Regional Economic Strategy and use relevant market information and economic data.

- 3.35 The importance of seeking a good mix of shops and services in a centre is also referred to, with the role of smaller shops specifically noted. Authorities are encouraged to seek to promote competitive town centre environments.
- 3.36 Suggested changes to Chapter 4 of PPS6 includes a list of key indicators that LPAs should collect and use to monitor the health of their town centres, including:
- The proportion of vacant street level property and the length of time properties have been vacant;
 - Land values and the length of time key sites have remained undeveloped; and
 - Perception of crime and occurrence of crime including safety and security issues relating to the threat of terrorism.
- 3.37 The Proposed Changes to PPS6 are the subject of consultation until 3 October 2008.

Planning Policy Guidance Note 13: Transport (PPG 13, March 2001)

- 3.38 The key objectives, set out at paragraph 4 of PPG13 are to integrate planning and transport, in order to:
- *“promote more sustainable transport choices for both people and for moving freight;*
 - *promote accessibility to jobs, shopping, leisure facilities and services by public transport; and*
 - *reduce the need to travel, especially by car.”*
- 3.39 The Guidance advises that planning policies should seek to promote the vitality and viability of existing town centres, which should be the preferred locations for new retail and leisure developments. When this development cannot be accommodated in or on the edge of existing centres, it may be appropriate to combine the proposal with existing out-of-centre developments.

The London Plan

- 3.40 The London Plan: Spatial Development Strategy has replaced strategic planning guidance for London (formerly RPG3). The London Plan was published in February 2004 and consolidated in 2008. One of the strategic priorities for West London (Policy 5F.1) is to: *“promote the sub-region’s contribution to London’s world city role, especially in relation to the Central Activity Zone including the offers of Knightsbridge and the Kensington museum complex as international shopping and leisure destinations”*.

3.41 Policy 3D.1 relates to town centres stating that the Mayor and London Boroughs should: “*enhance access to goods and services and strengthen the wider role of town centres, including UDP policies to:*

- *Encourage retail, leisure, and other related uses in town centres, and discourage them outside the town centres;*
- *Improve access to town centres by public transport, cycling and walking;*
- *Enhance the quality for retail and other consumer service in town centres;*
- *Support a wide role for town centres as locations for leisure and cultural activities, as well as business and housing;*
- *Require the location of appropriate health, education and other public and community serving in town centres;*
- *Designate core areas primarily for shopping uses and secondary areas for shopping and other uses and set out policies for the appropriate management of both types of area;*
- *Undertake regular town centre health checks; and*
- *Support and encourage town centre management, partnerships and strategies including the introduction of Business Improvement District in appropriate locations.”*

3.42 Policies 3D.2 and 3D.3 are consistent with advice set out in PPS6, regarding maintaining town centres and focusing development within centres. Policies 3D.4 and 3D.5 seek to promote and protect arts/culture and sports facilities.

3.43 The London Plan sets out a hierarchy/classification of centres across London, i.e. international centres (2), metropolitan centres (10), major centres (35) and district centres (160). Knightsbridge is classified as one of the two *International Centres*. Kensington High Street and King’s Road East are classified as *Major Centres*. Portobello Road, Notting Hill Gate, Fulham Road East, South Kensington, Earl’s Court Road, King’s Road West and Fulham Road West are classified as *District Centres*. The London Plan indicates that the broad classification of centres should be refined in the light of local circumstances through development plans.

3.44 Supporting the London Plan the Mayor has also published two documents relating to the future requirement for retail floorspace:

- Comparison Goods Floorspace Need in London (October 2004); and
- Convenience Goods Floorspace Need in London (June 2005).

- 3.45 These reports provide broad brush projections for retail floorspace requirements across London up to 2016 based on a number of scenarios relating to growth in turnover sales densities.

Sub-Regional Planning Framework

- 3.46 The Central London Sub-Regional Planning Framework (SRDF) was published in May 2006, covering the Boroughs of Camden, City of Westminster, Islington, Kensington & Chelsea, Lambeth, Southwark and Wandsworth. The document states in relation to retail developments (Paragraph 61):

“The scale of growth in population and consumer expenditure across London is generating substantial need for new retail space in the Central London sub-region. It is estimated that Central London’s resident-based consumer expenditure alone will increase by over 50% between 2001 and 2016, which is above the average increase for London as a whole. Over the same period resident-based comparison goods expenditure is expected to more than double from £4bn to £8bn. When commuter and tourist spend are factored in, comparison goods expenditure is projected to increase to over £10.5bn by 2016. Expenditure on convenience goods in the sub-region is also expected to increase but at a more modest rate of about 40% from £2.4bn to £3.4bn.”

- 3.47 The Royal Borough of Kensington & Chelsea is identified as having the second highest level of need for comparison floorspace compared to the other Boroughs in the sub-region, after Westminster. One of the proposed action points (Proposed Actions 1D) is for the boroughs to undertake fine-grained distributions of need and capacity for new retail space. Table 1D.1 estimates that Kensington & Chelsea needs an additional 56,000 sq m of comparison floorspace up to 2016, and an additional 10,000 sq m of convenience floorspace over the same period. These estimates are based on a sales density of £4,000 sq m for comparison goods and £5,000 sq m for convenience goods.
- 3.48 In relation to cultural and leisure uses Action 1E requests that Boroughs “seek to sustain and enhance Central London’s unique strategic leisure, cultural and tourism offer in line with London Plan policy...”. In Annex 4 of the SRDF per capita spending on leisure services in Kensington & Chelsea is predicted to rise from £2,602 in 2001 to £3,006 in 2016, both the highest of all Boroughs within the Central London area.

Local Planning Context

3.49 The Royal Borough of Kensington & Chelsea Unitary Development Plan was adopted in May 2002. The hierarchy of shopping centres in the Borough is defined in the UDP as follows:

- **Principal Shopping Centres:**
 - Portobello Road;
 - Notting Hill Gate;
 - Kensington High Street;
 - Fulham Road (West);
 - Fulham Road (East);
 - Knightsbridge;
 - King's Road (West);
 - King's Road (East);
 - South Kensington.
- **Local Shopping Centres:**
 - Barlby Road
 - Ladbroke Grove (North)
 - Golborne Road (North)
 - North Pole Road
 - St Helens Gardens
 - Ladbroke Grove Station
 - All Saints Road
 - Westbourne Park Road
 - Westbourne Grove
 - Clarendon Cross
 - Holland Park Avenue
 - Holland Road
 - Napier Road
 - Kensington High Street
 - Commonwealth Institute
 - Thackeray Street
 - Pembroke Road
 - Stratford Road
 - Gloucester Road
 - Cromwell Road Air Terminal
 - Gloucester Road (South)
 - Old Brompton Road (East)
 - Ifield Road
 - The Billings
 - Fulham Road - Old Church Street
 - Walton Street
 - Lowndes Street
 - Pont Street
 - Sloane Avenue
 - Elystan Street
 - Chelsea Manor Street
 - Lower Sloane Street
 - Earl's Court Road
 - Golborne Road
 - Worlds End
 - Fulham Road/Brompton Cemetery

3.50 The adopted UDP sets out a number of general strategic policies for Shopping in the Borough. The general strategy the Council will pursue in relation to the provision of shopping in the Royal Borough includes:

- *STRAT 38 – To seek to enhance the vitality and viability of Principal and Local Shopping Centres and to ensure that they are the focus for new retail development and continue to provide shopping facilities in the Royal Borough.*
- *STRAT 39 – To ensure that large new retail development is concentrated in the Principal Shopping Centres.*
- *STRAT 40 – To promote retail development in the Local Shopping Centres in keeping with their scale, character and function.*
- *STRAT 41 – To improve the attractiveness and competitiveness of the Borough's shopping centres by improving the townscape and streetscape environment.*

- *STRAT 43 – To ensure that the needs of those who live and work in the Royal Borough are met by shops and services which are easily accessible by a means of transport other than the car.*
- 3.51 Within the adopted plan Policy S6 states that the Council will “*seek to maintain and improve the vitality, viability and function of the shopping centres throughout the borough*”.
- 3.52 Policy S7 proposes that the Council will “*seek a concentration of shops in the core frontage of Principal Shopping Centres*”.
- 3.53 Further to this, within the Principal Shopping Centres policies S17 and S18 seek to ensure that core and non-core frontages retain a level of A1 retail uses and preserve the overall retail function of the centres.
- 3.54 Local Shopping Centres perform a more localised shopping function providing for the day-to-day needs of residents and workers in the locality. Policy S8 proposes the Council will normally resist the loss of any shop in Local Shopping Centres and Policy S9 seeks to encourage new convenience retail within Local Shopping Centres where it is appropriate to the character and function of the centre.
- 3.55 The UDP further acknowledges the role of Principal Shopping Centres and Local Shopping Centres in providing services to cater for important local needs. Policy S12 seeks to resist the loss of bank and building society branches in North Kensington and South West Chelsea and resist the loss of launderettes throughout the Borough’s centres. Policy S13 allows scope to change shop uses to community based uses, launderettes or local medical services in Local Shopping Centres and non-core frontages of Principal Shopping Centres where there is an established need and no detriment to vitality and viability of the centre. Policy S14 seeks to permit the change of use in Local Shopping Centres to bank and building society branches in north Kensington and south west Chelsea where there is an established need and no detriment to the vitality and viability of the centre.
- 3.56 Within the adopted plan Policy S25 relates to retail development outside the designated Shopping Centres. This policy states that on the edge of designated Town Centres proposals for retail development will only be acceptable where there are no suitable, viable and available in-centre sites, with out of town centre proposals only acceptable where there are no in-centre and edge-of-centre sites. This policy also requires edge-of-centre and out-of-centre proposals to:

- *Show that there is a clearly established need for the development;*
- *Show that the development would be accessible by a choice of means of transport other than by car, including on foot, bicycle and public transport;*
- *Not have a detrimental effect on the vitality and viability of any existing shopping centres;*
- *Not result in material increases in traffic movement on the existing road network; and*
- *Not result in any material reduction in residential character or amenity by reason of noise and excessive activity.*

3.57 The adopted UDP also outlines planning policy for recreation and leisure. General policy STRAT 46 seeks *“to ensure the continued contribution of sports, leisure and recreation provision, including arts, cultural and entertainment facilities in the Royal Borough, to the local and metropolitan area”*.

3.58 Policy LR28 states the Council will normally resist the loss of arts, cultural and entertainment facilities. Policy LR29 acknowledges the character and recreational value of theatres and cinemas within the Royal Borough and requires, *“a replacement of similar capacity upon redevelopment of any cinema or theatre”*.

Local Development Framework

3.59 The Royal Borough of Kensington & Chelsea Council has begun preparing a Local Development Framework (LDF) in line with the new provision of the Planning and Compulsory Purchase Act 2004. A Local Development Scheme (LDS) was approved by the Secretary of State in May 2005. A revised LDS was adopted by the Council and published in February 2008. The Council’s Statement of Community Involvement (SCI) was adopted in December 2007. It is anticipated that the LDF will completely replace the existing UDP in 2013, although the Core Strategy is due to be adopted in autumn 2010. The Royal Borough of Kensington & Chelsea LDF will comprise the following:

- Core Strategy and the North Kensington Plan DPD;
- Proposals Map DPD;
- Site Allocations DPD;
- Development Management Policies DPD;
- S106 Planning Agreements SPD;
- Transportation SPD; and
- Annual Monitoring Reports.

3.60 The LDF may also contain further Supplementary Planning Documents (SPDs) which explain the application of the policies outlined in the Development Plan Documents (DPDs), however the exact scope of these further SPDs is yet to be confirmed.

3.61 The LDF Core Strategy Interim Issues and Options document was published for public consultation in February 2008. The document highlights potential options for the future of town centres within the Borough which could be brought through in the Core Strategy. The document sets out a hierarchy of centres, following an initial issues and options consultation, which reflects the hierarchy identified in the London Plan, as follows:

- **International Centre:**
 - Knightsbridge

- **Major Centres:**
 - King's Road (East); and
 - Kensington High Street

- **District Centres:**
 - King's Road (West);
 - Fulham Road (East);
 - Fulham Road (West);
 - Notting Hill Gate;
 - South Kensington; and
 - Earl's Court Road
 -

- **Special District Centres:**
 - Portobello Road; and
 - Westbourne Grove

- **Neighbourhood and Local Centres:**
 - The remaining designated centres (35 in total)

3.62 These centres are shown on Plan 1 in Appendix I.

4.0 THE SHOPPING HIERARCHY AND CATCHMENT AREA

Shopping Centres in Kensington & Chelsea and the Surrounding Area

- 4.1 Knightsbridge, King's Road (East and West), Kensington High Street, South Kensington, Notting Hill, Fulham Road (East and West), Portobello Road, Earl's Court Road and Westbourne Grove are the eleven main shopping centres within Kensington & Chelsea. These town centres are influenced by major shopping destinations in Central and West London and compete with a number of centres in neighbouring boroughs including Queensway/Bayswater, Hammersmith and Oxford Street. Residents in the Borough have good access to a number of centres by road, public transport and on foot.
- 4.2 Venuescore's UK Shopping Index 2006 provides an index of retail centres on the basis of a weighted score for multiple retailers represented in each centre. Venuescore's rank for centres in the Borough and other shopping centres in the sub-region are shown in Table 4.1.
- 4.3 King's Road is the highest ranked centre in the Borough (107th) followed by Kensington (113th) and Knightsbridge (139th). Notting Hill Gate is ranked 396th and Earl's Court, Fulham Road and Gloucester Road are ranked significantly lower at 1,034th, 1,034th and 1,173rd respectively.
- 4.4 There are several centres surrounding the Borough that are ranked above King's Road, Kensington and Knightsbridge. Oxford Street is at the top of the hierarchy and is ranked 11th and Covent Garden is ranked 87th. Notting Hill is ranked below centres such as Hammersmith, Regent Street and Bayswater/Queensway but above Bond Street, Shepherds Bush and Acton.
- 4.5 Gloucester Road is ranked towards the bottom of the centres surveyed but is still above Baker Street, Maida Vale and Wandsworth Bridge Road. Other Local Centres within the Borough are not included within the Venuescore Index because they are relatively small with limited or no multiple retailer provision.

Table 4.1 Venuescore Shopping Index (2006)

Venue	Venuescore Index	Rank
Oxford Street	297	11
Covent Garden	160	87
Ealing	152	100
King's Road	147	107
Kensington	141	113
Knightsbridge	132	139
Hammersmith	126	149
Richmond Upon Thames	118	166
Putney	107	196
Bayswater/Queensway	94	224
Clapham Junction	92	232
Regent Street	87	256
Chiswick	85	256
Wandsworth	72	315
Notting Hill	60	396
Bond Street	53	453
Shepherds Bush	49	483
Acton	39	618
Marylebone	38	633
Soho	38	633
North End Road	34	700
Fulham Broadway	31	764
Edgware Road	31	764
East Sheen	28	850
Paddington	24	988
Earl's Court	23	1,034
Fulham Road	23	1,034
Parsons Green	21	1,127
West Kensington	21	1,127
Gloucester Road	20	1,173
Baker Street	20	1,173
Maida Vale	18	1,290
Wandsworth Bridge Road, Fulham	17	1,357
Belgravia	12	1,818

- 4.6 The catchment areas of the centres listed above overlap to a large extent. Residents within Kensington & Chelsea have a large number of shopping destinations to choose from. A notable proportion of residents travel to these destinations, particularly for higher order comparison shopping, such as clothing and footwear.
- 4.7 The relative performance and importance of shopping centres can be demonstrated by commercial yields and Zone A rental levels achieved for retail property. Commercial yields are a measure of property values, which enables the values of properties of different size, location and characteristic to be compared. The level of yield broadly represents the market's evaluation of risk and return attached to the income stream of shop rents. Broadly speaking low yields indicate that a centre is considered to be attractive and, as a result, more likely to attract investment and

rental growth than a centre with high yields. Retail yields for the established centres in the sub-region are shown in Table 4.2 and a comparison of Zone A rental levels is shown in Table 4.3.

- 4.8 Within the Borough retail yield data is only available for Knightsbridge, Chelsea (i.e. King's Road) and Kensington. Retail yields in relatively low (strong) in all three centres, and have fallen by 0.5% since 2006. Yields within Knightsbridge are slightly higher (worse) than the West End but slightly lower (better) than in Richmond. Yields in Chelsea and Kensington are slightly lower (better) than yields in Ealing Broadway, Chiswick, Acton and Hammersmith.

Table 4.2: Retail Yields in Kensington & Chelsea and Other Centres

Centre	Yield %							
	2001	2002	2003	2004	2005	2006	2007	2008
London, West End	5.25	5.25	5.25	5.25	5.0	5.0	4.25	4.25
London, Knightsbridge	5.0	5.0	5.0	5.0	5.0	5.0	4.5	4.5
Richmond	4.5	4.5	4.5	4.5	5.0	5.0	5.0	5.0
London, Chelsea	5.75	5.75	5.75	5.75	5.5	5.5	5.0	5.0
London, Kensington	6.25	6.25	6.25	6.25	6.25	6.0	5.5	5.5
Ealing Broadway	6.5	6.25	6.25	6.25	6.25	6.0	5.5	5.5
Chiswick	7.0	7.0	7.0	7.0	7.0	7.05	6.5	6.5
Acton	9.5	9.0	9.0	9.0	9.0	9.0	6.75	7.0
London, East Sheen	8.0	8.0	8.0	8.0	8.0	8.0	7.5	7.0
London, Hammersmith	9.25	9.25	9.25	9.0	9.0	9.0	8.5	7.5
London, Fulham Nth End Rd	9.5	9.5	9.0	9.0	9.0	9.0	8.5	7.5

Source: Valuation Office (Jan 2008)

- 4.9 Brompton Road (i.e. Knightsbridge) and Sloane Street (i.e. King's Road East) achieve the highest Zone A retail rents in the Borough only slightly lower than Oxford Street (West). Zone A retail rental data for the other centres in the Borough is only available up to 2004. Zone A rents are much lower in Notting Hill Gate (£1,615 per sq m), Fulham Road (£1,292 per sq m), Old Brompton Road (£1,023 per sq m), Earl's Court Road (£1,023 per sq m) and Portobello Road (£1,076 per sq m) than other larger centres in the Borough, i.e. Kensington and King's Road. In all centres rental levels have increased steadily since 1997.
- 4.10 In terms of retail rents on Kensington High Street, Property Week (15th February 2008) reported that Westfield's retail development in White City (which is due to open in November 2008) has already had an impact. Retailers have left the centre and retail rents are falling. Barkers (House of Fraser) Department Store closed in January

2006, followed by Next, Dixons, Shellys, Size?, Mango, Levi and Miss Sixty. It is understood that French Connection and Monsoon are also expected to leave.

Table 4.3: Retail Rents in Kensington & Chelsea and Other Centres

Centre	Annual Zone A Retail Rents £ per Sq M								
	1997	1998	1999	2000	2001	2002	2003	2004	2007
Oxford Street West	3,767	5,651	5,113	4,844	4,844	5,059	5,167	5,221	5,705
Brompton Road	4,467	4,736	5,382	5,382	5,651	5,651	5,597	5,597	5,651
Sloane Street	3,767	4,306	3,767	3,983	4,306	4,575	4,575	4,521	4,844
Oxford Street East	3,229	4,306	4,037	4,037	4,090	4,090	4,090	4,037	-
King's Road	1,938	2,530	2,583	3,229	3,444	3,444	3,498	3,552	-
Kensington High St	2,153	2,422	2,153	2,691	3,229	3,229	3,444	3,283	-
Westbourne Grove	700	700	861	1,076	1,615	1,938	2,153	2,099	-
Richmond	1,184	1,346	1,615	1,615	1,722	1,884	1,884	1,938	2,153
Ealing	1,346	1,615	1,615	1,615	1,615	1,884	1,938	1,991	2,045
Hammersmith	646	646	700	807	1,292	1,507	1,722	1,830	2,045
Queensway	1,076	1,076	1,292	1,615	1,615	1,615	1,615	1,668	-
Notting Hill Gate	700	700	861	1,292	1,399	1,507	1,507	1,615	-
Chiswick	700	700	807	915	915	1,292	1,399	1,399	1,453
Fulham Rd	861	861	969	1,023	1,076	1,076	1,292	1,292	-
Old Brompton Road	807	807	969	1,023	1,184	1,184	1,184	1,184	
Earl's Court Road	700	700	753	969	969	969	969	1,023	
Portobello Road	-	-	-	-	-	1,076	1,076	1,076	
Acton	377	377	431	431	431	484	484	484	700

Source: 1987-2004 figures - Colliers CRE 2004 In-Town Retail Rents, 2007 Figures - Colliers CRE 2007 Retail Rents.

- 4.11 In the last two years, according to Cushman & Wakefield, Zone A rents on Kensington High Street have fallen from £3,229 per sq m to £2,799 per sq m, the only prime London retail street to have witnessed such a decrease.

Socio-Economic Characteristics within Kensington & Chelsea

- 4.12 Shopping needs may vary considerably, often related to socio-economic characteristics. For example, residents without access to a car or those on low incomes will have different needs to those who are mobile by car or who enjoy higher income. Lower income groups without access to a car may be less able to travel to shopping facilities and may also be socially excluded from high priced shops, therefore, the availability of discount or value retail facilities may be important for these groups. The socio-economic characteristics of Kensington & Chelsea have been examined and compared with the Inner London and national averages.
- 4.13 Car ownership in Kensington & Chelsea (49.6% of households) is comparable with the Inner London average (49.4%) but is considerably lower than the UK average (72.6%), as shown in Table 4.4. A slightly higher proportion of households have two

or more cars in Kensington & Chelsea compared with the Inner London average, which may be an indication of higher levels of affluence and mobility than the rest of London, albeit the proportion is significantly lower than the UK average. The low car ownership when compared with the UK average reflects the Borough's good public transport links. Car ownership is generally lower in major urban areas than in rural areas or small towns, particularly in London and is not necessarily an indication of levels of affluence.

Table 4.4: Car Ownership 2001

Characteristic	% Households 2001		
	Kensington & Chelsea	Inner London Average	UK Average
Car Ownership			
Two or more	10.4	9.7	28.8
One	39.2	39.3	43.8
None	50.4	50.6	27.4

Sources: 2001 Census of Population

- 4.14 Kensington & Chelsea has a reasonably high proportion of economically active adults in employment as shown in Table 4.5, when compared with the Inner London average, but slightly lower than the UK average. The Borough, similar to the rest of Inner London, is characterised by a relatively high proportion of students, a low proportion of retired people and a relatively high unemployment rate.

Table 4.5: Economic Activity 2001

Status	% People aged 16-74		
	Kensington & Chelsea	Inner London Average	UK Average
Employed	59.0	57.4	60.4
Unemployed	4.7	5.6	3.4
Looking after home/family	8.1	7.1	6.5
Students	10.2	11.4	7.3
Retired	8.3	7.8	13.4
Other inactive	9.7	10.7	9.0

Sources: 2001 Census of Population

- 4.15 In terms of age structure Kensington & Chelsea is characterised by a low proportion of children (under 15) and a low proportion of elderly people (over 64), as shown in Table 4.6. The proportion of adults between 25 and 44 is significantly above the national average. These figures are consistent with the high proportions of students and young working adults without children.

Table 4.6: Age Structure 2001

Status	% of Population 2001		
	Kensington & Chelsea	Inner London Average	UK Average
Children 0-14	14.9	18.5	18.9
Adults 15 to 24	11.4	14.3	12.3
Adults 25 to 44	38.9	39.5	29.2
Adults 45 to 64	22.6	17.5	23.8
Adults 65 to 74	6.4	5.6	8.4
Adults 75 +	5.8	4.7	7.5

Sources: 2001 Census of Population

- 4.16 Kensington & Chelsea has a broadly similar ethnic mix when compared with the Inner London average, albeit Kensington & Chelsea has a significantly higher proportion of 'Other White' and a lower proportion of Asian/Asian British (Bangladeshi) and Black/Black British (Caribbean & African) than Inner London. Both Kensington & Chelsea and Inner London have a higher proportion of ethnic minorities than the average for the UK, as shown in Table 4.7.

Table 4.7: Ethnic Groups 2001

Status	% of Population 2001		
	Kensington & Chelsea	Inner London Average	UK Average
White British	50.1	50.5	88.2
White Irish	3.3	3.4	1.2
Other White	25.3	11.8	2.5
Mixed	4.1	3.9	1.2
Asian or Asian British (Indian)	2.0	3.1	1.8
Asian or Asian British (Pakistani)	0.7	1.6	1.3
Asian or Asian British (Bangladeshi)	0.7	4.6	0.5
Other Asian	1.4	1.3	0.4
Black/Black British (Caribbean)	2.6	6.9	1.0
Black/Black British (African)	3.8	8.3	0.9
Other Black/Black British	0.6	1.3	0.2
Chinese	1.6	1.4	0.4
Other Ethnic Group	3.8	2.0	0.4

Sources: 2001 Census of Population

- 4.17 This socio-economic analysis indicates that the profile of residents in the Borough differs slightly to the profile of residents in Inner London, and this profile is different to the UK profile. Kensington & Chelsea has a similar level of car ownership when compared to the Inner London average but has a higher proportion of economically

active adults. Kensington & Chelsea has a higher proportion of young adults aged 45 to 64 when compared with the Inner London profile and has a higher proportion of 'Other White' and a lower proportion of 'Black' ethnic groups.

- 4.18 However, these Borough wide averages hide variations within Kensington & Chelsea. The southern and central parts of the Borough are generally much more affluent than the north of the Borough. The Borough has 119 Super Output Areas (SOA), of which 46 (39%) are within the worst quartile of all SOA in England in terms of multiple deprivation in 2007. However 47 (39%) of the remaining are performing better than the national median. The wards in the north of the Borough, i.e. Saint Charles, Golborne and Colville are amongst the most deprived wards in the country, whilst wards in the south and central areas of the Borough are amongst the most affluent e.g. Campden, Hans Town and Royal Hospital.
- 4.19 These socio-economic characteristics will have implications for shopping provision within the Borough. Most local residents will generally want access to all forms of shopping, although more affluent households may be more selective and may be prepared to travel further for certain types of shopping. Less affluent residents will want access to value/discount shopping facilities within easy access of their home.
- 4.20 The level of accessibility to shopping centres/stores, in terms of the convenience to the home or work, is an important consideration for customers. The distance (or time) customers are prepared to travel for each type of shopping will vary. For example, residents in the Borough might reasonably expect to have easy walking access to local shops (for daily top up purchases). Employees working within the Borough may also expect to find shopping facilities within easy walking distance from their place of employment to meet their lunchtime needs.
- 4.21 For bulk or main food shopping, residents may expect to be able to visit a supermarket that provides a reasonable range of goods by car or public transport within the wider locality. Residents may be prepared to travel further for higher order comparison goods purchased on an occasional basis, such as Christmas gifts, fashion, furniture or electrical goods. For example, customers will be prepared to travel to larger centres for these occasional shopping trips.
- 4.22 The household shopper survey results demonstrate that residents tend to visit a diverse selection of shopping centres and leisure destinations. A high proportion of residents in the study area regularly shop in London's West End, Hammersmith and Brent Cross. These shopping patterns are likely to continue in the future.

5.0 HOUSEHOLD SURVEY

Survey Structure

5.1 NEMS Market Research carried out a telephone survey of 1,002 households across the Kensington & Chelsea study area in February 2008. The survey results are shown in Appendix E and summarised in this section. The study area, shown in Appendix A, was split into ten sectors or zones based on postcode boundaries, as follows:

- Zone 1: Kensington North
- Zone 2: Kensington Central
- Zone 3: Kensington South
- Zone 4: Brent South
- Zone 5: Westminster North
- Zone 6: Westminster South
- Zone 7: Wandsworth North
- Zone 8: Hammersmith & Fulham South
- Zone 9: Hammersmith & Fulham Central
- Zone 10: Hammersmith & Fulham North

5.2 The study area includes all parts of the Royal Borough of Kensington & Chelsea (i.e. Zones 1, 2 and 3), and also parts of adjacent boroughs where people are likely to shop within the Borough. A list of the postcodes contained in each zone is shown in Appendix A. The zones were chosen based on postcode boundaries which best fit the likely primary catchment areas of the main centres in the Borough.

5.3 The number of interviews undertaken in each zone reflects the population in each respective zone in order to provide statistically reliable sub-samples. The main aims of the survey were to establish patterns for the following:

- Main food and grocery shopping;
- Top-up food and grocery shopping;
- Non-food shopping, including:
 - clothing and footwear;
 - domestic electrical appliances;
 - other electrical goods (TV, Hi-Fi and computers);
 - furniture, soft furnishing or carpets;
 - DIY/garden items and hardware;
 - health, beauty and chemist goods;
 - other non-food items; and

- Leisure activities, including:
 - cinema;
 - theatre;
 - pub/bar;
 - restaurant;
 - nightclub;
 - bingo;
 - health club; and
 - ten-pin bowling.

Food and Grocery Shopping

Main Food Shopping

- 5.4 The larger food stores in the study area are the main destination for respondents' last main food shopping trip across the study area. Overall, the Sainsbury's at Ladbrooke Grove was the most popular shopping destination for the study area as a whole, although different zones recorded different responses as the most popular destination for their main food shopping trip. In Kensington North (Zone 1) Sainsbury's at Ladbrooke Grove was the most popular location for respondents (34.4% and 26.2% respectively). The Waitrose at High Street Kensington followed by the Tesco on West Cromwell Road were the main last food shopping destinations in the Kensington Central (Zone 2) with 14.3% and 13.3% respectively. In Kensington South (Zone 3), Waitrose on King's Road was the most popular last main shopping destination.
- 5.5 In the zones outside the Borough (Zones 4 to 10) most main food shopping trips go to large food stores outside Kensington & Chelsea, but there is some inflow in to the Borough, for example Brent South (Zone 4) and Westminster North (Zone 5) Sainsbury's at Ladbrooke Grove attracts customers.

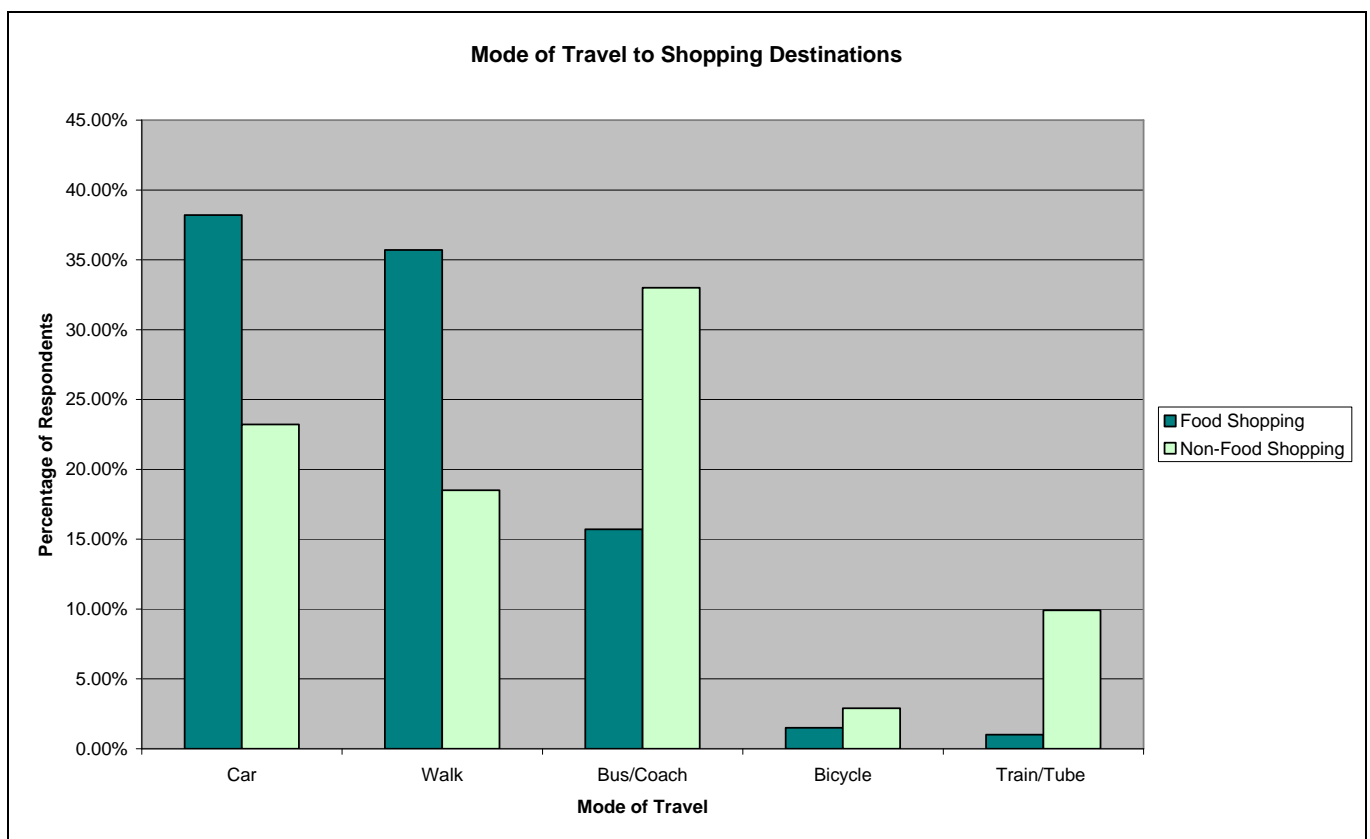
Mode of Travel for Main Food Shopping

- 5.6 In the whole study area 38% of respondents indicated that they travel to do their main food shopping by car, which is significantly lower than NLP's average derived from similar surveys across the Country (about 80%). A higher proportion of households travel by bus (16%) compared with the NLP average (7%), and also a higher proportion walk, 36% compared with the NLP average of 9%. A number of respondents (1.5%) used a bicycle to travel to their last main food shopping location which is also higher than NLP's average of 0.3%. A small proportion of respondents (1.0%) stated that they used the train/tube to travel to their last main food shopping

destination. These results reflect the high levels of accessibility to food stores and convenience shops within and around the Borough by bus and on foot.

Mode of Travel for Non-Food Shopping

5.7 The predominant modes of travel for non-food shopping were car and bus with 23% of respondents indicating they use the car and 33% indicating that they use buses to travel to their non-food shopping destination. The third most popular mode of travel for non-food shopping was walking (18.5%), followed by train/tube (9.9%). Generally fewer customers will drive for non-food shopping than food shopping, and are more prepared to use public transport (bus or train/underground).

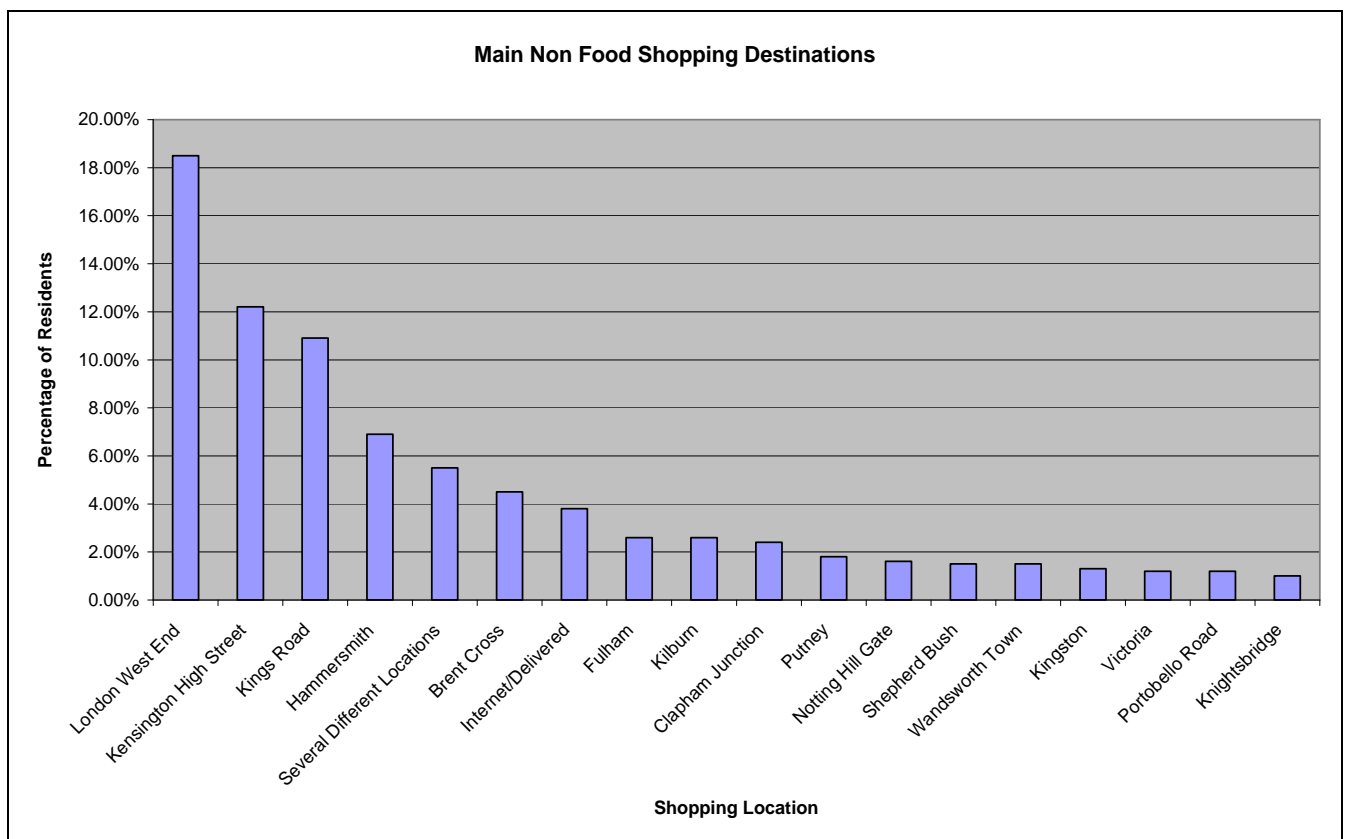


Top-Up Food Shopping

5.8 Top-up food shopping trips are usually made in addition to main weekly (or less frequent) shopping trips. Over 76% of households across the study area indicated that they undertake small-scale or top-up shopping trips in addition to their main food shopping trips. The results show that households use a combination of local shops and larger food stores for top-up shopping.

Non-Food Shopping

- 5.9 Households were asked in which location they buy most of their household's non-food shopping. For the study area as a whole, London's West End is the most popular destination, with 18.5% of all respondents shopping there, followed by Kensington High Street (12.2%) and King's Road (10.9%). Despite the preference of London's West End overall, it is only the most popular destination for non-food shopping in two zones (Zones 5 and 6 – in Westminster). Many respondents in both Zones 1 and 2 stated their main non-food shopping was Kensington High Street (22.2% in Zone 1 and 40.0% in Zone 2). In Zone 3, 54.1% of respondents' main non-food shopping is King's Road. These figures suggest that Kensington High Street and King's Road are the predominant non-food shopping destination for residents in the Borough (Zones 1 to 3).
- 5.10 Outside the Borough other centres are the main non-food shopping destinations, for example in Zone 4 Brent Cross is the main destination and Clapham Junction is the most popular location in Zone 7. The main destinations overall in the study area are shown below.



Non Food Shopping Destinations

- 5.11 Households were also asked where they last shopped for different types of non-food goods.
- 5.12 The most popular destination for buying clothes and footwear in Zones 5 (55.1%), 6 (38.9%) and 10 (23.8%) was London's West End, which is the most popular destination overall. In Zones 1 and 2, Kensington High Street was the most popular destination for clothing and footwear with 25.6% and 43.8% respectively. In Zones 3 (47.1%), 7 (18.5%) and 8 (16.7%), King's Road was the most popular destination, while in Zone 4 Brent Cross (34.0%) was the most popular destination.
- 5.13 Overall London's West End was the most popular destination for buying domestic electrical appliances such as fridges or kitchen items with 14.7% of all respondents. The West End accounted for the majority of respondents in Zones 1, 5, 6 and 10. Most respondents from Zone 2 bought their domestic appliances in Kensington High Street (16.2%) whilst most respondents from Zones 3 (48.2%), 7 (20.0%) and 8 (20.0) bought their domestic appliances in King's Road).
- 5.14 Overall the internet was the preferred way that respondents last bought other kinds of electrical goods, such as TVs, Hi-Fi and computers, with 16.0% of all respondents. The internet was the most popular location for purchasing these goods in Zones 4 (18.0%), 5 (28.0%) and 10 (15.0%). In Zones 1 (16.7%), 6 (17.9%) and 9 (19.7%) most respondents bought their other electrical goods from London's West End. In Zone 2, the highest proportion of respondents (25.7%) used Kensington High Street to buy their other electrical goods, whilst in Zones 3 (32.9%) and 7 (15.4%) most respondents last bought other electrical goods in King's Road.
- 5.15 Overall King's Road and London's West End were both popular destinations for shoppers buying furniture, soft furnishings and floor coverings with 10.1% and 10.0% respectively of respondents. The highest proportion of respondents in Zones 1 (16.6%), 5 (18.7%), 6 (15.8%) and 9 (12.5%) last bought furniture, soft furnishings or floor coverings in London's West End. In Zones 2 (16.2%), 3 (38.8%), 7 (13.8%) and 8 (12.2%) King's Road was the preferred location to shop for these goods.
- 5.16 Overall for DIY, hardware and garden items the most popular destination respondents last shopped at was Wandsworth (including B&Q and Homebase), followed by the Homebase on Warwick Road, Kensington. The Homebase on Warwick Road,

Kensington was the most popular destination for DIY, hardware and garden items in Zones 1 (17.8%), 2 (35.2%), 3 (14.1%), 6 (12.6%) and 9 (13.3%).

- 5.17 In both Zone 1 (21.1%) and Zone 2 (50.5%) the primary destination for buying chemist, health and beauty items was Kensington High Street. In Zone 3 54.1% of respondents last went to King's Road to buy their health and beauty items.
- 5.18 Of all respondents 18.4% last bought items such as books, CDs, toys and gifts on the internet, meaning overall the internet was the preferred method of purchasing these types of goods. Despite this, in Zone 2 respondents preferred to use Kensington High Street to buy books, CDs, toys and gifts (40.0%), whilst in Zone 3 most respondents (36.5%) last used King's Road.
- 5.19 Table 5.1 shows the shopping destination with the highest proportion of respondents for each comparison goods category in each zone. This indicates broadly where people prefer to shop for each type of good and allows comparison between each zone.
- 5.20 In Zone 1, people prefer to shop in London's West End for domestic appliances, other electrical goods and furniture/soft furnishings, while they prefer to shop in Kensington High Street for clothing and footwear and health and beauty items. In Zone 2 Kensington High Street is the main destination for respondents buying clothing and footwear, domestic appliances, other electrical goods, health and beauty products and books/CDs/toys/gifts, whilst for other goods they prefer to shop elsewhere. In Zone 3, King's Road is the preferred location among respondents for all comparison goods with the exception of DIY and hardware goods for which most people shop at Homebase, Warwick Road, Kensington.
- 5.21 Outside the Borough in Zone 4, Brent Cross is where the majority of respondents shop for clothing and footwear goods and domestic appliances, whilst the internet is most popular for other electrical goods and books/CDs/toys/gifts, Willesden Green is the most popular destination for DIY and hardware goods and Brent is the preferred location for buying furniture/soft furnishings. In Zone 5, London's West End is the preferred location among respondents for clothing and footwear, domestic appliances, furniture/soft furnishings and health and beauty items, whilst the internet is the preferred method of buying furniture/soft furnishings and books, CDs, toys and gifts.

Table 5.1: Destinations with High Proportions of Respondents

Comparison Good	Zone 1 Kensington North	Zone 2 Kensington Central	Zone 3 Kensington South	Zone 4 Brent South	Zone 5 Westminster North
Clothing & Footwear	Kensington HS	Kensington HS	King's Road	Brent Cross	West End
Domestic Appliances	West End	Kensington HS	King's Road	Brent Cross	West End
Electrical Goods	West End	Kensington HS	King's Road	Internet	Internet
Furnishings	West End	King's Road	King's Road	Brent	West End
DIY & Hardware	Homebase, Warwick Rd	Homebase, Warwick Rd	Homebase, Warwick Rd	Willesden Green	Kilburn
Health & Beauty	Kensington HS	Kensington HS	King's Road	Kilburn	West End
Books/CDs/Toys/Gifts	Internet	Kensington HS	King's Road	Internet	Internet
Comparison Good	Zone 6 Westminster South	Zone 7 Wandsworth North	Zone 8 Hammersmith & Fulham South	Zone 9 Hammersmith & Fulham Central	Zone 10 Hammersmith & Fulham North
Clothing & Footwear	West End	King's Road	King's Road	Hammersmith	West End
Domestic Appliances	West End	King's Road	King's Road	Hammersmith	West End
Electrical Goods	West End	King's Road	Fulham	West End	Internet
Furnishings	West End	King's Road	King's Road	West End	Wembley/ Shepherd's Bush
DIY & Hardware	Homebase, Warwick Rd	Wandsworth	Wandsworth	Homebase, Warwick Rd	Acton
Health & Beauty	Victoria	Clapham Junction	Fulham	Hammersmith	Hammersmith
Books/CDs/Toys/Gifts	Internet	Internet	Fulham	Hammersmith	Internet

5.22 London's West End was the most popular destination for clothing and footwear goods, domestic appliances, other electrical goods and furniture/soft furnishings in Zone 6. In Zone 7, the highest proportion of respondents went to King's Road for clothing and footwear goods, domestic appliances, other electrical goods and furniture/soft furnishings.

5.23 In Zone 8, King's Road was the preferred destination for clothing and footwear, domestic appliances and furniture/soft furnishings, whilst Fulham was the most popular location for buying other electrical goods, health and beauty items and books, CDs, toys and gifts.

5.24 In Zone 9, the most popular destination for respondents was Hammersmith last time they bought clothing and footwear goods, domestic appliances, health and beauty items and books, CDs, toys and gifts, whilst most preferred London's West End for other electrical goods and furniture/soft furniture.

5.25 In Zone 10, London's West End was the predominant destination among respondents for clothing and footwear and domestic appliances, however, for other electrical goods and books, CDs, toys and gifts the majority of respondents use the internet.

Westfield's White City Shopping Centre

- 5.26 Respondents were asked whether they had heard of the proposed White City Shopping Centre (about 150,000 sq m gross), which is due to open later this year, and if so, whether they will consider regularly shopping there. Over half (59%) the respondents stated that they had heard of White City, and of these, just over half (53%) said that they would consider regularly shopping there. There was a low level of awareness (28%) in Wandsworth North. In the three zones in Kensington & Chelsea the level of awareness was 41% in Kensington South - Zone 3, 68% in Kensington Central – Zone 2 and 82% in Kensington North – Zone 1.
- 5.27 Respondents in Zones 1, 9 and 10 (Kensington North, Hammersmith and Fulham Central and Hammersmith and Fulham North) were the most aware of the forthcoming shopping centre with 80% or more respondents. A high proportion (65% or over) said they would consider regularly shopping at White City in these three zones.
- 5.28 In terms of Kensington & Chelsea Borough (Zones 1 to 3) about 64% of respondents appear to be aware of the proposed shopping centre, and 51% of these respondents suggest they will consider regularly shopping there, or 31% in Kensington South - Zone 3, 46% in Kensington Central – Zone 2 and 65% in Kensington North – Zone 1. These results suggest a significant number of shopping trips from the Borough and surrounding Boroughs will be diverted to the White City Development, and the strategy for Kensington & Chelsea will need to monitor and respond to this impact.

Internet Shopping

- 5.29 In addition to those respondents who stated they last bought their main shopping or a specific comparison good on the internet, all respondents were asked what items, if any, they regularly bought on the internet. Overall 52.4% of the respondents stated they did not regularly buy goods on the internet.
- 5.30 Of all the respondents, the most popular category of goods people regularly bought on the internet were books, CDs and toys with 34.6% of all respondents. This was followed in popularity by electrical, TV, hi-fi and computer items (11.7%) and clothes and footwear (10.1%). Overall 8.0% of respondents regularly did their grocery shopping online and 5.7% of respondents bought their domestic electrical appliances on the internet. Other items that respondents regularly shopped for online include

travel tickets/holidays, furniture or soft furnishings, health and beauty items and DIY/hardware items (all between 1.2%-4.3% of respondents).

Leisure Activities

Cinemas

5.31 Respondents were asked if they went to the cinema and if so which cinema they last visited. About 56% of respondents indicated they visit the cinema, which was the second most popular leisure activity after visiting restaurants. This is higher than NLP's average derived from similar surveys across the Country (about 50%). The respondents visit a variety of cinemas, with no one cinema being dominant, but the most popular cinema destination (13% of respondents) was the Vue cinema at Fulham Broadway Shopping Centre. A notable proportion of respondents also visit the Vue cinema at Shepherd's Bush Green (9.6%), the Odeon on Kensington High Street (9.3%) and Cineworld on King's Road in Chelsea (8.2%), whilst 6.6% of respondents last visited a Central London cinema.

Theatre

5.32 In the study area, 50.8% of respondents indicated they visit theatres, compared with NLP's average for other surveys of only 40.6%. When asked where they visit the theatre, Central London and the West End were the most popular locations, accounting for over 70% of the respondents in the catchment area. Other locations where respondents visited the theatre include Hammersmith (2.8%), the Royal Court Theatre, Sloane Square (2.4%), Wimbledon (2.2%) and the National Theatre at Southbank (2.2%). Theatres within the Borough, other than the aforementioned Royal Court Theatre, Chelsea Theatre just outside King's Road (West) and Finborough Theatre north of Fulham Road (West), all of which attracted only 0.2% each of respondents' last visits to the theatre.

Pubs/Bars

5.33 The household survey asked respondents if and where they or their family last visited a pub/bar. 45.0% of respondents indicated that they visit pubs/bars, which is slightly lower than the NLP's average from other surveys (48.4%). The main destinations for respondents who visit pubs and bars varies across the zones:

- Zone 1 Notting Hill Gate (27%) and Kensington HS (21%)
- Zone 2 Kensington High Street (34%)

- Zone 3 King's Road (29%)
- Zone 4 London West End (29%)
- Zone 5 London West End (27%)
- Zone 6 Victoria (25%)
- Zone 7 Clapham Jct (20%), Allington (18%) and Wandsworth (17%)
- Zone 8 Fulham (53.5%)
- Zone 9 Hammersmith (24%) and Shepherd's Bush (18%)
- Zone 10 London West End (18%)

5.34 Of all the respondents who visit pubs/bars as a whole London's West End attracted 14.6% of respondents. Within the Borough, Kensington High Street and Notting Hill Gate were the most popular bar/pub venues with 7.8% and 4.0% of respondents respectively.

Restaurants

5.35 Almost 75% of respondents indicated they visit restaurants, which was the most popular leisure activity, and is much higher than NLP's average for other surveys (66.5%). Again there was significant variation in where respondents visited restaurants:

- Zone 1 - Notting Hill Gate (28%)
- Zone 2 - Kensington High Street (29%)
- Zone 3 - King's Road (15%) and Acton (12%)
- Zone 4 - London West End (20%) and Willesden Green (17%)
- Zone 5 - London West End (20%)
- Zone 6 - London West End (20%) and Victoria (18%)
- Zone 7 - London West End (17%), Chelsea (16%), Clapham Jct (15%)
- Zone 8 - Fulham (42%)
- Zone 9 - Hammersmith (24%) and London West End (21%)
- Zone 10 - London West End and Shepherd's Bush (both 18%).

5.36 Of all the respondents who visit pubs/bars, London's West End attracted 15.5% of respondents. Within the Borough Kensington High Street and Notting Hill Gate were the most popular restaurant venues with 6.9% and 5.2% of respondents respectively.

Nightclubs / Live Music

5.37 Only 13.7% of respondents indicated that they had visited nightclub/live music venues, however, this is higher NLP's average derived from other similar surveys suggests a similar participation rate of 9.6%. The main nightclub destination for respondents in the study area as a whole is London's West End (36.5%) with Notting Hill Gate second most popular (4.4%).

Bingo

5.38 Bingo proved the least popular leisure activity with only 3.2% of respondents indicating that they undertake this activity, and this is lower than NLP's average participation rate of 5.1% as derived from other similar surveys. The sample for bingo visitors within each zone is again very small. Cricklewood was the most popular place to play bingo (37.5%), followed by Acton (15.6%).

Health and Fitness Clubs

5.39 Over 30% of respondents indicated their household visit health clubs/gyms, which is slightly higher than the NLP average participation rate from other surveys (24.6%). Respondents used a wide range of gyms across the study area with some using gyms in the adjoining areas. The main gym/health club destinations for respondents in the study area as a whole are Fulham (7.8%), Wandsworth Town (5.4%) and Willesden Green (5.1%). Within the Borough the most popular gyms destinations are, Kensington High Street (4.8%), Virgin Active, Kensington (4.5%) gyms on King's Road (2.1%), gyms in Fulham Road (West) (1.8%) and David Lloyd, Kensington.

Tenpin Bowling

5.40 Overall 8.1% of respondents indicated their household visit tenpin bowling facilities, which is significantly lower than the NLP average for other surveys (18.8%). Tenpin bowling was the second least popular leisure activity, after bingo, and therefore the number of respondents in each zone is fairly small. The main tenpin bowling destinations are Queens Ice Bowl, Queensway (24.7%), Park Royal, Acton (22.2%) and London's West End (9.9%).

Key Messages from the Household Survey Results

5.41 Key findings of the household survey are summarised below:

- Large food stores are the primary destinations for main food shopping, but the preferred location of these food stores varies significantly throughout the study area. Generally resident will visit store near to their home, and many people walk to buy food and grocery items.
- Over 76% of respondents indicated that they undertook small scale shopping or top-up shopping trips in addition to their main food shopping trips.
- A relatively low proportion of respondents travel by car for both food and non-food shopping, when compared with NLP's national average derived from other surveys. Far higher proportions of respondents use the bus or walk, or the train/underground for non-food shopping.

- Many respondents use their local town centre for comparison shopping, however, in most goods categories London's West End and the internet were also popular choices. The exception is DIY, hardware and garden items where the majority of respondents used the large DIY stores, especially stores in Wandsworth and Homebase in Kensington.
- Approximately half of the respondents regularly use the internet to shop with the most common goods purchased being books, CDs, toys and gift items and electrical, TV, hi-fi and computer items. About 8% of respondents regularly use the internet to shop for their groceries.
- A high proportion of residents in the Borough are aware of the proposed shopping centre at White City and many suggest they will consider regularly shopping there. These results suggest a significant number of shopping trips from the Borough and surrounding Boroughs will be diverted to the White City Development. The strategy for Kensington & Chelsea will need to monitor and respond to this impact.
- The household survey demonstrates that for several types of leisure activity the majority of respondents travel outside the Borough. Popular destinations outside the Borough for all leisure activities include London's West End, Fulham Shepherd's Bush and Acton. Central London and the West End are popular for theatre-goers and the most popular locations for pubs/bars and restaurants vary greatly by zone but include a significant proportion of respondents going to destinations within the Borough.

6.0 TOWN CENTRE VISITORS SURVEY

Survey Structure

- 6.1 An on-street survey of visitors within the eleven main shopping centres in Kensington & Chelsea was undertaken by NEMS. In total over 1,400 interviews were completed. A copy of the survey results are provided in Appendix F. Interviews were conducted in February 2008. Interviews were conducted throughout the week, as shown in Table 6.1.

Table 6.1: Survey Structure

Centre	Number of interviews	Days Surveyed
Knightsbridge	200	Tues, Weds, Thurs, Fri, Sat
Kensington High Street	200	Mon, Tues, Weds, Sat, Sun
King's Road East	200	Mon, Tues, Weds, Thurs, Sat
King's Road West	100	Tues, Weds
Fulham Road East	100	Mon, Tues, Weds, Thurs
Fulham Road West	100	Tues, Thurs, Fri, Sat
Notting Hill Gate	100	Tues, Thurs, Sat
Portobello Road	100	Mon, Tues, Weds, Fri, Sat
South Kensington	100	Mon, Thurs, Sat
Earl's Court Road	100	Mon, Tues, Thurs, Fri, Sat
Westbourne Grove	100	Tues, Thurs, Sat
Total	1,400	

- 6.2 The results of the surveys are summarised in this section.

Main Purpose for Visit to Each Centre

- 6.3 Respondents were asked for the main reason for their visit to the centre. The results are shown in Table 6.2. In most of the centres, the main reason for visiting was shopping with an average of 44% (includes shopping for food, non-food goods or window shopping). The main type of shopping respondents intended to undertake within the majority of centres was for non-food goods, but in Portobello Road and Westbourne Grove shopping for food was the main type of shopping. Although Westbourne Grove has a very limited convenience provision, there are convenience units within Queensway/Westbourne Grove District Centre in the City of Westminster, and the respondents in Westbourne Grove may have visited food stores in this area. In Earl's Court Road and King's Road (East) a high proportion of respondents' main reason for visiting the centre was for work/business purposes.

Table 6.2: Main Purpose of Visit

Purpose of Visit	Knightsbridge	Kensington High Street	King's Road East	King's Road West	Fulham Road East	Fulham Road West	Notting Hill Gate	Portobello Road	South Kensington	Earl's Court Road	Westbourne Grove
Shopping for non-food goods only	0.0%	7.0%	7.3%	22.8%	7.0%	22.3%	6.0%	42.6%	0.0%	17.0%	24.8%
Shopping for both food and non-food	29.5%	23.0%	23.3%	26.7%	9.0%	23.3%	8.0%	2.0%	1.0%	7.0%	15.8%
Shopping for food only	4.0%	18.5%	9.2%	12.9%	24.0%	16.1%	4.0%	5.0%	0.0%	3.0%	6.9%
Window shopping	6.0%	4.5%	2.4%	4.0%	5.0%	0.0%	4.0%	20.8%	0.0%	5.0%	2.0%
To visit the market	1.0%	0.0%	4.4%	0.0%	11.0%*	2.7%	4.0%	15.8%	0.0%	3.0%	0.0%
To visit the restaurant /café/public house	4.5%	4.5%	2.4%	4.0%	1.0%	0.9%	9.0%	1.0%	5.0%	6.0%	2.0%
To have a walk/stroll around	12.5%	7.0%	5.8%	10.9%	5.0%	1.8%	7.0%	5.9%	2.0%	13.0%	6.9%
To use services e.g. bank, post office, hair dresser	5.5%	5.5%	7.8%	9.9%	14.0%	2.7%	3.0%	0.0%	6.9%	4.0%	12.9%
Work/business purposes	19.5%	24.5%	32.5%	14.9%	29.0%	5.4%	15.0%	2.0%	25.7%	32.0%	20.8%
Healthcare e.g. doctor, dentist, optician	1.8%	2.0%	1.0%	4.0%	7.0%	0.9%	1.0%	0.0%	0.0%	4.0%	1.0%
Social/leisure reason e.g. meeting friends, going to gym	12.9%	9.5%	10.2%	7.9%	11.0%	16.1%	30.0%	1.0%	30.7%	18.0%	8.9%
Sightseeing/visiting a tourist attraction	6.8%	2.0%	8.3%	1.0%	5.0%	5.4%	4.0%	5.0%	28.7%	4.0%	1.0%
Other	0.2%	0.5%	0.5%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
Church	0.2%	0.5%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%
University/College	0.6%	2.0%	0.5%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%
Live Here	0.6%	0.0%	0.5%	0.0%	0.0%	0.0%	1.0%	0.0%	2.0%	0.0%	5.0%
Passing Through	0.6%	1.0%	0.0%	0.0%	0.0%	0.0%	1.0%	1.0%	0.0%	0.0%	2.0%
No main purpose/DK	1.7%	1.0%	0.0%	1.0%	0.0%	3.6%	2.0%	1.0%	0.0%	2.0%	3.0%

* No street market in Fulham Road East so respondents may be referring to another street market nearby. N.B. The figures add up to more than 100% as some respondents gave more than one answer.

6.4 Of those people surveyed, South Kensington had the highest proportion of respondents whose main purpose of visit was for social/leisure reasons and Notting Hill Gate has the highest proportion of respondents whose main purpose of visit was to go to a restaurant/café or bar. Nevertheless, the results indicate that all centre attract visitors undertaking a wide range of activities.

Intended Visitor Purchases

6.5 Of all respondents, 59% intended to purchase goods during their visit, and of these customers, 51% intended to purchase food and grocery goods, 34% intended to purchase clothing or footwear and 9% intended to purchase health, beauty or chemist items.

Table 6.3: Intended Purchases

Reason for Visit	Total for all Centres (%)
Food and groceries	51.1%
Newspapers/magazines	4.5%
Confectionery/tobacco	1.8%
Clothing/footwear	34.1%
Furniture/carpets/soft furnishings	2.0%
Domestic electrical goods	2.5%
Other electrical goods	1.8%
DIY/hardware/gardening	3.0%
Other household goods	7.1%
Gifts/jewellery/china/glass	5.7%
Books/CD's/videos/toys/ hobbies	8.4%
Health/beauty/chemist items	9.0%
Other	0.7%
Stationary	0.8%
Don't know	8.1%

N.B. The figures add up to more than 100% because some respondents gave more than one answer.

6.6 Food and grocery purchases were made by a significant proportion of shopping customers (over half) in most centres, with the exception of Knightsbridge (17.5%), Portobello Road (30.3%) and South Kensington (36.4%). Knightsbridge had the highest proportion of clothing/footwear customers (59.8%), followed by Fulham Road East (54.5%) and Kensington High Street (51.4%). Other notable results are as follows:

- 13.4% in Knightsbridge purchasing gifts/jewellery/china/glass;
- 9.1% in Portobello Road purchasing gifts/jewellery/china/glass;
- 47.3% in Fulham Road East purchasing Other household goods; and
- 54.5% in Portobello Road not knowing what they would buy.

6.7 The results for Portobello Road suggest a high proportion of visitors are window shopping and are not sure what they may buy, e.g. impulse buying. Whilst in other centre customers may have a better idea what they intend to buy, and have specially visited the centre to make that purchase.

Expenditure during Visit

6.8 Visitors who intended to undertake some shopping during their visit were asked to estimate how much they would spend on different items during their visit, as shown in Table 6.4.

Table 6.4: Average Spend in Centre

Centre	Average Spend on Food & Groceries	Average Spend on Non-Food Items	Average Spend on Eating/Drinking Out
Knightsbridge	£3.30	£126.60	£8.80
Kensington High St	£9.40	£43.60	£8.60
King’s Road (East)	£13.90	£65.60	£13.70
King’s Road (West)	£16.30	£40.80	£6.20
Fulham Road (East)	£12.08	£60.60	£11.90
Fulham Road (West)	£13.20	£33.20	£4.20
Notting Hill Gate	£14.70	£28.30	£2.90
Portobello Road	£10.00	£45.70	£1.70
South Kensington	£5.70	£14.60	£14.10
Earl’s Court Road	£7.60	£26.00	£3.60
Westbourne Grove	£14.60	£17.40	£8.40
Average	£10.70	£52.00	£8.10

6.9 The highest average spend per shopping visitor for food and groceries was achieved in King’s Road West (£16.30) with the lowest being in Knightsbridge (£3.30), compared with the overall average of £10.70.

6.10 Non-food shopping accounted for the greater proportion of total expenditure in all of the centres, with an overall average of £52. The average spend on non-food items was highest in Knightsbridge (£127.60) and lowest in South Kensington (£14.60).

6.11 Portobello Road had a relatively low proportion of spending on eating and drinking out (£1.70) with over 90% of visitors saying they didn’t know or intended to spend nothing on eating and drinking in the centre. South Kensington has the highest average spend on eating/drinking out of all eleven centres (£14.10) with only 18.2% saying they intended to spend nothing on eating and drinking in the centre. The average spend in ten of the eleven centres was higher than the NLP average (£2.30) derived from similar surveys across the country. This is a daytime figure and tends to

underestimate the average spend in these centres for eating and drinking out in the evening.

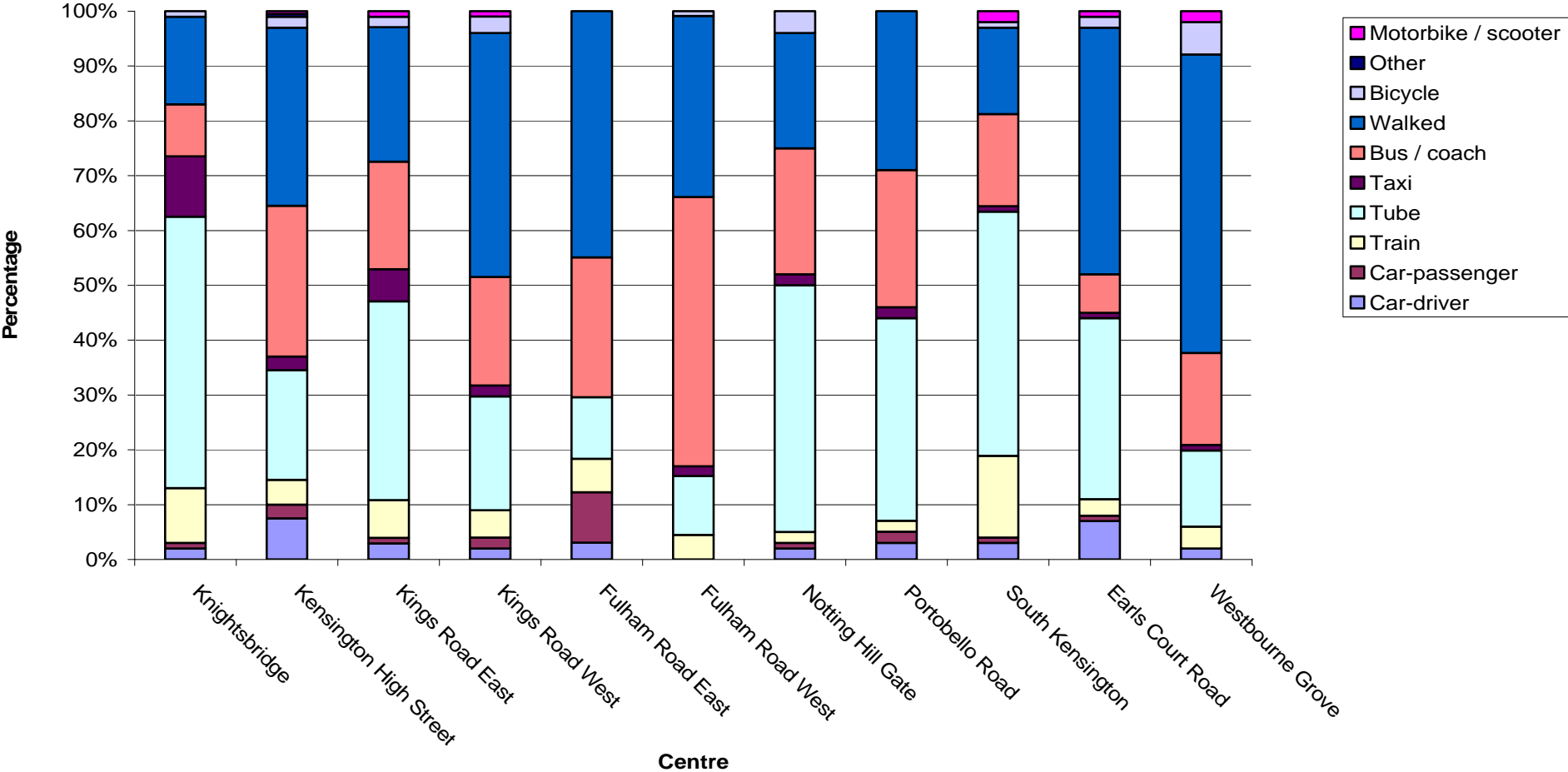
Mode of Travel

- 6.12 Mode of travel varied between each centre. A high proportion of visitors to Knightsbridge, Notting Hill Gate, Portobello Road and South Kensington travelled by underground as shown in Figure 6.1. A significant proportion of respondents walked to Westbourne Grove, Earl's Court Road, King's Road (West) and Fulham Road (East), which suggests these centres may have a more localised catchment area than the other main centres in the Borough. For Fulham Road (West) bus/coach was the most popular mode of travel and for Kensington High Street a similar proportions of respondents travelled by underground, bus/coach or on foot.
- 6.13 Overall walking, travelling by underground or bus were the most popular modes of travel. A relatively low proportion of respondents travelled to the centres by car, either as a passenger or driver. Kensington High Street has the highest proportion of respondents who travelled by car (10.0%).

Other Centres Visited

- 6.14 Respondents were asked which other shopping centres or towns they use regularly (i.e. at least one a month). Responses varied, but a high proportion indicated another centre within the Borough. Overall, Kensington High Street and the West End, London were the most popular "other" shopping destinations respondents used regularly (29.8% and 31.2% respectively).

Figure 6.1: Mode of Travel



Frequency of Shopping Trips

6.15 Respondents were asked how frequently they shopped in the centre, as shown in Table 6.5. A full breakdown by centre is shown in Appendix F. Westbourne Grove and Portobello Road had the highest proportion of respondents who shop at the centre every day (25.7% and 24.8% respectively), whilst Knightsbridge had no respondents who shop at the centre every day. South Kensington and Knightsbridge had the highest proportion of respondents who shop at the centre less than once a month (77% and 64% respectively).

Table 6.5: Frequency of Shopping Trips

Frequency of Visit	(%)
Everyday	13.4
2-3 times a week	18.5
Once a week	15.4
Once a fortnight	7.6
Once a month	7.6
Less than once a month	20.7
Never	15.0
Don't know	1.9
Total	100.0

6.16 In terms of time spent in the centre, Knightsbridge had a relatively high proportion of respondents staying for two to three hours (22.5%). A high proportion of visitors to South Kensington and Earl's Court Road intended to stay for less than 15 minutes (30.7% and 29.0% respectively). Other centres had a relatively even distribution of length of stays and overall for all eleven centres, the highest proportion of visitors stayed for between 30 minutes to one hour.

What Visitors Like about Shopping in Each Centre

6.17 Visitors were asked what they liked and disliked about shopping in the centre as shown in Table 6.6 and 6.7.

Table 6.6: What Visitors Like about the Centres

Factor	Knightsbridge	Kensington High Street	King's Road East	King's Road West	Fulham Road East	Fulham Road West	Notting Hill Gate	Portobello Road	South Kensington	Earl's Court Road	Westbourne Grove
Nothing in particular	28.5%	8.5%	13.6%	6.9%	19.0%	0.0%	10.0%	4.0%	19.8%	22.0%	12.9%
Close to home / easy to get to	10.0%	31.5%	29.6%	44.6%	47.0%	56.3%	20.0%	25.7%	5.0%	35.0%	42.6%
Close to work	2.5%	9.5%	12.6%	12.9%	2.0%	2.7%	7.0%	30.7%	2.0%	6.0%	6.9%
Choice of shops and services	25.0%	41.0%	45.1%	25.7%	50.0%	22.3%	29.0%	24.8%	4.0%	17.0%	30.7%
Plenty of parking	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%
Cheap car parking	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	1.0%	0.0%
Specialist shops	33.0%	16.5%	9.7%	14.9%	2.0%	5.4%	14.0%	29.7%	15.8%	4.0%	12.9%
Quality of shops	38.5%	26.0%	26.7%	11.9%	37.0%	4.5%	10.0%	29.7%	10.9%	6.0%	10.9%
General character / atmosphere	8.5%	16.0%	28.6%	13.9%	20.0%	6.3%	15.0%	26.7%	12.9%	12.0%	15.8%
Attractive environment	12.5%	12.0%	18.0%	9.9%	8.0%	8.9%	12.0%	44.6%	14.9%	10.0%	12.9%
The Market	1.0%	0.0%	2.9%	0.0%	6.0%	25.0%	7.0%	34.7%	0.0%	0.0%	3.0%
Other	0.0%	4.0%	1.0%	5.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	3.0%
Cheap prices	0.0%	2.0%	0.0%	0.0%	0.0%	4.5%	0.0%	0.0%	0.0%	0.0%	1.0%
Convenient	0.0%	2.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Everything available	1.0%	2.5%	1.5%	5.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	2.0%
Familiarity of area	0.0%	0.0%	2.4%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Not crowded	0.0%	1.0%	1.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Quiet	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	5.9%
(Don't know)	1.5%	3.0%	1.5%	4.0%	1.0%	0.9%	6.0%	6.9%	34.7%	12.0%	1.0%

Table 6.7: What Visitors Dislike about the Centres

Factor	Knightsbridge	Kensington High Street	King's Road East	King's Road West	Fulham Road East	Fulham Road West	Notting Hill Gate	Portobello Road	South Kensington	Earl's Court Road	Westbourne Grove
Nothing in particular	58.0%	44.0%	37.4%	35.6%	50.0%	82.1%	25.0%	66.3%	35.6%	50.0%	45.5%
Traffic congestion	8.0%	8.5%	13.1%	6.9%	47.0%	1.8%	13.0%	9.9%	8.9%	14.0%	5.9%
Poor choice of shops and services	0.0%	7.5%	4.4%	7.9%	1.0%	1.8%	2.0%	0.0%	3.0%	3.0%	3.0%
Lack of parking	1.5%	4.0%	12.1%	3.0%	2.0%	0.9%	2.0%	2.0%	5.0%	3.0%	5.0%
Expensive car parking	2.0%	4.0%	8.7%	1.0%	6.0%	0.0%	8.0%	1.0%	2.0%	1.0%	5.0%
Lack of specialist shops	1.5%	2.5%	2.4%	4.0%	3.0%	0.0%	3.0%	0.0%	0.0%	0.0%	3.0%
Poor quality of shops	0.5%	3.0%	0.5%	1.0%	0.0%	0.9%	2.0%	0.0%	2.0%	1.0%	2.0%
Poor department stores	0.5%	2.5%	0.0%	1.0%	0.0%	0.0%	1.0%	0.0%	2.0%	0.0%	1.0%
Prices too high	8.5%	6.5%	24.3%	19.8%	5.0%	2.7%	17.0%	3.0%	15.8%	5.0%	5.9%
Lack of large shops	0.5%	1.5%	0.0%	2.0%	4.0%	1.8%	2.0%	2.0%	0.0%	3.0%	3.0%
Unsafe / poor security / dangerous	0.50%	0.0%	0.0%	1.0%	2.0%	0.9%	1.0%	0.0%	0.0%	0.0%	1.0%
Poor facilities (e.g. seating, bins)	2.0%	1.0%	0.5%	0.0%	0.0%	0.0%	2.0%	0.0%	1.0%	0.0%	2.0%
Litter / dirty streets	4.5%	1.5%	0.5%	2.0%	23.0%	0.9%	7.0%	5.0%	0.0%	6.0%	3.0%
Anti-social behaviour (e.g. begging, vandals, on-street drinking)	1.0%	1.5%	1.0%	3.0%	4.0%	0.0%	5.0%	0.0%	0.0%	8.0%	5.9%
General character / atmosphere	1.5%	1.5%	0.5%	0.0%	0.0%	0.9%	2.0%	0.0%	2.0%	2.0%	1.0%
Unattractive environment	1.5%	1.5%	0.5%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	2.0%
The Market	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	1.0%	0.0%	0.0%	0.0%
Congestion Charge	2.5%	3.5%	15.5%	1.0%	8.0%	0.0%	1.0%	4.0%	0.0%	4.0%	4.0%
Too busy / crowded	11.0%	11.5%	8.3%	3.0%	3.0%	4.5%	24.0%	8.9%	9.9%	7.0%	5.0%
Hard to cross the road	1.0%	1.0%	1.0%	1.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%
Other	1.0%	5.5%	2.4%	4.0%	0.0%	0.9%	3.0%	0.0%	0.0%	1.0%	5.9%
Too noisy	0.0%	1.0%	0.0%	4.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
Road works	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.9%
Too touristy	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	1.0%
(Don't know)	3.5%	3.0%	5.3%	7.9%	0.0%	1.8%	6.0%	7.9%	25.7%	13.0%	2.0%

- 6.18 In Knightsbridge, a high proportion of visitors liked the quality of shops and the provision of specialist shops, but a relatively high proportion of visitors considered Knightsbridge to be too busy/crowded.
- 6.19 Visitors to Kensington High Street liked the fact that it was close to home/easy to get to and the choice of shops and services, but as within Knightsbridge a relatively high proportion felt it was too busy/crowded.
- 6.20 In King's Road (East) visitors liked the choice of shops and services and the general character/atmosphere but considered prices were too high and disliked paying the congestion charge. Visitors to King's Road (West) liked the fact that the centre was close to home/easy to get to and the choice of shops and services, but they considered prices were too high.
- 6.21 In both Fulham Road (East) and Fulham Road (West) respondents liked the fact that the centre was close to home/easy to get to. In Fulham Road (East) visitors also liked the choice of shops and services and the quality of shops. In Fulham Road (West) visitors liked the market. Traffic congestion was noted by a significant proportion of visitors as a dislike of shopping in Fulham Road (East) as was litter/dirty streets. The majority of visitors to Fulham Road (West) indicated that there was nothing in particular that they disliked about the centre.
- 6.22 Visitors to Notting Hill Gate liked the choice of shops and services and the fact that the centre was close to home and easy to get to, but felt the centre was too busy/crowded and that prices were too high.
- 6.23 In Portobello Road a significant proportion of respondents liked the fact that the centre was close to work, had an attractive environment and liked the market. Visitors indicated that they disliked the traffic congestion in Portobello Road and felt it was too busy/crowded, but the majority considered that there was nothing in particular that they disliked about the centre.
- 6.24 A relatively high proportion of visitors to South Kensington did not state what they liked about the centre, but of those that did, an attractive environment and the quality of shops were the main likes of the centre. Visitors to South Kensington disliked the high prices and thought the centre was too busy/overcrowded.

- 6.25 Visitors to Earl's Court Road liked the fact that the centre was close to home/easy to get to and the choice of shops and services but disliked the traffic congestion and anti social behaviour.
- 6.26 A high proportion of visitors to Westbourne Grove liked the fact that the centre was close to home/easy to get to and the choice of shops and services. There were no clear dislikes mentioned by a significant proportion of visitors.

Where Visitors Live

- 6.27 Respondents were shown a map and asked if they live within the study area, as shown in Appendix A. In total only 42.1% of visitors live within the study area. The centres attracting the highest proportion of local residents from within the study area were Westbourne Grove (65%), Kensington High Street (60%) and King's Road West (58%). The centres attracting the highest proportion of visitors from beyond the study area were South Kensington (88%), Knightsbridge (77%), Portobello Road (73%) and King's Road East (62%).
- 6.28 These results suggest that all centres to varying degrees rely on tourists, commuters and occasional long distance shoppers. Most centres appear to have a dual role in serving both local residents and visitors to the Borough.

Key Messages from the On-Street Survey Results

- 6.29 Key findings of the on-street survey are summarised below:
- Over half of visitors within the eleven main centres do not live in or near the Borough. Some centres rely heavily on tourist visitors for their trade.
 - Most centres attract visitors for a range of activities. However, in most centres the main reason for visiting the centre was to shop for non-food goods. In Portobello Road shopping for food was the main type of shopping (interviews conducted on all days except Thursday and Sunday), but Portobello Road attracts a high proportion of tourist visitors who may make impulse purchases. In Earl's Court Road and King's Road (East) a high proportion of respondents' main reason for visiting the centre was for work/business purposes.
 - The highest average spend on food and groceries was achieved in King's Road (West) with the lowest being in Knightsbridge. In terms of non-food goods, the highest average spend was achieved in Knightsbridge and lowest in South Kensington.
 - Mode of travel varied for each centre, a high proportion of visitors to Knightsbridge, Notting Hill Gate, Portobello Road and South Kensington travelled by underground. A significant proportion of respondents walked to Westbourne

Grove, Earl's Court Road, King's Road (West) and Fulham Road (East), which suggest they are a more localised catchment area.

- The majority of visitors to all eleven centres visited the centre at least 2-3 times a week. Westbourne Grove and Portobello Road had the highest proportion of respondents who shop at the centre every day and Knightsbridge had no respondents who shopped at the centre every day and had the highest proportion who shop at the centre less than once a month.
- The average length of stay was relatively short in most centres, e.g. a high proportion of visitors intended to stay for less than 15 minutes in South Kensington and Earl's Court Road. However, Knightsbridge has a relatively high proportion of respondents staying for two to three hours.
- A significant proportion of visitors to each centre indicated that they also visited other centres in Kensington & Chelsea. Overall High Street Kensington and the West End were the most popular other shopping destinations.

7.0 KNIGHTSBRIDGE INTERNATIONAL SHOPPING CENTRE

Introduction

- 7.1 Knightsbridge is designated as an International Shopping Centre in the London Plan and attracts a high number of visitors from around the UK and the World. The centre is famous for its exclusive retail offer, particularly Harrods department store, it is also noted as the home of flagship stores for many British and international fashion houses including Jimmy Choo, Manalo Blanhik and Chanel. The shopping centre is surrounded by high level residential development, and a number of exclusive hotels. Although retail uses dominate the centre, there are a number of exclusive restaurants in and around the centre which attract visitors into the centre.
- 7.2 Knightsbridge shopping centre crosses borough boundaries; although most of it is within the Royal Borough of Kensington & Chelsea, a notable element of it is within the City of Westminster. Whilst the centre serves shoppers from the Borough, it predominantly fulfils an international role. The majority of the centre is designated as within a conservation area, with the exceptions of parts of Sloane Street and a small section of the southern side of Brompton Road.
- 7.3 The centre is focussed along two main roads, Brompton Road and Sloane Street, with further retail offer located on Beauchamp Place. The main supermarket within the centre is the Marks & Spencer Simply Food store located on Brompton Road to the south west of the centre, there is also a Sainsbury's Local convenience store located on Brompton Road, with a few other national convenience retailers spread throughout the centre such as Holland and Barrett. Knightsbridge is bounded by residential areas to the south, west and east, and by Hyde Park to the north.

Mix of Uses and Occupier Representation

- 7.4 Knightsbridge shopping centre's key roles include:
- *convenience shopping* - including newsagents, grocers, a butchers, a bakery, an off licence, a patisserie, a confectioner, a health food shop and two sandwich shops. There are two convenience stores; Sainsbury's Local and Marks & Spencer Simply Food, and food halls in the Harrods and Harvey Nichols department stores;
 - *comparison shopping* - a large selection of comparison shops, comprising a high proportion of exclusive international multiple retailers alongside a range of national multiple retailers selling predominantly clothing and footwear;

- *services* - including a good range of high street national banks, a large number of cafés/restaurants/takeaways, a small number of travel agents, one laundrette and a number of hairdressers/beauty parlours; and
- *entertainment* - including several pubs and bars.

7.5 Knightsbridge shopping centre has 341 retail/service units (excluding non-retail Class A uses) of which 268 are within the Royal Borough of Kensington & Chelsea. Table 7.1 sets out the mix of uses in Knightsbridge shopping centre, compared with the Goad national average. The centre has a broadly similar mix of uses compared with the national average. The proportion of comparison retail units is substantially above the national average while the proportion of convenience retailers is significantly below the national average. The centre has comparison floorspace totalling 194,800 sq m gross (Source Goad and VOA), of which 85% is provided in the Harrods and Harvey Nicols department stores. The proportion of A3/A5 units and vacant units in Knightsbridge are broadly similar to the national averages while the proportions of A1 and A2 service units are slightly below the national averages.

Table 7.1: Knightsbridge Use Class Mix by Unit

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Knightsbridge (1)	National Average(2)
Comparison Retail	173 (154)	52.3	45.4
Convenience Retail	17 (9)	5.1	9.1
A1 Services	29 (19)	8.8	10.6
A2 Services	27 (21)	8.2	9.6
A3 and A5	49 (36)	14.8	14.3
A4	10 (7)	N/A	N/A
Vacant	36 (22)	10.9	11.0
Total	341 (268)	100	100.0

Source: Royal Borough of Kensington & Chelsea Council (2007)

(1) Knightsbridge average relates to all centre including part in Westminster – NB average excludes 10 Class A4 uses.

(2) UK average relates to all town centres surveyed by Goad Plans (Nov 07) – NB Goad average excludes Class A4 use. The number in brackets denoted the number of units within the Borough as some parts of the centre are in the London Borough of Westminster.

Retailer Representation

7.6 Knightsbridge has a good selection of comparison shops (173, of which 154 are within the Borough) reflecting the centre's comparison retail role as one the two international shopping centres within London, as identified in the London Plan. Table 7.2 provides a breakdown of comparison shop uses by goods categories.

Table 7.2: Knightsbridge Breakdown of Comparison Units

Type of Unit	Knightsbridge		UK Average*
	Knightsbridge	%	%
Clothing and Footwear	101	58.4	27.4
Furniture, carpets and textiles	7	4.0	8.8
Booksellers, arts, crafts and stationers	1	0.6	9.3
Electrical, gas, music and photography	6	3.5	10.1
DIY, hardware & homewares	10	5.8	6.3
China, glass, gifts & fancy goods	11	6.4	3.7
Cars, motorcycles & motor access.	0	0.0	2.9
Chemists, drug stores & opticians	11	6.4	8.7
Variety, department & catalogue	2	1.2	2.0
Florists, nurserymen & seedsmen	0	0.0	2.2
Toys, hobby, cycle & sport	1	0.6	5.3
Jewellers	15	8.7	5.1
Other comparison retailers	8	4.6	8.2
Total	173 (154)	100	100.0

Source: Royal Borough of Kensington & Chelsea Council (2007)

* UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

7.7 All categories except cars/motorcycles/motor accessories and florists/nurserymen/seedsmen are represented in the centre, but the breakdown differs significantly from the national average. Clothing and footwear units account for over half the total comparison units, over double the UK average. The proportion of jewellers and china/glass/gifts/fancy goods units is slightly higher, while all other types of good are represented by a lower proportion, than that of the national average. In particular, the proportions of booksellers/arts/crafts/stationers, electrical/ gas/music/photography and toys/hobby/cycle/sport are significantly below the national averages. Major international comparison retailers present in the centre include:

- Aga Shop;
- Bang & Olufsen;
- Burberry;
- Chanel;
- Christian Dior;
- Dolce Gabbana;
- Emporio Armani;
- Gucci
- Harrods;
- Harvey Nichols;
- Jimmy Choo;
- Louis Vuitton;
- Nicole Farhi;
- Prada;
- Swarovski;
- Valentino; and
- Yves Saint Laurent.

7.8 Major national comparison retailers present in the centre include:

- Accessorize;
- Boots;
- Body Shop
- Office;
- Sunglasses Hut;
- The Carphone Warehouse; and

- Clothing retailers including French Connection, H&M, Monsoon, United Colours of Benetton, Uniqlo and Zara.

7.9 Knightsbridge contains two department stores; Harrods on Brompton Road and Harvey Nichols on the corner of Knightsbridge and Sloane Street.

Service Uses

7.10 Knightsbridge has a good range of service uses, with all categories represented, as shown in Table 7.3. The centre has a significantly higher proportion of restaurants/cafes/takeaways compared with the national average, and slightly higher proportions of estate agents/valuers and travel agents than the national averages. The proportions of banks/other financial services, hairdressers/beauty parlours and laundries/dry cleaners are below the national averages.

Table 7.3: Knightsbridge Analysis of Selected Service Uses

Type of Use	Knightsbridge		UK Average*
	Units	%	%
Restaurants, cafes & takeaways	49	50.5	43.1
Banks/other financial services	11	11.3	15.4
Estate agents and valuers	12	12.4	11.7
Travel agents	5	5.2	4.9
Hairdressers & beauty parlours	19	19.6	22.0
Laundries and dry cleaners	1	1.0	2.9
Total Total	97 (74)	100	100.0

Source: Royal Borough of Kensington & Chelsea Council (2007)

*UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

N.B. 'Restaurants, cafés and takeaways' does not include the 10 pubs in the centre because these are excluded in the Goad averages.

7.11 A number of high street banks/building societies are represented within Knightsbridge including; HSBC, Lloyds TSB, Natwest, Halifax and Barclays, while a branch of Coutts is located close to the centre on Cadogan Place.

7.12 There is a noticeable difference between different parts of the centre in terms of the retail offer. The northern half of Brompton Road and Sloane Street are heavily dominated by class A1 retail uses, in particular by exclusive international clothing and footwear retailers. Along the southern half of Brompton Road the mix of A1 and other A class uses balances out slightly. Along Beauchamp Place the units are slightly smaller and contain a relatively diverse mix of types of retail, providing high quality boutique style shops, along with a number of non-retail units such as restaurants and hairdressers.

Accessibility and Movement

Car Parking

- 7.13 The on-street survey results indicate that 3% of respondents travelled by car (drivers and passengers) to Knightsbridge. 49.5% of visitors travelled by tube while 16.0% walked, 11.0% travelled by taxi and 10.0% got the train, a further 9.5% travelled by bus/coach. These results highlight the importance of good public transport provision to the centre. Over 80% of those who travelled by tube used Knightsbridge underground station while 6% used Sloane Square underground station. Whilst levels of car usage are substantially below NLP's observed average from similar studies, good accessibility to convenient car parks remains important to the vitality and viability of the centre.
- 7.14 There are four car parks serving the centre, all are run by National Car Parks (NCP). There is an underground car park at Knightsbridge Green, on the northern side of Brompton Road (within the City of Westminster) which has 70 spaces and charges a tariff of £9 for up to 2 hours, £15 for up to 4 hours and £30.80 for up to 8 hours. There is a multi-storey car park on Pavilion Road, which has 300 spaces; the tariff is £1.80 per 15 minutes up to a maximum of £44 per day. There is an underground car park at Cadogan Place which has 344 spaces and charges a tariff of £1.40 per 15 minutes up to a daily maximum of £35.00. There is also an underground car park at The Park Tower Hotel between Seville Street and William Street which has 70 spaces and charges a tariff of £8.80 for up to 2 hours, £15.70 for 2 – 4 hours, £19.00 for 4 – 6 hours, £21.00 for 6 – 9 hours, £25.20 for 9 – 12 hours and £30.40 for 12 – 24 hours.
- 7.15 In addition to the car parks there is some on-street parking available to visitors in Knightsbridge though all controlled via pay and display with a tariff of £3 per hour and varying restrictions apply.
- 7.16 Knightsbridge is within the Central London Congestion Charge Zone. There is a requirement for vehicles from outside the congestion zone to pay an £8 daily charge to drive within this zone, the aim of which is to reduce traffic congestion, improve journey times and encourage a modal shift in transport choices. Knightsbridge International Centre's limited amount of parking should help to support these aims, and good public transport provision is a key component to ensure low levels of car parking do not impact on the centres vitality and viability.

7.17 Traffic flows along Brompton Road and Sloane Street were observed to be heavy during NLP's visits, one at approximately 9 am, and one at approximately 5 pm. A large number of taxis, buses and vans were observed within the traffic flows, and some congestion was noted during NLP's visits. Traffic flows along Beauchamp Place were not particularly heavy and traffic was seen to be flowing freely.

Public Transport

7.18 In terms of public transport accessibility levels, most of the centre is located in an area rated as having "very good" accessibility (a score of 5). The area around Knightsbridge tube station has the highest PTAL score of 6. Public transport accessibility to Knightsbridge shopping centre is excellent. Knightsbridge underground station (Piccadilly Line) is located at the north eastern end of the centre near the junction of Brompton Road and Sloane Street, and as such is fairly central to the shopping centre. South Kensington underground station (Piccadilly, Circle and District Lines) is located approximately 300-400 metres from the centre. The stations provide regular direct links to the rest of Central and Greater London and a number of suburban and national rail stations.

7.19 Many bus routes have stops in Knightsbridge shopping centre. There are fifteen bus stops in total in the centre, located along Knightsbridge, Brompton Road and Sloane Street. The five bus stops located along Knightsbridge are in The City of Westminster, while this is not part of the shopping centre, it is within close proximity to it, and cannot be discounted in terms of public access. There are at least eleven bus routes providing access to and from Knightsbridge from surrounding areas in the Borough and beyond. The bus routes connect Knightsbridge with many destinations throughout London including Aldwych, Angel, Battersea Park, Chelsea, Clapham Common, Earl's Court, Euston, Finsbury Park, Fulham, Green Park, Hammersmith, Highbury, Kensington, King's Cross, Ladbroke Grove, Marble Arch, Notting Hill Gate, Oxford Circus, Piccadilly Circus, Putney, Shepherd's Bush, Trafalgar Square and Victoria. One of the bus routes through the centre run 24 hours with an additional eight night bus routes providing links to Battersea, Chelsea, Crystal Palace, Fulham, Hounslow, Ladbroke Grove, Putney, Soho, Streatham throughout the night.

Pedestrian Access and Movement

7.20 The main shopping areas within Knightsbridge are Brompton Road, Sloane Street and Beauchamp Place. There are no pedestrianised areas within the centre and

heavy traffic flows and fast moving vehicles act as major barriers to pedestrian movement. Brompton Road and Sloane Street, where the majority of shopping frontages are, have wide and even paving throughout, which is generally uncluttered. Paving along Beauchamp Place is also of a high quality, it is fairly narrow, but this is counteracted by lower pedestrian flows. There are a reasonable number of pedestrian crossings operated by traffic lights along Brompton Road, while there are two zebra crossings along Sloane Street and crossings at traffic lights at the northern end. There is one pedestrian crossing at the northern end of Beauchamp Place. The high number of pedestrians using the centre further impede pedestrian movement throughout the centre.

- 7.21 Pedestrian flows tend to be heaviest along the northern half of Brompton Road and the northern end of Sloane Street, particularly around Harrods and Harvey Nichols. However, high pedestrian flows were observed throughout most of the centre, with the entrances to Knightsbridge underground station also having high numbers of pedestrians. Pedestrian flows are significantly lower along Beauchamp Place and the southern half of Brompton Road where the type of retail is more diversified and there is a higher proportion of non-A1 uses.
- 7.22 Overall Knightsbridge shopping centre has a relatively good layout, but lacks a focal point. Its compact size ensures that the centre is accessible to visitors and encourages them to walk to the periphery.

Environmental Quality

- 7.23 Overall, the quality of buildings within Knightsbridge shopping centre is very good. The historic buildings are an attractive feature of the centre and enhance the centres environmental quality. The Harrods building is a landmark building within London and its grand Edwardian frontage dominates the rest of Brompton Road. The Victorian Harvey Nichols store is also an impressive building which competes with Harrods for pride of place in this exclusive centre. This high quality of architecture continues throughout the centre, although there is quite a mix of ages and styles. Along Sloane Street for example, there is an impressive nine storey art deco building housing retailers including Prada on the ground floor and apartments above. Sloane Street is also home to further imposing four and five storey period buildings with retail on the ground floor and residential units above. The attractive historic built form along Sloane Street is countered somewhat by the thirteen storey 1960s style concrete Millennium Hotel building. To the south of Harrods along Brompton Road the

buildings are attractive five storey period buildings, with some modern buildings interspersed such as those housing Reiss and Mulberry. The buildings along Beauchamp Place are again attractive historic buildings, however, on a smaller scale than those along Brompton Road and Sloane Street. The buildings along Beauchamp Place are Victorian terrace buildings with retail units on the ground floor and two to three storeys of residential above. Generally the facades including upper parts are very well maintained and the shopfronts do not detract from the quality of the built environment. In addition, there is evidence of shopkeepers maintaining the pavement area in front of their shop throughout the centre.

- 7.24 There was no evidence of graffiti or vandalism within the centre. Overall during the daytime the centre felt safe and there was no evidence of anti-social behaviour or begging. The area does not have any areas of green space, however, there are some benches along Brompton Road opposite Beauchamp Place and the centre is adjacent to Hyde Park.
- 7.25 Throughout the centre the paving is generally of good quality, with block paving throughout the centre which is even, well maintained and very clean with evidence of regular sweeping by council employees. The public realm was generally clean and free from litter or detritus, with good provision of bins throughout the centre, ensuring the upkeep of the environmental quality of the centre, however, there was a relatively high level of chewing gum on pavements. There is a good provision of street lighting throughout the centre, which is generally of a good quality, it is of a fairly standard design along Brompton Road and Sloane Street, and is more attractive along Beauchamp Place, in keeping with the character of the street. CCTV is evident within the core of the centre, and many of the shops have their own security staff, further enhancing the feeling of safety within the centre. The street furniture throughout the centre (i.e. litter bins, seating, bicycle racks) is of a good, attractive quality, and is co-ordinated in terms of style, colour and materials. Knightsbridge shopping centre has a very good physical fabric with a number of historic and characteristic buildings.
- 7.26 The Conservation Area designation upon the centre requires special attention be paid to the desirability of preserving or enhancing the character or appearance of the conservation area. Any proposed new development or alterations to buildings in the conservation area will therefore be subject to restrictive Unitary Development Plan policies.

7.27 The overall environmental quality within Knightsbridge International Shopping Centre is generally very good. Knightsbridge is an attractive centre with some exceptional architecture which remains in commercial use. The centre has a unique and rather exclusive range of retail and services. Although the traffic flow can be high in parts of the centre, there are an adequate number of pedestrian crossings, and there are measures in place to ensure a pedestrian friendly fabric to the centre.



The iconic Harrods building on Brompton Road



View south along Sloane Street



Retail units along Beauchamp Place



Attractive period buildings and heavy traffic along Brompton Road

Summary of Knightsbridge's Strengths and Weaknesses

Strengths

- Knightsbridge International Shopping Centre has a good selection of high quality, internationally renowned shops, and as such acts as a major tourist destination for the Capital.
- Knightsbridge has a high proportion of comparison retailers when compared with the national average and a reasonable number of high quality international and national multiple retailers.

- The centre provides a reasonable range of evening uses including provision of high quality restaurants, cafes and takeaways, as well as a good range of bars and pubs.
- The architectural quality of buildings is very good. There are a number of iconic historic buildings which are a special feature of the centre and enhance the attraction of the centre.
- The centre has good quality pavements, which provide a pleasant shopping environment for customers. All areas within the centre are very well maintained and clean.
- Knightsbridge has excellent public transport links with both the underground station and buses providing convenient means of getting to and from the centre.

Weaknesses

- The centre has a significantly lower than average provision of convenience stores, and specifically lacks a large supermarket, although there is a Marks & Spencer Simply Food, a Sainsbury's Local and food halls within Harrods and Harvey Nichols department stores. Convenience provision in the centre is suitable for top-up shopping and does not provide facilities for main food shopping.
- The heavy traffic through the centre detracts from the environment and acts as a barrier to free pedestrian movement.
- The retail mix is heavily skewed toward clothing and footwear units, with an under-representation of most other types of goods with the exception of china/glass/gifts/fancy goods and jewellers.
- There is a general lack of community services within the centre.
- There is an exclusive feel to the centre which may deter some shoppers.

8.0 KING'S ROAD (EAST) MAJOR SHOPPING CENTRE

Introduction

- 8.1 King's Road (East) has a long history dating back to the late 1600s when it was used by King Charles II to travel to Kew. The road gained public access in the 1830s and has been a centre of prominence ever since. It was a focal point for counterculture during the punk and hippie eras and is now one of the most fashionable shopping streets in London.
- 8.2 The centre serves shoppers from the Royal Borough and beyond, and its superior comparison offer ensures it fulfils its role as a major shopping centre. King's Road (East) fulfils a principal role within the Kensington & Chelsea UDP which states that principal shopping centres offer both comparison and day-to-day convenience shopping. The Kensington & Chelsea UDP identifies the majority of King's Road (East) shopping centre as within a conservation area.
- 8.3 The shopping centre is a long linear centre stretching along King's Road from the junction with Oakley Street at the south western end of the centre up to, and including, Sloane Square at the north eastern end of the centre. The centre also includes parts of the roads surrounding Sloane Square, in particular, Sloane Street to the north of the square. The main supermarket within the centre is a Waitrose store located on King's Road towards the south eastern end of the centre, with a significant food hall in the Marks & Spencer store also on King's Road slightly further north than Waitrose. King's Road (East) shopping centre is bounded by residential areas on all sides.

Mix of Uses and Occupier Representation

- 8.4 King's Road (East) major shopping centre's key roles include:
- *convenience shopping* – including a bakery, a grocer, an off licence, a confectioner, a health food shop and two sandwich shops. There is also the Waitrose supermarket and a food hall in the Marks & Spencer store;
 - *comparison shopping* - a good range of national multiple retailers alongside a good selection of exclusive international retailers selling a reasonable range of high and lower order comparison goods;
 - *services* – including a good range of cafés, restaurants, takeaways, and a reasonable range of high street national banks/building societies and hairdressers/beauty parlours; and

- *entertainment* – including three pubs/bars, a cinema, a nightclub and a theatre.

8.5 King's Road (East) Major Shopping Centre has 235 retail/service units (excluding non-retail Class A uses). Table 8.1 sets out the mix of uses in King's Road (East) shopping centre, compared with the Goad national average. The centre has a very different mix of uses compared with the national average. The proportion of comparison retail units is substantially higher than the national average at nearly three-quarters of the total number of retail/service units within the centre. Conversely, the proportion of convenience units is approximately a third of the national average proportion. The centre along with King's Road (West) has comparison floorspace totalling 70,300 sq m gross (source: Goad and VOA), of which 36% is provided in the Peter Jones department store. The proportion of vacant units is significantly below the national average, with the proportion of A1 and A2 service units and A3/A5 units also below the national average. The vacant units are well dispersed throughout the centre.

Table 8.1: King's Road (East) Use Class Mix by Unit

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		King's Road East	National Average*
Comparison Retail	183	72.3	45.4
Convenience Retail	8	3.2	9.1
A1 Services	13	5.1	10.6
A2 Services	10	4.0	9.6
A3 and A5	25	9.9	14.3
A4	3	N/A	N/A
Vacant	14	5.5	11.0
Total	256	100.0	100.0

Sources: Royal Borough of Kensington & Chelsea Council (2007)

NLP site visit (February 2008)

* UK average relates to all town centres surveyed by Goad Plans (Nov 07) - NB Goad average excludes Class A4 uses.

Retailer Representation

8.6 King's Road (East) shopping centre has a good selection of comparison shops (166) reflecting the centre's role as one of the two major shopping centres within the Borough, as identified in the London Plan. Table 8.2 provides a breakdown of comparison shop uses by goods categories.

Table 8.2: King's Road (East) Breakdown of Comparison Units

Type of Unit	King's Road (East) Major Shopping Centre		UK Average*
	King's Road East	%	%
Clothing and Footwear	97	53.0	27.4
Furniture, carpets and textiles	3	1.6	8.8
Booksellers, arts, crafts and stationers	6	3.3	9.3
Electrical, gas, music and photography	9	4.9	10.1
DIY, hardware & homewares	8	4.4	6.3
China, glass, gifts & fancy goods	4	2.2	3.7
Cars, motorcycles & motor access.	0	0.0	2.9
Chemists, drug stores & opticians	20	10.9	8.7
Variety, department & catalogue	2	1.1	2.0
Florists, nurserymen & seedsmen	1	0.5	2.2
Toys, hobby, cycle & sport	4	2.2	5.3
Jewellers	13	7.1	5.1
Other comparison retailers	16	8.7	8.2
Total	183	100.0	100.0

Sources: Royal Borough of Kensington & Chelsea Council (2007)

NLP site visit (February 2008)

* UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

8.7 All categories except cars/motorcycles/motor accessories are represented in the centre, however, the overall the breakdown differs from the national average. The proportion of clothing/footwear retail units is significantly higher than the national average and the proportions of jewellers and chemists/drug stores/opticians are slightly above the national averages. The proportions of all other types of retail units are below the national averages, and those which are significantly lower than the national average include furniture/carpets/textiles, booksellers/arts/crafts/stationers and electrical/gas/music/photography. Major international multiple comparison retailers present in the centre include:

- Cartier;
- Diesel;
- East;
- Hackett;
- Hobbs;
- Hugo Boss;
- Jack Wills;
- Karen Millen;
- Kurt Geiger;
- Mont Blanc;
- Peter Jones;
- Radley;
- Reiss;
- Space.NK;
- Ted Baker; and
- The White Company.

8.8 Major national multiple comparison retailers present in the centre include:

- Boots;
- Dolland & Aitcheson;
- Ernest Jones;
- Habitat;
- Jones;

- Marks & Spencer;
- Russell and Bromley;
- The Carphone Warehouse;
- The Early Learning Centre;
- Virgin Megastore;
- Waterstones; and
- Clothing retailers including Fat Face, French Connection, Jigsaw, Monsoon, Oasis, Principles, Warehouse and Whistles.

8.9 King's Road (East) shopping centre contains two department/variety stores; Marks & Spencer and Peter Jones, both on King's Road; Peter Jones at the north eastern end and Marks & Spencer towards the south western end.

Service Uses

8.10 King's Road (East) shopping centre has a reasonable range of service uses, with most categories represented, with the exception of Laundries/dry cleaners, as shown in Table 8.3. The centre has a relatively low proportion of estate agents/valuers, travel agents and hairdressers/beauty parlours compared with the national averages. The proportion of restaurants/cafes/takeaways is significantly higher than the national average, while the proportion of banks/financial services is slightly higher than the national average.

Table 8.3: King's Road (East) Analysis of Selected Service Uses

Type of Use	King's Road (East) Major Shopping Centre		UK Average*
	Units	%	%
Restaurants, cafes & takeaways	25	58.1	43.1
Banks/other financial services	7	16.3	15.4
Estate agents and valuers	2	4.7	11.7
Travel agents	1	2.3	4.9
Hairdressers & beauty parlours	8	18.6	22.0
Laundries and dry cleaners	0	0.0	2.9
Total Total	43	100	100.0

Sources: Royal Borough of Kensington & Chelsea Council (2007)

NLP site visit (February 2008)

*UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

N.B. 'Restaurants, cafés and takeaways' does not include the 22 pubs in the centre because these are excluded in the Goad averages.

8.11 Four high street banks/building societies are represented within King's Road (East) shopping centre, namely HSBC, Natwest, Barclays and Lloyds TSB. In addition to Class A service uses in King's Road (East) shopping centre there is one place of worship; Chelsea Methodist Church. The centre also contains some non Class A

entertainment uses including a The Royal Court Theatre, Chelsea Cinema, Mamilanji nightclub and 151 Club.

- 8.12 The convenience retail units are spread quite evenly throughout the centre, although Waitrose and Marks & Spencer are fairly close together, as are the retail service units. The centre has a high number of comparison units predominantly found in the shopping core along King's Road, with concentrations also found on Duke of York Square (off King's Road) and Sloane Street.

Duke of York Square

- 8.13 The Duke of York Square off King's Road has recently been redeveloped and includes a retail quarter and public square, and has opened up a previously inaccessible place to the public. The development has attracted a number of high profile international retailers such as Pied A Terre, Coccinelle, Ted Baker and Space NK. The public space provided enhances the centre considerably as it provides an attractive contemporary open space with public seating, public art and planting. As well as shops, the square provides a number of cafes, some with outdoor seating and a hair salon.

Accessibility and Movement

Car Parking

- 8.14 The on-street survey results indicate that 3.9% of respondents travelled by car (drivers and passengers) to King's Road (East). 35.9% of visitors travelled by tube while 24.3% walked, 19.4% travelled by bus/coach and 6.8% got the train, a further 5.8% travelled by taxi. These results highlight the importance of good public transport provision and high quality walking routes to the centre. Over 80% of those who travelled by tube used Sloane Square underground station while 3.4% used Knightsbridge and 3.4% used South Kensington underground stations. Whilst levels of car usage are substantially below NLP's observed average from similar studies, good accessibility to convenient car parks remains important to the vitality and viability of the town centre.
- 8.15 There are three car parks that serve the centre; Whitelands House Car Park off King's Road near the Saatchi Gallery, Cadogan Place Car Park, which is off King's Road at the north eastern end of the centre and Chelsea Cloisters Car Park which is slightly out of the centre on Sloane Avenue. The car parks are all privately operated and

together provide 684 spaces. The tariffs vary from approximately £4 per hour in the Chelsea Cloister car park, to around £5 per hour in the Whitelands House car park, to £1.40 per 15 minutes up to a maximum of £35 per day in the Cadogan Place car park.

- 8.16 King's Road (East) is within the central London Congestion Charge Zone. There is a requirement for vehicles from outside the congestion zone to pay an £8 daily charge to drive within this zone, the aim of which is to reduce traffic congestion, improve journey times and encourage a modal shift in transport choices. King's Road (East) major centre's limited amount of parking should help to support these aims, and good public transport provision is a key component to ensure low levels of car parking do not impact on the centres vitality and viability.
- 8.17 Traffic flows through the centre were noted to be heavy during the NLP site visit; however, there did not appear to be any congestion.

Public Transport

- 8.18 In terms of public transport accessibility levels, most of the centre is located in an area rated as having "very good" accessibility (a score of 5). The area around Sloane Square tube station has the highest PTAL score of 6. Public transport accessibility to King's Road (East) shopping centre is good. Sloane Square underground station is located at the northern end of the centre on the south eastern corner of Sloane Square, which is slightly removed from the main retail offer along King's Road (East). The station is on the Circle and District lines and provides regular direct links to the rest of Central and Greater London and a number of suburban and national rail stations via the tube network.
- 8.19 Many bus routes have stops in King's Road (East) shopping centre. Several bus stops are located along King's Road, Symons Street, Sloane Street, Sloane Square and Lower Sloane Street. There are at least nine bus routes providing access to and from King's Road (East) from surrounding areas in the Borough and beyond. The bus routes connect King's Road (East) with many destinations throughout London including Aldwych, Barnes, Charing Cross, Clapham, Earl's Court, Finsbury Park, Fulham, Green Park, Hammersmith, Islington, Knightsbridge, Ladbrooke Grove, Marble Arch, Piccadilly, Putney, Richmond, South Kensington, Streatham, Tooting Bec, Victoria, Waterloo and Westminster. Four of the bus routes through the centre provide night bus routes giving links to links to Acton, The City, Clapham, Crystal

Palace, Hammersmith, Holborn, Islington, Putney, Richmond, Wembley and the West End.

Pedestrian Access and Movement

- 8.20 The main shopping areas within King's Road (East) are King's Road, Sloane Street and the southern side of Sloane Square. Apart from Duke of York's Square there are limited pedestrianised areas within the centre and heavy traffic flows act as major barriers to pedestrian movement, although there are several pedestrian crossings throughout the centre which are spaced fairly evenly. The paving is of good quality and is clean, wide and even throughout the centre. The centre is a long linear centre (approximately 1.25 km in length), and as such does not provide a natural circuit for pedestrians, nor does its length encourage pedestrian's to visit all parts of the centre.
- 8.21 Pedestrian flows were fairly heavy along the whole of King's Road, but particularly busy areas were noted around the entrance to Marks & Spencer and around the Duke of York Square shopping area. Pedestrian flows are significantly lower at the south western end of King's Road.
- 8.22 Overall King's Road (East) shopping centre has a reasonably good layout, with some aspects which facilitate pedestrian movement, particularly around Duke of York Square, and others which impede pedestrian movement, such as its length.

Environmental Quality

- 8.23 The quality of buildings within King's Road (East) major shopping centre is good. The centre contains mainly historic buildings, although there is a mix of different styles and ages with attractive period buildings dominating either end of the centre, and more modern buildings providing some infill in the middle of the centre. The Antiquarius Building at the south western end of the centre is a distinctive imposing building and is an important part of the centre's character. The Peter Jones building, on the corner of King's Road and Sloane Square, is another important landmark within King's Road (East) and features an impressive 6-storey glass wall. There are a number of modern buildings some of which are more attractive than others, although all appear well maintained. Generally in the centre the facades including upper floors are well maintained and the shop fronts do not detract from the quality of the built environment. The buildings along Sloane Street and around Sloane Square are largely grand period buildings, although there are also some more modern buildings,

such as the building housing Smythson and Paul & Joe on Sloane Street, and Liscarten House.

- 8.24 There was no evidence of graffiti or vandalism within the centre. Overall during the daytime the centre felt safe and there was no evidence of anti-social behaviour or begging. The area does not have any areas of green space, but there are three public spaces with areas of seating with public art, bins, lighting and planting. A public space by Dovecote Street provides attractive seating, bins and planting fronting on to King's Road at the south western end of the centre, Duke of York Square provides a contemporary public space with well designed seating, lighting, bins and public art, while Sloane Square provides a public space at the north eastern end of the centre with public art and a water feature as well as some trees and seating.
- 8.25 Throughout the centre the paving is generally of good quality, with attractive block paving throughout the centre which is even and well maintained. The level of chewing gum on the paving is relatively low and the public realm was generally clean and free from litter or detritus, with good provision of bins throughout the centre, ensuring the upkeep of the environmental quality of the centre. There is a good provision of street lighting throughout the centre, which is generally of a good quality. CCTV is evident within core of the centre. The street furniture throughout the centre (i.e. litter bins, bollards, railings) is of a good, attractive quality, and is co-ordinated in terms of style, colour and materials. King's Road (East) shopping centre generally has a very good physical fabric with a number of historic and characteristic buildings.
- 8.26 The Conservation Area designation upon the centre requires special attention be paid to the desirability of preserving or enhancing the character or appearance of the conservation area. Any proposed new development or alterations to buildings in the conservation area will therefore be subject to restrictive Unitary Development Plan policies.
- 8.27 The overall environmental quality within King's Road (East) shopping centre is generally very good. King's Road (East) is an attractive centre with some high quality architecture which remains in commercial use. The centre has a good range of comparison retail, however, is somewhat lacking in its provision of convenience retail and services. Although the traffic flow can be high throughout the centre, no congestion was observed and there are an adequate number of pedestrian crossings in place.



The distinctive Antiquarius building.



View north east along King's Road.



The impressive façade of the Peter Jones Department Store.



Public Art in Sloane Square.

Summary of King's Road East's Strengths and Weaknesses

Strengths

- King's Road (East) shopping centre has a good selection of comparison shops, with a good proportion of high quality international multiple retailers, alongside a range of national multiple retailers including Marks & Spencer and Peter Jones stores. The centre has a much higher proportion of comparison retail uses compared with the national average.
- The centre provides a reasonably good range of evening uses including limited, but exclusive, provision of restaurants, cafes and takeaways alongside a few pubs/bars, a cinema and a theatre.
- The vacancy rate is half that of the national average which suggests demand for premises is strong.
- The architectural quality of buildings is generally very good. The historic buildings are an attractive feature and there are several iconic buildings within the centre.

- The centre has good quality pavements, which provide a pleasant shopping environment for customers. Most areas within the centre are well maintained and clean. The provision of street furniture throughout the centre is good.
- King's Road (East) has good public transport links with both the train station and buses providing convenient means of getting to and from the centre.
- The centre contains three attractive public spaces, two with high quality public art, and all with attractive seating, bins, lighting and planting.

Weaknesses

- The centre has a very low proportion of convenience retailers compared with the national average and has only one supermarket (Waitrose) along with a food hall in Marks and Spencer.
- The comparison retail offer at King's Road (East) is heavily skewed towards clothing and footwear retailers leading to an under provision of cars/motorcycles/motor accessories, furniture/carpets/textiles, booksellers/arts/crafts/stationers, electrical/ gas/music/photography and toys/hobby/cycle/sport.
- The heavy traffic through the centre detracts from the environment and acts as a barrier to free pedestrian movement.
- There is limited car parking provision within the centre, however, this is countered by the good public transport links.
- There is a low proportion of services when compared to the national averages, in particular there is a general lack of travel agents and there are no laundries/dry cleaners.

9.0 KENSINGTON HIGH STREET MAJOR SHOPPING CENTRE

Introduction

- 9.1 Kensington High Street is designated as a Principal Shopping Centre in the adopted UDP, however, the Core Strategy Issues and Option identifies the centre as a Major Centre in line with the London Plan. Kensington High Street is within the middle of the Borough to the north of Earl's Court Road District Centre and to the south of Notting Hill Gate District Centre. To the north east of the centre is Kensington Gardens and Hyde Park.
- 9.2 The centre is predominantly linear in form running for approximately 900 metres along Kensington High Street. The retail frontage also runs along Kensington Church Street. Kensington High Street is all within a conservation area apart from the underground station and adjacent building. The underground station was first built in 1868, but was demolished in 1906 and rebuilt to include a shopping arcade. Until the early 1970s there were three department stores on Kensington High Street, Derry & Toms, Pontings and Barkers.

Mix of Uses and Occupier Representation

- 9.3 Kensington High Street's key roles include:
- *convenience shopping* – including newsagents, grocers, off licences, delicatessens, health food shops, sandwich shops and two confectionaries. There are a number of supermarkets including a Tesco Metro, Waitrose and a food hall in the Marks & Spencer store. There is also a Whole Foods Market store in the former House of Fraser Barkers building;
 - *comparison shopping* - a good proportion of multiple retailing shops selling a range of high and lower order comparison goods including a Marks & Spencer store.
 - *services* – including a good range of high street national banks/building societies, cafés, restaurants, takeaways, travel agents, dry cleaners, and hairdressers/beauty parlours;
 - *entertainment* – including a good selection of restaurants, several pubs/bars and a nightclub, plus a cinema to the west of the centre; and
 - *community facilities* – including several places of worship, a school and a police station.
- 9.4 Kensington High Street has 329 retail/service units (excluding non-retail Class A uses). Table 9.1 sets out the mix of uses on Kensington High Street, compared with

the Goad national average. The centre has a higher proportion of comparison retail units compared to the national average but a slightly lower proportion of convenience retail units. The proportion of vacant units is significantly below the national average, with the proportion of comparison retail units also below the national average. The centre has comparison floorspace totalling 57,400 sq m gross (source: Goad and VOA). The centre has a slightly higher proportion of A3/A5 units and A1 service units compared to the national average but a slightly lower proportion of A2 service units.

Table 9.1: Kensington High Street Use Class Mix by Unit

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Kensington High St	National Average*
Comparison Retail	163	50.6	45.4
Convenience Retail	18	5.6	9.1
A1 Services	41	12.7	10.6
A2 Services	24	7.5	9.6
A3 and A5	54	16.8	14.3
A4	7	n/a	N/A
Vacant	22	6.8	11.0
Total	329	100.0	100.0

Source: Royal Borough of Kensington & Chelsea (2007)

* UK average relates to all town centres surveyed by Goad Plans (Nov 07)

Retailer Representation

- 9.5 Kensington High Street has a good selection of comparison shops (163) reflecting the centre's comparison retail role as a Major Centre within the Borough. Table 9.2 provides a breakdown of comparison shop uses by goods categories.

Table 9.2: Kensington High Street Breakdown of Comparison Units

Type of Unit	Kensington High St Major Centre		UK Average*
	Kensington High St	%	%
Clothing and Footwear	65	39.9	27.4
Furniture, carpets and textiles	2	1.2	8.8
Booksellers, arts, crafts and stationers	6	3.7	9.3
Electrical, gas, music and photography	16	9.8	10.1
DIY, hardware & homewares	8	4.9	6.3
China, glass, gifts & fancy goods	27	16.6	3.7
Cars, motorcycles & motor access.	0	0.0	2.9
Chemists, drug stores & opticians	19	11.7	8.7
Variety, department & catalogue	1	0.6	2.0
Florists, nurserymen & seedsmen	1	0.6	2.2
Toys, hobby, cycle & sport	2	1.2	5.3
Jewellers	5	3.1	5.1
Other comparison retailers	11	6.7	8.2
Total	163	100.0	100.0

Source: Royal Borough of Kensington & Chelsea (2007)

* UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

9.6 All categories except cars/motorcycles/motor accessories are represented in the centre. There is a higher proportion of clothing and footwear retailers when compared with the national average, but there are only two furniture/carpet/textile retailers. Major national multiple comparison retailers present in the centre include:

- Marks & Spencer;
- Waterstones;
- WH Smiths;
- Boots;
- Early Learning Centre;
- Superdrug;
- Argos;
- Robert Dyas; and
- Clothing retailers including H&M, Gap, French Connection, Urban Outfitters, Zara, Warehouse, Oasis, Karen Millen, Top Shop, American Apparel, All Saints, Monsoon and Jigsaw.

Service Uses

9.7 Kensington High Street has a good range of service uses, with all categories represented, as shown in Table 9.3. The centre has a relatively low proportion of banks/other financial services and estate agents and valuers compared with the national average. The proportion of restaurants/cafes/takeaways is slightly higher than the national average as is the proportion of hairdressers and beauty parlours.

Table 9.3: Kensington High Street Analysis of Selected Service Uses

Type of Use	Kensington High St Major Centre		UK Average*
	Units	%	%
Restaurants, cafes & takeaways	54	47.0	43.1
Banks/other financial services	10	8.7	15.4
Estate agents and valuers	11	9.6	11.7
Travel agents	5	4.3	4.9
Hairdressers & beauty parlours	29	25.2	22.0
Laundries and dry cleaners	6	5.2	2.9
Total Total	115	100.0	100.0

Source: Royal Borough of Kensington & Chelsea (2007)

*UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

N.B. 'Restaurants, cafés and takeaways' does not include the 7 pubs in the centre because these are excluded in the Goad averages.

9.8 Most high street banks/building societies are represented on Kensington High Street including:

- HSBC;
- Natwest;
- Royal Bank of Scotland;
- Lloyds TSB
- Halifax;
- Abbey;
- Barclays;
- Bradford & Bingley; and
- Nationwide.

9.9 In addition to Class A service uses Kensington High Street has several other non-retail uses including two places of worship, a school and a police station (outside the designated centre). The centre also contains a number of non Class A entertainment uses including a nightclub. There is also an Odeon cinema to the west of the centre.

9.10 The majority of the vacant units are located along Kensington Church Street, with other vacancies spread throughout the centre. Kensington Church Street is to the east of the centre and is not part of the natural shopping circuit, therefore shops suffer from less footfall.

9.11 The convenience retail units are spread quite evenly throughout the centre as are the retail service units. The Waitrose is to the far west of the centre, Tesco Metro is in the centre and the Marks & Spencer food hall and Whole Foods Market towards the east of the centre.

Accessibility and Movement

Car Parking

9.12 Kensington High Street is within the Central London Congestion Charge area and there is a requirement for vehicles from outside the congestion zone to pay an £8 daily charge to drive within this zone. The household survey indicated that within the Kensington Central zone only 17% of respondents travelled by car (drivers and passengers) to do their main food shopping and only 16% travelled by car to their main non-food shopping destination. The On-street survey in Kensington High Street indicated that 10% travelled by car to visit the centre and of those nearly half paid the congestion charge. The majority of visitors walked to Kensington High Street (32.5%) followed by travelling by bus/coach (27.5%) Lack of parking was only indicated as a

dislike about shopping in Kensington High Street by 4% of respondents and only 4% also indicated that the cost of parking was a dislike. Therefore, due to the good public transport provision, good accessibility to convenient car parks is not of significant importance to the vitality and viability of the centre.

9.13 There is one local authority car park near Kensington High Street, situated under Kensington Town Hall. The car park has 450 parking spaces and tariffs range from £3 for up to one hour up to £30 for eight to ten hours.

9.14 There is also a private car park run by NCP on Young Street which has 250 parking spaces and charges range from £7.50 for two hours up to £32 for 12 to 24 hours. In addition to these car parks there are some on-street parking spaces available to visitors at £3 per hour.

Public Transport

9.15 In terms of public transport accessibility levels, most of the centre is located in an area rated as having “excellent” accessibility (a score of 6). The peripheral area to the west still a PTAL score of 5. Public transport accessibility to Kensington High Street is excellent. Kensington High Street underground station is located within the primary retail area and is accessed via a shopping arcade. The underground station is on both the Circle and District lines. A significant number of bus routes pass through the centre, linking the centre with most parts of the Borough as well as Central and West London.

Pedestrian Access and Movement

9.16 There are high levels of pedestrian movement within the centre, particularly outside the underground station and Marks & Spencer. Pedestrian movement is much lighter to the west of the centre. Although there are relatively wide pavements, the high volumes of shoppers can hinder pedestrian movement in the centre. Pedestrian movement is also hindered by the heavy traffic flows along Kensington High Street, however, recent traffic calming measures have assisted in allowing easier pedestrian movement around the centre. There are several pedestrian crossings within the centre and a traffic island along part of Kensington High Street assists in allowing ease of movement for pedestrians.

9.17 Along Kensington Church Street, the pavements are narrower, but pedestrian flows are significantly lighter allowing pedestrians to move around with ease. To the west

of Kensington High Street pedestrian flows are lighter as there are less national multiple retailers and an increase in service uses.

Environmental Quality

- 9.18 The quality of buildings along Kensington High Street is excellent. The historic buildings are an attractive feature of the centre and enhance the attraction of the centre. The Barkers building is a landmark building at the eastern end of Kensington High Street with its art deco façades. There are several listed buildings along Kensington High Street and most of the buildings are well maintained. The shops, particularly to the east have well maintained fascias. Refurbishment work was completed in the late 1990s. There are residential properties and offices above most of the shops.
- 9.19 There was no evidence of graffiti or vandalism within the centre. During the daytime the centre felt safe and there was no evidence of anti-social behaviour or begging. Several community policemen were patrolling the centre at the time of the site visit which added to the sense of safety within the centre. The area does not have any areas of green space or planting, however, it is very close to Holland Park and Hyde Park. There is limited seating within the centre, but there is good bin and cycle stand provision.
- 9.20 Throughout the centre the paving is generally of good quality, with well maintained block paving throughout the centre. The level of chewing gum on the paving is quite good and the public realm was generally clean and free from litter or detritus. There is a good provision of street lighting throughout the centre, which is generally of a good quality, attractive and in keeping with the character of the centre. CCTV is evident within core of the centre. The street furniture throughout the centre (i.e. litter bins, seating, bicycle racks) is of a good, attractive quality, and is co-ordinated in terms of style, colour and materials. Kensington High Street has a very good physical fabric with a number of historic buildings.
- 9.21 The Conservation Area designation upon the centre requires special attention be paid to the desirability of preserving or enhancing the character or appearance of the conservation area. Any proposed new development or alterations to buildings in the conservation area will therefore be subject to restrictive Unitary Development Plan policies.

9.22 The overall environmental quality within Kensington High Street is generally very good. The centre has a good range of retail and services. Although the traffic flow can be high, there are an adequate number of pedestrian crossings, and there are measures in place to ensure pedestrian friendly fabric to the centre.



Shops to the north east of Kensington High Street



Cycle parking in the middle of Kensington High Street



High traffic volumes along Kensington High Street



Wide pavements along Kensington High Street

Summary of Kensington High Street's Strengths and Weaknesses

Strengths

- Kensington High Street has a good selection of shops, with a reasonable range of high quality multiple retailers including Marks & Spencer, Gap and H&M. The centre has a slightly higher proportion of comparison retail uses compared with the national average with a much higher proportion of clothing and footwear retailers.
- The centre has three supermarkets (Waitrose, Tesco Metro and Whole Foods) along with a food hall in Marks and Spencer spread throughout the centre.
- There is a good provision of banks and building societies in the centre with most of the main operators represented.

- There is excellent public transport provision within the centre with both the underground station and buses providing convenient means of getting to and from the centre.
- The centre provides a good range of evening uses including provision of restaurants, cafes and takeaways that is slightly higher than the national average. There is also an Odeon Cinema immediately to the west of the centre.
- The vacancy rate is substantially lower than the national average which suggests demand for premises is reasonably strong.
- The architectural quality of buildings is very good. The historic buildings are a special feature of the centre and enhance the attraction of the centre.
- The overall environmental quality of the centre is good with well maintained paving throughout the centre, which provides a pleasant shopping environment for customers. Most areas within the centre are well maintained and clean.

Weaknesses

- The proportion of convenience retailers in the centre is slightly lower than the GOAD national average. Although there are three supermarkets and a food hall within Marks & Spencer, there is limited provision of local convenience shopping provision for top up shopping.
- The heavy traffic through the centre detracts from the environment and acts as a barrier to free pedestrian movement, however, traffic calming measures have been introduced to make the centre more pedestrian friendly.
- There is limited car parking provision within the centre, however, this is countered by the excellent public transport links.
- The Westfield shopping centre at White City which is due to open in November 2008 is likely to have an impact on trade at Kensington High Street.

10.0 NOTTING HILL GATE DISTRICT SHOPPING CENTRE

Introduction

- 10.1 Notting Hill Gate was widely redeveloped in the 1950s with the character of the centre now defined by the two tower blocks on either side of the road and other post-war development that lines the central area of Notting Hill Gate. Despite this, there remains, interspersed with the more modern developments, terraces of period properties. Notting Hill Gate is identified as a 'District Centre' in The London Plan and also the Royal Borough of Kensington & Chelsea Core Strategy Issues and Options.
- 10.2 The centre serves shoppers from the Royal Borough and beyond, but does not have a strategic shopping role to the same extent as the International and Major centres in the Borough. Notting Hill Gate is a principal shopping centre within the Kensington & Chelsea UDP, and offers both comparison and day-to-day convenience shopping. Parts of Notting Hill Gate are within the conservation areas.
- 10.3 The centre is located in the northern part of the borough and is focussed around the Notting Hill Gate and Kensington Church Street junction, with Notting Hill Gate underground station located centrally. The centre is reasonably compact and runs east to west for approximately 600m with several other clusters of retail units on adjoining minor roads. Notting Hill Gate District Centre is bounded by residential areas to the north, west and south, with Kensington Gardens and Queensway to the east.

Mix of Uses and Occupier Representation

- 10.4 Notting Hill Gate District Centre's key roles include:
- *convenience shopping* – including newsagents, fishmongers, grocers, off licences, and a health food shop. There are a number of convenience stores including a Tesco Express and a Marks & Spencer Simply Food store;
 - *comparison shopping* – several multiple retailing shops selling a range of high and lower order comparison goods and a number of specialist independent retailers;
 - *services* – including a range of high street national banks/building societies, cafés, restaurants, takeaways, travel agents, dry cleaners, estate agents, hairdressers/beauty parlours and a launderette;
 - *entertainment* – including several pubs/bars, an amusement arcade and two cinemas; and

- *community facilities* – including a college, and two dentists.

10.5 Notting Hill Gate District Centre has 262 retail/service units (excluding non-retail Class A uses). Table 10.1 sets out the mix of uses in Notting Hill Gate District Centre, compared with the Goad national average. The centre has a broadly similar mix of uses compared with the national average. The proportion of vacant units is significantly below the national average, with the proportion of comparison, convenience and A1 service retail units also below the national average. The centre has comparison floorspace totalling 9,800 sq m gross (source: Goad and VOA). The centre has a significantly greater proportion of A3/A5 units and A2 services compared to the national average.

Table 10.1: Notting Hill Gate Use Class Mix by Unit

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Notting Hill Gate	National Average*
Comparison Retail	105	41.8	45.4
Convenience Retail	21	8.4	9.1
A1 Services	23	9.2	10.6
A2 Services	35	13.9	9.6
A3 and A5	48	19.1	14.3
A4	10	N/A	N/A
Vacant	19	7.6	11.0
Total	261	100.0	100.0

Source: Royal Borough of Kensington & Chelsea (2007)

* UK average relates to all town centres surveyed by Goad Plans (Nov 07) - NB Goad average excludes Class A4 uses.

Retailer Representation

10.6 Notting Hill Gate District Centre has a reasonable selection of comparison shops (105) reflecting the centre's more specialist comparison retail role as a District Centre. Table 10.2 provides a breakdown of comparison shop uses by goods categories.

10.7 All categories except cars, motorcycles and motor accessory shops and variety, department and catalogue stores are represented in the centre. The proportion of china, glass, gifts and fancy goods shops is significantly above the national average due to the proliferation of antiques shops in the centre, which supports Notting Hill Gate's role as a specialist centre for these types of good. This has led to all other categories having proportions less than the national average.

Table 10.2: Notting Hill Gate Breakdown of Comparison Units

Type of Unit	Notting Hill Gate District Centre		UK Average*
	Notting Hill Gate	%	%
Clothing and Footwear	22	21.0	27.4
Furniture, carpets and textiles	9	8.6	8.8
Booksellers, arts, crafts and stationers	7	6.7	9.3
Electrical, gas, music and photography	9	8.6	10.1
DIY, hardware & homewares	1	0.9	6.3
China, glass, gifts & fancy goods	42	40.0	3.7
Cars, motorcycles & motor access.	0	0.0	2.9
Chemists, drug stores & opticians	4	3.8	8.7
Variety, department & catalogue	0	0.0	2.0
Florists, nurserymen & seedsmen	1	0.9	2.2
Toys, hobby, cycle & sport	1	0.9	5.3
Jewellers	4	3.8	5.1
Other comparison retailers	5	4.8	8.2
Total	105	100.0	100.0

Source: Royal Borough of Kensington & Chelsea (2007)

* UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

10.8 Clothing and Footwear, although below the national average, maintains a good proportion of units in the centre. Major national multiple comparison retailers present in the centre include:

- Waterstones;
- WH Smiths;
- Boots;
- Ryman;
- Dolland & Aitcheson;
- Orange;
- O2;
- Carphone Warehouse; and
- Gap

Service Uses

10.9 Notting Hill Gate District Centre has a good range of service uses, with all categories represented, as shown in Table 10.3. The centre has a relatively low proportion of banks/other financial services and hairdressers and beauty parlours compared with the national average. The proportion of restaurants, cafes and takeaways and estate agents are significantly higher than the national average.

10.10 A number of high street banks/building societies are represented within Notting Hill Gate District Centre including; HSBC, Barclays, Natwest, Abbey, and Lloyds TSB. In addition to Class A service uses Notting Hill Gate District Centre has several other non-retail uses including a college, dental surgeries, a hotel and a number of office

buildings. The centre also contains a number of non Class A entertainment uses including an amusement arcade and the two cinemas The Coronet and The Gate.

Table 10.3: Notting Hill Gate Analysis of Selected Service Uses

Type of Use	Notting Hill Gate District Centre		UK Average*
	Units	%	%
Restaurants, cafes & takeaways	48	50.0	43.1
Banks/other financial services	12	12.5	15.4
Estate agents and valuers	20	20.8	11.7
Travel agents	4	4.2	4.9
Hairdressers & beauty parlours	8	8.3	22.0
Laundries and dry cleaners	4	4.2	2.9
Total Total	96	100.0	100.0

Source: Royal Borough of Kensington & Chelsea (2007)

*UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

N.B. 'Restaurants, cafés and takeaways' does not include the 10 pubs in the centre because these are excluded in the Goad averages.

10.11 The majority of the vacant units are located along Kensington Church Street. The vacant units are predominantly located towards the peripheries of the centre, with limited vacancies in the core frontage. As well as a higher proportion of vacant units, the Kensington Church Street area provides a focus for the large number of antique shops located within the centre.

10.12 The convenience retail units are spread quite evenly throughout the centre as are the retail service units. The centre has a reasonable selection of comparison units of which the majority of multiple retailers are located on Notting Hill Gate and the majority of clothing and footwear retailers appear to cluster on Pembridge Road and the southern end of Portobello Road.

Accessibility and Movement

Car Parking

10.13 The on-street survey indicated that only 3% of respondents travelled to Notting Hill Gate by car (either as a driver or passenger). Most people instead preferred to walk, get the bus, or use the underground. Notting Hill Gate is within the central London Congestion Charge Zone. There is a requirement for vehicles from outside the congestion zone to pay an £8 daily charge to drive within this zone, the aim of which is to reduce traffic congestion, improve journey times and encourage a modal shift in transport choices. Of the observed 3% who travelled by car none of the respondents were required to pay the full congestion charge amount.

- 10.14 There are a number of on-street pay and display parking space available to visitors within Notting Hill Gate. On Notting Hill Gate there is an intermediate tariff of 90p for a maximum of 30 minutes. Within the roads north of Notting Hill Gate pay and display visitor parking is £1.50 an hour whilst within the roads south of Notting Hill Gate pay and display visitor parking is £2.40 an hour. In addition to the limited amount of on street visitor car parking there is a private car park located to the rear of the Marks & Spencer Simply Food Store on Bulmer Place, though this car park is not noted as for general public use.
- 10.15 Notting Hill Gate District Centre's limited amount of parking should help to support the aims of the congestion charge, and the centres good public transport provision is a key component in ensuring low levels of car parking do not impact on the centres vitality and viability.
- 10.16 Traffic flows through the centre can be heavy throughout the day, especially in the peak periods including the morning and evening commuter hours. The use of Notting Hill Gate as a main route in and out of Central London means that significant amounts of traffic can build up. During NLP's visit at an off-peak period during the day the traffic levels observed were relatively steady with flows of moving vehicles.

Public Transport

- 10.17 In terms of public transport accessibility levels, the centre is located in an area rated as having "excellent" accessibility (a score of 6). Notting Hill Gate underground station is located centrally within the centre and provides circle, district and central line services with direct links to the West End and other destinations within Central, East, West and South London.
- 10.18 Many bus routes have stops in Notting Hill Gate District Centre. Several bus stops are located along Notting Hill Gate, Pembridge Road and Kensington Church Street. There are at least ten bus routes providing access to and from Notting Hill Gate from surrounding areas in the Borough and beyond. The bus routes connect Notting Hill Gate with many destinations throughout London including Chelsea, South Kensington, Hammersmith, Acton, Willesden, Golders Green, Chalk Farm, Camden, Wandsworth Road, Elephant & Castle and the West End. Four of the bus routes through the centre run 24 hours with an additional four night bus routes running providing links to Wandsworth Town, Clapham Junction, Hammersmith, Uxbridge, Kilburn, Camden, Holborn and Victoria, throughout the night.

Pedestrian Access and Movement

- 10.19 The main shopping areas within Notting Hill Gate are Notting Hill Gate, Kensington Church Street and Pembridge Road, with several other units located on smaller side streets close to these three main shopping streets. Notting Hill Gate is part of the main thoroughfare within the Borough running east-west as a key route from Central London to the West. Notting Hill Gate is a wide street, with six lanes in places, and large volumes of traffic. The pavements are wide along the core of the District Centre. The use of bollards, street furniture and planting, as opposed to railings, to demarcate a boundary between road and path helps to maintain a modest level of pedestrian permeability. The width of the road and volume of traffic ultimately create a divide between the two sides of the street, significantly reducing the ease of movement throughout the District Centre. This is partially mitigated by pelican crossings and Notting Hill Gate underground station acting as an underpass, though the opposite frontages still appear divorced from each other.
- 10.20 In the peripheral areas of the District Centre, including Kensington Church Street and Pembridge Road, traffic levels are lower, the roads are smaller and there is less pedestrian - vehicular conflict. In both of these areas the pavements are also smaller, though still adequate, and regular crossings help to create an easily navigable pedestrian realm.
- 10.21 Pedestrian flows appeared heaviest along Notting Hill Gate, especially around the underground station, and Pembridge Road, which is a main route through to nearby Westbourne Grove and Portobello Road. Pedestrian flows appeared significantly lower along Kensington Church Street, particularly where there is a proliferation of antiques shops. At the time of the NLP site visit pedestrian flows in general were relatively strong, with the main pedestrian movement on Notting Hill Gate and the areas around the underground station entrances.
- 10.22 Overall Notting Hill Gate District Centre has a reasonably good layout, with some aspects which facilitate pedestrian movement, though the centre is cut in two by Notting Hill Gate. Its compact core ensures that the centre is accessible to visitors and the location of the peripheral areas on pedestrian routes to other shopping centres within the Borough encourages pedestrian movement throughout.

Environmental Quality

- 10.23 The quality of buildings within Notting Hill Gate District Centre is mixed, with the post-war buildings which form the core of the centre predominantly very poor in comparison with the buildings in the rest of the centre and those typical of the Royal Borough. The historic buildings that do remain enhance the character and attraction of the centre with more typical forms of development along Kensington Church Street, Pembridge Road and parts of Notting Hill Gate. Though there are a number of good quality period buildings the centre is dominated by the harsh, dominating structures built in the 1950s redevelopment of the area. The concrete and glass post war developments are incongruous with the character of the Notting Hill area and add very little to the environmental and aesthetic qualities of the centre. Generally in the centre the shop facades are well maintained, but many are poor and could be improved.
- 10.24 There was only limited evidence of graffiti or vandalism within the centre. Overall during the daytime the centre felt safe and there was no evidence of anti-social behaviour or begging. The centre does not have any areas of green space, but is within close proximity to both Kensington Gardens and Holland Park. The centre does have a good proportion of trees, in addition to planting in hanging baskets and planters, which go some way to softening the architecture and creating a more attractive public realm.
- 10.25 Throughout the centre the paving is generally of a reasonable standard, with clean and well maintained slab paving throughout the centre. During NLP's visit the public realm appeared well kept and clear of litter and the pavement was generally clear of excessive amounts of chewing gum. There is a good provision of street lighting throughout the centre, although the design of the street lighting befits Notting Hill Gate as a major road, rather than a shopping street, and is of a standard design. During NLP's visit there was a visible community support police officer presence. The street furniture throughout the centre (i.e. litter bins, seating, bicycle racks) is of a good, attractive quality, and is located so as not to cause a cluttering effect on the pedestrian realm. Notting Hill Gate District Centre has a generally clean physical fabric, but is relatively unattractive. There are some good quality buildings but there are also some poor quality 1950s buildings.
- 10.26 The Conservation Area designation upon parts of the District Centre requires special attention be paid to the desirability of preserving or enhancing the character or

appearance of the conservation area. Any proposed new development or alterations to buildings in the conservation area will therefore be subject to restrictive Unitary Development Plan policies. Conversely the parts of the District Centre which are not within a conservation area provide an opportunity to redesign and develop buildings to a high standard, especially to improve the context of the adjacent conservation areas.

10.27 The overall environmental quality within Notting Hill Gate District Centre is very mixed. Notting Hill Gate is a District Centre with polarised qualities. Parts of the centre have very good architecture. The core area suffers from its 1950s redevelopment which contains little character, but which has brought wide pedestrian pavements and has led to retrofit improvements in the streetscape since development including planting and public art. The District Centre has a reasonable range of retail and services. Traffic flow can be high in areas of the centre, especially along Notting Hill Gate, which is only partially mitigated by the pelican crossings. This high volume of traffic does create a feeling of segregation within the centre.



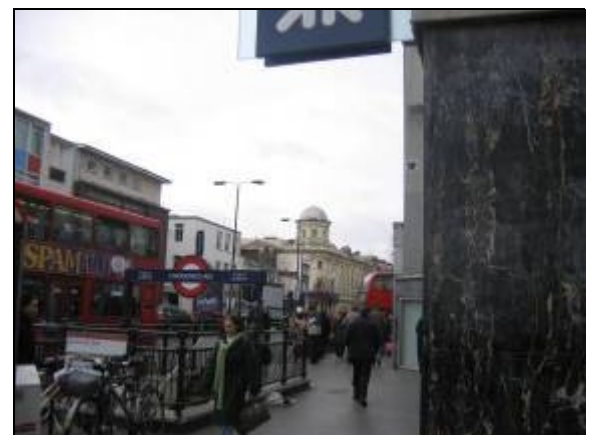
Period Buildings Retained on Notting Hill Gate



Notting Hill Gate



Traffic on Notting Hill Gate



Pedestrian Area near Notting Hill Gate Underground

Summary of Notting Hill Gate's Strengths and Weaknesses

Strengths

- Notting Hill Gate District Centre has a good selection of non-retail class A uses. There are several high street banks, estate agents, travel agents and hairdressers.
- The centre has a well developed evening economy. There are several public houses and there are a good proportion of restaurants, cafes and takeaways, with a healthy mix of independent and chain restaurants. There are also The Coronet and The Gate cinemas.
- The centre has a Tesco Metro supermarket and a Marks & Spencer Simply Food Store. These major convenience retailers are complemented by several independent type grocers and off licences.
- The vacancy rate is lower than the national average which suggests the centre is relatively buoyant and demand for premises is reasonably strong.
- Kensington Church Street provides a specialist function for antique and high quality specialist retailers.
- Notting Hill Gate has excellent public transport links with both the underground station and buses providing convenient means of getting to and from the centre.

Weaknesses

- The heavy traffic through the centre detracts from the environment and acts as a significant barrier to free pedestrian movement, segregating the two sides of the centre.
- The overall architectural quality of the centre is reduced by the 1950s redevelopments, which are visually intrusive and create an unappealing environment in the core area.
- There is limited car parking provision within the centre, however, this is countered by the excellent public transport links and may help to influence sustainable transport choices.
- The centre has a relatively poor comparison shopping offer, with a limited variety of stores and a limited number of multiple retailers.
- The public realm is relatively clean but could be improved.

11.0 FULHAM ROAD (WEST) DISTRICT SHOPPING CENTRE

Introduction

- 11.1 Fulham Road (West) District Centre offers a good mix of convenience and lower order comparison shopping. The centre has a high proportion of restaurants and cafes (Class A3) and comprises a high number of small independent specialist retailers. The centre also contains the Chelsea and Westminster Hospital and a Cineworld cinema (formerly UGC Fulham). Fulham Road (West) is identified as a 'District Centre' in The London Plan (2004) and the Royal Borough of Kensington & Chelsea Core Strategy Issues and Options.
- 11.2 The centre serves shoppers from the Royal Borough and beyond, and fulfils a day-to-day shopping role with a high provision of restaurants/cafes and a buoyant evening economy. Fulham Road (West) fulfils a principal role within the Kensington & Chelsea UDP which states that principal shopping centres offer both comparison and day-to-day convenience shopping. In addition the Royal Borough of Kensington & Chelsea UDP identifies the majority of Fulham Road (West) as within a Conservation Area.
- 11.3 The District Centre is focussed along Fulham Road (A308). The core frontages of Fulham Road (West) District Centre are all located on Fulham Road. The non core frontages are found on the peripheries of the centre located on Fulham Road, Park Walk, Drayton Gardens and Hollywood Road. Fulham Road (West) District Centre is bounded by residential areas to the north, south, east and west.

Mix of Uses and Occupier Representation

- 11.4 Fulham Road (West) District Centre's key roles include:
- *convenience shopping* – including a newsagent, butchers, confectionaries and two delicatessens. The centre also contains a Sainsbury's Local, two Tesco Express stores and a Marks & Spencer Simply Food.
 - *comparison shopping* - a high proportion of specialist independent retailers selling a limited variety of comparison goods, alongside a limited number of up-market national multiple clothing retailers.
 - *services* – including a good range of restaurants/cafes and estate agents; and
 - *entertainment* – including four pubs/bars and a Cineworld cinema.

11.5 Fulham Road (West) District Centre has 124 retail/service units (excluding non-retail Class A uses). Table 11.1 sets out the mix of uses in Fulham Road (West), compared with the Goad national average. The proportion of comparison retail units is significantly lower than the national average, whilst the proportion of convenience retail units is slightly higher than the national average. The centre along with Fulham Road (East) has comparison floorspace totalling 32,800 sq m gross (source: Goad and VOA). The centre has a significantly higher proportion of A3/A5 units and a higher proportion of A1 service units. The proportion of vacant units is lower than the national average suggesting that the health of the centre is reasonably buoyant and the vitality and viability is being maintained. The council's land use survey only identifies four Class A4 use, but there may be others on upper or lower floors that were not recorded. Restaurant/bars will have been recorded as Class A3 uses.

Table 11.1: Fulham Road (West) Use Class Mix by Unit

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Fulham Road (West)	National Average*
Comparison Retail	38	31.7	45.4
Convenience Retail	16	13.3	9.1
A1 Services	18	15	10.6
A2 Services	10	8.3	9.6
A3 and A5	29	24.2	14.3
A4	4	n/a	n/a
Vacant	9	7.5	11.0
Total	124	100.0	100.0

Source: Royal Borough of Kensington & Chelsea Council (2007)

* UK average relates to all town centres surveyed by Goad Plans (Nov 07) - NB Goad average excludes Class A4 uses.

Retailer Representation

11.6 Fulham Road (West) has a reasonably low selection of comparison shops (38) which does not reflect the centre's comparison retail role as one of the principle centres within the Borough, as identified in the revised RBKC UDP. Table 11.2 provides a breakdown of comparison shop uses by goods categories.

Table 11.2: Fulham Road (West) Breakdown of Comparison Units

Type of Unit	Fulham Road (West) District Centre		UK Average*
	Fulham Road (West)	%	%
Clothing and Footwear	9	23.7	27.4
Furniture, carpets and textiles	4	10.5	8.8
Booksellers, arts, crafts and stationers	2	5.3	9.3
Electrical, gas, music and photography	2	5.3	10.1
DIY, hardware & homewares	6	15.8	6.3
China, glass, gifts & fancy goods	7	18.4	3.7
Cars, motorcycles & motor access.	2	5.3	2.9
Chemists, drug stores & opticians	2	5.3	8.7
Variety, department & catalogue	0	0.0	2.0
Florists, nurserymen & seedsmen	1	2.6	2.2
Toys, hobby, cycle & sport	1	2.6	5.3
Jewellers	0	0.0	5.1
Other comparison retailers	2	5.3	8.2
Total	38	100.1	100.0

Source: Royal Borough of Kensington & Chelsea Council (2007)

* UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

11.7 Eleven out of the thirteen categories are represented in the centre, with no variety/department/catalogue stores or jewellers represented. The proportion of clothing and footwear units is slightly lower the national average, and overall, they account for approximately 20% of comparison units. The proportions of DIY/hardware/homewares and china/glass/gifts/fancy goods are significantly higher than the national average, while the proportions of the majority of the remaining other types of good are all below the national average. The high proportion of china/glass/gifts/fancy goods is due to the number of art shops and antique shops. There are limited major national comparison retailers present in the centre. Those available include: Bathstore and Joseph.

Service Uses

11.8 Fulham Road (West) shopping centre has a reasonable range of service uses, with all categories represented, as shown in Table 11.3. The centre has a high proportions of restaurants/cafes/takeaways (the majority of which are restaurants), estate agents/valuers and laundries/dry cleaners compared with the national averages. The proportion of banks/other financial services is significantly lower than the national averages. Of the high street banks/building societies only HSBC is represented within Fulham Road (West) centre. The centre is predominantly made up of retail and service uses and has very limited community or non-A class uses.

Table 11.3: Fulham Road (West) Analysis of Selected Service Uses

Type of Use	Fulham Road (West) District Centre		UK Average*
	Units	%	%
Restaurants, cafes & takeaways	29	55.8	43.1
Banks/other financial services	1	1.9	15.4
Estate agents and valuers	8	15.4	11.7
Travel agents	1	1.9	4.9
Hairdressers & beauty parlours	11	21.2	22.0
Laundries and dry cleaners	2	3.8	2.9
Total Total	52	100.00	100.0

Source: Royal Borough of Kensington & Chelsea Council (2007)

*UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

N.B. 'Restaurants, cafés and takeaways' does not include the 4 pubs/bars in the centre

Accessibility and Movement

Car Parking

- 11.9 Fulham Road West is within the Central London Congestion Charge area. The on street survey indicated that no respondents travelled to the centre by car (drivers and passengers) to do their shopping. This is likely to be due to the centre being located within the congestion charge zone and within a predominantly residential area. The survey indicated that 49.1% of respondents travelled to the centre by bus/coach, 33% walked and 10.7% travelled by tube. Of those travelling by tube, 29.4% used Earl's Court station (Piccadilly and District lines), 11.8% used Sloane Square (Circle and District lines) and 23.5% used 'other' stations.
- 11.10 There are no car parks serving Fulham Road (West) District Centre. This reflects the survey results which showed that no respondents travelled to the centre by car. The nearest car park is located to the west of the centre on Fenelon Place (off King's Road). It is a surface level car park operated by 'Car Parks 4U' and has a pay on entrance charge system.
- 11.11 Given Fulham Road (West) District Centre is within the central London Congestion Charge Zone, there is a requirement for vehicles from outside the congestion zone to pay an £8 daily charge to drive within this zone, the aim of which is to reduce traffic congestion, improve journey times and encourage a modal shift in transport choices. The lack of car parking within Fulham Road (West) District Centre should help to support these aims, and good public transport provision, as available with this centre, is a key component to ensure low levels of car parking do not impact on the centres vitality and viability.

11.12 During NLP's site visit, traffic flows were observed to be relatively heavy, but there was no evidence of congestion.

Public Transport

11.13 In terms of public transport accessibility levels, most of the centre is located in an area rated as having "good" accessibility (a score of 4). Along with Portobello Road and Westbourne Grove, the centre is the least accessible of the main centres. However public transport accessibility to Fulham Road (West) District Centre is still reasonably good, although there are no train/underground stations within the core of the centre. Fulham Broadway, South Kensington, Earl's Court, Gloucester Road and Sloane Square underground stations are all located within walking distance from the centre to the north, east and west. These stations are located on one or more of the following tube lines; District, Circle and Piccadilly, and as such provide regular direct links to the rest of central and Greater London and a number of suburban and national rail stations.

11.14 Fulham Road (West) District Centre, as defined by its core and non-core frontage on the UDP proposals map, is served by two bus stops. These are located on either side of Fulham Road outside of the Chelsea and Westminster Hospital. The No. 14 (towards Putney Heath and Warren Street Station), No. 414 (towards Maida Hill and Putney Bridge) and No. 211 (towards Hammersmith and Waterloo) serve these bus stops. The No. 14 bus provides a 24 hour service.

Pedestrian Access and Movement

11.15 The main shopping areas of Fulham Road (West) include the north and south side of Fulham Road between the Chelsea and Westminster Hospital and the Cineworld cinema. Fulham Road has relatively narrow pavements. The pavements are, however, generally unobstructed which allows relatively free pedestrian movement. The pavements along Fulham Road are wider outside 158-164 Fulham Road (the former The Pan Bookshop). This area is, however, divided and slightly obstructed by bollards and planting features.

11.16 The greatest obstacle to pedestrian movement in Fulham Road (West) District Centre is the narrow pavements and the reasonably high level of traffic. Fulham Road is a linear centre with the ease of pedestrian circulation from one side of Fulham Road to the next being obstructed by the consistently high flow of traffic.

- 11.17 Pedestrian flows were observed to be constant along the length of the centre. No area was observed to experience particularly high levels of pedestrian flow in comparison to the rest of the centre, but the busiest areas were outside the Marks & Spencer Simply food and Sainsbury Local.
- 11.18 Overall Fulham Road (West) District Centre has a reasonable layout, with some aspects preventing pedestrian movement. Its relatively compact size ensures that the centre is accessible to visitors and encourages them to walk to the peripheries.

Environmental Quality

- 11.19 The quality of buildings within Fulham Road (West) District Centre is reasonably good. The buildings are a mixture of architectural styles and ages which adds to the sense of place and character of the centre. Generally in the centre the facades including upper parts are well maintained and the shop fronts do not detract from the quality of the built environment.
- 11.20 There was no evidence of graffiti or vandalism within the centre. Overall during the daytime the centre felt safe and there was no evidence of anti-social behaviour or begging. The area does not have any areas of green space, nor does it have any areas of public seating. The centre has a small selection of landscape features, including plant pots, throughout the centre.
- 11.21 Throughout the centre the paving is generally of good quality, with block paving throughout the centre which is even and well maintained. The level of chewing gum on the paving is low and the public realm was generally clean and free from litter or detritus, with a good provision of bins throughout the centre. There is a good provision of street lighting throughout the centre, which is generally of a good quality and is reasonably attractive. CCTV is not evident within core of the centre. There is a general lack of street furniture throughout the centre (i.e. seating, bicycle racks) and what little there is, is of a reasonably attractive quality in respect of style, colour and materials. Fulham Road (West) District Centre has a generally good physical fabric with a number of characteristic buildings.
- 11.22 The Conservation Area designation upon part of the centre requires special attention be paid to the desirability of preserving or enhancing the character or appearance of the conservation area. Any proposed new development or alterations to buildings in the conservation area will therefore be subject to restrictive Unitary Development Plan policies.

11.23 The overall environmental quality within Fulham Road (West) District Centre is generally good. Fulham Road (West) is a reasonably attractive centre with some reasonable architecture which remains in commercial use and viable. The centre has a reasonable range of retail and services. The traffic flow can be high throughout the centre.



Junction of Fulham Road and Finsborough Road



Fulham Road towards South Kensington



Callow Street off Fulham Road



Cineworld Cinema, Fulham Road

Summary of Fulham Road West's Strengths and Weaknesses

Strengths

- Fulham Road (West) District Centre offers a good mix of convenience and lower order comparison shopping. The proportion of comparison retail units is significantly lower than the national average, whilst the proportion of convenience retail units is slightly higher than the national average.
- The centre provides a reasonable range of evening uses including the provision of a number of high quality restaurants that is significantly higher than the national average as well as a reasonable proportion of bars and pubs. The centre also contains a Cineworld cinema.
- The architectural quality of buildings is reasonably good.

- The centre has good quality pavements, which provide a pleasant shopping environment for customers, although the pavements are narrow in places which can constrain movement. Most areas within the centre are well maintained and clean.
- Fulham Road (West) has reasonably good public transport links with a number of underground stations and bus stops easily within walking distance providing convenient means of getting to and from the centre.
- The vacancy rate is lower than the national average. There is no evidence of clusters of vacant units which indicates that the centre is reasonably buoyant.

Weaknesses

- The centre has particularly poor higher order national multiple retailer representation.
- A few categories of comparison good are not represented within the centre, i.e. variety/department/ catalogue and toys/hobby/cycle/sport.
- The busy traffic experienced throughout the linear centre detracts from the environment and acts as a barrier to free pedestrian movement.
- There is no car parking provision within the centre, however, this is countered by the good public transport links.
- There are significantly lower proportions of a number of service uses; particularly, banks/other financial services and travel agents.

12.0 FULHAM ROAD (EAST) DISTRICT SHOPPING CENTRE

Introduction

- 12.1 Fulham Road (East) District Centre offers a range of high quality international comparison shops which owes much to the decision by Michelin to locate their head offices there in the early 1900s and to Terence Conran. In the mid-1980s the building was sold to Paul Hamlyn and Terence Conran who opened The Conran Shop and Bibendum restaurant. Two decades earlier, Conran opened the first Habitat shop on Fulham Road, on the site now occupied by Joseph. Fulham Road (East) is identified as a '*Major Centre*' in The London Plan.
- 12.2 The centre serves shoppers from the Royal Borough and beyond, and fulfils a somewhat specialist shopping role with a high provision of high quality international clothing and footwear retailers. Fulham Road (East) fulfils a principal role within the Kensington & Chelsea UDP which states that principal shopping centres offer both comparison and day-to-day convenience shopping. In addition the Royal Borough of Kensington & Chelsea UDP identifies part of Fulham Road (East) as within a Conservation Area.
- 12.3 The District Centre is focussed around a junction of roads which forms part of 'Brompton Cross' which provides links between South Kensington, Chelsea and Knightsbridge. The streets which come together at Brompton Cross include Fulham Road, Brompton Road, Walton Street, Draycott Avenue, Sloane Avenue, Lucan Place and Pelham Street. The main shopping areas of Fulham Road (East) include the south eastern side of Fulham Road opposite Pelham Crescent, the southern end of Brompton Road, the southern end of Walton Street and the north western ends of Draycott Avenue and Sloane Avenue. Fulham Road (East) District Centre is bounded by residential areas to the north, south, east and west.

Mix of Uses and Occupier Representation

- 12.4 Fulham Road East centre's key roles include:
- *convenience shopping* - including a newsagent, a fishmonger and two off licences;
 - *comparison shopping* - a high proportion of international retailers selling a limited range of comparison goods, alongside a few up-market national multiple clothing retailers.

- *services* – including a good range of restaurants and estate agents; and
- *entertainment* – including five pubs/bars.

12.5 Fulham Road (East) District Centre has 165 retail/service units (excluding non-retail Class A uses). Table 12.1 sets out the mix of uses in Fulham Road (East), compared with the Goad national average. The centre has a limited mix of uses compared with the national average. The proportion of comparison retail units is significantly above the national average, whilst the proportion of convenience retail units is considerably below the national average. The centre along with Fulham Road (West) has comparison floorspace totalling 32,800 sq m gross (source: Goad and VOA). The centre has a slightly below average proportion of A3/A5 units and significantly below average proportions of Class A1 and A2 service units. The proportion of vacant units identified by the Council's data (2007) is significantly higher than the national average, however, the NLP site visit was undertaken at a later date than when this data was collated and a lower proportion of vacant units was observed during the site visit, in particular a number of units along Walton Street have now been occupied.

Table 12.1: Fulham Road (East) Use Class Mix by Unit

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Fulham Road (East)	National Average*
Comparison Retail	96	60.0	45.4
Convenience Retail	4	2.5	9.1
A1 Services	6	3.8	10.6
A2 Services	9	5.6	9.6
A3 and A5	21	13.1	14.3
A4	5	n/a	N/A
Vacant	24	15.0	11.0
Total	165	100.0	100.0

Source: Royal Borough of Kensington & Chelsea Council (2007)

* UK average relates to all town centres surveyed by Goad Plans (Nov 07)

Retailer Representation

12.6 Fulham Road East has a reasonable selection of comparison shops (96) reflecting the centre's comparison retail role as one of the principal centres within the Borough, as identified in the revised Royal Borough UDP. Table 12.2 provides a breakdown of comparison shop uses by goods categories.

Table 12.2: Fulham Road (East) Breakdown of Comparison Units

Type of Unit	Fulham Road (East) District Centre		UK Average*
	Fulham Road (East)	%	%
Clothing and Footwear	52	54.2	27.4
Furniture, carpets and textiles	4	4.2	8.8
Booksellers, arts, crafts and stationers	1	1.0	9.3
Electrical, gas, music and photography	1	1.0	10.1
DIY, hardware & homewares	9	9.4	6.3
China, glass, gifts & fancy goods	12	12.5	3.7
Cars, motorcycles & motor access.	0	0.0	2.9
Chemists, drug stores & opticians	6	6.3	8.7
Variety, department & catalogue	0	0.0	2.0
Florists, nurserymen & seedsmen	0	0.0	2.2
Toys, hobby, cycle & sport	0	0.0	5.3
Jewellers	11	11.5	5.1
Other comparison retailers	0	0.0	8.2
Total	96	100.0	100.0

Source: Royal Borough of Kensington & Chelsea Council (2007)

* UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

12.7 Eight out of the thirteen categories are represented in the centre, with no cars/motorcycles/motor accessories, variety/department/catalogue, florists/nurserymen/seedsmen, toys/hobby/cycle/sport or 'other comparison retailer' units present. The proportion of clothing and footwear units is approximately double the national average, and overall, they account for over half the total number of comparison units. The proportions of DIY/hardware/homewares, china/glass/gifts/fancy goods and jewellers are significantly higher than the national average, while the proportions of other types of unit are all below the national average. The high proportion of china/glass/gifts/fancy goods is due to the high number of art shops and antique shops. Major international comparison retailers present in the centre include:

- Anne Fontaine;
- Betty Jackson;
- Chanel;
- Dyson;
- Guiseppa Zanotti Design;
- Issey Miyake;
- Jean Paul Gautier
- Joseph;
- L.K. Bennett;
- Marie Chantal;
- Nicole Farhi;
- Ralph Lauren; and
- Space.NK.

Service Uses

12.8 Fulham Road (East) shopping centre has a reasonable range of service uses, with all categories except travel agents represented, as shown in Table 12.3. The centre has high proportions of restaurants/cafes/takeaways (of which all but one are restaurants), estate agents/valuers and laundries/dry cleaners compared with the

national averages. The proportions of banks/other financial services and hairdressers/ beauty parlours are significantly lower than the national averages.

Table 12.3: Fulham Road (East) Analysis of Selected Service Uses

Type of Use	Fulham Road (East) District Centre		UK Average*
	Units	%	%
Restaurants, cafes & takeaways	21	58.3	43.1
Banks/other financial services	2	5.6	15.4
Estate agents and valuers	7	19.4	11.7
Travel agents	0	0.0	4.9
Hairdressers & beauty parlours	4	11.1	22.0
Laundries and dry cleaners	2	5.6	2.9
Total Total	36	100.0	100.0

Source: Royal Borough of Kensington & Chelsea Council (2007)

*UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

N.B. 'Restaurants, cafés and takeaways' does not include the 5 pubs/bars in the centre

- 12.9 Of the high street banks/building societies only HSBC is represented within Fulham Road (East) centre. The centre is predominantly made up of retail and service uses and has very limited community or non-A class uses.
- 12.10 There is a disproportionately high concentration of vacant units along the north western side of Fulham Road towards the south west of the centre, the rest of the vacant units are located fairly evenly throughout the centre.

Accessibility and Movement

Car Parking

- 12.11 The on-street survey results indicate that 12.0% of respondents travelled by car (drivers and passengers) to Fulham Road (East). 44.0% of visitors walked while 25.0% travelled by bus/coach, 11.0% travelled by tube and 6.0% by train. These results highlight the importance of high quality walking routes into the centre and good public transport provision to the centre. The relatively low proportion of visitors that travel by tube reflects the lack of an underground station within the centre, and suggests that bus/coach provision is most important mode of public transport to the centre. Of those visitors who did travel by tube/train, 29.4% used Earl's Court station, while 11.8% used Gloucester Road, Queensway, Shepherd's Bush and Westminster. Whilst levels of car usage are significantly below NLP's observed average from similar studies, good accessibility to convenient car parks remains important to the vitality and viability of the town centre.

- 12.12 There are two car parks serving Fulham Road (East) District Centre; North Terrace Car Park and Chelsea Cloisters car park. North Terrace car park is approx. 200m north of the centre's non-core frontage on North Terrace, just off Brompton Road. The car park is run by Pure Parking and charges the following tariffs: up to 1 hour: £5.55, up to 2 hours £10, up to 3 hours: £13.55, up to 4 hours: £17.85, up to 5 hours: £21.75, up to 6 hours: £26.25, up to 7 hours: £30.75, 8-24 hours: 37.00. Chelsea Cloisters car park is located just off Sloane Avenue approx. 200m south of the centre's non-core frontage. The car park is operated by Eaton Securities Plc, and is an underground car park with 240 spaces which charges the following tariffs: up to 1 hour: £4, up to 2 hours: £8, up to 3 hours: £11, up to 4 hours: £14.50, up to 5 hours: £18, up to 6 hours: £21.50, up to 7 hours: £25, 8-24 hours: £28.50.
- 12.13 In addition to the car parks there is some on-street parking available to visitors in Fulham Road (East) which is controlled via pay and display with a tariff of £3 per hour and varying restrictions apply.
- 12.14 Fulham Road (East) is within the Central London Congestion Charge Zone. There is a requirement for vehicles from outside the congestion zone to pay an £8 daily charge to drive within this zone, the aim of which is to reduce traffic congestion, improve journey times and encourage a modal shift in transport choices. Fulham Road (East) District Centre's limited amount of parking should help to support these aims, and good public transport provision is a key component to ensure low levels of car parking do not impact on the centres vitality and viability.
- 12.15 During NLP's site visit, traffic flows were observed to be relatively heavy, but there was no evidence of congestion.

Public Transport

- 12.16 In terms of public transport accessibility levels, the centre is located in an area rated as either "very good" or "excellent" accessibility (a score of 5 or 6). Public transport accessibility to Fulham Road (East) District Centre is good, although there are no bus stops or train/underground stations within the core of the centre which is unusual for a centre in London. South Kensington is the nearest underground station and is located approximately 250m to the west of the centre's core frontage on Pelham Street. The station is on the Piccadilly, Circle and District lines, and as such provides regular direct links to the rest of central and Greater London and a number of suburban and national rail stations.

12.17 Although no bus routes have stops in Fulham Road (East) District Centre as defined by its core and non-core frontage on the UDP proposals map, there are several in the surrounding streets and bus links to the area generally good. Several bus stops are located along Fulham Road immediately to the south west of the designated non-core frontage, along Sydney Street to the south of the designated non-core frontage and along Sydney Place and Onslow Gardens to the north of the designated non-core frontage. There are also bus stops located along Old Brompton Road, Thurloe Place, Cromwell Gardens and Brompton Road to the north of centre. There are at least nine bus routes providing access to and from the area immediately surrounding Fulham Road (East) District Centre from surrounding areas in the Borough and beyond. The bus routes connect Fulham Road (East) with many destinations throughout London including Battersea, Brixton, Clapham, Earl's Court, Edgware Road, Fulham, Green Park, Hyde Park, Kensington, Knightsbridge, Ladbroke Grove, Marble Arch, Peckham, Putney, Queens Gate, Roehampton, Shepherd's Bush, Vauxhall, Victoria, Waterloo and Westminster. There are four night bus routes that run through the surrounding area to the which provide links to Battersea, Clapham, Hammersmith, Peckham, Putney, Roehampton and the West End throughout the night.

Pedestrian Access and Movement

12.18 The main shopping areas of Fulham Road (East) include the south eastern side of Fulham Road opposite Pelham Crescent, the southern end of Brompton Road, the southern end of Walton Street and the north western ends of Draycott Avenue and Sloane Avenue. Fulham Road, Brompton Road and Walton Street where the main shopping frontages are, is generally quite open with Fulham Road and Brompton Road having relatively wide, unobstructed pavements; the pavements on Walton Street are somewhat narrower. The paving is even, clean and well maintained.

12.19 The greatest obstacle to pedestrian movement in Fulham Road (East) District Centre is the relatively busy junction of Brompton Road, Fulham Road, Pelham Street, Draycott Avenue, Sloane Avenue and Lucan Place. Not only does this junction provide an obstacle to pedestrians, it also separates the different parts of the centre to some extent. However, the junction has a good provision of pedestrian crossings easing pedestrian movement considerably.

12.20 Pedestrian flows tend to be highest along Fulham and Brompton Road towards the junction where they meet, and along Walton Street. Pedestrian flows are significantly lower further north along Brompton Road.

12.21 Overall Fulham Road (East) District Centre has a reasonable layout. Its compact size ensures that the centre is accessible to visitors and encourages them to walk to the periphery.

Environmental Quality

12.22 The quality of buildings within Fulham Road (East) District Centre is generally very good. The historic buildings are an attractive feature of the centre and enhance the attraction of the centre. The Michelin House building is a landmark within Fulham Road (East) and is a highly individual building, built around 1911 in a unique style. The high quality of architecture is present throughout the centre, across a range of ages of building, with a few exceptions. Along Fulham Road the buildings are predominantly attractive 6 storey historic buildings with retail on the ground floor and residential units above. However, there are two 1950s-60s buildings on the south eastern side of Fulham Road within the non-core frontage which are of a lower quality of architecture. Along the section of Brompton Road within the District Centre the buildings are of an attractive, predominantly historic, architectural style, however, are more understated than those along Fulham Road, and are 3-4 storey with residential units above retail on the ground floor. The buildings along Walton Street are historic three storey terraces with retail on the ground floor and residential units above. As well as the attractive historic buildings, the centre has a few attractive modern units, such as the Joseph Store on Sloane Avenue and the glass front of The Conran Shop, which forms part of Michelin House, and fronts onto Sloane Avenue. Generally in the centre the facades including upper parts are well extremely well maintained and the shop fronts do not detract from the quality of the built environment.

12.23 There was no evidence of graffiti or vandalism within the centre. Overall during the daytime the centre felt safe and there was no evidence of anti-social behaviour or begging. The area does not have any areas of green space, nor does it have any areas of public seating.

12.24 Throughout the centre the paving is of good quality, with attractive block paving throughout the centre which is even and well maintained. There is limited evidence of chewing gum on the paving and the public realm was generally clean and free from litter or detritus, despite the general lack of provision of bins throughout the centre. There is a good provision of street lighting throughout the centre, which is generally good quality and reasonably attractive. CCTV is not evident within core of the centre. There is a general lack of street furniture throughout the centre (i.e. litter bins,

seating, bicycle racks) however, the limited provision is of attractive quality, and is coordinated in terms of style, colour and materials. Fulham Road (East) District Centre has a generally good physical fabric with a number of historic and characteristic buildings.

12.25 The Conservation Area designation upon part of the centre requires special attention be paid to the desirability of preserving or enhancing the character or appearance of the conservation area. Any proposed new development or alterations to buildings in the conservation area will therefore be subject to restrictive Unitary Development Plan policies.

12.26 The overall environmental quality within Fulham Road (East) District Centre is generally very good. Fulham Road (East) is an attractive centre with some exceptional architecture which remains in commercial use and viable. The centre has a reasonable range of retail and services, although lacks convenience retail provision. Although the traffic flow can be high in some areas of the centre, there are an adequate number of pedestrian crossings.



Michelin House



Retail units along Walton Street



Brompton Road looking towards Fulham Road



The impressive façade of The Conran Shop

Summary of Fulham Road East's Strengths and Weaknesses

Strengths

- Fulham Road (East) District Centre has a range of shops, with a notable proportion of high quality international retailers. The centre has a much higher proportion of comparison retail uses compared with the national average, but has a limited mix.
- The centre provides a reasonable range of evening uses including the provision of a number of high quality restaurants that is significantly higher than the national average as well as a reasonable proportion of bars and pubs.
- The architectural quality of buildings is very good. The Michelin House building is a special feature of the centre and enhances its attractiveness.
- The centre has good quality pavements, which provide a pleasant shopping environment for customers. Most areas within the centre are well maintained and clean.
- Fulham Road (East) has reasonably good public transport links with both the underground station and many bus stops easily within walking distance providing convenient means of getting to and from the centre.

Weaknesses

- The centre has particularly poor convenience shopping provision, and does not provide adequate facilities for top up food shopping.
- A number of categories of comparison good are not represented within the centre, i.e. cars/motor cycles/motor accessories, variety/department/ catalogue, florists/nurserymen/seedsman, toys/hobby/cycle/sport and '*other comparison retailers*'.
- The vacancy rate in 2007 is significantly higher than the national average; however, there is evidence to suggest that this may no longer be the case.
- The busy main junction detracts from the overall environmental quality and acts as a barrier to free pedestrian movement.
- There is limited car parking provision within the centre, however, this is countered by the good public transport links.
- There are significantly lower proportions of A1 and A2 service uses in Fulham Road (East) when compared with the national average; there is only one bank and a poor provision of hairdressers.

13.0 KING'S ROAD (WEST) DISTRICT SHOPPING CENTRE

Introduction

- 13.1 King's Road (West) has a good mix of specialist comparison retailers, including furniture and fashion. The centre has some local shopping facilities and services and a high proportion of restaurants/cafes. King's Road (West) is designated as a District Centre within the London Plan and in the Royal Borough of Kensington & Chelsea Core Strategy Issues and Options document. The centre also contains an Antiques Market and the distinctive Bluebird café/restaurant.
- 13.2 The centre serves shoppers from the Royal Borough and beyond, and its reasonable comparison offer ensures it fulfils its role as a District Centre. King's Road (West) fulfils a principal role within the Kensington & Chelsea UDP which states that principal shopping centres offer both comparison and day-to-day convenience shopping. The Kensington & Chelsea UDP identifies the majority of King's Road (West) shopping centre as within a conservation area.
- 13.3 The shopping centre is a long linear centre stretching along King's Road from the junction with Limerston Street in the west to the junction with Glebe Place/Manresa Road to the east.
- 13.4 The District Centre is focussed along King's Road (A3217). The core frontages of King's Road (West) District Centre are all located on King's Road (303-353 (odd) and 350-408 (even)). The non core frontages are found on the peripheries of the centre located on King's Road, Old Church Street and Lamont Street. King's Road (West) District Centre is bounded by residential areas to the north, south, east and west.

Mix of Uses and Occupier Representation

- 13.5 King's Road (West) major shopping centre's key roles include:
- *convenience shopping* - including a confectioner, grocers, an off licence and a health food shop. There is also a Tesco Express;
 - *comparison shopping* - a high proportion of specialist independent retailers selling a limited range of comparison goods, alongside a few up-market national multiple clothing retailers.
 - *services* - including a good range of cafés, restaurants, takeaways, a bank/post office and a number of hairdressers/beauty parlours; and

- *entertainment* - including three pubs/bars, two clubs and a Cineworld cinema.

13.6 King's Road (West) shopping centre has 116 retail/service units (excluding non-retail Class A uses). Table 13.1 sets out the mix of uses in King's Road (West) shopping centre, compared with the Goad national average. The proportion of comparison retail units is slightly higher than the national average at over half of the total number of retail/service units within the centre. The centre along with King's Road (East) has comparison floorspace totalling 70,300 sq m gross (source: Goad and VOA), of which 36% is provided in the Peter Jones department store. The proportion of convenience units is slightly lower than the national average proportion. The proportion of vacant units is slightly below the national average, with the proportion of A1 and A2 service units and A3/A5 units also below the national average. The vacant units are dispersed throughout the centre.

Table 13.1: King's Road (West) Use Class Mix by Unit

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		King's Road West	National Average*
Comparison Retail	63	55.8	45.4
Convenience Retail	6	5.3	9.1
A1 Services	9	8.0	10.6
A2 Services	5	4.4	9.6
A3 and A5	21	18.6	14.3
A4	3	n/a	N/A
Vacant	9	8.0	11.0
Total	116	100	100.0

Sources: Royal Borough of Kensington & Chelsea Council (2007)

NLP site visit (February 2008)

* UK average relates to all town centres surveyed by Goad Plans (Nov 07) - NB Goad average excludes Class A4 uses.

Retailer Representation

13.7 King's Road (West) shopping centre has a reasonable selection of comparison shops (63) reflecting the centre's comparison retail role as a District Centre within the Borough, as identified in the London Plan. Table 13.2 provides a breakdown of comparison shop uses by goods categories.

Table 13.2: King's Road (West) Breakdown of Comparison Units

Type of Unit	King's Road (West) Major Shopping Centre		UK Average*
	King's Road West	%	%
Clothing and Footwear	23	36.5	27.4
Furniture, carpets and textiles	8	12.7	8.8
Booksellers, arts, crafts and stationers	3	4.8	9.3
Electrical, gas, music and photography	2	3.2	10.1
DIY, hardware & homewares	10	15.9	6.3
China, glass, gifts & fancy goods	9	14.3	3.7
Cars, motorcycles & motor access.	0	0.0	2.9
Chemists, drug stores & opticians	3	4.8	8.7
Variety, department & catalogue	0	0.0	2.0
Florists, nurserymen & seedsmen	0	0.0	2.2
Toys, hobby, cycle & sport	0	0.0	5.3
Jewellers	1	1.6	5.1
Other comparison retailers	4	6.3	8.2
Total	63	100	100.0

Sources: Royal Borough of Kensington & Chelsea Council (2007)

NLP site visit (February 2008)

* UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

13.8 All categories except cars/motorcycles/motor accessories, variety/department /catalogue, florist/nurserymen/seedsmen and toys/hobby/cycle/ sports are represented in the centre, however, the overall the breakdown differs from the national average. The proportion of clothing/footwear retail units, DIY/hardware/homeware and china/glass/gifts/fancy goods are significantly higher than the national average and the proportion of furniture/carpets/textiles is slightly above the national averages. The proportions of all other types of retail unit are below the national averages, and those which are significantly lower than the national average include jewellers, electrical/gas/music/photography and booksellers/arts/crafts/stationers. Major international multiple comparison retailers present in the centre include:

- Sweaty Betty;
- LK Bennett;
- Space NK; and
- Sofa Workshop.

13.9 King's Road (West) shopping centre does not contain any department stores.

Service Uses

13.10 King's Road (West) shopping centre has a reasonable range of service uses, with most categories represented, with the exception of travel agents, as shown in Table 13.3. The centre has a relatively low proportion of banks/other financial services and

laundries/dry cleaners compared with the national averages. The proportion of restaurants/cafes/takeaways is significantly higher than the national average, while the proportion of banks/financial services is slightly lower than the national average.

Table 13.3: King's Road (West) Analysis of Selected Service Uses

Type of Use	King's Road (West) Major Shopping Centre		UK Average*
	Units	%	%
Restaurants, cafes & takeaways	21	70	43.1
Banks/other financial services	1	3.3	15.4
Estate agents and valuers	3	10	11.7
Travel agents	0	0	4.9
Hairdressers & beauty parlours	4	13.3	22.0
Laundries and dry cleaners	1	3.3	2.9
Total Total	30	100	100.0

Sources: Royal Borough of Kensington & Chelsea Council (2007)

NLP site visit (February 2008)

*UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

N.B. 'Restaurants, cafés and takeaways' does not include the 22 pubs in the centre because these are excluded in the Goad averages.

- 13.11 Barclays is the only bank represented within King's Road (West) shopping centre. The centre also contains some non Class A entertainment uses including a Cineworld Cinema, Raffles and Po Na Na nightclubs.

Accessibility and Movement

Car Parking

- 13.12 The on-street survey results indicate that only 4% of respondents travelled by car (drivers and passengers) to King's Road (West). 20.8% of visitors travelled by tube while 44.6% walked, 19.8% travelled by bus/coach and 5.0% got the train, a further 3.0% cycled. These results highlight the importance of good public transport provision and high quality walking routes to the centre. Over 70% of those who travelled by tube used Sloane Square underground station (District and Circle lines) while 15.4% used South Kensington (Piccadilly, Circle and District lines). Levels of car usage are substantially below NLP's observed average from similar studies which suggests that car parks are not important to the vitality and viability of the town centre.

- 13.13 There are no car parks serving King's Road (West) District Centre. This reflects the survey results which showed that only 4% of respondents travel to the centre by car. The nearest car park is located to the west of the centre on Fenelon Place (off King's

Road). It is a surface level car park operated by 'Car Parks 4U' and has a pay on entrance charge system.

- 13.14 King's Road (West) District Centre is entirely within the central London Congestion Charge Zone. There is a requirement for vehicles from outside the congestion zone to pay an £8 daily charge to drive within this zone, the aim of which is to reduce traffic congestion, improve journey times and encourage a modal shift in transport choices. The lack of car parking within King's Road (West) District Centre should help to support these aims. Good public transport provision is a key component to ensure low levels of car parking do not impact on the centres vitality and viability. King's Road (West) enjoys good public transport provision.
- 13.15 During NLP's site visit, traffic flows were observed to be relatively heavy, but there was no evidence of congestion.

Public Transport

- 13.16 In terms of public transport accessibility levels, the centre is located in an area rated as having "good" or "very good" accessibility (a score of 4 or 5). Public transport accessibility to King's Road (West) shopping centre is relatively good. Sloane Square underground station is located to the eastern end of King's Road within King's Road (East) Major Centre but is slightly divorced from the main retail offer along King's Road (West). South Kensington station is also located within close proximity to the north of the centre. These stations are on the Piccadilly, Circle and District lines and provide regular direct links to the rest of Central and Greater London and a number of suburban and national rail stations via the tube network.
- 13.17 King's Road (West) District Centre is served by three bus stops. These are located on either side of King's Road on the junction of Manresa Road and on the northern side of King's Road at the junction with Old Church Street. These bus stops are serviced by five bus routes. The No. 11 (towards Fulham Broadway and Liverpool Street), No. 19 (towards Battersea Bridge and Finsbury Park), No. 22 (towards Piccadilly Circus and Putney Common), No. 49 (towards Clapham Junction and Shepherd's Bush Green) and the No. 319 (towards Sloane Square and Streatham Hill). Three night buses serve the District Centre. The No. N11, N19 and N22. These provide night bus services towards Liverpool Street, Wembley Central, Clapham Junction, Finsbury Park, Kingston and Piccadilly Circus.

Pedestrian Access and Movement

- 13.18 The main shopping areas within King's Road (West) are along King's Road. There are no pedestrianised areas within the centre and heavy traffic flows act as major barriers to pedestrian movement. There are a few pedestrian crossings throughout the centre which are spaced fairly evenly. The paving is of a reasonably good quality and is clean and even throughout the centre. The pavements are generally narrow in width although in some areas of the centre the paving widens assisting pedestrian flow and movement. The centre is a long linear centre and as such does not provide a natural circuit for pedestrians, nor does its length encourage pedestrians to necessarily visit all parts of the centre.
- 13.19 Pedestrian flows were fairly light along the whole of King's Road (West), however, heavier pedestrian flows were noted to the east of the centre where it is in close proximity to the King's Road (East) Major Centre. Pedestrian flows were also observed to be reasonable high on the western periphery where the 'Worlds End' Local Centre joins King's Road (West). This was primarily due to the presence of the Somerfield supermarket. Pedestrian flows are significantly lower towards the middle of the King's Road (West) centre.
- 13.20 Overall King's Road (West) shopping centre has a reasonable layout, clean and tidy pavements and generally attractive and well maintained buildings.

Environmental Quality

- 13.21 The quality of buildings within King's Road (West) District Centre is predominantly good, particularly the Bluebird café/restaurant building to the west of the centre. The centre contains some historic buildings, although there is some modern infill including the Cineworld building. There are a number of modern buildings, some of which are more attractive than others, although all appear well maintained. The majority of the buildings within the centre have two or three upper floors. Generally in the centre the facades including upper parts are well maintained and the shop fronts do not detract from the quality of the built environment.
- 13.22 There was no evidence of graffiti or vandalism within the centre. Overall during the daytime the centre felt safe and there was no evidence of anti-social behaviour or begging. The area does not have any areas of open green space, but there is an area of public space with seating and planting to the western end of the centre near to the Worlds End Local Centre.

13.23 Throughout the centre the paving is generally of good quality, with attractive block paving throughout the centre which is even and well maintained. The amount of chewing gum on the paving was low and the public realm was generally clean and free from litter or detritus, with good provision of bins throughout the centre, ensuring the upkeep of the environmental quality of the centre. There is a good provision of street lighting throughout the centre, which is generally of a good quality. The street furniture throughout the centre (i.e. litter bins, bollards, railings) is of a reasonable attractive quality, and is co-ordinated in terms of style, colour and materials. King's Road (West) District Centre generally has a very good physical fabric with a number of historic and characteristic buildings.

13.24 The Conservation Area designation upon the centre requires special attention be paid to the desirability of preserving or enhancing the character or appearance of the conservation area. Any proposed new development or alterations to buildings in the conservation area will therefore be subject to restrictive Unitary Development Plan policies.

13.25 The overall environmental quality within King's Road (West) District Centre is generally good. King's Road (West) is a pleasant centre with some high quality architecture which remains in commercial use and viable. The centre has a reasonable range of comparison retail, however, is somewhat lacking in its provision of multi national and higher order retailers. Traffic flow can be high throughout the centre which leads to conflict between traffic and pedestrian movement in some areas.



Bluebird Restaurant, King's Road



Heavy traffic within the centre



Cineworld, King's Road



Street furniture and trees along King's Road West

Summary of King's Road West's Strengths and Weaknesses

Strengths

- King's Road (West) shopping centre has a good mix of independent specialist comparison retailers, particularly fashion and furniture retailers.
- The centre provides a good range of evening uses including a high provision of restaurants, cafes and takeaways alongside a few pubs/bars and a cinema.
- The vacancy rate is lower than the national average which suggests demand for premises is strong and the vitality and viability of the centre is good.
- The architectural quality of buildings is generally good. The buildings all appear to be well maintained including the upper levels.
- The centre has good quality pavements, which provide a pleasant shopping environment for customers. Most areas within the centre are well maintained and clean. The provision of street furniture throughout the centre is reasonably good.
- King's Road (West) has good public transport links with a number of underground stations and bus routes providing convenient means of getting to and from the centre.
- The centre does not contain any designated public open spaces, however, there is a reasonable provision of seating, bins, lighting and planting.

Weaknesses

- The centre has a very low proportion of convenience retailers compared with the national average.
- The comparison retail offer at King's Road (West) is heavily skewed towards clothing and footwear and DIY/hardware/homeware retailers leading to an under provision of a number of other comparison uses.

- The heavy traffic throughout the centre detracts from the environmental attractiveness of the centre and acts as a barrier to free pedestrian movement.
- There is no designated car parking provision within the centre, however, this is countered by the good public transport links.
- There is a low proportion of services when compared with the national averages, apart from restaurant/cafes/takeaways which is significantly above the national average.

14.0 SOUTH KENSINGTON DISTRICT SHOPPING CENTRE

Introduction

- 14.1 South Kensington was largely undeveloped until the mid 1800s when it became home to arts and science institutions, and later the many museums and Imperial College University. Further development soon followed and the underground station opened in 1968, affirming South Kensington's importance to London. South Kensington retains an essentially Victorian character, with the main shopping area located along Old Brompton Road. This is complimented by further retail and other A class use units along Bute Street, Glendower Place, Harrington Road, Thurloe Street, Thurloe Place, Exhibition Road, Cromwell Place, Pelham Street and South Kensington Arcade. There is a farmers market in Bute Street. South Kensington is identified as a 'District Centre' in The London Plan and within the Core Strategy Issues and Options document.
- 14.2 The centre serves shoppers from the Royal Borough and beyond, but does not fulfil a strategic shopping role to the same extent as the International and Major centres in the Borough. South Kensington is a principal shopping centre offering both comparison and day-to-day convenience shopping. In addition the Royal Borough of Kensington & Chelsea UDP identifies part of South Kensington as within a conservation area.
- 14.3 The centre is focussed around South Kensington underground station on Thurloe Street/Pelham Street. The District Centre is bounded by residential areas to the south, west and east, and the Natural History Museum, the Science Museum and the Victoria and Albert Museum to the north.

Mix of Uses and Occupier Representation

- 14.4 South Kensington District Centre's key roles include:
- *convenience shopping* – including newsagents, grocers, off licences, a bakery, a delicatessen, a fishmonger and a health food shop. There is also a Tesco Express convenience store;
 - *comparison shopping* – predominantly independent specialist shops selling a range of high and lower order comparison goods;
 - *services* – including a good range of high street national banks/building societies, cafés, restaurants, takeaways, travel agents, dry cleaners, and

hairdressers/beauty parlours;

- *entertainment* – including a selection of pubs/bars; and
- *community facilities* – including a gym.

14.5 South Kensington District Centre has 178 retail/service units (excluding non-retail Class A uses). Table 14.1 sets out the mix of uses in South Kensington, compared with the Goad national average. The centre’s mix of uses differs somewhat from that of the national average. The proportion of comparison retail units is substantially below the national average, while the proportion of convenience retail units is slightly above the national average. The centre has comparison floorspace totalling 5,900 sq m gross (source: Goad and VOA), and is one of the smallest of the main centres in this respect. The centre has a significantly greater proportion of A3/5 units compared to the national average, while the proportion of A1 and A2 service units are also above the national average. The proportion of vacant units is slightly lower than the national average. The vacant units are fairly well dispersed throughout the centre, with no clusters of vacant units evident.

Table 14.1: South Kensington Use Class Mix by Unit

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		South Kensington	National Average*
Comparison Retail	40	22.9	45.4
Convenience Retail	19	10.9	9.1
A1 Services	25	14.3	10.6
A2 Services	21	12.0	9.6
A3 and A5	52	29.7	14.3
A4	4	N/A	N/A
Vacant	18	10.3	11.0
Total	178	100.0	100.0

Source: Royal Borough of Kensington & Chelsea Council (2007)

* UK average relates to all town centres surveyed by Goad Plans (Nov 07) - NB Goad average excludes Class A4 uses.

Retailer Representation

14.6 South Kensington District Centre has a fairly small selection of comparison shops (40) reflecting the centre’s close proximity to Knightsbridge and Fulham Road (East). Table 14.2 provides a breakdown of comparison shop uses by goods categories.

Table 14.2: South Kensington Breakdown of Comparison Units

Type of Unit	South Kensington District Centre		UK Average*
	South Kensington	%	%
Clothing and Footwear	3	7.5	27.4
Furniture, carpets and textiles	2	5.0	8.8
Booksellers, arts, crafts and stationers	6	15.0	9.3
Electrical, gas, music and photography	8	20.0	10.1
DIY, hardware & homewares	4	10.0	6.3
China, glass, gifts & fancy goods	6	15.0	3.7
Cars, motorcycles & motor access.	0	0.0	2.9
Chemists, drug stores & opticians	6	15.0	8.7
Variety, department & catalogue	0	0.0	2.0
Florists, nurserymen & seedsmen	0	0.0	2.2
Toys, hobby, cycle & sport	2	5.0	5.3
Jewellers	1	2.5	5.1
Other comparison retailers	2	5.0	8.2
Total	40	100.0	100.0

Source: Royal Borough of Kensington & Chelsea Council (2007)

* UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

- 14.7 All categories except cars/motorcycles/motor accessories, variety/department/catalogue and florists/nurserymen/seedsmen are represented in the centre, but the number of units in each category is limited. The proportion of clothing and footwear retailers is under a third of the national average, and other categories represented to a lesser extent than the national average include furniture/carpets/textiles, jewellers and 'other comparison retailers'. The proportion of units in a number of the categories is higher than the national average, including booksellers/arts/crafts/stationers, electrical/gas/music/photography, DIY/hardware/homewares, china/glass/gifts/fancy goods, and chemists/drugstores/opticians stores. The proportion of toys/hobby/cycle/sport units is approximately equal to the national average. The only major national multiple comparison retailers present in the centre are Waterstones, Ryman and Snappy Snaps.

Service Uses

- 14.8 South Kensington District Centre has a good range of service uses, with all categories represented, as shown in Table 14.3. The centre has a very high proportion of restaurants/cafes/takeaways compared with the national average, and a higher than average proportion of laundries/dry cleaners. The proportions of banks/other financial services, travel agents and hairdressers/beauty parlours are significantly below their respective national averages, while the proportion of estate agents/valuers is slightly below the national average. The centre has a high

proportion of services uses that cater for the needs of tourist visitors e.g. visitors to the museums.

Table 14.3: South Kensington Analysis of Selected Service Uses

Type of Use	South Kensington District Centre		UK Average*
	Units	%	%
Restaurants, cafes & takeaways	52	60.5	43.1
Banks/other financial services	7	8.1	15.4
Estate agents and valuers	9	10.5	11.7
Travel agents	2	2.3	4.9
Hairdressers & beauty parlours	11	12.8	22.0
Laundries and dry cleaners	5	5.8	2.9
Total Total	86	100.0	100.0

Source: Royal Borough of Kensington & Chelsea Council (2007)

*UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

N.B. 'Restaurants, cafés and takeaways' does not include the 4 pubs in the centre because these are excluded in the Goad averages.

- 14.9 Four of the high street banks/building societies are represented within South Kensington District Centre; Natwest, Barclays, Royal Bank of Scotland and Natwest.
- 14.10 The convenience retail units are spread quite evenly throughout the centre, while the restaurants/cafes/takeaways are found almost exclusively on Old Brompton Road and Bute Street. The centre has a selection of comparison units predominantly found along Old Brompton Road, Bute Street and Harrington Road.

Accessibility and Movement

Car Parking

- 14.11 The on-street survey results indicate that 4.0% of respondents travelled by car (drivers and passengers) to South Kensington. 44.6% of visitors travelled by tube while 16.8% travelled by bus/coach, 15.8% walked and a further 16.9% got the train. These results highlight the importance of good public transport provision to the centre and of high quality walking routes into the centre. Whilst levels of car usage are substantially below NLP's observed average from similar studies, good accessibility to convenient car parks remains important to the vitality and viability of the town centre.
- 14.12 The main car park serving the centre is North Terrace car park situated approximately 300m north east of the centre's non-core frontage, just off Brompton Road. The car park is run by Pure Parking and charges the following tariffs: up to 1 hour: £5.55, up

to 2 hours £10, up to 3 hours: £13.55, up to 4 hours: £17.85, up to 5 hours: £21.75, up to 6 hours: £26.25, up to 7 hours: £30.75, 8-24 hours: 37.00.

- 14.13 In addition to the car park there is some on-street parking available along Harrington Road, Old Brompton Road and Exhibition Road controlled by pay and display charged at a tariff of £3 per hour and subject to varying restrictions.
- 14.14 South Kensington is within the Central London Congestion Charge Zone. There is a requirement for vehicles from outside the congestion zone to pay an £8 daily charge to drive within this zone, the aim of which is to reduce traffic congestion, improve journey times and encourage a modal shift in transport choices. South Kensington District Centre's limited amount of parking should help to support these aims, and good public transport provision is a key component to ensure low levels of car parking do not impact on the centres vitality and viability.
- 14.15 Traffic flows through the centre were observed to be heavy during the NLP site visit, although not congested. In particular the junction around which the centre is based had high levels of traffic and presented an obstacle to pedestrian movement.

Public Transport

- 14.16 In terms of public transport accessibility levels, the centre is located in an area rated as having "excellent" accessibility (a score of 6). Public transport accessibility to South Kensington District Centre is excellent. South Kensington underground station is located at the eastern end of the centre with entrances on Thurloe Street and Pelham Street, and as such has a good feeling of centrality within the District Centre. The station is on the Piccadilly, Circle and District lines, and provides regular direct links to the rest of central and Greater London and a number of suburban and national rail stations.
- 14.17 Many bus routes have stops in South Kensington District Centre. There are bus stops located along Harrington Road, Thurloe Place, Thurloe Street and Pelham Street. There are at least nine bus routes providing access to and from South Kensington from surrounding areas in the Borough and beyond. The bus routes connect South Kensington with many destinations throughout London including Acton, Battersea, Brixton, Chelsea, Clapham Junction, Earl's Court, Fulham, Kensington, Knightsbridge, Ladbroke Grove, Marble Arch, Notting Hill Gate, Peckham, Putney, Roehampton, Shepherd's Bush, Vauxhall and Victoria. Four of the bus routes through the centre run a night bus service providing links to Battersea,

Chelsea, Clapham, Hammersmith, Peckham, Putney and The West End throughout the night.

Pedestrian Access and Movement

- 14.18 The main shopping areas within South Kensington are Old Brompton Road, Bute Street, the eastern end of Harrington Road and the western end of Thurloe Street. South Kensington Arcade, which is a relatively small parade of shops connecting the entrances to South Kensington underground station on Pelham Street and Thurloe Street, is covered and pedestrianised. However, the rest of the centre is uncovered and open to traffic. The main shopping areas generally have wide and even pavements, which assists pedestrian movement throughout the centre. There are a number of pedestrian crossings throughout the centre, but the complicated and busy junction of Old Brompton Road, Thurloe Street, Thurloe Place, Harrington Road, Onslow Square and Cromwell Place is a significant barrier to free pedestrian movement. While the busy roads and high pedestrian levels give the centre a vibrant and healthy feel, they also impede pedestrian movement. The somewhat complicated layout of the centre does not invite pedestrians to visit all parts of the centre and may act as an impediment to free movement.
- 14.19 Pedestrian flows tend to be around South Kensington underground station, and in particular around the triangle formed by Harrington Road, Old Brompton Road and Bute Street, and also along South Kensington Arcade where access to the station is obtained. Pedestrian flows are significantly lower towards the south western end of Old Brompton Road. At the time of the NLP site visit pedestrian flows were fairly high.
- 14.20 Overall South Kensington District Centre has a reasonable layout. Its compact size ensures that the centre is accessible to visitors and encourages them to walk to the periphery, but this is countered somewhat by its confusing layout.

Environmental Quality

- 14.21 Overall, the quality of buildings within South Kensington District Centre is very good. The 3-5 storey historic buildings are an attractive feature of the centre and house retail/service uses on the ground floor with residential uses above. The high quality historic architecture is apparent throughout the centre, with the exception of the fitness first building on Harrington Road which is a more modern, but still an attractive building. Throughout the centre the facades including upper parts are well

maintained and the shop fronts are generally in keeping with the quality and style of the built environment.

- 14.22 There was no evidence of graffiti or vandalism within the centre. Overall during the daytime the centre felt safe and there was no evidence of anti-social behaviour or begging. The area does not have any areas of green space or public seating, but there are two triangles with planting, one of which also has public art, opposite the Pelham Road entrance to South Kensington underground station.
- 14.23 Throughout the centre the paving is generally of good quality, with attractive block paving throughout the centre which is even and well maintained. The level of chewing gum on the paving is relatively high, but the public realm was generally clean and free from litter or detritus. There was a general lack of bins throughout the centre, but the pavements are well maintained. There is a good provision of street lighting throughout the centre, which is generally of a good quality, attractive and in keeping with the character of the centre. CCTV is evident within core of the centre, with particularly high provision outside the underground station. The street furniture throughout the centre (i.e. litter bins, railings, street lighting etc) is of a good, attractive quality, and is co-ordinated in terms of style, colour and materials. South Kensington District Centre has a generally very good physical fabric with a number of historic and characteristic buildings.
- 14.24 The Conservation Area designation upon part of the centre requires special attention be paid to the desirability of preserving or enhancing the character or appearance of the conservation area. Any proposed new development or alterations to buildings in the conservation area will therefore be subject to restrictive Unitary Development Plan policies.
- 14.25 The overall environmental quality within South Kensington District Centre is generally very good. South Kensington is an attractive centre with an abundance of high quality, historic architecture. The centre has a relatively poor range of comparison retail, however, a good range of services. Although the traffic flow can be high in areas of the centre, there are an adequate number of pedestrian crossings.



View south along Exhibition Road towards major junction



View north east along Old Brompton Road



South Kensington Arcade



Heavy traffic along Old Brompton Road

Summary of South Kensington's Strengths and Weaknesses

Strengths

- The centre has a slightly higher than average proportion of convenience retailers, which includes a Tesco Express store alongside a number of high quality independent convenience outlets. However, the convenience shopping provision in the centre is more suitable for top up than main food shopping.
- The centre provides a reasonably good range of evening uses including an excellent provision of restaurants, cafes and takeaways that is significantly higher than the national average, as well as a small selection of bars and pubs.
- The architectural quality of buildings is very good. The historic buildings are an attractive feature of the centre and enhance its character.
- The centre has good quality pavements, which provide a pleasant shopping environment for customers. Most areas within the centre are well maintained and clean.
- South Kensington has excellent public transport links with both the tube station and buses providing convenient means of getting to and from the centre.

- The vacancy rate is slightly lower than the national average which suggests demand for premises is relatively strong.

Weaknesses

- South Kensington District Centre has a fairly small selection of comparison shops, with only three national multiple retailers. The centre has a much lower proportion of comparison retail uses compared with the national average and within that a substantially lower than average proportion of clothing and footwear and jewellery retailers.
- The heavy traffic through the centre detracts from the environment and acts as a barrier to free pedestrian movement.
- There is a poor provision of bins within the centre, and no public seating.
- There is limited car parking provision within the centre, however, this is countered by the excellent public transport links.
- There are a significantly lower proportion of banks and other financial services, travel agents and hairdressers/beauty parlours in South Kensington when compared with the national average.

15.0 EARL'S COURT ROAD DISTRICT CENTRE

Introduction

- 15.1 Earl's Court is designated as a Local Centre in the adopted UDP, however, the Core Strategy Issues and Options identifies the centre as a District Centre in line with the London Plan. Earl's Court is situated within the south west of the Borough to the south of Kensington High Street Major Centre and to the west of Knightsbridge International Centre. Earl's Court Exhibition Centre is to the south west of the centre.
- 15.2 The centre is predominantly linear in form running for along Earl's Court Road from just north of Old Brompton Road to the junction of West Cromwell Road and Cromwell Road. The retail frontage also runs along part of Childs Street, Kenway Road and Hogarth Place. Earl's Court Road is all within a designated conservation area. Earl's Court underground station opened in 1887 at the same time as the Earl's Court Exhibition Centre. Further works were carried out on the station in the 1900s when the Piccadilly line was opened.

Mix of Uses and Occupier Representation

- 15.3 Earl's Court Road's key roles include:
- *convenience shopping* - including health food shops, newsagents, off licenses, delicatessens and several independent grocers. There are also three small supermarkets, a Sainsbury's Local, a Somerfield and a Marks & Spencer Simply Food store;
 - *comparison shopping* - a select number of multiple retailing shops including Robert Dyas and Boots along with a number of independent shops.
 - *services* – including a good selection of restaurants and cafés, several high street national banks/building societies, travel agents and hairdressers/beauty parlours;
 - *entertainment* – including a range of pubs/bars, an amusement arcade and several betting offices; and
 - *community facilities* – including a dentist and a gym.
- 15.4 Earl's Court Road has 130 retail/service units (excluding non-retail Class A uses). Table 15.1 sets out the mix of uses in Earl's Court Road, compared with the Goad national average. The centre has a much smaller proportion of comparison retail than the national average but a notably higher proportion of Class A3 and A5 uses and A1 service uses. The centre has comparison floorspace totalling 2,300 sq m gross

(source: Goad and VOA), and is the smallest of the main centres in this respect. The proportion of convenience units is also slightly higher than the national average. The centre has a lower proportion of vacant units than the national average.

Table 15.1: Earl's Court Road Use Class Mix by Unit

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Earl's Court Road	National Average*
Comparison Retail	15	12.2	45.4
Convenience Retail	19	15.4	9.1
A1 Services	31	25.2	10.6
A2 Services	14	11.4	9.6
A3 and A5	35	28.5	14.3
A4	7	n/a	N/A
Vacant	9	7.3	11.0
Total	130	100.0	100.0

Source: Royal Borough of Kensington & Chelsea (2007)

* UK average relates to all town centres surveyed by Goad Plans (Nov 07) - NB Goad average excludes Class A4 uses.

Retailer Representation

- 15.5 Earl's Court Road has a limited selection of comparison shops (15) reflecting the centre's role as a predominantly local convenience shopping and service destination. Table 15.2 provides a breakdown of comparison shop uses by goods categories. Not all of the categories are represented in the centre and there is only a limited representation of those categories with provision. The centre has two booksellers/arts/crafts and stationers, two clothing and footwear retailers, three DIY/hardware stores and 3 chemist/drug store/opticians. Major national multiple comparison retailers present in the centre include Boots, Rymans and Robert Dyas.

Table 15.2: Earl's Court Road Breakdown of Comparison Units

Type of Unit	Earl's Court Road Centre		UK Average*
	Units	%	%
Clothing and Footwear	2	13.3	27.4
Furniture, carpets and textiles	1	6.7	8.8
Booksellers, arts, crafts and stationers	2	13.3	9.3
Electrical, gas, music and photography	1	6.7	10.1
DIY, hardware & homewares	3	20.0	6.3
China, glass, gifts & fancy goods	0	0.0	3.7
Cars, motorcycles & motor access.	0	0.0	2.9
Chemists, drug stores & opticians	3	20.0	8.7
Variety, department & catalogue	0	0.0	2.0
Florists, nurserymen & seedsmen	0	0.0	2.2
Toys, hobby, cycle & sport	0	0.0	5.3
Jewellers	0	0.0	5.1
Other comparison retailers	3	20.0	8.2
Total	15	100.0	100.0

Source: Royal Borough of Kensington & Chelsea (2007)

* UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

Service Uses

- 15.6 Earl's Court Road has a reasonable range of service uses, with all categories represented, as shown in Table 15.3. The centre has a relatively high proportion of restaurants/cafés/takeaways compared with the national average. The proportion of travel agents is significantly higher than the national average, but the proportion of estate agents and valuers is lower than the national average.

Table 15.3: Earl's Court Road Analysis of Selected Service Uses

Type of Use	Earl's Court Road District Centre		UK Average*
	Units	%	%
Restaurants, cafes & takeaways	35	49.3	43.1
Banks/other financial services	7	9.9	15.4
Estate agents and valuers	4	5.6	11.7
Travel agents	8	11.3	4.9
Hairdressers & beauty parlours	12	16.9	22.0
Laundries and dry cleaners	5	7.0	2.9
Total Total	71	100.0	100.0

Source: Royal Borough of Kensington & Chelsea (2007)

*UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

N.B. 'Restaurants, cafés and takeaways' does not include the 7 pubs in the centre because these are excluded in the Goad averages.

- 15.7 Several of the main high street banks/building societies are represented on Earl's Court Road including; HSBC, Natwest, Lloyds TSB and Barclays. In addition to Class A service uses Earl's Court Road District Centre has several other non-retail uses including a hotel, a dentist and an amusement arcade.
- 15.8 There are several vacant units on Earl's Court Road, two on Kenway Road, one on Hogarth Road and another on Hogarth Place.
- 15.9 The convenience retail units are spread quite evenly throughout the centre as are the retail service units. The centre has a small number of comparison units of which there are limited national multiple retailers. There is a wide range of Class A3-A5 uses and these are spread through out the centre.

Accessibility and Movement

Car Parking

- 15.10 Earl's Court is within the Central London Congestion Charge area and there is a requirement for vehicles from outside the congestion zone to pay an £8 daily charge

to drive within this zone. The on-street survey indicated that only 8% of visitors to Earl's Court Road arrived by car, with the majority of visitors travelling to the centre by tube (33%) or walked (45%). There are no designated car parks in the centre and most of Earl's Court Road is a red route. There is some on-street pay and display parking surrounding the centre, however, the majority of parking is resident permit parking. Earl's Court Road is within the medium tariff zone so visitor parking costs £2.40 per hour. The centre is surrounded by residential streets which are primarily residents permit parking.

- 15.11 Traffic flows are relatively heavy along Earl's Court Road as it is one of the main routes from the A4 (Cromwell Road) to A3218 (Old Brompton Road) particularly with coaches and lorries. It can be particularly heavy in the peak periods including the morning and evening commuter times. During one of NLP's visits at an off-peak period the traffic levels observed were relatively heavy, although despite the large volume of traffic it was predominantly flowing.

Public Transport

- 15.12 In terms of public transport accessibility levels, the centre is located in an area rated as having "very good" accessibility (a score of 5). The main entrance to Earl's Court underground station is situated on Earl's Court Road providing access to the District and Piccadilly lines. West Brompton train and underground station is also within close proximity to the centre. There are also a number of bus routes which pass along Earl's Court Road, linking the centre with other parts of the Borough as well as Central and West London.

Pedestrian Access and Movement

- 15.13 The main shopping area is along Earl's Court Road, the pavements along Earl's Court Road are reasonably wide to the south but get narrower to the north of the centre. The heaviest pedestrian flows are near the tube where the pavements are relatively wide allowing unhindered pedestrian movement. The heavy traffic flows along Earl's Court Road hinder pedestrian movement within the centre, but there is good provision of pedestrian crossings. Traffic flows along Hogarth Place and Kenway Road are light which means pedestrians can move around these shopping areas easily.

Environmental Quality

- 15.14 The quality of buildings within Earl's Court Road centre is predominantly good with well maintained facades. Most of the buildings have residential properties above. There are a range of period style buildings along Earl's Court Road which enhance the character of the centre. The underground station is a prominent building in the centre with an attractive façade and well maintained fascias. Generally in the centre the facades including upper parts are well maintained and the shop fronts do not detract from the quality of the built environment, especially where they have incorporated the original features of the building.
- 15.15 There was some evidence of graffiti or vandalism within the centre. Overall during the daytime the centre felt safe and there was no evidence of anti-social behaviour or begging. CCTV was evident in the centre and at the time of the NLP site visit there were police patrolling the centre. The centre does not have any areas of green space, but hanging baskets in the side streets (i.e. Hogarth Place) improve the attractiveness of the centre.
- 15.16 There are no benches provided in the centre but where the pavements are wider to the south of the centre some of the cafes and restaurants have outdoor seating. There is good provision of bins and street lighting in the centre. The street lighting varies in style throughout the centre, with basic lighting to the north of the centres whilst in the side roads including Hogarth Place and Kenway Road the street lighting is more attractive and in keeping with the period buildings.
- 15.17 Throughout the centre the paving is generally of good quality and is well maintained, there is some evidence of cracked paving but limited evidence of chewing gum on the pavements. The pavements were relatively clean at the time of the NLP site visit, but there were lots of bin bags piled up on the street as the rubbish collection had not yet taken place.
- 15.18 The Conservation Area designation upon the centre requires special attention be paid to the desirability of preserving or enhancing the character or appearance of the conservation area. Any proposed new development or alterations to buildings in the conservation area will therefore be subject to restrictive Unitary Development Plan policies.
- 15.19 The overall environmental quality within Earl's Court Road centre is generally good, but is let down by the heavy traffic flows along Earl's Court Road. The good provision

of pedestrian crossings and relatively wide pavements help in reducing the impact of the traffic. The centre has a good range of convenience retail and restaurants and cafes.



Marks & Spencer Simply Food on Earl's Court Road



Cycle Parking on Earl's Court Road



Units along Kenway Road



Earl's Court Road Underground Station

Summary of Earl's Court's Strengths and Weaknesses

Strengths

- The centre has three small supermarkets (Sainsbury's, Somerfield and M&S Simply Food) along with delicatessens, off licences and several independent grocers. Food and grocery provision in the centre is mainly suitable for top up food shopping. The convenience provision within the centre is higher than the GOAD average.
- The centre provides a good range of service facilities particularly restaurants, cafes and takeaways (35 in total).
- The vacancy rate is lower than the national average which suggests demand for premises is reasonable.
- The architectural quality of buildings is good with well maintained facades.

- The centre has good quality pavements which provide a pleasant shopping environment for customers.
- The centre has excellent public transport links.
- There is good street furniture provision within the centre.

Weaknesses

- The centre does not offer the same quality and range of comparison retailers available in other centres in Kensington & Chelsea. This is especially noticeable in the number of multiple retailers present in the centre.
- There is limited car parking provision, however, this is counteracted by the excellent transport provision.
- There are heavy traffic flows along Earl's Court Road which causes vehicle/pedestrian conflict.
- The centre does not have any open spaces/green areas.

16.0 WESTBOURNE GROVE SPECIAL DISTRICT CENTRE

Introduction

- 16.1 Westbourne Grove built up as an east west route from Bayswater to the Ladbrooke Grove Estate in the mid-1800s. Westbourne Grove runs across Notting Hill from Portobello Road eastwards into the City of Westminster to Queensway. Westbourne Grove Special District Centre is centred around the Westbourne Grove Traffic Island (a triangular junction with Colville Road) and the junction with Ledbury Road. The retail premises are predominantly typical Victorian premises that have been adapted to enable commercial uses.
- 16.2 The centre serves shoppers from Notting Hill, the Borough and beyond. Westbourne Grove is designated as a Local Shopping Centre within the Kensington & Chelsea UDP which states that Local Centres perform a genuine local shopping function and provide for the day-to-day needs of residents and workers in the locality. The designation of Westbourne Grove as a Special District Centre in the Core Strategy Issues and Options document highlights that the centre has evolved and performs a far more unique function, as opposed to a traditional Local or District Centre function. In addition the Kensington & Chelsea UDP identifies the majority of Westbourne Grove as within a conservation area.
- 16.3 The centre is located in the northern part of the Borough and is focussed around Westbourne Grove and Ledbury Road. The centre is a short walk from Portobello Road and is relatively compact with the majority of shops clustered along the main shopping frontages. Westbourne Grove Special District Centre is located in a predominantly residential area.

Mix of Uses and Occupier Representation

- 16.4 Westbourne Grove Special District Centre's key roles include:
- *comparison shopping* - an exceptional range of high quality international fashion retailers and international designer boutique shops, complemented by several jewellers and antique shops;
 - *services* – including a beauty parlour; estate agents; and a launderette;
 - *community facilities* – including a doctors and a dental surgery; and
 - *entertainment* – including several public houses.

16.5 Westbourne Grove Special District Centre has 94 retail/service units (excluding non-retail Class A uses). It should be noted that 11 of these units are outside of the Borough in neighbouring City of Westminster, but are included in the health check as they remain an integral part of the centre. Table 16.1 sets out the mix of uses in Westbourne Grove, compared with the Goad national average. The centre has a much higher proportion of comparison retail units compared with the national average, with much lower proportions of all other types of unit, reflecting Westbourne Grove's position as a specialist destination. The centre has comparison floorspace totalling 5,900 sq m gross (source: Goad and VOA), and is one of the smallest of the main centres in this respect.

Table 16.1: Westbourne Grove Use Class Mix by Unit

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Westbourne Grove	National Average*
Comparison Retail	78	85.7	45.4
Convenience Retail	2	2.2	9.1
A1 Services	2	2.2	10.6
A2 Services	2	2.2	9.6
A3 and A5	4	4.4	14.3
A4	3	N/A	N/A
Vacant	3	3.3	11.0
Total	94	100.0	100.0

Source: Royal Borough of Kensington & Chelsea (2007)

* UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

Retailer Representation

16.6 Westbourne Grove Special District Centre has an excellent selection of comparison shops (78) reflecting the centre's role as a specialised retail destination within the Borough and beyond. Table 16.2 provides a breakdown of comparison shop uses by goods categories.

16.7 The centre is predominantly defined by 3 types of retailers: clothing and footwear; china, glass, gifts and fancy goods (including antique shops); and jewellers. All other types of units have a much lower proportion of retailers than the UK average with five categories not represented at all. National multiple comparison retailers present in the centre includes an Orange mobile phone shop and the following clothing retailers:

- LK Bennet;
- Mulberry;
- Reiss;
- Ghost;
- Joseph;
- Ted Baker; and
- Jigsaw.

Table 16.2: Westbourne Grove Breakdown of Comparison Units

Type of Unit	Westbourne Grove		UK Average*
	Units	%	%
Clothing and Footwear	51	65.4	27.4
Furniture, carpets and textiles	1	1.3	8.8
Booksellers, arts, crafts and stationers	0	0.0	9.3
Electrical, gas, music and photography	1	1.3	10.1
DIY, hardware & homewares	0	0.0	6.3
China, glass, gifts & fancy goods	14	17.9	3.7
Cars, motorcycles & motor access.	0	0.0	2.9
Chemists, drug stores & opticians	3	3.8	8.7
Variety, department & catalogue	0	0.0	2.0
Florists, nurserymen & seedsmen	1	1.3	2.2
Toys, hobby, cycle & sport	0	0.0	5.3
Jewellers	6	7.7	5.1
Other comparison retailers	1	1.3	8.2
Total	78	100.0	100.0

Source: Royal Borough of Kensington & Chelsea (2007)

* UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

16.8 The centre is predominantly defined by 3 types of retailers: clothing and footwear; china, glass, gifts and fancy goods (including antique shops); and jewellers. All other types of units have a much lower proportion of retailers than the UK average with five categories not represented at all. National multiple comparison retailers present in the centre includes an Orange mobile phone shop and the following clothing retailers:

- LK Bennet;
- Mulberry;
- Reiss;
- Ghost;
- Joseph;
- Ted Baker; and
- Jigsaw.

16.9 In addition to national multiple comparison retailers the centre contains a number of international and designer led boutique style retailers less commonly found on the typical UK high street, including:

- Ralph Lauren;
- Pepe Jeans;
- Heidi Klein;
- Marc Cain;
- Armand Basi;
- Bonpoint;
- Ventilo;
- Bodas; and
- Ross & Bute.

Service Uses

- 16.10 Westbourne Grove Special District Centre has a limited selection of service uses, with only 8 units in total, as shown in Table 16.3.

Table 16.3: Westbourne Grove Analysis of Selected Service Uses

Type of Use	Westbourne Grove		UK Average*
	Units	%	%
Restaurants, cafes & takeaways	4	50.0	43.1
Banks/other financial services	0	0.0	15.4
Estate agents and valuers	2	25.0	11.7
Travel agents	0	0.0	4.9
Hairdressers & beauty parlours	1	12.5	22.0
Laundries and dry cleaners	1	12.5	2.9
Total Total	8	100.0	100.0

Source: Royal Borough of Kensington & Chelsea (2007)

* UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

N.B. 'Restaurants, cafés and takeaways' does not include the 3 pubs in the centre because these are excluded in the Goad averages.

- 16.11 The centre has a reasonable selection of cafes, two estate agents and a launderette which provides a key local need use. There are no banks or travel agents. In addition to Class A service uses Westbourne Grove Special District Centre has several other non-retail uses including a doctor's surgery and a dental surgery. There are also free to use public toilets located on the Westbourne Grove Traffic Island.
- 16.12 The centre has a very low vacancy rate, suggesting demand for units is good, and where there are vacant units they are not clustered in any one part of the centre. The centre has a very poor convenience retail offer, with only a confectioner and a health food shop present in the centre. Following the closure of the Fresh & Wild store within the centre there are no shops capable of providing a top-up shopping function within the centre, although there is provision within walking distance in neighbouring centres including Portobello Road and at Queensway/Westbourne Grove in Westminster.

Accessibility and Movement

Car Parking

- 16.13 Westbourne Grove is within the Central London Congestion Charge area and there is a requirement for vehicles from outside the congestion zone to pay an £8 daily charge to drive within this zone. There are a number of on-street pay and display parking space available to visitors within Westbourne Grove. On Westbourne Grove itself

there are pay and display visitor parking spaces costing is £1.50 an hour whilst there is additional parking on many of the surrounding streets with similar pay and display charges. There is limited off road parking within the locality. The nearest car park is an 86 space NCP run car parking, charging £6.80 per hour and located 200m east of Westbourne Grove Special District Centre in Bayswater.

16.14 The on-street survey indicated that only 2% of respondents travelled to Westbourne Grove by car, with the majority of respondents electing to walk. Westbourne Grove is within the central London Congestion Charge Zone. There is a requirement for vehicles to pay an £8 daily charge to drive within this zone, the aim of which is to reduce traffic congestion, improve journey times and encourage a modal shift in transport choices. Westbourne Grove Special District Centre's limited parking provision and mix of retail uses that do not necessitate car trips should help to support these aims. The on-street survey indicated that 50% of the respondents who travelled to Westbourne Grove by car were required to pay the full congestion charge amount.

16.15 Traffic flows through the District Centre are quiet throughout the day, with relatively light traffic along the main shopping streets. The context of Westbourne Grove within the residential area of Notting Hill and on minor roads that are not necessarily used for through traffic means the roads are not congested. During NLP's visit at an off-peak period during the day the traffic levels observed were low.

Public Transport

16.16 In terms of public transport accessibility levels, the centre is located in an area rated as having "good" accessibility (a score of 4), which along with Portobello Road and Fulham Road West is the lowest score achieved by the main centres in the Borough. However, Westbourne Grove Special District Centre still has relatively good accessibility by public transport. Ladbroke Grove underground station, on the Hammersmith and City Line, and Notting Hill Gate underground station, on the Central, Circle and District Lines, are both short walks from Westbourne Grove and provide London underground links to destinations across London.

16.17 There are a range of bus routes that serve Westbourne Grove Special District Centre. Several bus stops are located on Westbourne Grove with further bus stops located in close proximity to the centre on Pembridge Villas and Kensington Park road. There are at least nine bus routes providing access to and from Westbourne Grove. The

bus routes connect Westbourne Grove with many destinations throughout London including Chelsea, South Kensington, Acton, East Acton, Hammersmith, Wandsworth, Willesden, Chalk Farm, Camden, Wandsworth Road, Victoria, Liverpool Street and the West End. One of the bus routes through the centre run 24 hours with an additional four night bus routes running providing links to Liverpool Street, Clapham Junction, Willesden, Acton, Ealing, Greenford, Fulham, Camden and Victoria, throughout the night.

Pedestrian Access and Movement

- 16.18 Westbourne Grove and Ledbury Road are the main shopping streets within Westbourne Grove Special District Centre. Both of these streets are minor roads with features that ensure naturally slow traffic, such as the Westbourne Grove Traffic Island and frequent cross junctions, allowing them to be easily traversed. Even so the provision of pedestrian crossings across Westbourne Grove further enhances the ease of pedestrian movement. The layout of the centre on the junction of Westbourne Grove and Ledbury Road does not lead to a natural circuit for pedestrians, but as the centre is quite compact, this is not a particular problem.
- 16.19 Pedestrian movement through Westbourne Grove is relatively uninhibited with wide and clutter-free pavements. The main barriers to pedestrian movement observed during NLP's visit were the scaffolding associated with building works going on in one building and temporary barriers associated with streetscape improvements being carried out. In addition to this the number of parked cars in on-street parallel parking bays create a hazard when crossing the road in certain places, though with slow and small amounts of traffic this is only a minor issue.
- 16.20 At the time of NLP's site visit pedestrian flows within the centre were generally low with footfall far lower than nearby Portobello Road. Pedestrian flows tend to be heaviest nearest to the Westbourne Grove and Ledbury Road junction, with fair pedestrian flows also on the northern side of Westbourne Grove. Pedestrian flows are significantly lower in the peripheral areas on Ledbury Road, further away from the junction.
- 16.21 Overall Westbourne Grove Special District Centre has a good layout, with many aspects which facilitate pedestrian movement. Its compact core ensures that the centre is accessible to visitors and the location of the peripheral areas on pedestrian

routes to other shopping centres including Portobello Road and Bayswater outside of the Borough encourages pedestrian movement throughout.

Environmental Quality

- 16.22 The quality of buildings within Westbourne Grove Special District Centre is predominantly very good. The historic Victorian terraces are an attractive feature of the centre and have been extended at the front to create active retail frontages. Despite this they retain traditional style facades and create a good sense of character within the centre. Each of the buildings within the terraces have been painted different colours which gives the centre an added sense of uniqueness in character, typical of the Notting Hill area. Generally in the centre the shop facades are well maintained and do not detract from the quality of the built environment but help to enhance the centre as a retailing destination.
- 16.23 There was no obvious evidence of graffiti or vandalism within the centre, though some street furniture appeared to have been hit by vehicles. Overall during the daytime the centre felt safe and there was no evidence of anti-social behaviour or begging. The centre does not have any areas of green space, but the Westbourne Grove Traffic Island provides an open urban area with seating providing a valuable public space. The centre has a very good proportion of trees, in addition to planting in planters and hanging baskets, which complements the good quality architecture and creates the feeling of a good quality public realm.
- 16.24 Throughout the centre the paving is of very good quality and well maintained and there is clear evidence of further investment, with paving improvements observed going on along Ledbury Road. There were very limited levels of litter observed within the centre and the pavements were generally free of chewing gum.
- 16.25 There is a good provision of street lighting throughout the centre. The street lighting on Ledbury Road is attractive and befits the style and quality of architecture in the centre, although the design of the street lighting on Westbourne Grove is of a more standard design. The street furniture throughout the centre (i.e. litter bins, seating, bicycle racks) is of a very good, attractive quality, and is located so as not to cause a cluttering effect on the pedestrian realm. Westbourne Grove Special District Centre has an excellent physical fabric with a good pedestrian realm and a very good sense of character underlined by its streetscape and architecture.

16.26 The Conservation Area designation upon the centre requires special attention be paid to the desirability of preserving or enhancing the character or appearance of the conservation area. Any proposed new development or alterations to buildings in the conservation area will therefore be subject to restrictive Unitary Development Plan policies.

16.27 The overall environmental quality within Westbourne Grove Special District Centre is excellent. The Westbourne Grove streetscape provides an attractive and complementary setting for the specialised high quality fashion retail offer that it has and helps to underpin the comparison retail function of the centre.



View east from Westbourne Grove Traffic Island



Westbourne Grove Traffic Island



View East along Westbourne Grove



Ledbury Road Junction, with paving improvements being carried out

Summary of Westbourne Grove's Strengths and Weaknesses

Strengths

- The centre has an excellent selection of high quality exclusive fashion retailers, including national multiples, international retailers, specialist designer shops and independent fashion retailers.

- The centre's fashion retail function is supported by other high end comparison retailers such as antiques shops and jewellers.
- The vacancy rate is substantially lower than the national average which suggests demand for premises is reasonably strong.
- The architectural quality of buildings is very good. The historic buildings are an attractive feature of the centre and enhance the environment within the centre.
- The centre has a very good public realm with good quality pavements, no significant barriers to pedestrian movement, good provision of street furniture and good use of trees and planting. The façades and buildings in general are well maintained and the centre has a very good sense of character.
- Westbourne Grove has good public transport links with the rest of London and beyond and is located nearby to other centres providing different retail offers.

Weaknesses

- The centre does not provide for day-to-day shopping needs as it has a very limited convenience offer and cannot cater for top-up shopping trips.
- Westbourne Grove has a limited proportion of retail services which could be developed to support the comparison retail offer and provide for important local service, like the existing launderette. Likewise a greater proportion of restaurants and cafes could help support the specialist function of the centre.

17.0 PORTOBELLO ROAD SPECIAL DISTRICT CENTRE

Introduction

- 17.1 Portobello Road built up in the late 1800s on a north-south lane between Kensal Green and Notting Hill. The Victorian development occurred gradually with the northern end of the road being developed following the completion of the Hammersmith & City underground line and the opening of Ladbrooke Grove station in the 1860s. Since this period Portobello Road has been well known for its shops and markets. The linear centre retains its diverse retail offer along the central section of Portobello Road between Chepstow Villas in the south and Oxford Gardens in the north. Portobello Road is identified as a *'District Centre'* in The London Plan and a *'Special District Centre'* in the Royal Borough of Kensington & Chelsea Core Strategy Issues and Options.
- 17.2 The centre serves shoppers from the Borough and beyond as an internationally renowned attraction. The Core Strategy Issue & Options document highlights that the centre is *"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."* The London Plan designates Portobello Road as a District Centre. In addition the Kensington & Chelsea UDP identifies the majority of Portobello Road's retail frontages south of Westway as within a conservation area.
- 17.3 Portobello Road Market is one of the most famous markets in the world and is internationally recognised for its second-hand and antique sections. It features in the top ten rankings as the most visited tourist site in London. During the week the market is used mainly by the local community and has a mix of fruit and vegetable produce, new goods and hot food stalls. Friday the second hand market is open and on Saturday the famous antiques market is held towards the Southern end of Portobello Road, near Notting Hill Gate. In addition to the antique stalls there are a whole host of arcades, galleries, shops and cafes open to cater for the flocks of tourists and visitors. A recent addition to the Saturday market is the Arts & Crafts section which is located just off Portobello Road on the Tavistock Piazza. This was created to encourage a range of unique trades and handicrafts.
- 17.4 The District Centre has a linear structure focussed on Portobello Road, although some units are located on adjoining roads, such as Blenheim Crescent and

Westbourne Grove. In addition there is the Portobello Green Shopping Arcade underneath the Westway Flyover. The main supermarket within the centre is the Tesco Metro located on Portobello Road north of Westbourne Park Road. Portobello Road District Centre is bounded by residential areas to the east and west and provides a key linkage in the Borough across the Westway flyover.

Mix of Uses and Occupier Representation

17.5 Portobello Road Special District Centre's key roles include:

- *convenience shopping* – including the week day market stalls, newsagents, butchers, bakers, grocers, off licences and spices shop. There is a Tesco Metro supermarket and a number of independent convenience stores suitable for top-up shopping and the ;
- *comparison shopping* - an excellent selection of independent retailing shops selling a range of high and lower order comparison goods. Several multiple retailers are also present in the centre. The antiques and second hand market also attracts a significant number of shopping trips;
- *services* – including high street national banks/building societies, cafés, restaurants, takeaways, a launderette, a dry cleaners, a cobblers, a photo processing shop and hairdressers/beauty parlours;
- *entertainment* – including several pubs/bars, amusement arcades, and a cinema; and
- *community facilities* – including a community centre, a school, and public amenities.

17.6 Portobello Road Special District Centre has 291 retail/service units (excluding non-retail Class A uses). Table 17.1 sets out the mix of uses in Portobello Road, compared with the Goad national average. This table excludes the market stalls. The District Centre has a significantly greater proportion of comparison units than the national average. The proportion of vacant units is substantially below the national average, with the proportion of both A1 and A2 Service units also below the national average. The centre has comparison floorspace totalling 23,700 sq m gross (source: Goad and VOA). The centre has a comparable proportion of A3/5 units to the national average with only a slightly smaller proportion of convenience retailers than the national average.

Table 17.1: Portobello Road Use Class Mix by Unit

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Portobello Road	National Average*
Comparison Retail	181	65.7	45.4
Convenience Retail	20	7.3	9.1
A1 Services	12	4.4	10.6
A2 Services	9	3.3	9.6
A3 and A5	38	13.8	14.3
A4	16	N/A	N/A
Vacant	15	5.5	11.0
Total	291	100.0	100.0

Source: Royal Borough of Kensington & Chelsea (2007)

* UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

Retailer Representation

- 17.7 Portobello Road Special District Centre has a good selection of comparison shops (181) reflecting the centre's specialist role within the Borough providing a unique comparison retail offer, as identified in the Kensington & Chelsea Core Strategy Issues and Options document. Table 17.2 provides a breakdown of comparison shop uses by goods categories.

Table 17.2: Portobello Road Breakdown of Comparison Units

Type of Unit	Portobello Road SDC		UK Average*
	Portobello Road	%	%
Clothing and Footwear	81	44.8	27.4
Furniture, carpets and textiles	3	1.7	8.8
Booksellers, arts, crafts and stationers	7	3.9	9.3
Electrical, gas, music and photography	6	3.3	10.1
DIY, hardware & homewares	5	2.8	6.3
China, glass, gifts & fancy goods	62	34.3	3.7
Cars, motorcycles & motor access.	0	0.0	2.9
Chemists, drug stores & opticians	8	4.4	8.7
Variety, department & catalogue	1	0.5	2.0
Florists, nurserymen & seedsmen	1	0.5	2.2
Toys, hobby, cycle & sport	2	1.1	5.3
Jewellers	4	2.2	5.1
Other comparison retailers	1	0.5	8.2
Total	181	100.0	100.0

Source: Royal Borough of Kensington & Chelsea (2007)

* UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

- 17.8 All categories except cars, motorcycles, motor accessories are represented in the centre. The proportion of china, glass, gifts and fancy goods shops is significantly above the national average due to the proliferation of antiques shops in the centre, which supports Portobello Road's role as a specialist centre for the antiques sector. There is a good proportion of clothing and footwear retailers, though all other

categories have a lower proportion of retail units than the national average. National multiple comparison retailers present in the centre include:

- Woolworths;
- The Body Shop;
- Lush;
- Octopus;
- Orange;
- Accessorize; and
- Clothing retailers including Punky Fish, Agent Provocateur and Paul Smith.

Service Uses

17.9 Portobello Road Special District Centre has a modest range of service uses, with all categories except travel agents represented, as shown in Table 17.3. The centre has a relatively low proportion of banks/other financial services and estate agents compared with the national average. The proportion of restaurants, cafes and takeaways is significantly higher than the national average.

17.10 There are two high street banks/building societies represented within Portobello Road, Abbey and HSBC. The centre also has several book makers, a cobblers and photo processors providing additional retail services. In addition to Class A service uses Portobello Road District Centre has several other non-retail uses including three amusement arcades, a cinema, a community centre and public amenities.

Table 17.3: Portobello Road Analysis of Selected Service Uses

Type of Use	Portobello Road SDC		UK Average*
	Units	%	%
Restaurants, cafes & takeaways	38	70.3	43.1
Banks/other financial services	3	5.6	15.4
Estate agents and valuers	3	5.6	11.7
Travel agents	0	0.0	4.9
Hairdressers & beauty parlours	8	14.8	22.0
Laundries and dry cleaners	2	3.7	2.9
Total Total	54	100.0	100.0

Source: Royal Borough of Kensington & Chelsea (2007)

* UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

N.B. 'Restaurants, cafés and takeaways' does not include the 16 pubs in the centre because these are excluded in the Goad averages.

17.11 The majority of the vacant units are located on the peripheral roads which adjoin Portobello Road, with other vacancies located on the northern and southern extremities of Portobello Road special District Centre. The southern end of the Portobello Road Special District Centre provides a focus for Antique shops, with a much higher proportion of these units clustered south of the Elgin Crescent junction.

In addition the Portobello Green Shopping Arcade provides a focus for independent fashion retailers.

- 17.12 The convenience retail units are spread evenly throughout the centre as are the retail service units. The centre has a good number of comparison units of which the majority of the multiple retailers are located in the core frontage on Portobello Road.

Accessibility and Movement

Car Parking

- 17.13 There are a number of on-street pay and display parking space available on Portobello Road, though these are restricted to traders only for large parts of the day. Outside of these restricted times and on surrounding streets pay and display visitor parking spaces cost is £1.50 an hour for a maximum of 4 hours. There is limited off road parking within the locality.

- 17.14 The on-street survey indicated that 5% of respondents travelled to Portobello Road by car, with respondents preferring to walk, take a bus, or take an underground train. Portobello Road is within the central London Congestion Charge Zone. There is a requirement for vehicles from outside the congestion zone to pay an £8 daily charge to drive within this zone, the aim of which is to reduce traffic congestion, improve journey times and encourage a modal shift in transport choices. The on-street survey indicated that 60% of the respondents who travelled to Portobello Road by car were required to pay the full congestion charge amount.

- 17.15 Traffic flows through the District Centre are relatively quiet at all times. When the market is in operation Portobello Road becomes virtually un-navigable to vehicles, with market traders using the space for loading/unloading and their stalls. During NLP's visit at a period when the market was trading traffic levels observed within the centre was low.

Public Transport

- 17.16 In terms of public transport accessibility levels, the centre is located in an area rated as having "good" accessibility (a score of 4), which along with Westbourne Grove and Fulham Road West is the lowest score achieved by the main centres in the Borough. However, the centre still has relatively good accessibility by public transport. Ladbroke Grove underground station, on the Hammersmith and City Line, and Notting

Hill Gate underground station, on the Central, Circle and District Lines, are both short walks from Westbourne Grove and provide London underground links to destinations across London.

- 17.17 There are a range of bus routes that serve Portobello Road special District Centre. There are bus stops serving Portobello Road on Westbourne Park Road, Elgin Crescent, Colville Terrace, Kensington Park Road and Westbourne Grove. There are at least nine bus routes providing access to and from Westbourne Grove. The bus routes connect Westbourne Grove with many destinations throughout London including Chelsea, South Kensington, Acton, East Acton, Hammersmith, Wandsworth, Willesden, Chalk Farm, Camden, Wandsworth Road, Victoria, Liverpool Street and the West End. One of the bus routes through the centre run 24 hours with an additional four night bus routes running providing links to Liverpool Street, Clapham Junction, Willesden, Acton, Ealing, Greenford, Fulham, Camden and Victoria, throughout the night.

Pedestrian Access and Movement

- 17.18 Portobello Road, Kensington Park Road, Westbourne Park Road, Blenheim Crescent and Elgin Crescent are the main shopping streets within Portobello Road Special District Centre. Portobello Road itself has little through traffic which means, especially when the market is trading, that the street becomes essentially pedestrianised. The streets that cross Portobello Road are minor roads in a predominantly residential setting, allowing them to be easily traversed at the junctions. The linear layout of the centre is not compact but does allow legibility within centre and also suits the nature of the centre as an enclosed intimate street market.
- 17.19 Pedestrian movement along Portobello Road can vary depending on the day, time and activity on the street. When the market is trading market stalls the volume of people can cause congestion. The main barriers to pedestrian movement observed during NLP's visit (Tuesday, Wednesday, Thursday and Saturday) were the parallel parked vans associated with traders parked along the street, which both create a physical barrier and a psychological barrier by obscuring lines of sight along and across Portobello Road.
- 17.20 At the time of NLP's site visit pedestrian flows within the centre were highest in the core areas, where the market activities for that day were concentrated. Pedestrian

flows tend to be heaviest in the enclosed core of Portobello Road between Lancaster Road and Lonsdale Road. Pedestrian flows are significantly lower on the peripheral streets which branch off of Portobello Road.

- 17.21 Overall Portobello Road Special District Centre has a layout which reinforces its sense of scale and unique character. Though the market can cause congestion and can feel cluttered, this is part of the quintessential character that Portobello Road should retain.

Environmental Quality

- 17.22 The quality of buildings within Portobello Road Special District Centre is predominantly very good. The historic Victorian terraces are an attractive feature of the centre and help to create an intimate streetscape and where they have been painted provide a distinctive character. The buildings mainly retain narrow frontages which help to reinforce the small scale character of the centre. Generally in the centre the majority of shop facades are well maintained, though some shop facades and buildings look tired.

- 17.23 There is some evidence of graffiti within the centre, most notably a piece by well-known graffiti artist Banksy. There was also evidence of fly-posting and several rubbish bags on the peripheral streets during NLP's site visit. Overall during the daytime the centre felt safe, there was no evidence of anti-social behaviour or begging and there was clear evidence that CCTV was in use. The centre has limited amounts of green space, with the only areas of green space within the quasi-private Portobello Court development. Due to the compact streetscape along Portobello Road there is limited space for trees and planting, though where there are small urban squares, such as on Tavistock Road and Acklam Road there are mature which contribute to the good quality public realm. Throughout the centre the paving is of good quality and well maintained. There were very low levels of litter observed within the centre and the pavements were generally free of chewing gum.

- 17.24 There is a good provision of street lighting throughout the centre with the street lighting along Portobello Road of an attractive design and complementary to the character of the centre. The street furniture (including bollards, bins and cycle racks) throughout the centre is of a good, attractive quality, though there is a limited provision of benches. Portobello Road Special District Centre has a very good physical fabric with a good pedestrian realm and an excellent sense of character

underlined by its streetscape, architecture and the level of on-street activity within the urban realm.

17.25 The Conservation Area designation upon the centre requires special attention be paid to the desirability of preserving or enhancing the character or appearance of the conservation area. Any proposed new development or alterations to buildings in the conservation area will therefore be subject to restrictive Unitary Development Plan policies.

17.26 The overall environmental quality within Portobello Road Special District Centre is very good. The Portobello Road streetscape provides an attractive and complementary setting for the unique mix of independent retailers and the market stalls offering a wide range of products. The centre retains a very distinctive feel that continues to ensure Portobello Road is a specialist centre that attracts shoppers from a wide catchment.



Portobello Road Core



Tavistock Road Pedestrian Square



Banksy Graffiti north of Westway



South End of Portobello Road with Antiques Shops

Summary of Portobello Road's Strengths and Weaknesses

Strengths

- Portobello Road has an excellent selection of independent comparison retailers and has a specialist shopping function for both antiques and clothing fashion retailers.
- Portobello Road market provides an invaluable retail function to the centre with stalls selling antiques, bric-a-brac, fruit, vegetables and second hand goods. This both attracts visitors to the District Centre and enhances the vitality and offer of the centre.
- The centre has a Tesco Metro supermarket which is supported by a range of independent convenience retailers.
- The District Centre provides a good range of evening uses including provision of restaurants, cafes and takeaways, as well as a good proportion of bars and pubs. The centre also has a cinema.
- The vacancy rate is substantially lower than the national average which suggests demand for premises is reasonably strong.
- The architectural quality of buildings is very good. The centre has a unique character, rich in diversity.
- The centre has a visually appealing public realm which is generally of a good environmental quality providing a pleasant shopping environment for customers. Most areas within the centre are relatively well maintained and clean.
- Portobello Road has good public transport links with both the underground stations within walking distance and buses providing convenient means of getting to and from the centre.

Weaknesses

- The centre can become congested at peak times, which can impact on movement through the centre.
- There is limited car parking provision within the centre. For visitors this is countered by the excellent public transport links, however, for traders who require vehicular access during busy periods this can cause problems.
- The centre contains a number of 'dead' frontages. The Portobello Court Estate detracts from the enclosed character of Portobello Road and does not engage with the street. North of the Portobello Road core and non-core frontages, where there is still market pitches, Portobello Road is enclosed by walls on either side, providing no permanent activity along this stretch.

18.0 LOCAL SHOPPING PROVISION

Introduction

18.1 The Core Strategy Interim Issues and Options Document (published February 2008) identifies 35 Local Centres within the Borough. NLP have visited and carried out an audit of each centre. The audits have been based on the following:

- the physical structure of the parade
- the size of each parade in terms of the number of commercial units
- the mix and diversity of retail and service uses
- the role of the centre in relation to different forms of shopping and customer groups; and
- levels of accessibility by public transport.

18.2 The results of the audit of local centres and parades are shown in Appendix G.

Local Needs Index

18.3 Our analysis and split the local centres into: *large* (more than 45 commercial units), *medium* (between 16 and 44 commercial units) or *small* (15 commercial units or less).

18.4 The key focus in auditing local centres has been in assessing the 'needs' of local residents and to what extent each centre is meeting these 'needs'. There is no clear definition of need, but it is considered that residents in the densely populated Borough could expect to find some or all of the following shops and services within easy walking distance of their home:

- food or convenience store suitable for top-up shopping;
- bank;
- Post Office;
- newsagent;
- off licence;
- takeaway, cafe or restaurant;
- public house;
- bookmakers;
- launderette;
- hairdressers; and
- chemist.

18.5 Each local centre has therefore been allocated a score out of 11, based on the number of categories of shops and services listed above (one point per category

represented) that are available in the centre. For example Ladbroke Grove Local Centre provides all eleven of the identified categories of shops and services, scoring 11 on the local needs index, which would suggest the local residents of the Ladbroke Grove Station area are relatively well served by their local shopping centre. By contrast, Kensington High Street (West) and Lowndes Street Local Centres only attract score of 2 on the local needs index, which would suggest a very limited level of a local needs are being met. In addition to this it is important to consider the ability of a local important parade in meeting top-up shopping needs. Therefore the number of convenience stores with the ability to provide local top-up shopping (e.g. a grocers, local corner shop or small supermarket) in the parade is also considered.

18.6 Clearly the local needs index is not a precise measure of whether a local shopping centre is meeting the needs of local residents, as there are many other factors to consider:

- the relative size of an important local parade will dictate the range of shops and services each centre can offer;
- the close proximity of other town centres, local centres and ‘*stand alone*’ shops means that local need may be met at an alternative location within walking distance and local needs are therefore still being met;
- the quality of the shopping centre or parade, in terms of its environment, type and range of retailers will effect how it is perceived and used by local residents; and
- the relative accessibility of each centre will be an important factor in how local people use the local shops and services. For example, a major traffic route, which is difficult for pedestrians to cross, may influence shopping patterns in the area.

18.7 It is considered that the local needs index provides a useful indicator of whether a local centre or important local parade is meeting some or all needs of local residents.

Local Needs Index Summary

18.8 Table 18.1 provides a summary of local centres within the Borough, including their accessibility by public transport (PTAL). A PTAL map for the Borough is shown in Appendix I. The local shopping centres vary significantly in size, from only 5 commercial retail units (Ifield Road) to as large as 98 (Golbourne Road). The key points are:

- 14 local centres are classified as small;
- 13 local centres are classified as medium; and
- 8 local centres are classified as large.

Table 18.1: Local Needs Index Summary

Local Centre Name	Size of Centre	Total Number of Units	Local Needs Index	No. of Convenience Stores	No. of Vacant Units	PTAL
Barlby Road	Small	7	5	2	1	3
Ladbroke Grove (North)	Small	14	6	0	1	4
Golborne Road (North)	Small	11	8	1	0	4
North Pole Road	Medium	24	9	2	4	2
Golborne Road	Large	98	10	5	18	4
St. Helens Gardens	Small	12	5	1	0	3
Ladbroke Grove Station	Large	45	11	4	0	4
All Saints Road	Medium	32	3	0	6	4
Westbourne Park Road	Small	12	3	1	2	4
Clarendon Cross	Medium	19	3	0	2	3
Holland Park Avenue	Large	47	7	2	3	3
Holland Road	Small	9	3	1	1	3
Napier Road	Small	9	5	1	4	4
Kensington High Street	Small	6	2	3	0	5
Commonwealth Institute	Large	52	8	3	7	5
Thackeray Street	Medium	25	3	0	5	5
Pembroke Road	Small	10	3	0	2	5
Stratford Road	Medium	20	8	2	0	4
Gloucester Road (North)	Large	62	8	2	2	4
Cromwell Road – Air Terminal	Small	13	3	0	2	4
Gloucester Road (South)	Large	59	8	2	2	5
Old Brompton Road (West)	Large	64	9	4	8	5
Old Brompton Road (East)	Medium	24	5	0	1	4
Ifield Road	Small	5	3	1	0	4
The Billings	Medium	20	3	0	4	4
Fulham Road – Old Church St	Medium	34	3	1	3	5
Walton Street	Medium	20	4	1	4	5
Lowndes Street	Medium	17	2	0	0	5
Pont Street	Small	14	3	0	1	5
Sloane Avenue	Small	11	4	0	0	5
Elystan Street	Medium	44	6	1	1	5
Chelsea Manor Street	Small	10	3	0	0	3
Lower Sloane Street	Medium	31	3	1	1	5
Worlds End	Large	50	9	2	5	4
Fulham Road/Brompton Cemetery	Medium	24	4	2	5	4
Total		954	n/a	45	95	n/a

Notes: Centre ranking based upon the number of identified 'key' retail/service unit types found in each centre, (highest 11, lowest 0).

Size of centre based on number of commercial retail units (A1, A2, A3, A4, A5, SG & Vacant).

Convenience stores includes all convenience retailers able to provide for top-up shopping, such as grocers, mini/supermarkets and local corner shop type retailers (butchers, bakers, newsagents and off licences whilst convenience stores, generally do not cover top-up shopping requirements).

Where a shop meets more than one 'key' identified need (e.g. a grocers with an off licence section) it may only score in one category of the index (e.g. as a top-up convenience store or as an off licence). This assumption is made to ensure a range and choice of retailers/services in meeting local needs.

All data based upon Kensington & Chelsea Borough Council Shopping Survey (2007) and NLP visit (2008) updates where applicable. PTAL information is from Kensington & Chelsea Transportation and Highways Department, accessibility range is from 1a and 1b (very poor) to 3 (moderate) to 6 (excellent).

Non retail/service units within the parades have been excluded (e.g. B1 Office, C3 Residential, D1, D2).

- 18.9 All of the large sized local centres are meeting most key local needs. Based on the local needs index, all 8 large sized local centres in the Borough are meeting at least 7 of the identified local needs. Of the 13 medium sized centres only North Pole Road and Stratford Road are meeting most key local needs with scores of 9 and 8 on the index respectively. 6 of the medium local centres are only meeting 3 of the key local needs and Lowndes Street medium local centre is only meeting 2 local needs.
- 18.10 Of the 14 small local centres within the Borough there is a wide range of scores on the local needs index. Golborne Road North meets 8 local needs, whereas Kensington High Street (west) local centre only meets 2 local needs. A further 7 small local centres only meet 3 local needs, whilst the remaining 5 small local centres meet between 4 and 6 local needs. 12 of the local centres were identified as not being able to provide for convenience top-up shopping as they did not have a shop capable of meeting this need. The close proximity of small local parades to other centres is reflected in the range of services they provide.
- 18.11 In addition to using the local needs index as an indicator of whether a local centre is meeting some or all needs of local residents it is important to consider more qualitative aspects of the centre, especially with regards to: environmental factors (e.g. cleanliness, quality of the urban realm and general attractiveness); the range and quality of shops and services; and accessibility (e.g. car parking and public transport). During NLP's visit to each centre these factors were considered and the results are summarised in Appendix G.

The Need for New Local Centres

- 18.12 Plan 3 in Appendix I shows the areas of the Borough that are beyond 300 metres of an International, Major, District or Local Centre. The main built up residential areas which lie beyond 300 metres from a centre, seem to be located in the north of the Borough and the south west corner of the Borough. It may be appropriate to consider whether additional local provision is required in these areas to address areas of deficiency. Provision within mixed use developments could be considered. The Lots Road Power Station redevelopment is expected to include local shopping provision which may help to address the area of deficiency in the south west corner of the Borough. New residential and employment development at Kensal Green in the

north of the Borough could also be served by new local shops and services within the development area, although this area has good access to the existing Sainsbury store.

- 18.13 There may be potential to expand local shopping provision around the Latimer Road Station area to provide a new local centre, which would also help to improve provision in the north west of the Borough. Crossrail proposals could also provide an opportunity to expand local shopping provision in the north of the Borough at Ladbroke Grove North (which currently has a Local Needs Index of 6).

19.0 THE NEED FOR NEW RETAIL DEVELOPMENT

Introduction

- 19.1 This section assesses the quantitative and qualitative scope for new retail floorspace in the Royal Borough of Kensington & Chelsea during the period from 2008 to 2028. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping. A qualitative assessment of the range and scale of existing shopping facilities has been undertaken.
- 19.2 All monetary values expressed in this analysis are at 2006 prices, consistent with Experian's base year expenditure figures for 2006. Expenditure data for 2007 and 2008 is not currently available and 2006 is the most up to date information.

Methodology and Data

- 19.3 The quantitative analysis is based on a study area defined for the shopping facilities in the Borough along with nearby centres outside the Borough, for example, Hammersmith, Shepherds Bush, Bayswater, Putney, Clapham Junction, Wandsworth and Victoria. The study area has been divided into 10 zones or sectors (1 to 10) for more detailed analysis.
- 19.4 The study area is shown in Appendix A. The extent of the study area is based on postcode area boundaries and the proximity of competing shopping destinations, i.e. shopping facilities within the Borough are expected to attract a significant proportion of their trade from residents within the study area, although there will be an element of trade drawn from beyond the study area.
- 19.5 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2006 have been obtained.
- 19.6 Experian's latest national expenditure projections between 2006 and 2016 have been used to forecast expenditure within the study area. Unlike previous expenditure growth rates provided by The Data Consultancy (formerly URPI), which were based on past trends, Experian's projections are based on an econometric model of

disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of disaggregated consumer spending volumes, prices and value. The model incorporates assumptions about income and price elasticities.

- 19.7 Experian provides recommended growth rates for the period 2006 to 2011, and 2006 to 2016. The recommended growth rates for the period 2006 and 2011 are 0.7% per annum for convenience goods and 3.8% per annum for comparison goods. These growth rates, particularly for comparison goods, are lower than actual recent growth trends up to 2006, but in our view provide a more realistic forecast of future growth, particularly in the light of the current credit crunch and economic downturn. We believe these growth rates of the most appropriate for planning purposes, taking on board the likely effects of the economic downturn. These growth rates have been used in this study to forecast expenditure per capita up to 2011. Adjusted growth rates (0.9% and 3.2% per annum for convenience and comparison goods respectively) have been adopted to project expenditure between 2011 and 2016, consistent with Experian's overall growth forecasts for 2006 to 2016. Growth in expenditure beyond 2016 is based on 0.8% and 3.5% per annum for convenience and comparison goods respectively, in line with Experian's growth forecast for 2006 to 2016.
- 19.8 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors including:
- information from the household and in-street survey results;
 - the level and quality of retail facilities and retail floorspace surveys; and
 - the relative distance between shopping centres and study area zones.
- 19.9 The total turnover of shops within the study area is estimated based on expected penetration rates and the expected level of expenditure inflow. These turnover estimates are converted into average turnover to sales floorspace densities. Turnover densities are compared with company average turnover to sales floorspace densities for and benchmark turnover levels in order to identify potential surplus capacity or deficit.

Population and Spending

- 19.10 The study area population for 2001 to 2028 is set out in Table 1B in Appendix B, based on the 2001 Census and the GLA's ward based population projections. Population in the study area is forecast to increase by 14% between 2001 to 2028. Table 2B in the Appendix B sets out the forecast growth in spending per head for convenience goods within each zone in the study area. Comparison forecasts of per capita spending are shown in Table 1C.
- 19.11 The levels of available spending are derived by combining the population in Table 1B and per capita spending figures in Tables 2B and 1C. For both comparison and convenience spending, a reduction has been made for special forms of trading such as mail order, e-tail (non-retail businesses) and vending machines.
- 19.12 Special Forms of Trading (SFT) and non-store activity is included within Experian's goods based expenditure estimates. "*Special forms of trading*" includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling (e.g. tupperware parties), market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship to the demand for retail floorspace.
- 19.13 The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian has attempted to provide projections for special forms of trading and E-tailing (Retail Planner Briefing Note 5.1 – November 2007).
- 19.14 This Experian information suggests that non-store retail sales in 2008 is:
- 5.6% of convenience goods expenditure; and
 - 12.1% of comparison goods expenditure.
- 19.15 Experian predicts that these figures will increase to 7.3% and 14.4% by 2013, and will then stabilise thereafter.
- 19.16 For convenience expenditure 5% of the 5.6% is estimated to be E-tailing, and the rest 0.6% is other forms of SFT e.g. mail order. E-tailing in 2004 was broken down into E-tailing through retail businesses (e.g. Tesco and Sainsbury) at 1.1% and non-retail

businesses (0.5%). The E-tailing split for retail and non-retail businesses was approximately 70:30 in 2004.

- 19.17 For comparison expenditure in 2008, 9.5% of the 12.1% is estimated to be E-tailing, and the rest 2.6% is other forms of SFT e.g. mail order. E-tailing through retail businesses with shop/store premises (e.g. Next and Argos) was 1.3% and for non-retail businesses 1.8% (e.g. Amazon and other businesses with no shops/stores) in 2004. The E-tailing split for retail and non-retail businesses was approximately 40:60 in 2004.
- 19.18 Experian provide projections for E-tailing and other SFT. These projections have been used to exclude expenditure attributed to e-tailing through non-retail businesses, which will not directly impact on the demand for retail floorspace. Based on Experian data SFT (including non-retail e-tailing but excluding e-tail through retail businesses) is 2.0% and 8.3% of total convenience and comparison goods expenditure respectively in 2008. The projections provided by Experian suggest that these percentages could increase to 2.5% and 9.2% by 2012. The amount of e-tail expenditure through non-retail businesses is expected to increase significantly in proportional terms, but as a proportion of total expenditure this sector is expected to remain relatively insignificant for the foreseeable future.
- 19.19 The levels of available spending are derived by combining the population in Table 1B and per capita spending figures in Tables 2B and 1C (See Appendix A, B and C). For both comparison and convenience spending, a reduction has been made for special forms of trading such as mail order and vending machines.
- 19.20 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 26.9% from £1,242.65 million in 2008 to £1,576.80 million in 2028, as shown in Table 3B.
- 19.21 Comparison goods spending is forecast to increase by 112.6% from £2,331.58 million in 2008 to £4,957.74 million in 2028, as shown in Table 2C. These figures relate to real growth and exclude inflation.

Existing Retail Floorspace

- 19.22 Existing convenience goods retail sales floorspace within Kensington & Chelsea is 45,495 sq m net as set out in Table 1A, Appendix A. This floorspace figures excludes comparison sales floorspace within food stores (3,502 sq m net within the Borough).

Convenience shopping provision has been separated into four main categories, i.e. large food superstores suitable for bulk food shopping trips (with a sales floorspace of at least 2,500 sq m net, as defined by PPS6); large supermarkets (between 1,000 to 2,499 sq m net) which are suitable for both main and top up food shopping trips; small supermarkets (200 to 999 sq m net) which cater for primarily for basket and top up food shopping trips; and small convenience shops (less than 200 sq m net) which will include small specialist shops such as butchers, bakers, off licences and newsagents.

19.23 Comparison goods retail floorspace within Kensington & Chelsea is 269,702 sq m net as shown in Tables 3A, Appendix A. This figure includes comparison sales floorspace within large food stores (3,502 sq m net).

Existing Spending Patterns 2008

Convenience Shopping

19.24 The results of the household shopper and in-street visitor surveys undertaken by NEMS in February 2008 have been used to estimate existing shopping patterns within the study area. The estimates of market share or penetration within each study area zone are shown in Table 4B, Appendix B.

19.25 The level of convenience goods expenditure attracted to shops/stores in Kensington and Chelsea in 2008 is estimated to be £516.19 million as shown in Table 5B, Appendix B. The market share for the Borough's stores/shops within the study area as a whole is estimated to be about 37%. The market share in the Kensington & Chelsea part of the study area (Zones 1 to 3) is over 85%. The retention of convenience expenditure within the Borough is relatively high and there is limited scope to claw back expenditure leakage from the Borough. Many residents within the other peripheral zones have good access to other large food stores in other Boroughs (e.g. in Hammersmith/Fulham, Brent, Wandsworth and Westminster).

19.26 Convenience stores/shops within Kensington & Chelsea's main centres have a much broader role than merely serving local residents within the Borough. They also cater for the needs of commuters, tourist visitors and occasional shoppers

19.27 The estimated inflow of convenience expenditure from beyond the study area (£57 million or 11% of total turnover) is based on the in-street survey of visitors within the main centres. Across all centres 58% of respondents interviewed live outside the study area. The average expenditure on food and grocery goods amongst these

visitors was only £2.80, compared with over £9.10 for each visitor who lives within the study area. If correct and representative these figures imply the inflow of convenience expenditure from beyond the study area would be less than 30% of total turnover within the main centres.

19.28 However, the visitor surveys were conducted during weekdays and Saturdays, and only in the main centres. In general a higher proportion of local residents is likely to undertake their main food shopping trips in the evenings (e.g. after work) and at the weekends including Sundays. In addition the in-street survey did not include shopping provision outside the main centres, including the three out-of-centre food superstores in the Borough, where the proportion of customers from outside the study area is likely to be much lower than in the main centres. Local shopping provision across the Borough is also likely to attract a lower proportion of customers from outside the study area. The inflow of expenditure to food superstores is estimated to be not more than 5%. For other large food stores, predominantly within the main centres the inflow estimate is 15%. For small stores and shops, within local centres and main centres an average inflow of 10% is adopted.

19.29 Company average turnover to sales floorspace densities are available for major food store operators. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores listed in Table 1A, Appendix A, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a helpful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms. Estimates for comparison sales floorspace within large food stores have been deducted from the figures in Table 1A, for consistency with the use of goods based expenditure figures. Average sales densities are not widely available for small convenience shops, particularly independent retailers. The total benchmark turnover of existing convenience sales floorspace within food stores (over 200 sq m net) in the Borough is £284.90 million, as shown in Table 1A in Appendix A.

19.30 Our assessment suggests convenience goods expenditure attracted to the Borough in 2008 is £516.19 million, of which £414.81 million is taken by large food stores (over 200 sq m net). These figures suggests that food store convenience sales floorspace in the Borough is collectively trading about 46% above the benchmark turnover, +£129.91 million. In particular large food superstores (over 2,500 sq m net) in the Borough appear to be trading significantly above average (+57%).

Table 19.1: Convenience Trading Levels in 2008 (£ millions)

Centres	Available Expenditure	Benchmark Turnover	Difference
Food superstore (over 2,500 sq m net)	153.64	97.76	+£55.88
Other food stores (over 200 sq m net)	261.17	187.14	+£74.03
Small stores/shops (under 200 sq m net)	101.38	n/a	n/a
TOTAL	516.19	n/a	+£129.91

Source: Table 1A (Appendix A) and Table 5B & 11B (Appendix B)

19.31 Existing trading levels within food stores in the Borough appears to be high, which may reflect the higher than average convenience expenditure per capita (£1,783 per capita per annum) in the study area, which is 9.2% higher than the national average. Within Kensington & Chelsea Borough convenience expenditure per capita is 19% above the national average. These expenditure figures suggest it may be reasonable to expect food stores in Kensington & Chelsea to continue to trade significantly above national average, with customers spending more on higher value goods as well as a higher volume of goods. Furthermore overheads and staff costs are likely to be higher in Central London than the national average, and operators may need to trade at a higher than average rate to cover these higher costs.

Comparison Shopping

19.32 The assessment of existing shopping patterns in 2008 indicates that there is a relatively high level (over 60%) of comparison expenditure retention within the Borough (zones 1 to 3). The Borough's comparison shopping facilities also attracts a high proportion of their trade from residents living in neighbouring Boroughs and from beyond the study area (including tourist visitors and commuters). In total only about 25% of the turnover of comparison shops within the Borough is estimated to be derived from residents living within the Borough. A further 20% comes from residents within the remainder of the study area, and therefore 55% comes from customers who do not live in the study area.

19.33 These figures indicate that comparison shops within Kensington & Chelsea have a much broader role than merely serving local residents within the Borough. Many of the Borough's centres also cater for the needs of commuters, tourist visitors and occasional shoppers from across London, the South East Region and beyond.

19.34 The estimated comparison goods expenditure currently attracted by shopping facilities within the Borough is £1,737.5 million in 2008, as shown in Table 3C, Appendix C. This expenditure figure is based on the household and in-street survey

results. The market share of the Borough within the study area as a whole is estimated to be about 34%. The market share in the Kensington & Chelsea part of the study area (Zones 1 to 3) is about 61%. Comparison expenditure within the Borough is relatively high, bearing in mind the proximity of shopping destinations in Westminster. The main comparison destinations outside the Borough in terms of expenditure from the study area as a whole are:

- Westminster = £566.66 million (24.3%);
- Hammersmith & Fulham = £230.56 million (9.9%);
- LB Brent (incl. Brent Cross) = £204.21 million (8.8%);
- LB of Wandsworth = £187.87 million (8.1%); and
- Ealing/Hounslow = £67.41 million (2.9%).

19.35 The estimated inflow of comparison expenditure from beyond the study area (£950 million or 55% of total turnover) is based on the in-street survey of visitors within the main centres. These survey results indicate that the inflow of visitors from beyond the study area is particularly high in the main centres in the south of the Borough, i.e. Knightsbridge, King Road East and South Kensington. An average inflow figure of 65% has been adopted for the main centres in the south of the Borough. In the central and north part of the Borough, the inflow of visitors from beyond the study area is also high, particularly within Portobello Road, but overall a slightly lower inflow estimate (40%) is adopted for the main centres in this area. For local shops spread across the Borough an inflow of estimate of 5% is adopted.

19.36 These comparison shopping patterns indicate that residents have a wide choice of comparison shopping destinations, which are reasonably accessible by public transport and on foot. In terms of comparison shopping the centres in the south of the Borough (Zone 3 as shown in Appendix A), i.e. Knightsbridge, Kings Road, Fulham Road, South Kensington, are located close to each other and have overlapping catchment areas. These centres attract a high proportion of tourist customers and the need for new development in these centres can be assessed collectively (referred to as main centres in South Kensington & Chelsea in Table 19.2). Other centres in the centre and north of the Borough (zones 1 and 2) serve a slightly different catchment area and these centres have been assessed separately (referred to as main centres in North/Central Kensington & Chelsea in Table 19.2).

19.37 It is likely that most households will do all of their comparison shopping at more than one destination, and one would expect cross flows of expenditure into and out of the Borough. This pattern of shopping is likely to continue in the future. The level of expenditure attracted to each destination in the Borough is shown in Table 19.2.

19.38 The average sales density of all comparison sales floorspace in the Borough is estimated to be £6,442 per sq m net. The average sales density in the main centres in the north/central area of the Borough is relatively high (£7,592 per sq m net), but this average is dominated by the largest centre, Kensington High Street (with 43,000 sq m net of comparison sales floorspace). The turnover density in the main centres in the South of the Borough (dominated by Knightsbridge and King's Road) is also relatively high (£6,109 per sq m net). Other comparison shopping facilities including local shops have a lower average sales density (£4,904).

Table 19.2: Comparison Trading Levels in 2008

Location	Available Expenditure £M	Comparison Sales Floorspace Sq M Net	Average Sales Density £ Per Sq M Net
Main Centres – South K&C (1)	1,118.48	183,100	6,109
Main Centres – North/Central K&C (2)	548.88	72,300	7,592
Main Centres Sub-total	1,667.36	255,400	6,528
Other outside main centres in K&C	70.14	14,302	4,904
TOTAL	1,737.50	269,702	6,442

(1) South K&C includes Knightsbridge, Kings Road, Fulham Road and South Kensington (Zone 3).

(2) North/Central K&C covers Kensington High Street, Portobello Road, Earl's Court, Notting Hill Gate and Westbourne Grove (Zones 1 and 2)

Source: Table 2A (Appendix A) and Table 3C & 8C (Appendix C)

19.39 Available information indicates that sales densities amongst comparison retailers vary significantly. Mintel's Retail Rankings 2008 provided company average sales density information for a selection of national high street retailers. The average for high street multiple comparison retailers, where sales density data is available within Mintel's Retail Rankings, is £5,294 per sq m net, as shown at the end of Appendix A. Based on our recent experience across the country average sales densities for comparison floorspace within town centres can range from £3,000 to £7,000 per sq m net, and the average derived from Mintel information is broadly in the middle of this range. The higher end of this range is usually only achieved by very successful shopping centres, which reflects the higher proportion of quality multiple retailers and high rental levels/property values.

19.40 Existing comparison trading levels within the main centres appear to be high, which may reflect the higher than average comparison expenditure per capita (£3,345 per capita per annum) in the study area, which is 19.2% higher than the national average. Within Kensington & Chelsea Borough comparison expenditure per capita is 34% above the national average. These expenditure figures suggest it may be reasonable

to expect comparison shop in Kensington & Chelsea to trade above national average, and in order to cover higher overheads and staff costs.

- 19.41 Based on this information, comparison shopping facilities across the Borough are on average trading healthily in 2008.

The Potential Impact of the Growth in Home Shopping

- 19.42 Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the Internet. Trends within this sector may well have implications for retailing within Kensington & Chelsea. Therefore, it will be necessary to carefully monitor the growth within this sector particularly in the long term and the effect that it may have on diverting expenditure that might otherwise be spent in shops.
- 19.43 In broad terms, home/electronic shopping from non-retail businesses is classified by Experian as “*special forms of trading*”, as mentioned previously, this includes other forms of retail expenditure not spent in shops e.g. mail order. Special forms of trading have been excluded from the quantitative capacity analysis within this study because this expenditure does not affect the need for retail floorspace. The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.
- 19.44 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector. However, there is still uncertainty about its longer-term prospects. Verdict Research suggests that online retail sales could account for about 6.8% of total retail sales by 2010, which is consistent with Experian’s projections. However, if this growth is achieved it may (to a large extent) be at the expense of other forms of home shopping such as catalogue and mail order shopping. In addition the implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators. Therefore, growth in on-line sales may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet

shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

Quantitative Capacity for Additional Convenience Floorspace

Future Scenarios

- 19.45 The assessment of quantitative capacity for additional convenience retail floorspace has been based on two separate scenarios. The low growth scenario assumes that food stores in the Borough will continue to trade above company average sales densities, for the reasons outlined in paragraph 19.31. This scenario assumes that new development will reduce the future trading performance of food store floorspace to 20% above benchmark turnover levels (i.e. a reduction from the current +46%). This 20% higher than average level of trading may be reasonable for Kensington & Chelsea given the higher than national average expenditure levels and higher property overheads. The high growth scenario assumes new development will reduce existing trading levels to national benchmark levels, i.e. there will be more expenditure available for new development.
- 19.46 The level of available convenience goods expenditure in 2012, 2015, 2020 and 2028 is shown at Tables 7B to 10B in Appendix B, and is summarised in Table 11B. The future expenditure projections are based on the existing 2008 market shares derived from the household survey results, adjusted to take into account proposed developments.
- 19.47 There is a degree of uncertainty regarding food store provision in neighbouring Boroughs in the future, e.g. it is unclear whether future development (if permitted) at Battersea Power Station, Brent Cross or at Victoria Station will include new food stores. However, current information suggests Westfield's new shopping centre at White City will include Waitrose and Wholefoods food stores and the proposed Mark & Spencer store will include a large food hall. A Waitrose store is also proposed at Hammersmith and a food store of over 4,500 sq m gross is proposed at Edgware Road in Westminster. If implemented these food stores will change convenience shopping patterns in the study area.
- 19.48 The expenditure projections take into account these food store proposals. The adjusted market shares (penetration rates) are shown in Table 6B Appendix B.

19.49 The total level of convenience goods expenditure available for shops in Kensington & Chelsea at 2012, 2015, 2020 and 2028 are summarised in Tables 11B and 12B in Appendix B. These tables take into account the population and expenditure projections shown in Table 1B to 3B in Appendix B. The benchmark turnover of existing convenience floorspace has been subtracted from the estimates of available expenditure to provide surplus expenditure estimates for the high growth scenario, as shown in Table 11B, Appendix B. The level of surplus expenditure is expected to fall from £129.91 million in 2008 to £85.50 million in 2012 due to the implementation of new stores at White City, Westminster and Hammersmith, which should absorb some of the existing expenditure surplus in the Borough. Surplus expenditure for the low growth scenario is shown in Table 12B.

19.50 Table 11B and Table 12B assume that the turnover of existing convenience floorspace within the Borough will increase in real terms in the future, an increase of 0.3% per annum. PPS6 indicates that retail studies should assess the potential for existing floorspace to increase its productivity in the future.

19.51 Historically, limited or no growth in turnover density has been assumed by most retail planners for convenience floorspace. However, recent information published by Experian recommends a growth rate of 0.6% per annum for convenience businesses. However, we believe that this figure is too high for the following reasons:

- the historic trends measure increases in sales density on gross floorspace. Over time there has been a trend towards increased net to gross ratios both in existing stores and as new floorspace adds to and replaces older floorspace. This means that a constant sales density on net floorspace will have led to an increase in sales density on gross floorspace. As our analysis going forward deals with net floorspace some allowance should be made to strip out this effect;
- as Experian recognise, past growth in sales density will have been influenced by one-off changes such as the introduction of Sunday trading and significant increases in trading hours which are unlikely to be repeated to the same extent in the future, and therefore 0.6% is unlikely to be achieved in the future;
- Experian's historic analysis includes the effect of old floorspace being replaced and added to by more modern and efficient floorspace potentially with higher sales densities. The growth rate measured therefore is not simply an increase in sales density on a static stock of floorspace. At the local level our figures make specific allowance for changes in sales density that will arise from new commitments and proposals trading at modern sales density and a separate assumption is needed for the change in sales density on the stock of existing floorspace.

19.52 On this basis, we believe that a growth rate of 0.3% is appropriate for convenience sales floorspace only. However as a sensitivity analysis, projections assuming

floorspace trades 20% above benchmark levels are shown in Table 12B in Appendix B.

19.53 The surplus expenditure projections are converted into potential new floorspace, for the high growth scenario shown in Table 11B, and the low growth scenario in Table 12B in Appendix B. The high growth figures assume that food stores (i.e. stores with a net sales floorspace of 200 sq m net or more) will have an average sales density of about £11,000 per sq m net at 2008 (inflated by 0.3% per annum up to 2020). The low growth projections assume a figure 20% higher.

High Growth Scenario

19.54 In the high growth scenario estimated convenience expenditure is projected to exceed the benchmark turnover of existing floorspace in the Borough by £85.50 million, see Table 11B in Appendix B. Proposed food stores in neighbouring Boroughs are expected to help relieve some of the high trading within large food stores in Kensington & Chelsea. Nevertheless the projections suggest there is still scope to improve convenience shopping provision within the Borough if suitable opportunities are available. By 2015, estimated convenience expenditure is projected to exceed the benchmark turnover by £100.84 million. The long term forecasts are £124.53 million in 2020 and £147.47 million in 2028.

19.55 These surplus expenditure figures indicate that further convenience retail development could be supported in the Borough, over and above the proposed stores in neighbouring boroughs. The floorspace projections at the bottom of Table 11B Appendix B, suggest that up to 8,638 sq m net (12,341 sq m gross) of food store (over 200 sq m net) floorspace could be accommodated in the Borough by 2015 and 745 sq m (1,064 sq m gross) net in smaller stores/shops (9,383 sq m net in total or 16,898 sq m gross). This scale of new convenience sales floorspace is likely to be difficult to physically accommodate within the Borough's existing centres.

Low Growth Scenario

19.56 In the low growth scenario estimated convenience expenditure is projected to exceed the benchmark turnover of existing floorspace in the Borough by £42.65 million in 2015, see Table 12B in Appendix B. The longer term forecasts are £65.46 million in 2020 and £86.97 million in 2028. The floorspace projections at the bottom of Table 12B Appendix B, suggest that 2,882 sq m net (4,117 sq m gross) of food store (over 200 sq m net) floorspace could be accommodated in the Borough by 2015 and 745

sq m (1,064 sq m gross) net in smaller stores/shops (3,627 sq m net in total or 5,181 sq m gross). The low growth scenarios suggest there is still scope for an additional food superstore in the Borough by 2015.

Quantitative Capacity for Additional Comparison Floorspace

Future Scenarios

- 19.57 The quantitative capacity for additional comparison retail floorspace has been based on two separate scenarios. The first low growth scenario adopts future expenditure projections based on the existing 2008 market shares derived from the household survey results, but adjusted to take into account future development in neighbouring boroughs. The projected the level of comparison goods expenditure available to shops in Kensington & Chelsea at 2012, 2015, 2020 and 2028, as shown in Tables 4C, 6C, 8C and 10C in Appendix C.
- 19.58 The second high growth scenario also adopts expenditure projections based on the existing 2008 market shares, but assumes these 2008 market shares will remain constant in future. The projected the level of comparison goods expenditure available to shops in Kensington & Chelsea at 2012, 2015, 2020 and 2028, as shown in Tables 5C, 7C, 9C and 11C in Appendix C.
- 19.59 Major retail development in neighbouring Boroughs, in particular the White City development due to open before the end of 2008, will change existing shopping patterns in the study area. The trade drawn from comparison shopping facilities within Kensington & Chelsea will be significant, because this development is located within the heart of the study area, just outside the Borough boundary. Many Borough residents interviewed in the household survey suggested they would consider regularly shopping at White City. The catchment area will encompass most if not all of Kensington & Chelsea. In addition to the White City scheme, there are other major development proposals in neighbouring Boroughs that will if implemented affect shopping patterns in the study area.
- 19.60 The London Plan Sub-Regional Development Frameworks (SRDF) for Central London and West London (May 2006) identify a number of strategically significant retail developments in Central London and other parts of London in the pipeline. Comparison developments listed (Table 1D.3 Annex 4) that could affect shopping patterns in the study area included:

- White City - 83,575 sq m comparison floorspace;
- Brent Cross extension - 55,000 sq m comparison floorspace;
- Battersea Power Station - 41,805 sq m comparison floorspace; and
- Elephant & Castle - 74,320 sq m comparison floorspace.

19.61 This list included developments without planning permission and some of these development proposals and other proposals in pipeline are at an early stage. There are other emerging redevelopment proposals not included in the SRDF for example in proposals in Clapham Junction, Wandsworth and Victoria. The implementation and timing of these developments is uncertain. Nevertheless, it is reasonable to assume that major improvements to comparison shopping facilities will be implemented in neighbouring Boroughs in next decade.

19.62 The Westfield shopping centre at White City is expected to be completed in 2008, and will affect shopping patterns in the short to medium term up to 2012 and 2015. The expenditure projections in Appendix C take into account the proposed Westfield development at White City. The amended market shares (penetration rates) are shown in Table 4C Appendix C. We believe the projections in this low growth scenario are probably the most realistic, based on the likely scale of development in neighbouring Boroughs.

19.63 From 2012 onwards market shares are assumed to remain constant within both scenarios, on the basis that improvements to comparison shopping provision in the Borough will be counter-balanced by emerging developments in neighbouring Boroughs.

Expenditure Growth from Tourists and Commuters

19.64 The future growth in comparison expenditure within the study area is generated by an increase in the resident population and growth in expenditure per person. However as indicated earlier, about 55% of the turnover of comparison shops in the Borough is generated from visitors/commuters who live outside the study area. It does not follow that the growth in visitor/commuter numbers will increase in line with population growth in the study area, but it seems reasonable to assume that the average expenditure per visitor/commuter will grow in line with Experian's expenditure projections per person.

- 19.65 The Central London Tourism Development Framework 2006-2009 suggests Central London attracted 100.3 million day visits in 2006 and 18.5 million over-night visits. These visits were estimated to generate £9.5 billion. Kensington & Chelsea share of these visits was 10% for day visitors and 14.6% for staying visitors, and 14.3% of tourist expenditure.
- 19.66 The Mayor's Plan for Tourism indicates London's growth as a leading tourism destination will be supported. However, the Mayor also wishes to encourage greater dispersal of tourism across London. Recognising the need for dispersal away from existing tourist destinations, but overall growth in visitor numbers across London as a whole, it is reasonable to assume that the number of tourist visitors in Kensington & Chelsea will remain stable in the future. Major retail development at White City and other areas (e.g. Victoria and Battersea) may reduce Kensington & Chelsea's share of retail expenditure generated by tourists, which may offset any benefits in terms of increased visitor numbers in London.
- 19.67 The London Plan indicates London provides about 4.6 million jobs, of which a fifth are commuters into London. The London Plan also suggests employment in London could increase by about 900,000 (20%) between 2006 and 2028. Growth in employment in West London during this period is projected to be slightly lower (+15% or 140,000 new jobs). Much of the employment growth in West London will be concentrated in new opportunity areas e.g. Heathrow. The growth in employment within or near the main shopping centres in the Borough is likely to be much lower than 15%. Therefore the number of commuters shopping within the Borough is unlikely to increase by 15%. Furthermore, major retail development at White City and at Victoria may reduce Kensington & Chelsea share of commuter's retail expenditure.
- 19.68 The retail capacity assessment in this report assumes that comparison retail expenditure generated from tourist visitors, commuters and occasional shoppers who live outside the study area will grow in line with growth in expenditure per person, but no increase in the number of customers is assumed for both scenarios.

Low Growth Scenario

- 19.69 The change in comparison goods expenditure available for shops in the Borough between 2008 and 2028, based on the low growth scenario (adjusted market shares) is summarised in Table 12C, in Appendix C. Future available expenditure is compared with the projected benchmark turnover of existing retail floorspace in order

to provide estimates of surplus/deficit expenditure. This table takes into account the population and expenditure projections shown in Table 1B, 1C and 3C in Appendix B and C.

19.70 The projections suggest that the impact of development White City will absorb a significant amount of comparison expenditure growth in the Borough from 2008 to 2012. However, continued growth in comparison expenditure should generate an expenditure surplus of £146.95 million in 2015 and £403.25 million in 2028.

19.71 Surplus expenditure projections are converted into new comparison goods floorspace at the bottom of Table 12C Appendix C. New floorspace within the main centres is expected to have an average sales density of £6,528 per sq m net inflated by 1.5% per annum up to 2028, in line with the 2008 main centre average. An average sales density of £4,904 per sq m net is adopted for other shopping facilities outside the main centres.

19.72 Tables 12C and 13C assume that the benchmark turnover of existing and new comparison floorspace within the Borough will increase in real terms in the future, an increase of 1.5% per annum. Historically a growth rate of between 1% to 1.5% per annum has been widely adopted by retail planners. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio. Allowing for this growth to be absorbed by existing retailers represents a cautious approach to forecasting future needs, and this allowance may help existing centres maintain their vitality and viability in the future. It effectively allows for existing retail outlets to increase their turnover to help them to compete with new provision. Recent information provided by Experian recommends a slightly higher growth rate of 2.2%. However, we believe this recommended range of rates is too high, primarily for the following reasons:

- Experian's growth rate is based on past trends during the period 1986 to 1999. During this period comparison expenditure grew rapidly (5.8% per annum). The forecast rate of growth in comparison expenditure adopted in this study is much lower (about 3.8%). Growth in turnover efficiencies and expenditure growth are inextricably linked, therefore it is unlikely that the Experian recommended growth in turnover efficiencies (2.2%) will be experienced if future growth in expenditure is only 3.8% per annum.
- an element of the past growth in turnover efficiency between 1986 and 1999 will have related to a qualitative improvement in the overall stock of retail floorspace, i.e. the development of modern shopping centres and out-of-centre stores. As a

result it would be wrong to assume that existing retail floorspace can increase its turnover efficiency at the same rate as suggested by national figures.

- Experian's growth rate is based on gross floorspace rather than net sales. Therefore, an element of the past growth in turnover density will relate to improvements in net to gross ratios e.g. reductions in storage. It does not follow that improvements to net to gross ratio will continue at the same rate in the future.

19.73 Furthermore existing comparison sales floorspace in the Borough appears to be trading very healthily in 2008. For these reasons a turnover efficiency growth rate of 1.5% per annum has been adopted, slightly lower than the range recommended by Experian, and consistent with the top end of the range historically adopted by retail planners. However as a sensitivity analysis, floorspace projections adopting a higher growth rate (2.2%) are shown in Table 14C in Appendix C.

19.74 By 2015, estimated comparison expenditure is projected to exceed the benchmark turnover in the Borough by £146.95 million, as shown in Table 12C in Appendix C. However, there is only a small expenditure surplus in the central/north part of the Borough due to the impact of the White City development, which suggests there is limited scope for further comparison sales floorspace in this area, based on adjusted market shares. Surplus expenditure in the south of the Borough could support 19,749 sq m net (26,332 sq m gross) in the main centres by 2015, and a further 711 sq m net (948 sq m gross) in other local centres in the Borough. Longer term projections are shown at the foot of Table 12C.

High Growth Scenario

19.75 The growth in comparison goods expenditure available for shops in the Borough based on the high growth scenario (constant market shares) between 2008 and 2028 is summarised in Table 13C, in Appendix C.

19.76 The projections assume no impact or trade diversion to White City or other developments. Based on this assumption, comparison expenditure growth available in the Borough between 2008 to 2012 will generate an expenditure surplus of £164.11 million in 2012, increasing to £295.31 million in 2015 and £582.48 million in 2020.

19.77 Surplus expenditure projections are converted into new comparison goods floorspace at the bottom of Table 13C Appendix C.

19.78 Surplus expenditure at 2015 could support 38,906 sq m net (51,876 sq m gross) in the main centres by 2015, and a further 2,467 sq m net (3,289 sq m gross) in other

local centres in the Borough. Longer term projections are shown at the foot of Table 13C.

The Qualitative Need for Retail Development

Food and Grocery Shopping

19.79 Most households tend to undertake two kinds of food and grocery shopping trips, i.e. a *main* shopping trip generally made once a week or less often and *top-up* shopping trips made more frequently. Many households will also undertake bulk food shopping trips, particularly households who have access to a car for shopping. The availability of a wide range of products and free surface level car parking are important requirements for bulk food shopping trips. Large supermarkets or superstores, defined as over 2,500 sq m net or more in PPS6, are the usual destination for these types of shopping trip. However, in Kensington & Chelsea a higher proportion of household shop at smaller stores, by bus or on foot, when compared with other parts of the Country and outer London. This is reflected in the existing mix of food store in the Borough. The provision of food stores in the Borough are shown in Table 1A in Appendix A. The distribution of food stores is shown on Plan 2 in Appendix I.

19.80 There are three food superstores in the Borough (PPS6 definition), i.e. Sainsbury stores at Ladbrooke Grove and Cromwell Road and Tesco West Cromwell Road. However there are a number of other food superstores within neighbouring Boroughs, as follows:

- Asda, Clapham Junction;
- Sainsbury, Nine Elms;
- Sainsbury, Townmead Road, Fulham;
- Sainsbury, Pimlico;
- Tesco, Willesden;
- Asda, Park Royal;
- Morrison's, Acton;
- Tesco, Hammersmith;
- Sainsbury, Chiswick.

19.81 The proposed Waitrose stores at White City and Hammersmith and a proposed new store at Edgware Road will further improve food superstore provision close to the Borough boundary.

19.82 In addition to these superstore, there are also five other large food stores (with a sales area of between 1,000 to 1,500 sq m net) within the Borough, which are

suitable for main and bulk food shopping, excluding Harrods Food Hall and Wholefoods.

- 19.83 These food stores are the dominant shopping destinations used by residents in the Borough for main/bulk food shopping. Households in the south and central parts of the Borough have a good choice of large food stores, including at least two superstore within two kilometres of their home, i.e. two Tesco superstores (Hammersmith and Cromwell Road West) and three Sainsbury stores (Fulham, Pimlico and Fulham). There are no obvious locational areas of deficiency in large food store provision in this part of the Borough, i.e. south of Holland Park Road.
- 19.84 Residents in the north of the Borough have only one food superstore (Sainsbury Ladbrooke Grove) and no large food stores over 1,000 sq m net. The provision of food stores at White City will improve choice for residents in this area. However, there should be scope to improve food store provision in the north of the Borough, without harming small shops and market stalls.
- 19.85 These large food stores (over 1,000 sq m net) are supported by a relatively good range of smaller supermarkets and convenience stores, as shown in Tables 1A and a large number of small convenience shops. There are a number of small stores (200 sq m net to 700 sq m net) that provide basket and top-up shopping facilities including three M&S food simply stores, four Tesco Express stores and four Sainsbury Local stores. There are no discount food retailers within the Borough i.e. Lidl or Aldi.

High Street Comparison Shopping

- 19.86 A detailed audit and qualitative analysis of shopping provision within the town and local centres is set out in Sections 7 to 18. Kensington & Chelsea has one International Centre (Knightsbridge), two Major Centres (King's Road (East) and Kensington High Street), six District centres (South Kensington, Notting Hill Gate, Fulham Road (East), Fulham Road (West), King's Road (West), Earl's Court Road) in line with the London Plan hierarchy of centres. Two Special District Centres were proposed by the Borough (Portobello Road and Westbourne Grove) and the GLA was supportive of these designations. The distribution of shopping centres is shown on Plan 1 in Appendix I. These centres are compared in Table 19.3 below.
- 19.87 Table 19.3 suggests that Knightsbridge International Centre is the main centre in terms of comparison shopping offer, followed by King's Road (East) and Kensington High Street Major Centres. The household and on street survey results suggest

Knightsbridge is predominantly an occasional shopper and tourist shopper destination, whilst King's Road (East) and Kensington High Street are more popular destinations amongst the Borough's residents and these two centres dominate in terms of comparison shopping trips in the Borough.

Table 19.3: Main Centres in Kensington & Chelsea

Centres	Number of Comparison Shops	Comparison Sales Floorspace Sq M Net
Knightsbridge	173 (154)	104,000
King's Road (East)	183	52,000
King's Road (West)	63	
Kensington High Street	163	43,000
South Kensington	40	4,100
Notting Hill Gate	105	7,400
Fulham Road (East)	96	23,000
Fulham Road (West)	38	
Earl's Court Road	15	1,700
Portobello Road	181	16,600
Westbourne Grove	78	3,600

Source: Table 2A (Appendix A).

- 19.88 These centres provide a good spread of comparison shopping destinations across the centre and south of the Borough, however there is limited comparison provision in the north of the Borough. Portobello Road and Westbourne Grove serve the northern part of the Borough, but they are more specialist destinations and do not provide the same range and choice of comparison shopping when compare with the Major and International Centres. The household survey indicates that households in the northern part of the study area mainly undertake their non-food shopping outside the Borough in the West End, Brent Cross, Kilburn and Hammersmith. The Westfield Centre in White City will also attract a significant proportion of households from the north and central parts of the Borough. This development should significantly improve the range and choice of shopping, accessible (within two kilometres) to residents in the north and central parts of the Borough.
- 19.89 Within Kensington & Chelsea the main department stores offer an extensive range of furniture and electrical items and there is also a good provision of high street and independent furniture, carpet and electrical shops. There are a large number of antique shops and art galleries throughout the Borough, which reflects the high proportion of affluent residents within the Borough and the areas national and international reputation for specialist antiques shopping.

Large Format Stores/Retail Warehouses

- 19.90 There is only one traditional large retail warehouse in Kensington & Chelsea, a Homebase of about 5,200 sq m gross on Warwick Road. In general, Inner London Boroughs have a limited number of retail warehouses, because land values are relatively high and the availability of large development sites is constrained. Retail warehouses in London are generally concentrated in outer London Boroughs. For example, within South and West London there are concentrations of retail warehouses in LB of Merton (i.e. Plough Lane, Colliers Wood and Shannon Corner), Wandsworth (Smugglers Way/Swandon Way) and Brent (i.e. Brent Cross).
- 19.91 The DIY sector is under-represented, although there are some traditional hardware stores and interior design specialists around the Borough. The Homebase store is the only major DIY outlet within the Borough.
- 19.92 Despite the lack of retail warehouses within the Borough, there are a selection of retail warehouses within close proximity to the Borough including Homebase & B&Q in Wandsworth, Comet and Currys in Wembley and other standalone stores in Hammersmith, Fulham, Acton and Chiswick. The potential to improve retail warehouse provision within the Borough may be limited, due to the lack of large development sites and the high land values which mean that large format retail may not be commercially viable. Any retail warehouse proposals would need to be considered on their individual merits.

Local Shops and Services

- 19.93 As shown in Section 18, the existing provision of local shopping centres and parades within the Borough offers a balanced distribution of local facilities serving local communities. These facilities complement the eleven main centres and have an important role in serving the day-to-day needs in their local areas. Most residential areas within the Borough are within 300 metres (a reasonable walking distance for local shopping) of a main centre or local centre. As stated in Section 4, the main residential areas not within 300 metres of a centre are within the north of the Borough and it may be appropriate to consider whether additional local provision is required in these areas to address the deficiency.
- 19.94 The network of local centres and parades should be maintained to ensure that residents have easy access to local shops and services. There may be scope for improving some of the existing local centres where there is a relatively high vacancy

rate and does not achieve a high local needs index and therefore function properly as a local centre. Improvements would help to secure their viability but would only meet a small element of the scope for new retail development.

Customer Views

19.95 The in-street surveys carried out in the main centres provide an indication of the shopping patterns of different types of shoppers i.e. residents, tourists and workers. Table 19.4 provides a summary of the findings of the survey for each type of shopper.

Table 19.4: Customer Shopping Patterns

Customer Type	Survey Comments
Residents within or near the Borough	The surveys indicate that a high proportion of residents shop for food and groceries compared with tourist and those who live outside the study area. A significant proportion of residents walk or get the bus to their nearest centre and visit the centre regularly (i.e. more than once a week). A notable proportion of residents considered traffic congestion to be a dislike about shopping in their nearest centre.
Those who work in the Borough	The surveys indicate that a high proportion of workers in the Borough shop for food and groceries compared with tourists and those who live outside the Borough. A significant proportion travel to work by tube and spend only a short time shopping in the centre. A notable proportion of workers considered the prices to be too high.
Tourists and occasional shoppers	The surveys indicate that a high proportion of tourist intended to buy gifts/jewellery/china and glass on their visit, or did not know what they would buy i.e. impulse purchases. A high proportion of visitors travelled by tube.

Source: NEMS Tourist, Resident & Shopper Survey 2008

Table 19.5: The Relative Importance of Shopping Facilities

Example of Types of Shopping	Level of Importance to Each Group		
	Local Residents	Employees	Visitors/Tourists
Food and Grocery Shopping	High	High	Medium
Fashion shopping	Medium	High	High
Crafts, arts, gifts	Low	Low	High
Bulky non-food items (electrical, furniture, DIY)	Medium	Low	Low
Health/Beauty/Chemist Items	Medium	Medium	High
Other Household items	High	Low	Medium

Source: NEMS Tourist, Resident & Shopper Survey 2008

19.96 The table below (Table 19.5) provides a indication of the relative importance of different types of shopping facilities to local residents, employees and visitor/tourists based on the survey results. For local residents all types of shopping are relatively important (i.e. medium to high) apart from crafts/arts/gifts. Employees are less likely to purchase crafts/arts/gifts, bulky non-food items and other household items compared to food and groceries and fashion shopping. Visitors/tourists are most

likely to purchase fashion shopping and crafts/arts/gifts and least likely to purchase bulky non-food items.

Occupier Demand

- 19.97 The floorspace projections set out in this section provide an indication of the theoretical scope for new retail development based on expenditure projections. It is also necessary to consider the potential level of demand from operators for new floorspace within the Borough.
- 19.98 A postal questionnaire was sent to over 300 national/regional multiple retailers and leisure operators, in order to ascertain their potential space requirements in Kensington & Chelsea. The results from 27 responses are summarised in Appendix D. This canvas of operators identified only 8 operators with space requirements in Kensington & Chelsea, of which only 3 are comparison retailers (Maplin, Primark and Staples). A further 19 operators suggested they do not have a requirement for space in Kensington & Chelsea. The limited interest identified by this canvas may reflect the imminent opening of the Westfield shopping centre, which is likely to be the prime location for new operators within the study area.
- 19.99 Multiple retail and leisure operators' space requirements across the country are often publicised. Published requirements registered by Estates Gazette (EGi) for floorspace in the Borough's centres during the last six months are shown in Appendix D. In total only 21 requirements are listed for centres or areas within Kensington & Chelsea, none of which were highlighted in the canvas of operators. If correct the canvas of operators and EGi register suggest there are 29 current space requirements in the Borough, which based on our experiences is very low for large centres such as Knightsbridge, King's Road and Kensington High Street, and this again may be due to the Westfields development.

20.0 THE NEED FOR COMMERCIAL LEISURE / OTHER TOWN CENTRE USES

Introduction

20.1 This section assesses the need and potential for commercial leisure development and other main town centre uses in Kensington & Chelsea. The potential to improve the provision of a range of commercial leisure uses is considered including cinema/multiplex, ten pin bowling, bingo, nightclubs, private health and fitness clubs and catering, pubs and bars and other Class A2 to A5 uses.

The Potential for Leisure and Entertainment Uses

Catchment Potential

20.2 In general, commercial leisure facilities will draw the main part of their trade from residents up to a 20 minutes travel time. Major leisure facilities such as multiplex cinemas, ten-pin bowling centres, ice rinks and family entertainment centres require a large catchment population, and often benefit from locating together.

20.3 Kensington & Chelsea has a large catchment population. There are around 700,000 people within the defined study area for Kensington & Chelsea and approximately 166,600 within the Borough. Zones 1 to 3 include all of Kensington & Chelsea, approximately 190,000 people live in these three zones. This catchment population has good access to major leisure facilities in the Central London, Fulham, Hammersmith and Shepherds Bush and the proximity of these major leisure facilities will limit the potential for major leisure facilities within Kensington & Chelsea.

20.4 The household survey results show that a high proportion of residents in the study area visit leisure facilities in the Borough, but overall the most popular destination is the West End of London. Other popular locations outside the Borough are Fulham, Clapham Junction, Shepherds Bush, Wandsworth and Hammersmith.

20.5 The choice of leisure facilities in surrounding areas means that the Borough's potential leisure related catchment population is likely to be less than the population of the study area as a whole (697,000). Our assessment of shopping patterns, although not directly comparable for leisure and entertainment uses, suggests that stores/shops in the Borough attract only about 32% of total comparison expenditure within the study area, which implies the comparison shopping catchment population

of Kensington & Chelsea is only around 220,000, which is slightly higher than the Borough population of around 166,600 people.

The Cinema Market

- 20.6 Cinema admissions in the UK declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s, but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. The cinema industry reached a plateau in 2005 following a slight recovery in 2004 with a net gain of 24 operating screens (still a virtual standstill compared to the 100-200 screens added at the turn of the decade). Total admissions in 2006 were 157 million, slightly lower than in 2005 (164.6 million) and significantly lower than in 2004 (171.3 million, 2.86 visits per person).
- 20.7 Cinemagoing 16 published in March 2007 by Dodona Research reported that 2006 was a poor year for the cinema business in the United Kingdom, but it was anticipated that 2007 would be a better year. As the industry is now dominated by three main operators (Odeon, Cineworld and Vue), the emphasis is shifting from consolidation to physical expansion. This is the same for their two smaller rivals, The Showcase owned by National Amusements and the Ward Anderson group of companies which own Empire. Multiplex cinemas now dominate the market with over 70% of available screens in 2006.
- 20.8 Cinemagoing 16 forecasts that total admissions would increase by about 10% between 2005 and 2009, an average growth rate of 2.5% per annum. Forecasts anticipated a net addition of 110 screens in 2006, 120 in 2007, 60 in 2008 and 60 in 2009. Compared to the last decade these figures represent a considerable slowing of growth, 2% compared to past growth of 5.5%.
- 20.9 Further to this, Cinemagoing 16 forecasts that by 2011 more than 300 screens will be added to the 3,440 screens operating in 2006. According to predictions in Cinemagoing 16, British cinema-goers will pay nearly £1.1 billion for cinema tickets in 2011, this is due to a strong upcoming film product, benefits from digital projection and a turn in the investment cycle to new cinemas.
- 20.10 There are three multiplex cinemas as well as seven independent cinemas in Kensington & Chelsea, as follows:

- The Odeon on Kensington High Street (6 screens and 1,319 seats);
- Cineworld on Fulham Road (6 screens and 1,242 seats);
- The Coronet on Notting Hill Gate (2 screens and 525 seats);
- The Electric Cinema on Portobello Road (approx. 220 sofas);
- The Gates on Notting Hill Gate (240 seats);
- Cine Lumiere, Institut Francais (350 seats);
- Goethe Institute, Exhibition Road (170 seats);
- IMAX, Science Museum, Exhibition Road (450 seats);
- Chelsea Cinema, King's Road (713 seats); and
- Cineworld, King's Road (4 screens and 691 seats).

20.11 These facilities provide over 5,900 seats. There is also a good provision of cinemas in Central London and other surrounding boroughs.

20.12 The catchment area of an additional cinema facility in the Borough will be restricted by the proximity of these major multiplexes and independent cinemas. The household survey results indicate that 56% of respondents in the study area visit cinemas, of which 9.3% indicated their last trip was to the Odeon on Kensington High Street, 8.2% to Cineworld on King's Road, 5.9% to Cineworld on Fulham Road and 3.6% to the Notting Hill Coronet. The other main cinema destinations were Vue on Fulham Broadway (12.8%), Vue at Shepherds Bush (9.6%), Central London (6.6%) and Wandsworth (5.9%).

20.13 To assess the demand for cinema admissions within the study area, we have assumed that the Borough could retain its existing share of cinema trips in the study area (about 30% as suggested by the household survey results). The catchment population has been converted into a total number of cinema admissions per annum based on the national visitation rate (2.8 per person in 2003). Visitation rates have been projected based on a 2% growth rate per annum, broadly in line with recent national growth trends. The total number of cinema admissions has been converted into an optimum number of cinema seats, based on Dodona figures (300 visits per annum per seat). The results are shown in Table 20.1 below.

20.14 The existing provision is 5,910 seats within the Borough but the theoretical potential in 2008 is only 2,154 seats. However, the theoretical potential figure excludes demand generated from visitors who live outside the study area e.g. tourists and commuters. The in-street survey within the main centres indicated that 58% of visitors live outside the study area. If cinemas in the Borough attract 58% of their customers from beyond the study area then the theoretical capacity at 2008 would increase from 2,154 to 5,129 seats, and 2,975 seats could be required to meet

demand from beyond the study area. Even allowing this significant inflow of customers (58%) the number of cinema seats in the Borough appears to be more than sufficient to meet demand.

Table 20.1 Cinema Potential in Kensington & Chelsea

Centre	2008	2012	2015	2020	2028
Catchment Population	209,095	214,313	217,761	222,527	226,822
Visits Per Annum	3.09	3.34	3.55	3.92	4.59
Total Visits Per Annum	646,105	716,816	772,931	872,054	1,041,472
Optimum Visits Per Screen	75,000	75,000	75,000	75,000	75,000
Optimum Visits Per Seat	300	300	300	300	300
Screen Potential	8.6	9.6	10.3	11.6	13.9
Seat Potential	2,154	2,389	2,576	2,907	3,472
Existing Seats	5,910	5,910	5,910	5,910	5,910

20.15 The theoretical potential generated by the study area population at 2015 is only 2,482 seats. As indicated above, a further 2,975 could be added to meet the demand from visitors from beyond the study area, i.e. 5,457 seats in total. This analysis suggests that there is limited potential for further cinema facilities within Kensington & Chelsea in the short to medium term, based on the Borough's current market share being maintained. It should also be noted that a 14-screen multiplex cinema is proposed within the White City development, and it is likely that the Borough's market share of cinema trips in the study area will reduce in the future.

20.16 The theoretical potential generated by the study area population at 2028 is 3,472 seats, or 6,447 seats in total with visitors, which suggests there could be scope for cinema development in the long term (about 800 seats). This figure is based on constant market share, which may be difficult to achieve due to the White City development.

20.17 There is limited potential for further cinema facilities within Kensington & Chelsea for the foreseeable future. Existing and proposed cinema provision within neighbouring Boroughs will limit the potential for further cinema facilities within the Borough.

20.18 The canvas of leisure operators undertaken during the study did not identify a demand for cinema development in Kensington & Chelsea. The commercial viability of further cinema development in the Borough may also be questionable.

Private Health and Fitness Clubs

- 20.19 The UK health club market expanded rapidly as public awareness about personal fitness has increased. Business in Sport and Leisure (BISL) 2008 indicates healthy growth across the industry with the Fitness Industry Report stating that by the end of March 2007, there were 5,714 combined public and private sector fitness sites across the UK, 3,117 private clubs and 2,597 gyms within public sports centres. Since 2006, 232 new facilities had opened. The total number of UK health and fitness members at public gyms and private health clubs is now over 7 million, about 1,225 members per club.
- 20.20 Nearly 12% of the population are now members of a private health club or registered users of a leisure centre gym in the UK, compared with just 8.9% in 2002 and this growth looks set to continue. An estimated 7.3% of the population being members of private clubs at March 2007 up from 7.2% since January 2006. However, the UK is still chasing the US where the fitness membership rate is 15.6%.
- 20.21 Private health clubs in the UK range from small independent clubs to large operators such as Cannons, David Lloyd, Esporta, Fitness First, Virgin Active, Bannatyne and LA Fitness.
- 20.22 Private health clubs had 4.2 million members in 2007 (1,375 members per club). The largest health clubs can have memberships of approximately 4,000 people. However, independent clubs remain a strong presence in the private sector market running 55% of all private clubs. Of the 126 new private health clubs that have opened since January 2006, 58% were independent clubs and 42% were owned by multi-club operators. Public sector sports centres are also important, and the market increased significantly between January 2006 and March 2007, with 106 new facilities opened and in terms of like-for-like membership growth rates, the sector saw an impressive 4.6% growth.
- 20.23 There are a significant number of private health and fitness clubs in the Borough, including:
- Club Kensington, Kensington High St;
 - David Lloyd Kensington, Cromwell Road;
 - Bodyworks, Lampton Place, Notting Hill;
 - Portobello Green Fitness Club, Thorpe Close;
 - Fitness First South Kensington, Harrington Road;
 - KX Gym UK, Draycott Avenue;
 - LA Fitness, Pelham Street;

- Soho Gyms, Earl's Court Road;
- Virgin Active, Lancaster Road;
- Marriott Leisure Club, Marriott Hotel, Cromwell Road;
- Aquilla Health and Fitness Club, Thurloe Place;
- Virgin Active, Fulham Road, Chelsea;
- Figure Fit, Burnsall Street;
- Kensington Green Fitness Centre, Stone Hall Gardens;
- Kensington Close Health Club, Kensington Close Hotel, Wrights Lane; and
- Virgin Active, Old Court Place.

20.24 Four of the large national operators are represented in the Borough. There are three Virgin Active gyms, an LA Fitness gym, a Fitness First gym and a David Lloyd fitness centre. In addition to the independent private leisure/entertainment facilities there are two local authority sports facilities (run by Courtneys which is part of the Cannons Group):

- Kensington Leisure Centre, Walmer Road; and
- Chelsea Sports Centre, Chelsea Manor Street.

20.25 These facilities both have a gym, swimming pool and sports hall. There are also facilities in the Borough's parks.

20.26 The study area population is 696,985 in 2008, which could generate demand for about 84,000 public and private membership places, based on the UK national average membership rate (12%) or 109,000 based on the US rate (15.6%). Study area residents will also use health and fitness clubs in neighbouring Boroughs. The household survey indicates that over 33% of households in the study area had visited a health/fitness club, which suggest health club membership could be higher than 12% in the study area, but it should be noted that not all members of these households will participate and not all households will be members of clubs. The household survey suggests the Borough's share of trips to health and fitness facilities generated by the study area is about 28%, which could represent about 23,500 members based on the national average membership rate.

20.27 The 6 private national clubs, 10 independent private clubs and 2 public leisure/recreation centres, assuming an average membership of at least 1,225 members per club, could accommodate about 22,000 members, which is broadly in line with the Borough's market share of members within the study area (23,500 members).

- 20.28 A future increase in membership rates and population growth could generate additional demand. By way of an example, an increase in membership rates from 12% to 15.6% (the US rate) along with projected population change in the study area could increase demand by about 29,600 places by 2015 in the study area as a whole, the Borough's potential share of this growth (28%) would be 8,300 places.
- 20.29 These figures suggest there could be scope for further health and fitness facilities within the Borough particularly in the future in line with the increase in population and membership rates. In our canvas of operators Esporta Health & Fitness, who are currently not represented in the Borough, indicated they are currently searching for opportunities of between 2,000 sq m and 3,000 sq m with the capability of accommodating a swimming pool in the centres of Knightsbridge, Kensington High Street, South Kensington, King's Road and/or Notting Hill Gate.

Tenpin Bowling

- 20.30 Tenpin bowling grew rapidly in the UK in the 1960s. However, the complex scoring system, lack of investment and the deterioration exacerbated a significant decline in the 1970s. However, a resurgence of interest in tenpin bowling during the late 1980s and computer scoring led to a second boom. There were 280 tenpin bowling centres (5,600 lanes) in the UK in 2004, approximately one lane per 10,000 people. The tenpin bowling sector experienced steady growth in the late 1990s, with a 27% growth in spending during the last 10 years, although any real growth was mostly in the past four years. Mintel predicted the value of the tenpin bowling market would increase from £245 million in 2002 to £324 million by 2007.
- 20.31 Bowling centres now tend to be part of major leisure developments that include multiplex cinemas, restaurants and nightclubs offering a choice of leisure and entertainment activities.
- 20.32 Tenpin bowling centres require large buildings of between 2,300 to 4,200 sq m (25,000 to 45,000 sq ft) and are generally located in towns with a population of over 150,000 people.
- 20.33 The Royal Borough of Kensington & Chelsea has no tenpin bowling facility. The household survey indicates that residents who visit bowling facilities in the study area mainly go to Queens Ice Bowl on Queensway (25%), Park Royal, Acton (22%) and the West End (10%). Residents in the Borough have good access to the range of tenpin bowling facilities in neighbouring boroughs.

- 20.34 The household survey results suggest that about 8% of households in the study area visit tenpin bowling facilities. The study area population (697,000) is in theory capable of supporting 69 lanes, based on one lane per 10,000 people. If Kensington & Chelsea attracted about 30% of tenpin bowling trips in the study area then about 21 lanes could be required. In both our EGi search and canvas of operators no operators indicated a requirement.
- 20.35 There appears to be theoretical potential for a ten pin bowling facility within the Borough, but operators' space requirements may limit this opportunity. Furthermore high land values in Kensington & Chelsea may make low density tenpin bowling facilities unviable.

Bingo

- 20.36 The bingo market peaked in the mid-1970s, with almost 2,000 clubs nationwide. Since then the sector has struggled to compete with other leisure activities, including the impact of the National Lottery. However, the decline has bottomed out and attendance figures have remained steady since the late 1990s, and revenues and profits have started to increase.
- 20.37 Great Britain had 676 commercial bingo clubs in 2005, however, in March 2007 this had decreased to 643 commercial bingo clubs, approximately one club per 90,000 people. The amount staked on bingo had continued to rise in previous years but peaked in 2006 at £1,826 million and fell slightly in 2007 to £1,820 million.
- 20.38 Bingo clubs attracted 79 million admissions in 2005 (source: Mintel), about 1.75 admissions per adult per annum. On average each club attracted 117,000 admissions in 2005 (about 2,250 admissions per week). The average participation rate (adults) was 6.9% in 2004 (source: Mintel), split 2.8% regular players and 4.1% occasional players. Mintel forecasts that admissions will decline between from 79 million in 2005 to 68 million in 2010, although the average spend per head will increase from £26.90 to £38.40.
- 20.39 Mecca and Gala are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas), into purpose built units. Bingo clubs have become increasingly sophisticated, and have actively sought to attract all age groups.

- 20.40 The bingo sector usually prefers central locations that are accessible by public transport and by foot. Major bingo operators, such as Mecca and Gala, require buildings of between 2,000 to 3,000 sq m, capable of seating up to 2,000 people, with a catchment population of 50,000 to 70,000 people within freestanding towns (source: BISL).
- 20.41 The household survey results indicated that only 3.2% of households in the study area had visit bingo facilities, of which 38% last visited Beacon Bingo Hall in Cricklewood and 16% last played bingo at Gala Bingo in Acton. The Bingo participation rate appears to be relatively low within the study area.
- 20.42 The study area population (679,000 or about 570,000 adults) could generate nearly one million admissions based on the national participation rate (1.75 per adult), compared with the average of 113,000 admissions per club. These figures suggest that the study area as a whole could accommodate about 8-9 bingo clubs, if national participation rates were achieved. There are currently no bingo clubs in the Borough and there is theoretical scope for these types of facilities in the Borough. However the lack of available sites or large premises and high land values/property prices may limit potential in Kensington & Chelsea.

Nightclubs

- 20.43 The value of the nightclub market (permanent venue offering dancing in return for an admission fee) declined from £2.16 billion in 1998 to £1.77 billion in 2002 (source: Mintel - Nightclubs). There are approximately 1,700 nightclubs in the UK, approximately one per 30,000 people.
- 20.44 The sector has faced increasing competition from late night pubs and bars, with no admission fees. The BISL envisages a continued period of rationalisation and price competition with new challenges in the form of the smoking ban. However, the forecast trend of significant growth in the 18-24 year old age group is expected to provide a growing market.
- 20.45 Large nightclubs (capacity up to 2,000 people) are generally located in large towns with a population of over 100,000 people. There are no large nightclubs in Kensington & Chelsea, but there are a number of smaller nightclubs and private members clubs. The provision of night clubs in the West End is significant.

20.46 The household survey results indicated that only 13.7% of households in the study area visit nightclubs or late night music venues, and 36.5% of these households last visit to a nightclub/live music venue was in London's West End. Within the Borough, 4.4% visited a nightclub or late night music venue in Notting Hill Gate, 3.7% visited Kensington High Street and 3.7% visited King's Road. The provision of nightclubs in the West End combined with the excellent access will limit the potential for major new nightclubs in the Borough.

Casinos

20.47 Due to the changing nature of the casino market, with its proposed deregulation across the county, there is uncertainty to where casinos will be located in the future. Prior to deregulation operators could only obtain licences for casinos in specifically defined areas.

20.48 Operators now have to think in more detail about the catchment area of their casinos and the level of existing or future competition in a given area. From our knowledge of the casino market, key catchment areas will have to be within or within the near vicinity of a large centre such as a major town or city, with a drive time of approximately 30-40 minutes and as close to the centre of the catchment area as possible, with good transport links. The proximity of other established commercial uses will also be a key factor for operators when looking at locations for casinos.

20.49 There were 138 licensed casinos operating in Britain at 31 March 2007 with a further 40 licensed casinos, although some of these will be replacements for existing establishments. Attendance at casinos by members and guests increased by 8% from the previous year to over 15 million.

20.50 There are a number of casinos in Kensington & Chelsea, including the Connoisseur Club, The Mint, Cromwell Mint Casino, Gloucester Casino and Maxims Casino Club.

20.51 No specific catchment area population has been identified by casino operators. The main centres within the borough may have a catchment population large enough to support a casino. As the market adjusts to deregulation, the locational requirements of casinos may evolve and become more clearly defined. Our canvas of retail and leisure operators included several major casino operators, but a requirement for a casino in the Kensington & Chelsea area was not identified.

Bars and Restaurants

- 20.52 On average households in the UK spent over £1,100 per annum eating and drinking away from the home in 2006 (source: Family Spending 2007).
- 20.53 Food and drink establishments (Class A3/A4/A5) including restaurants, bars and pubs have supported other major leisure uses on leisure and retail parks. Within town centres the demand for A3/A4/A5 uses has increased including a significant expansion in the number of coffees shops, such as Starbucks, Costa Coffee and Coffee Republic, and national branded pub/restaurant chains have been investing heavily.
- 20.54 PPS6 (paragraph 2.22) indicates that *“a diversity of uses in centres makes an important contribution to their vitality and viability. Different but complementary uses, during the day and in the evening, can reinforce each other, making town centres more attractive to local residents, shoppers and visitors. Local planning authorities should encourage diversification of uses in the town centre as a whole, and ensure that tourism, leisure and cultural activities, which appeal to a wide range of age and social groups, are dispersed throughout the centre”*. Paragraph 2.23 also indicates that planning policies should *“encourage a range of complementary evening and night-time economy uses which appeal to a wide range of age and social groups, ensuring that provision is made where appropriate for a range of leisure, cultural and tourism activities such as cinemas, theatres, restaurants, public houses, bars, nightclubs and cafes”*.
- 20.55 National information available from Goad Plans indicates that the proportion of non-retail uses within town centres across the country has increased over the last decade as shown in Table 20.2. The proportion of Class A1 retail uses in Goad town centres has decreased by 12% between 1994 to 2007 (down 6.7 percentage points from 61.2% to 54.5%), whilst non-retail uses including Class A2, A3 and non-retail (service) A1 uses have all increased.
- 20.56 As indicated in earlier sections of this report, the proportion of Class A3/A5 uses in seven of the eleven main centres in the Borough is above the national average of 14.3%. In Knightsbridge and Kensington High Street it is only slightly higher than the national average, 14.8 and 16.8% respectively. In King's Road (West), Notting Hill Gate, Fulham Road (West), South Kensington and Earl's Court Road the proportions are significantly higher than the national average, 18.6%, 19.1%, 24.2%, 29.7% and 28.5% respectively. Only 4.4% of the uses in Westbourne Grove are Class A3/A5

uses and in King's Road (East) it is only 9.9%. In Fulham Road (East) and Portobello Road the proportion of Class A3/A5 uses are only slightly lower than the national average at 13.1% and 13.8% respectively.

20.57 This national Goad data provides an average for over 1,100 town centres across the country, and relates to a wide range of centres in terms of size and type. In general, larger city and town centres will have a higher proportion of retail units than smaller town and district centres, which have a mix of shops and services. However, within London this is not always the case and many centres have a higher proportion of Class A3/A5 uses than the national average.

Table 20.2: GB Goad Plan Town Centres Use Class Mix

Type of Unit	% Change 1994 to 2007	Proportion of Total Number of Units (%)			
		1994	2000	2005	2007
Class A1 (Retail)	- 12.3	61.2	59.1	56.4	54.5
Class A1 (Services)	+ 43.5	6.9	8.2	9.6	9.9
Class A2	+ 5.9	8.5	8.9	8.9	9.0
Class A3/A5*	+ 55.4	9.2	11.2	13.7	14.3
Miscellaneous	+ 30	1.0	1.4	1.4	1.3
Vacant & Under Const.	- 20	13.2	11.2	10.1	11.0
Total	-	100.0	100.0	100.0	100.0

Source: Goad Centre Reports

*excludes Bars/Public houses (A4)

20.58 The number of bars and pubs continued to decline in 2006 according to figures produced by the Department of Culture, Media and Sport and this was prior to the smoking ban. In 2006 there were 51,479 pubs and bars in England and Wales.

20.59 The Beer Orders in the early 1990s saw a massive expansion of themed bar operators and pub restaurants, such as JD Wetherspoons. These outlets generally require a minimum 50,000 population and are usually located on main streets or secondary positions close to prime retail, commercial and other leisure users. The borough's centres have a limited provision of themed bar operators. Operators usually require large premises of 250 - 1,500 sq m, in close proximity to public car parks and good transport links. The EGi retail requirements did not identify any requirement by themed bar operators/pub restaurants in the Borough.

20.60 Themed restaurants also expanded rapidly in the 1990s. These operators have located in out of centre retail/leisure parks as well as good secondary/primary high street locations. Fast food operators such as McDonalds and Burger King have

expanded the number of drive through outlets, and town centre outlets. Outlets have been developed within retail/leisure parks or on busy roads. Outlets require sites of approximately 0.2 hectares. The EGi published requirements suggest that the following Class A3 retailers are looking to locate in the Borough:

- Costa Coffee;
- Pret a Manger;
- Gourmet Burger Kitchen;
- Giraffe;
- Yo! Sushi; and
- Smollensky's.

20.61 The growth in Class A3 to A5 uses within town centres may continue in the future, and will compete for shop premises with other town centre uses. Future town centre development should provide additional space for these uses as well as Class A1 retail. An allowance of 10% of new floorspace for Class A3 to A5 uses may be appropriate.

Theatres

20.62 The household survey indicated that 50.8% of respondents in the study area visit theatres, which is significantly higher than NLP's average for other surveys. The West End was the main theatre destination last visited for households within the study area (71.7%) followed by Hammersmith (2.8%) and the Royal Court Theatre, Sloane Square, Chelsea (2.4%).

20.63 Only 2.4% of respondents indicated that they visited the Royal Court Theatre on their last trip. The range and quality of theatres in the West End may limit potential in the Borough.

Conclusions on Leisure

20.64 The study area has a reasonable range of commercial leisure, entertainment and cultural facilities, and residents in Kensington & Chelsea have good access to facilities outside the Borough particularly in the West End. The Borough's location next to the West End may limit the potential for further commercial leisure and entertainment facilities. High land/property values in the Borough may also make large format leisure uses commercially unviable e.g. tenpin bowling and bingo clubs, despite the theoretical capacity for these uses, unless they are part of a major mixed use development.

- 20.65 The existing cinema provision within and around the Borough suggests there is limited potential for further cinema facilities. Existing provision in the Borough exceeds all the theoretical potential up to 2028.
- 20.66 There may be scope for further private health club facilities and this may increase in the future if membership rates increase in line with the US along with the projected population growth. A requirement by Esporta has been identified.
- 20.67 Most of the centres within the Borough have a good provision of Class A3 and A5 uses. Future town centre development should provide additional space for bar and restaurant uses (Class A3, A4 and A5) as well as Class A1 retail, but this should perhaps be limited to approximately 10% of the development, in line with the normal proportion one would expect to find in town centres, based on Goad information.

21.0 SCOPE FOR ACCOMMODATING GROWTH

Floorspace Projections

21.1 There are a number of issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:

- the impact of major retail developments in competing centres, such as the White City development;
- the re-occupation of vacant floorspace;
- the reliability of long term expenditure projections, particularly after 2015;
- the effect of Internet/home shopping on the demand for retail property;
- the acceptability of higher than average trading levels;
- the level of operator demand for floorspace in Kensington & Chelsea, bearing in mind the proximity of the White City Development.

21.2 The long term floorspace projections shown in the previous sections (i.e. 2020, 2025 and 2028) should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development control decisions. Long term forecasts may be subject to change due to unforeseen circumstances, for example the long term impact of the White City development is uncertain. Projected surplus expenditure is primarily attributable to projected growth in spending per capita. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under-review.

21.3 The expenditure projections in this study take into account home shopping, because special forms of trading has been excluded. The study assumes that special forms of trading will increase in the future, including the growth of internet shopping. However, the impact of Internet growth on the demand for retail floorspace is unclear. Some retailers' home delivery and Internet services utilise existing stores rather than warehouses, for example Tesco Direct. Therefore, Internet sales will not always significantly reduce the demand for shop floorspace. In addition, some of the growth in Internet sales may divert trade away from mail order companies rather than retail operators. Overall the impact of home shopping on expenditure projections is uncertain.

21.4 The quantitative and qualitative assessment of the potential capacity for new retail floorspace within the previous sections suggests that there is scope for new retail development within Kensington & Chelsea in the period up to 2015, albeit there is limited scope for new comparison floorspace in the north and central parts of the Borough due to the impact of the White City Development in the short to medium term. This section examines the opportunities for accommodating new development and assesses potential opportunities to accommodate this floorspace.

Accommodating Future Growth

21.5 The sequential approach suggests that town and district centre sites should be the first choice for retail and leisure development, which is supported by policies within the London Plan. In Kensington & Chelsea the preferred location for retail and leisure development needs to be carefully considered, particularly for major development which may have an extensive catchment area. Major development should be located within the International, Major and District Centres, as suggested in the London Plan.

21.6 Some forms of retail or leisure facilities which serve more localised catchment areas may be more appropriate within local centres, rather than the main centres. However, all development should be appropriate in terms of scale and nature to the centre in which it is located.

21.7 The existing stock of premises may have a role to play in accommodating projected growth. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. A growth rate of 1.5% per annum is assumed for comparison floorspace and 0.3% for convenience floorspace. The adoption of these growth rates represents a balanced approach. The floorspace projections reflect these assumptions. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

21.8 There are 178 vacant units within the eleven main centres Kensington & Chelsea, a vacancy rate of 7.8%, this is compared to a GOAD national average vacancy rate of about 11%. The vacancy rate in the main centres in the south of the Borough (Knightsbridge, King's Road, Fulham Road and South Kensington) is 9.3%, and the vacancy rate in the main centres on the central/north part of the Borough (Earl's Court, Kensington High Street, Notting Hill Gate, Portobello Road and Westbourne Grove) is 6.2%. There are a further 95 vacant units within local centres (vacancy rate of 10%).

21.9 These vacant premises could also help to accommodate growth, for example if the overall vacancy rate be reduced to 5% then 111 units could be reoccupied, which could be a realistic target based on the vacancy rate within successful centres. Based on an average size of a unit of about 100 sq m gross, these reoccupied units could accommodate about 11,100 sq m gross. This potential within vacant premises is broken down as follows.

- South – Main centres 51 reoccupied units = 5,100 sq m gross.
 - North/Central – Main centres 13 reoccupied units = 1,300 sq m gross.
 - Local centres 47 reoccupied units = 4,700 sq m gross.
- Total 111 reoccupied units = 11,100 sq m gross**

21.10 The strategy should seek to reduce the vacancy rate within the Borough, particularly in the south of the Borough and within local centres.

Potential Development Opportunities

21.11 A review of potential development sites has been undertaken in Kensington & Chelsea. In terms of existing commitments, the redevelopment of Lots Road Power Station in the south of the Borough includes 1,200 sq m gross of Class A1 shops and 530 sq m gross of Class A3 (restaurants and cafés). The development proposals within the Kensal area in the north of the Borough may also include new retail uses to serve proposed new residential and employment areas. Other sites without planning permission have been evaluated as shown in Appendix H.

21.12 Sites in each centre have been evaluated, in terms of their implications on the scope and need for additional retail and leisure facilities in the District, and have been assessed against the following factors:

- existing land uses and availability, categorised as follows:
 - short term - up to 2012;
 - medium term - up to 2015
 - long term - likely to be completed after 2015;
- commercial potential for retail/leisure development and the most likely form of development, categorised as follows:
 - prime sites likely to attract a developer and occupiers;

- secondary sites which may generate limited demand or only demand for a specific kind of use.
- potential scope to accommodate additional retail/leisure floorspace (net increase), categorised as follows:
 - small scale - under 1,000 sq m gross floorspace;
 - medium scale – 1,000 to 2,500 sq m gross floorspace;
 - large scale - over 2,500 sq m gross floorspace;
- potential development constraints; and
- possible alternative uses.

21.13 The overall development prospects of each opportunity, taking on board all of the factors listed above, has been categorised as follows:

- *Good* – potential opportunity sites that have good prospects for providing additional retail/leisure floorspace, and should be considered for implementation in the short to medium term;
- *Reasonable* - potential opportunity sites which are well located and may provide potential for additional floorspace, although obstacles to development will need to be overcome, but implementation may only be achieved in the long term; and
- *Poor* - potential opportunity sites that may be unattractive or unsuitable for retail or leisure development, where their delivery is very uncertain, or sites which are unlikely to provide a significant increase in retail/leisure floorspace.

21.14 This overall rating is based on an initial evaluation for each site. The level of analysis undertaken at this stage is limited, i.e. detailed appraisals of development constraints, land ownership and potential development costs have not been undertaken. More detailed examinations of each site will need to be undertaken before sites can be brought forward for development or ruled out as viable options. The evaluations undertaken for each opportunity are not detailed planning appraisals and they do not imply that planning permission should be granted or refused for retail/leisure development on any site. However, the evaluation is expected to identify potentially suitable development opportunities that may be worthy of further consideration by the Council. This evaluation provides a framework within which the Council can consider the implementation of a development strategy for retail development within Kensington & Chelsea.

21.15 In total 12 potential development sites have been identified which could accommodate retail, leisure or other town centre uses. Most (11) of these sites are identified as potential redevelopment sites in the UDP and/or the LDF site allocations document, but only 6 of these sites have retail indicated in the suggested mix of uses.

21.16 Many of the sites have constraints on development and their availability for redevelopment is uncertain. Most of the sites are currently in active use and only high density development is likely to be viable i.e. to acquire/relocate existing uses. The sites (overall development potential rated as *reasonable* or *good*) most likely to deliver a significant net increase in retail, leisure or other town use floorspace are:

- S1 – Chelsea Farmers Market (edge-of-centre – King's Road East);
- S2 – The Clearings, Draycott Avenue (edge-of-centre - Fulham Road East);
- S4* – Iranian Embassy (edge-of-centre – South Kensington);
- S5 – High Street Kensington Station (within centre – Kensington High Street);
- S6 – Odeon Cinema/Post Office (edge-of-centre – Kensington High Street);
- S7* – LEB Depot, Victoria Gardens (edge-of-centre – Notting Hill Gate);
- S8 – Newcombe House (within centre – Notting Hill Gate);
- S9 – Telephone Exchange and TA Centre, Warwick Road (out-of-centre);
- S11* – Earl's Court Exhibition Centre (edge-of-centre – Earl's Court Road)
- S12* – Portobello Court Estate (edge-of-centre – Portobello Road).

* sites not allocated for retail use in the UDP/LDF site allocation documents.

21.17 If implemented the sites allocated for retail use in the UDP/LDF could deliver up to 9,000 sq m gross of Class A use, 4,000 sq m gross in the south part of the Borough and 5,000 sq m gross in the north/central part of the Borough.

22.0 CONCLUSIONS AND RECOMMENDATIONS

22.1 This report provides a borough wide needs assessment for retail and commercial leisure uses in Kensington & Chelsea. It provides a guide to the shopping and leisure needs of the Borough up to 2012, 2015, 2020 and 2028. The principal conclusions of the analysis contained within this study are summarised below.

Meeting Shopping Needs in Kensington & Chelsea

22.2 Overall, in order to meet projected growth in expenditure, there is a need for additional shopping and service facilities. Future planning policy and site allocations should seek, in line with PPS6, to identify opportunities to accommodate growth.

22.3 The floorspace projections shown in this report provide broad guidance. Meeting the projections between 2008 and 2015 remains the priority. The projections should not be considered to be maximum or minimum limits or targets, particularly when translated into the development plan allocations or when used to guide development control decisions. For instance if a major scheme comes forward within a designated centre in the period to 2015, although the implementation of this proposal may possibly result in an over-supply of comparison retail floorspace, it may be acceptable to permit such a scheme if it is of an appropriate scale in terms of the role and function of that centre. Such floorspace limits should not inhibit competition between retailers when located within centres, subject to the consideration of scale and impact. However, if an out of centre proposal exceeds the floorspace projections then the need for the proposal and impact will need to be carefully considered.

22.4 Long term forecasts (beyond 2015) may be more susceptible to change, due to unforeseen circumstances. Projected surplus expenditure beyond 2015 is attributable to projected growth in spending per capita, extrapolated from short to medium term growth projections. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under review. The implications of major retail development within and surrounding the Borough should also be monitored and the affects proposals may have on the demand for additional development in Kensington & Chelsea should be considered carefully.

Convenience Development

22.5 The quantitative capacity analysis indicates there is significant potential for further convenience goods floorspace within the Borough, based on both the high or low growth scenario, as shown in Table 22.1.

Table 22.1: Convenience Expenditure/Floorspace Projections

	2008 to 2012	2008 to 2015	2008 to 2020	2008 to 2028
HIGH GROWTH SCENARIO				
Projected Sales Floorspace SQ M Net	7,751	9,383	11,829	13,955
Food stores (over 200 sq m net)	7,621	8,638	10,165	11,520
Small stores/shops (up to 200 sq m net)	130	745	1,664	2,436
Projected Gross Floorspace SQ M	11,072	13,404	16,898	19,936
Food stores (over 200 sq m net)	10,887	12,340	14,521	16,457
Small stores/shops (up to 200 sq m net)	186	1,064	2,377	3,480
LOW GROWTH SCENARIO				
Projected Sales Floorspace SQ M Net	2,164	3,627	5,818	7,719
Food stores (over 200 sq m net)	2,034	2,882	4,154	5,283
Small stores/shops (up to 200 sq m net)	130	745	1,664	2,436
Projected Gross Floorspace SQ M	3,091	5,181	8,311	11,027
Food stores (over 200 sq m net)	2,906	4,117	5,934	7,547
Small stores/shops (up to 200 sq m net)	186	1,064	2,377	3,480

22.6 There is significant capacity to improve convenience sales floorspace in the Borough in the short to medium term (i.e. up to 2015), taking into account the impact of food store proposals in neighbouring Borough. These projections do not take into account the Lots Road Power Station development, which includes up to 1,200 sq m gross of Class A1 shops. A significant element of this floorspace is likely to be convenience retail, and this floorspace would need to be deducted from the floorspace projections above. There is likely to be potential to accommodate new food store facilities within shop major development in the Kensal area in the north of the Borough. The provision of new local centres to serve areas of deficiency again in the north of the Borough should be considered.

- 22.7 Vacant units within main and local centres should be sufficient to meet the projection for small stores/shops for the foreseeable future, and could also eat into the food store projection if small supermarkets can be accommodated. The high growth food store projection (12,340 sq m gross by 2015) may be difficult to accommodate in the Borough. In our view it may not be necessary to meet the entire high growth food store projection, because it may be reasonable to expect food stores in Kensington & Chelsea to trade above national average densities, due to higher customer expenditure and overhead. However, the potential to accommodate larger food stores suitable for main and bulk food shopping (over 1,000 sq m net) should also be considered, in order to relieve high trading levels in existing large food stores. The low growth floorspace projections may be a more realistic target for the development strategy in the Borough Kensington (4,117 sq m gross by 2015).
- 22.8 If proposals for food stores emerge then the impact of these stores on designated centres would need to be carefully considered, regardless of the global retail capacity identified in this study.

Comparison Development

- 22.9 The future need for new comparison retail floorspace will in Kensington & Chelsea will be affected by Westfield's new shopping centre at White City. Many residents in the Borough indicated they are likely to shop regularly at the proposed shopping centre. The impact on centres particularly in the north and central parts of the Borough is likely to be significant, and Kensington High Street appears to be the most vulnerable centre. The strategy for Kensington & Chelsea will need to monitor and respond to this impact.
- 22.10 Two scenarios were also assessed in the study for comparison shopping development. The low growth scenario assumes major retail development in neighbouring Boroughs, in particular at White City, will reduce the Borough's market share of comparison expenditure within the study area. The second high growth scenario assumes the Borough can deliver major retail development that will help the Borough to maintain its 2008 market share of comparison expenditure within the study area.
- 22.11 The analysis of potential development sites in the Borough suggests that major comparison retail development is unlikely to come forward in the short to medium term, certainly of a scale capable of countering the impact of competing

developments. The low growth scenario comparison floorspace projected appear to be the most realistic for planning purposes. However if retail development proposals emerge within designated centres, that would exceed these low growth projections, then this scale of development may still be appropriate subject to issues of scale and the impact on other centres. Nevertheless, the strategy should seek to accommodate the low growth projections within designated centres. On this basis the potential for further comparison goods floorspace within the Borough is shown in Table 22.2.

22.12 These projections suggest that in the short term, the impact of competing developments could lead to a reduction in comparison floorspace within the central and north parts of the Borough, with Kensington High Street and Notting Hill Gate perhaps the most vulnerable. The strategy for this part of the Borough should be to concentrate on retaining existing Class A1 retail uses and the reoccupation of existing vacant units, through the continued implementation of shop frontage policies and restrictions on changes of use. It may be desirable for some comparison retail units to be re-occupied by convenience operators in order to meet some of the convenience floorspace projections highlighted previously.

Table 22.2: Comparison Expenditure/Floorspace Projections (Low Growth)

	2008 to 2012	2008 to 2015	2008 to 2020	2008 to 2028
Surplus Expenditure £M	31.19	146.95	403.95	943.67
Projected Sales Floorspace SQ M Net	4,449	20,458	52,284	108,661
South Kensington & Chelsea Main Centres (1)	8,896	19,256	39,853	76,924
Central/North Kensington & Chelsea Main Centres (2)	-4,233	493	9,928	26,347
Other in Kensington & Chelsea	-214	709	2,503	5,390
Projected Gross Floorspace SQ M	5,932	27,277	69,712	144,881
South Kensington & Chelsea Main Centres (1)	11,862	25,674	53,137	102,565
Central/North Kensington & Chelsea Main Centres (2)	-5,644	658	13,237	35,129
Other in Kensington & Chelsea	-286	945	3,338	7,186

(3) South K&C includes Knightsbridge, Kings Road, Fulham Road and South Kensington (Zone 3).

(4) North/Central K&C covers Kensington High Street, Portobello Road, Earl's Court, Notting Hill Gate and Westbourne Grove (Zones 1 and 2)

22.13 In the south of the Borough existing vacant shop premises should be capable of accommodating a significant element of retail capacity in the short term. As indicated in the previous section vacant units in the main centres in the south of the Borough could accommodate about 5,100 sq m gross, if the vacancy rate reduced to 5%,

which seems a reasonable target. Vacant units within local centres across the Borough could accommodate about 4,700 sq m gross.

22.14 In the medium term (2012 to 2015) the implementation of retail development proposals within or on the edge of the main centres in the south of the Borough could be appropriate.

22.15 If emerging retail development proposals within centres exceed these floorspace projections, or the proposal is expected to be implemented before the forecast year, this does not necessarily imply that planning permission should be refused. However, careful consideration will be required relating to whether the development is of an appropriate scale (in relation to the relevant centre) and whether the potential impact of the development both within the centre and on other centres will be acceptable.

22.16 The Council should seek to identify sites within the designated centres to meet at least the floorspace projections up to 2015, in the south of the Borough. In the Central/North part of the Borough the Council will need to take a longer term view, and should consider how the longer term projections after 2015 may be accommodated. Potential development sites need to be examined further as currently proposed in the LDF process. Sites identified in the LDF should continue to be explored with the landowner/developers, recognising it may take a number of years to complete complex developments.

22.17 Any major comparison retail proposals outside the designated centres will need to be considered very carefully, and the cumulative impact of the proposal along with other pipeline schemes should be considered. These proposals would be required to demonstrate there is a need for the development proposed, comply with the sequential approach to site selection, and the applicant will also need to demonstrate the proposal will not have an unacceptable impact on existing centres. Development within centres will also need to be consistent in terms of scale and nature to the role of that centre and the catchment area the centre serves. Proposed changes to PPS6 if adopted would remove the requirement for developers to show need, but the current PPS6 still remains the material consideration.

Commercial Leisure Development

22.18 The provision of leisure, entertainment and cultural facilities within the Borough and study area is relatively good. Residents also have good access to facilities in the

West End and neighbouring authorities. The Borough's location within the catchment area of existing facilities will limit the potential for further commercial leisure and entertainment facilities.

- 22.19 Based on our assessment, there could be potential scope for further health and fitness facilities and demand was identified by Esporta in our canvas of occupiers. There could also be theoretical scope for large scale leisure facilities such as ten-pin bowling and bingo clubs, albeit no demand was identified in our canvas of occupiers. Furthermore, these low density uses may not be viable within the Borough due to high land values and the shortage of large development sites, unless they are developed as part of a major mixed use development.

The Designation and Role of Centres in the Borough

- 22.20 PPS6 indicates that local planning authorities should adopt a positive and proactive approach to planning for the future of the centres within their areas, whether planning for growth, consolidation or decline. Local planning authorities are expected to set out a vision and strategy for the pattern and hierarchy of centres within their area. This strategy should set out how the role of different centres will contribute to the overall vision for their area.
- 22.21 The sequential approach indicates that major, district and local centres are the preferred location for the main town centre uses including retail and leisure development. Some forms of development may be more appropriate in smaller centres, if there are localised areas of deficiency. The key issues are the nature and scale of retail/leisure development proposed and the catchment area the development seeks to serve. Development should normally be consistent in terms of scale and nature with the character and role of the nearest centre. Therefore, development plan policies should provide clear advice in this respect.
- 22.22 PPS6 suggests that local authorities should adopt policies that enable major, district and local centres to meet the needs of residents in their area. The sequential approach indicates that the first preference for new developments should be within centres followed by edge-of-centre locations. Out of centre sites are last in the order of preference. Edge of centre sites for shopping purposes are generally within 300 metres of the primary shopping area. In practical terms a 300 metre distance from the main shopping centres within Kensington & Chelsea would cover a large part of the Borough. In some centres surrounding areas are predominately high density

residential areas, and development opportunities within edge-of-centre areas may be unavailable.

22.23 The distinction between major, district and local centres is important when applying the sequential approach and determining the appropriate scale of development within each centre. The nature, role and location of proposed retail/leisure schemes need to be considered when applying the sequential approach. Future development plan policies in Kensington & Chelsea must clearly define where centres lie in the hierarchy in order to avoid confusion when applying the sequential approach.

22.24 The current UDP identifies 46 centres. The Plan identifies the following nine '*Principal Centres*':

- Knightsbridge;
- King's Road (East);
- Kensington High Street;
- South Kensington;
- Notting Hill;
- King's Road (West);
- Fulham Road (East);
- Fulham Road (West); and
- Portobello Road.

22.25 Below these main centres the Local Plan identifies 37 '*Local Centres*' including Earl's Court Road and Westbourne Grove.

22.26 The Core Strategy Interim Issues and Options Document published in February 2008 sets out a revised retail hierarchy, which endorses the Major of London's hierarchy of centres, albeit with some modifications to reflect the special character of both Portobello Road and Westbourne Grove, as follows:

- **International Centre:**
 - Knightsbridge
- **Major Centres:**
 - King's Road (East); and Kensington High Street
- **District Centres:**
 - King's Road (West); Fulham Road (East); Fulham Road (West); Notting Hill Gate; South Kensington; and Earl's Court Road
- **Special District Centres:**
 - Portobello Road; and Westbourne Grove
- **Neighbourhood and Local Centres:**
 - The remaining designated centres (35 in total)

- 22.27 Within the London Plan (2004), Knightsbridge is classified as an '*International Centre*' and King's Road (East) and Kensington High Street are classified as '*Major Centres*'. South Kensington, Notting Hill, King's Road (West), Fulham Road (East), Fulham Road (West), Portobello Road and Earl's Court Road are classified as '*District Centres*'.
- 22.28 The UDP designation for the main centres in the Borough predates the London Plan, but the Core Strategy Interim Issues and Options Document is more in line with the London Plan. The designation of Westbourne Grove and Portobello Road as special district centres, as proposed in the Core Strategy Issues and Options, has not raised objections from the GLA. The role of these two centres and other centres in the Borough are examined in this report.
- 22.29 Annex A of PPS6 provides guidance on the definition of centres and some clarification on the designation and role of centres. Table 1 of PPS6 describes the characteristics of different centres. It suggests that city centres are the highest level of centre and will often be a regional centre and will serve a wide catchment. Town centres are usually the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. These description best fit the roles of Knightsbridge, King's Road (East) and Kensington High Streets, as the main centres within the Borough. However the nature of shopping in Kensington and Chelsea is unique in terms of the large numbers of tourist visitors, and the definitions in PPS6 are not that helpful in understanding the hierarchy within and surrounding the Borough.
- 22.30 PPS6 also suggests that *District Centres* will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library. The London Plan suggests *District Centres* traditionally provide convenience goods and services for more local communities, although some may have developed specialist shopping functions. There is a wide variation in the scale and nature of the 156 district centres designated in the London Plan.
- 22.31 It appears the London Plan definition of district centres goes beyond that suggested by the description in Table 1 of PPS6, in terms of the scale and range of facilities available. Therefore some local centres in London may be similar in size and function to district centres designated outside London.
- 22.32 In our view South Kensington, Notting Hill, King's Road (West), Fulham Road (East),

Fulham Road (West) and Earl's Court Road's roles are in line with the London Plan's description for district centres, with Westbourne Grove and Portobello Road's designation as '*Special District Centres*' reflecting their specialist shopping functions are referred to in the London Plan. These roles are examined later in this report.

- 22.33 Below district centres, PPS6 does not provide sub-divisions for local centres. However, the footnotes indicate that small parades of shops of purely neighbourhood significance are not regarded as centres for purposes of the policy statement. PPS6 states that local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette.
- 22.34 The proposal in the Core Strategy Issues and Options for Earl's Court Road and Westbourne Grove to be re-categorised as district centres reflects their existing provision and is consistent with the London Plan. Earl's Court Road contains three small supermarkets as well as a range of services and as mentioned before Westbourne Grove has a particular specialist shopping function.
- 22.35 All the other local centres are relatively small when compared with the existing District Centres in Kensington & Chelsea and other district centres in London. In our view none of the local centres apart from Earl's Court Road and Westbourne Grove should be reclassified as district centres, based on the current scale of commercial floorspace.
- 22.36 The London Plan describes *neighbourhood centres* as providing services for local communities, but provides limited guidance on what may be considered to be appropriate within neighbourhood centres.
- 22.37 PPS6 makes a distinction between local centres and smaller parades, but does not give definitive guidance on how local authorities should categorise local centres/shopping parades within their areas. However, PPS6 suggests that the designation of local centres (i.e. anything below district centres) should be defined by local authorities based on local circumstances. Therefore there is no set methodology or approach that can be applied from elsewhere.
- 22.38 An analysis of local centres and parades is set out in Section 18 of this report. Smaller clusters of local shops and freestanding shops should not be designated as local centres.

22.39 The Borough's centres are very close to each other, and PPS6's definition of edge of centre (within 300 metres of the primary shopping area) implies that most of the Borough is either within or edge of centre. Over the LDF period it is unlikely there will be sufficient sites and/or vacant units within the designated centres to accommodate growth in medium to long term. Therefore suitable edge of centre sites for expansion may need to be identified by the Council.

22.40 An alternative option could be to adopt a Central Activity Zone (CAZ) approach, similar to that adopted in the City of Westminster to promote retail development. For example, the International and Major Centres within the Borough, i.e. Knightsbridge, King's Road (East) and Kensington High Street could be covered by a similar CAZ designation. Within this area the policy approach could seek to ensure:

- that development schemes within the Primary Shopping Frontages retain Class A1 uses on ground, basement and first floor levels with no loss of A1 floorspace;
- that development schemes at least provide the same amount of retail floorspace if existing Class A1 use is replaced;
- that the number of consecutive non-A1 uses is limited; and
- that there is an appropriate balance of town centre uses outside the primary shopping frontages.

22.41 However, in our view this approach may be inappropriate because not all areas surrounding these centres are likely to be suitable for commercial/town centres uses, for example predominantly residential areas. As a result, we believe development plan policies within Kensington and Chelsea should continue to designate centres and establish an appropriate hierarchy, which will help to guide future development. Site allocations may identify edge of centre sites where retail development will be appropriate. The town centre first policy advocated in PPS6 remains the most appropriate approach within Kensington & Chelsea. Development/allocations on edge of centre sites should be well connected to existing shopping frontages, and should be capable of being integrated into the centre.

Future Strategy Implementation and Monitoring

22.42 There are a number of broad areas of possible action the Council could pursue in order to maintain the role of shopping centres within the Borough, in face of increasing competition, and to address the weaknesses highlighted in this report, as follows:

- application of guidance within PPS6, particularly relating to need and the sequential approach in determining out-of-centre retail and other development proposals that generate significant numbers of trips;
- improving the range and choice of shops and services in all centres (where appropriate in terms of scale) by encouraging intensification, development and the re-occupation of vacant premises, and continuing to promote the centres;
- maintaining the generally high quality environment within each centre;
- measures to maintain high levels of accessibility and public transport to the centre;
- the continued implementation of shop frontage policies within the development plan to protect retail and other desirable town centre uses; and
- measures to bring forward development opportunities to improve the availability of modern premises suitable for new occupiers within designated centres.

22.43 The recommendations and projections within this study are expected to assist the Council in preparing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail and leisure development up to 2015, with longer term forecast up to 2020 and 2028. However, projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available. In particular long-term projections beyond 2015 should be treated with caution.

22.44 Therefore, we would recommend that this retail/leisure capacity study should be updated in 4-5 years time and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections (i.e. uncertainties relating to GLA housing projections);
- local expenditure estimates (information from Experian or other recognised data providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping;
- existing retail floorspace and average turnover to floorspace densities (floorspace surveys and turnover data); and
- implemented and impact of development within and around the study area.

22.45 These key inputs into the retail/leisure capacity assessment can be amended to provide revised capacity projections. We do not envisage that the structure of the capacity assessment set out in this report will need to be amended. It may be necessary to undertake an updated household survey to address the implementation of major developments that will significantly alter shopping/leisure patterns in the Borough.

22.46 The Council should consider monitoring and updating the centre health checks provided in this study on a regular basis, perhaps 2-3 years in order to assess changes in the vitality and viability of the centres. In particular changes in the land use and vacancy rates should be monitored. Property market data should also be monitored i.e. rents and yields.