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Planning Design Economics



THE ROYAL BOROUGH OF
**KENSINGTON
AND CHELSEA**

**ROYAL BOROUGH OF
KENSINGTON & CHELSEA**

**RETAIL AND LEISURE NEEDS
STUDY**

**PORTOBELLO ROAD ADDENDUM
REPORT**

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1.0 INTRODUCTION

The Portobello Road Addendum Report

- 1.1 Nathaniel Lichfield & Partners (NLP) were commissioned by Royal Borough of Kensington & Chelsea to prepare a retail and leisure needs study. As part of this study NLP have produced this addendum report which considers the feasibility, primarily in terms of retail need, of expanding the Portobello Road retail frontage. This addendum report should be read alongside the main Retail and Leisure Study. This addendum report will help inform the Council's current process of reviewing the development of a number of its estates, in the context of the options set out in the North Kensington Area Action Plan (NKAAP) Issues and Options Document.

Content of the Report

- 1.2 Section 2.0 provides an overview of adopted and emerging policy on Portobello Road, including the NKAAP Issues and Options. Section 3.0 provides a summary of the health check and identifies the key themes within Portobello Road. Section 4.0 evaluates the need for an extended retail frontage at Portobello Road. Section 5.0 provides conclusions and recommendations on extending the Portobello Road retail frontage.

2.0 PLANNING POLICY CONTEXT

The London Plan & Sub Regional Planning Framework

- 2.1 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. 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). Within the London Plan Portobello Road is classified as a district centre. The London Plan states that district centres:

“...have traditionally provided convenience good and services for more local communities and are distributed across London. Some District centres have developed specialist shopping functions, often as a result of their lower rents. Developing the capacity of District centres for convenience shopping is critical to ensure access to goods and services at the local level, particularly for people without access to cars. Many have a linear nature which may need to be consolidated to make more efficient use of land and transport capacity”

- 2.2 The Central London Sub-Regional Planning Framework (SRDF) was published in May 2006. The SRDF recognises the importance of street markets due to the social and ethnic composition of central London and specifically recognises Portobello Road market as a market of London Wide and potentially international significance due to its antiques specialism. The SRDF acknowledges the potential issue of identifying, protecting and enhancing Central London’s markets. This includes maintaining and developing the broader offer of strategic street markets, including Portobello Road.

Local Planning Context

Adopted Unitary Development Plan

- 2.3 The Royal Borough of Kensington and Chelsea Unitary Development Plan was adopted in May 2002. It designates Portobello Road as a principal shopping centre. In considering any extension to the Portobello Road retail frontage it will be important to assess the feasibility within the existing adopted Planning Policy, which sets out the role and nature of principal shopping centres and how they should develop.
- 2.4 The adopted UDP sets out a number of general strategic policies for Shopping in the Borough. Two general strategies the Council will pursue which are of specific relevance to potential extension of the Portobello Road retail frontages are:

- *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.*
- 2.5 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*”.
- 2.6 Policy S7 proposes that the Council will “*seek a concentration of shops in the core frontage of Principal Shopping Centres*”.
- 2.7 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.
- 2.8 The UDP 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 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.

Core Strategy

- 2.9 The Royal Borough of Kensington and Chelsea Council is preparing a Local Development Framework (LDF) in line with the new provision of the Planning and Compulsory Purchase Act 2004. As part of this process the Core Strategy Interim Issues and Options document was published in February 2008 for consultation. Following an initial issues and options consultation the Council endorsed the London Plan’s hierarchy of town centres, though modified the classifications to reflect both Portobello Road and Westbourne Grove’s special character, with these two centres designated ‘Special District Centres’.
- 2.10 The Core Strategy Interim Issues and Options document sets out concerns about the future of Portobello Road, e.g. its attractiveness is under threat from an influx of national multiples at the expense of independent traders. The Council therefore,

through the Core Strategy, will seek to include strategic policies which will attempt to maintain the diversity of the Borough's centres. The designation of Portobello Road and Westbourne Grove as Special District Centres is one such measure with the Council proposing that the Core Strategy will explicitly recognise the value of diversity within these two centres. The Issues and Option Document specifically highlights that Portobello Road 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."*

2.11 The Core Strategy Interim Issues and Options document also states:

"A balance must be reached between protecting our existing centres (which may push up rents, and therefore discourage smaller independent retailers), and extending our existing centres in order to allow for premises with lower rentals where independent stores may be more likely to do well."

North Kensington Area Action Plan DPD

2.12 The North Kensington Area Action Plan Issues and Options consultation document was published in February 2008. This document identifies a number of themes that apply to the future of North Kensington with estate renewal one theme identified. In addition to this the plan identifies the Portobello/Notting Hill Gate area as one of three areas for change setting out options for development based around *moderate*, *medium* and *significant* changes.

2.13 The *moderate* change option for the Portobello/Notting Hill Gate area involves retaining the present boundaries of Portobello Road with an emphasis on safeguarding small units and the unique character, though it is acknowledged that this is difficult to manage through existing planning powers.

2.14 The *medium* change option would involve extending the retail frontage eastwards between Portobello Road and Westbourne Grove (Appendix 1). As part of the Estate Renewal options, Portobello Court is highlighted as one potential estate to undergo estate renewal and this redevelopment could provide an opportunity to extend the retail frontage eastwards.

2.15 The *significant* change option would involve extending the retail offer both eastwards (as in the *medium* change option) and northwards along Portobello Road towards Golbourne Road. The option states that any retail expansion would include the

provision of a number of affordable retail units provided through a Section 106 agreement.

3.0 PORTOBELLO ROAD SPECIAL DISTRICT CENTRE

Introduction

- 3.1 The Portobello Road shopping areas has a unique and vibrant character. Its architecture, intimate streetscape, lively street market and wide range of small independent shops create a retail centre that is far removed from the typical high street. The retail offer serves a wide ranging function e.g. from the specialist antiques stores that helps to attract international customers, to local convenience retailers and local services that provide more for the day-to-day needs of residents. The shop units are supported by the street market which provides and invaluable retail function with stalls selling antiques, bric-a-brac, fruit, vegetables and second hand goods. The market both attracts visitors to the centre from a very wide catchment and enhances the intensity of activity within the street.
- 3.2 Despite the relative success of Portobello Road there remain a number of weaknesses observed within NLP's health check analysis. Space within the public realm on the busy weekend market days is at a premium in the core areas of the Centre which can cause an overly cluttered streetscape. This can reduce the ease of movement along Portobello Road which is exacerbated by the linear nature of the centre. The centre also contains a number of 'dead' frontages including the Portobello Court Estate and the northern end around Portobello Road. 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 are still market pitches, Portobello Road is enclosed by walls on either side, providing no permanent activity along this stretch.
- 3.3 The full health check analysis and audit of uses for Portobello Road can be found in the main Retail and Leisure Needs Study.

Key Issues for Portobello Road

- 3.4 Portobello Road's unique character and special retail function raises several key issues which will need to be considered in assessing the feasibility of extending the retail frontage. In providing any further retail floorspace in Portobello Road Special District Centre through development these key issues will need to be addressed to ensure the preservation and enhancement of Portobello Road Special District Centre. We consider these key themes to be:

- retention of the independent nature of retailers within Portobello Road and expanding these types of uses within any extension to the retail offer. New uses would need to relate to the existing function of the centre and wider area e.g. specialist shops such as art, antiques etc;
- Portobello Road also performs a local function, when the fruit and vegetable market is in full operation. The centre could seek to retain and enhance this vital and viable function and meet day-to-day needs;
- retention of the eclectic uses within Portobello Road Special District Centre and the high quality fashion retail offer in Westbourne Grove Special District Centre. Both have differing characteristics which could be diluted and eroded if they were allowed to blend; and
- enhancement of Portobello Road's character by enlivening 'dead' frontages and creating an improved street scene in keeping with the existing environment.

3.5 These themes have been reinforced during NLP's discussion with a number of stakeholders, which have informed this addendum report.

Balance of Trade Report

3.6 In May 2007 the Commission on Retail Conservation published its report 'A Balance on Trade'. This report to the Council considered how best a balance between national multiples, independent shops and other town centre retailers could be struck and specifically looked at the perspectives of stakeholders in the context of Portobello Road Special District Centre.

3.7 The Commission found that, *"Portobello Road is a victim of its own success, with new landlords and national chain stores increasingly keen to share in it"* and that *"The development of a shared vision and effective policy instruments are necessary to sustain its appeal."*

3.8 The Commission also observed that market forces, especially upward movement of rents, were forcing independent shop owners and local amenity shops out of the centre to be replaced by coffee shops and fashion stores. It also observed that the management of the market did not help to enhance the retail offer, and this was again a view reinforced in our stakeholder discussions.

4.0 PORTOBELLO ROAD GAP ANALYSIS

Existing Customer Base

- 4.1 An in-street visitor survey was conducted in Portobello Road (101 completed interviews spread over a Monday, Tuesday, Wednesday, Friday and Saturday). This survey indicated that a high proportion of visitors' (43%) main purpose for visiting the centre was non-food shopping. A further 21% were window shopping and 16% of customers were visiting the market. Relatively low proportions were visiting the centre primarily to use non-retail services, restaurants/café/bars or for work/businesses purposes, compared with other centres in the Borough.
- 4.2 Nearly two thirds of visitors suggested they would do some shopping during their visit, but 22% were unsure, which suggests that many of the window shoppers were not sure if they would buy anything. When asked what types of goods visitors intended to buy, over half were uncertain. These figures suggest Portobello Road relies to a large extent on impulse purchases. The main categories of goods purchased were:
- food and grocery 30%;
 - clothing/footwear 12%; and
 - gifts/jewellery/china/glass 9%.
- 4.3 The average spend per shopping visitor was £10 for food and grocery, £46 for non-food goods and £1.70 for eating/drinking out.
- 4.4 Over 73% of visitors interviewed in Portobello Road live outside the study area (i.e. Kensington & Chelsea and significant parts of neighbouring Boroughs), which was the third highest figure in the Borough's eleven main centres, behind South Kensington and Knightsbridge. Portobello has a wide catchment area and attracts a high proportion of occasional visitors. It also attracts a large number of frequent trips from the local area and the centre has a dual role, i.e. serving local needs and occasional shoppers.

Gaps in the Retail Provision

- 4.5 Table 4.1 and 4.2 provide breakdowns of the retail provision within Portobello. This analysis suggests there are gaps in the retail provision.
- 4.6 Portobello Road Special District Centre has an excellent provision of comparison shops. The selection of convenience retailers and A1 services is more limited. This

suggests there is potentially a qualitative need for a wider selection of local convenience stores, non-retail services, newsagents and other local centre type uses to meet local day-to-day amenity needs. There could be scope for a medium sized food store that would cater for main and bulk food shopping. The Tesco Metro store is the largest store in the centre but is only 519 sq m net. This store caters primarily for basket and top-up shopping trips rather than main and bulk food shopping.

Table 4.1: Portobello Road Special District Centre 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)

Table 4.2: 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)

4.7 Table 4.2 demonstrates that, although Portobello Road has a large number of comparison shops, most of the main categories of comparison shops are poorly represented. Comparison provision focuses on two categories of shops only, which confirms Portobello Road has a specialised/niche comparison shopping role. Portobello Road has an excellent provision of antique (categorised under china/glass/gifts/fancy goods) and fashion (clothing/footwear) retailers.

- 4.8 In the context of the desire to retain and enhance independent traders, there are a number of types of comparison retail that are poorly represented and would suit an independent business including florists/nurserymen/seedsman, booksellers/arts/crafts/stationers, DIY/hardware/homewares, jewellers and toys/hobby/cycle/sport'.
- 4.9 This gap analysis suggests there a number of potential options for expanding the centre, as follows:
1. build on the centre's existing strengths – i.e. fashion shopping and china, glass, gifts and fancy goods (including antiques) that attract occasional customers from a wide area;
 2. improve shops and services for local people – i.e. food and grocery shopping and non-retail services;
 3. address gaps in the provision of comparison shops to provide a better range and choice of products both for local residents and occasional shoppers.
- 4.10 However, there are a number of factors that may affect each of these approaches, as shown below.

1. Build on existing strengths	This approach could result in an over-provision of fashion/antique type shops and lead to saturation, which may result in an increase in shop vacancies, which could dilute rather than extend the existing retail offer. Nevertheless these types of uses are less likely to impact on other centres within the Borough, and the demand for premises is less likely to be affected by the Westfield Shopping Centre development at White City. This approach will only be viable if Portobello Road can increase its market share of tourist/occasional shoppers within Central London.
2. Improve local provision	This approach is also unlikely to be affected significantly by the Westfield Shopping Centre development, but the impact on nearby local centres would need to be carefully considered. This approach may dilute Portobello Road's existing strengths as a fashion/antiques shopping destination.
3. Extend range of comparison shopping	This approach is most likely to be affected by the Westfield Shopping Centre with comparison operators reluctant to invest in the centre due to the competition from Westfield's scheme. The impact on other centres, such as Notting Hill Gate and Kensington High Street would also need to be considered.

The Quantitative Potential for Extending the Frontage

- 4.11 The main report provides floorspace projections for both convenience and comparison retail within the Borough as a whole.
- 4.12 In terms of food and grocery shopping, the main study identifies significant capacity to improve convenience sales floorspace in the Borough in the short to medium term (i.e. up to 2015). In particular, there is potential to accommodate larger food stores suitable for main and bulk food shopping (over 1,000 sq m net), and opportunities in Portobello Road could be appropriate to meet this need. The retail capacity figures suggest Option 2 set out above could be viable. A food store catering for main and bulk food shopping trips would help to draw additional trade to the centre, and is likely to benefit rather than harm existing small convenience shops and market stalls, by attracting more customers to the centre. A new food store should generate linked shopping trips and would have a complementary role along side the market and small convenience shops. The survey results suggest a high proportion of convenience expenditure within the local areas is attracted to large food stores outside Portobello Road centre. It would be beneficial if more of this expenditure could be attracted to Portobello Road.
- 4.13 In terms of comparison shopping, the study suggests the Westfield development at White City will draw a significant level of trade from the northern and central parts of Kensington and Chelsea Borough. The impact of this and other competing developments could lead to a reduction in comparison floorspace within the central and north parts of the Borough in the short term, but perhaps Kensington High Street and Notting Hill Gate are more vulnerable than Portobello Road due to the nature of shopping within these centres. The global retail capacity projections suggests there is limited quantitative need for comparison retail floorspace in the main centres in the central/north part of the Borough up to 2015, and only about 9,900 sq m gross by 2020. These capacity figures suggest Option 3 set out above may not be viable until after 2015.
- 4.14 These projections assume that the growth in comparison expenditure generated from visitors who live outside the study area will be in line with growth in expenditure per capita. No growth in the number of visitors has been assumed. If Portobello Road can attract a greater number of occasional visitors to the centre then there may be additional scope to improve specialist/niche comparison shopping facilities within the

centre (i.e. Option 1), over and above that suggested by the retail capacity assessment.

Occupier Demand

- 4.15 As outlined in the main report, floorspace capacity projections 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 when considering the scope to extend the retail frontage in Portobello Road.
- 4.16 There are limited vacancies within Portobello Road Special District Centre, with a vacancy rate of 5.5%, which is significantly lower than the 11% national average. One would normally expect even the most successful shopping centres to have a vacancy rate of around 5% at any given time, because this reflects the natural churn of occupiers.
- 4.17 The low vacancy rate in Portobello Road suggests that the existing demand for premises is relatively strong and that the property market in Portobello Road is relatively buoyant, when compared with the existing supply of premises. However, the impact of the Westfield development could result in a reduction in occupier demand. If the number of shop units is significantly increased in Portobello Road then there is a risk the vacancy rate will increase, and/or new development will take a long time to be occupied.
- 4.18 The canvas of national operators and EGi search for occupier requirements only highlighted two current floorspace requirements specifically for Portobello Road, Regis International hairdressers and Holland & Barrett health foods, which are local shopping facilities rather than comparison retailers. This suggests that demand from national multiple operators is low. The close proximity of the Westfield White City development to Portobello Road suggests that comparison national multiple retailers are unlikely to locate in this part of the Borough. This suggests Option 3 is unlikely to be viable due to the lack of operator demand.
- 4.19 It is more difficult to quantify demand from independent retailers or market stall traders. However, it appears through our discussions with key stakeholders that if rents remain affordable that there is potential to attract more independent businesses to Portobello Road. The commercial viability of retail development will be influenced by rental levels, therefore a fine balance between offering affordable rents that can

attract operators and commercially viable development needs would need to be achieved. In the current economic and property market climate this may be difficult to achieve. Retail development at affordable rents may need to be cross funded by other forms of development, e.g. high residential uses.

- 4.20 Our discussions suggest that the number and demand for market stalls is falling, which suggests the market needs to be sustained through effective management.

5.0 EXTENDING PORTOBELLO ROAD FRONTAGES

Introduction

- 5.1 There is physical potential to extend the Portobello Road Special District Centre frontage in two directions. As identified in the North Kensington Area Action Plan Issues and Options a *medium* change would involve creating frontages as part of the housing renewal of Portobello Court, creating a retail frontage onto Portobello Road and extending retail frontages towards Westbourne Grove Special District Centre along Lonsdale Road and Westbourne Grove. A *significant* change option would involve also extending Portobello Road northwards between Oxford Gardens and Golborne Road.

Portobello Court Eastwards Extension

- 5.2 If Portobello Court were to undergo housing renewal as part of the *medium* or *significant* change options then the design, scale and use of the development would have to respond to the existing character of both Portobello Road and Westbourne Grove District Centres. The creation of retail frontages along the east side of Portobello Road between Westbourne Grove and Lonsdale Road would add to the continuity of Portobello Road and could help to reinforce and develop the character of the Portobello Road experience if designed appropriately. In addition there is the potential to link new uses to the existing retail character of the Portobello Court area, which is predominantly where the antiques dealers are located.
- 5.3 It will be important to ensure that the character of shopping in Westbourne Grove and Portobello Road is not diluted following any westward extension to Portobello Road District Centre.
- 5.4 This potential expansion area is reasonably central to the prime shopping area within Portobello Road, and the gap between Portobello Road and Westbourne Grove is within reasonable walking distance. The close proximity of the two centres should help to generate sufficient pedestrian flows to attract new occupiers on the Portobello Court frontage of Portobello Road. There could also be potential to provide a natural circuit for pedestrians if active frontages can be provided along Colville Road and Lonsdale Road.



The Portobello Court Estate's frontage onto Portobello Road creates a visual break in the continuity of the retail centre on the east side, which detracts from the character and enclosure of Portobello Road.

5.5 The physical potential for extending the retail frontages as part of a major redevelopment of Portobello Court appears to be good. The site has a prominent frontage on to Portobello Road which has a good footfall. The area is situated in a good position between Westbourne Grove District Centre and Portobello Road, which would help encourage linkages between the two centres. The site is relatively large and has the potential to accommodate both small and large retail units, including smaller units that would be in keeping with the District Centre's existing units.



The Estate's frontages on to Westbourne Grove and Lonsdale Road have poor relationships with the roads and no active frontages. Redevelopment could provide active frontages.

- 5.6 In physical terms there are four options that could be explored, as follows:
- A. active frontage (about 100 metres) on the Portobello Road (east side) frontage only;
 - B. active frontages on both Portobello Road (east side) and Westbourne Grove Court (north side) linking the two centres (a total frontage of about 200 metres);

- C. active frontages on Portobello Road (east side) and a new shopping street linking Portobello Road with Colville Road, through Portobello Court (a total frontage of over 300 metres);
- D. a shopping circuit with active frontages on Portobello Road (east side), Westbourne Grove (north side), Colville Road (west side) and Lonsdale Road South side (a total frontage of about 400 metres).

5.7 Option A would require at least 1,500 sq m gross of shop floorspace at ground floor level in the form of small shop units (about 15 shop small units – 5% increase in the size of the centre). Option B would require at least 3,000 sq m gross (about 30 shops – 10% increase); Option C would require at least 4,500 sq m gross (about 45 shops – 15% increase), and Option D would require at least 6,000 sq m gross (about 60 shops – 20% increase). These options are shown in Appendix 2.

Portobello Road Northwards Extension

5.8 Extension of the Portobello Road Special District Centre northwards may be more difficult to integrate into the existing centre and existing streetscape. Portobello is already a long linear centre (nearly a kilometre in length), and a 600 to 700 metre extension to the retail frontages would represent a considerable walk for pedestrians, and this extension would not provide a natural shopping circuit. The A40 Westway is also a major physical and psychological barrier.



To the north of Portobello Road Special District Centre the road has no active frontages and there are significant challenges to overcome to extend the Centre northwards.

5.9 We do not believe an extension of Portobello Road to the north of Golborne Road is viable or appropriate given the distance from the prime shopping area. The scale of development required to extend active frontages on both sides of Portobello Road beyond Golborne Road would need to exceed 3,000 sq m gross, and up to 15,000 sq

m gross could be needed to extend the centre up to Ladbroke Road North Local Centre. The retail capacity assessment suggests this scale of development is not viable.

- 5.10 An extension between Raddington Road and Golborne Road (about 100 metres) is more realistic, but significant constraints still exists.
- 5.11 The existing urban area along Portobello Road between Oxford Gardens/Raddington Road and Golborne Road is lined by high featureless brick walls, with a school on the west side and the back of houses on the east. These uses create dead frontages with little space to create a permanent extension to the retail frontages. If this part of Portobello Road could be pedestrianised there could be physical potential to provide market stalls or kiosk type units such as permanent lock-ups for market traders.
- 5.12 To extend the Portobello Road retail frontage northwards would require the creation of active frontages preferably on both sides of Portobello Road, which would necessitate significant alterations to the existing urban fabric.
- 5.13 Residential units would need to be acquired to facilitate development of the east side of Portobello Road and the existing school would need to be redeveloped to provide units. An active frontage on one side up to Golborne Road would require at least 1,500 sq m gross of shop floorspace at ground floor level in the form of small shop units (about 15 shop small units – 5% increase in the size of the centre). An active frontage on both sides would require at least 3,000 sq m gross (about 30 shops – 10% increase).

6.0 CONCLUSIONS AND RECOMMENDATIONS

- 6.1 This addendum report provides an analysis of the scope for extending the retail frontages in Portobello Road Special District Centre. This has been evaluated in the context of the *medium* change and *significant* change options for the Portobello, Golbourne, Westbourne and Notting Hill Gate area in the North Kensington Area Action Plan Issues and Options consultation document (February 2008).
- 6.2 There are a number of gaps in Portobello Road's retail offer. This gap analysis suggests there a number of potential options for expanding the centre, as follows:
1. build on the centre's existing strengths – i.e. fashion shopping and china, glass, gifts and fancy goods (including antiques) that attract occasional customers from a wide area;
 2. improve shops and services for local people – i.e. food and grocery shopping and non-retail services;
 3. address gaps in the provision of comparison shops to provide a better range and choice of products both for local residents and occasional shoppers.
- 6.3 In quantitative terms there is potential to extend the Portobello Road retail frontage especially to include a convenience retail store. There is a borough-wide capacity for convenience floorspace. There is less scope for comparison retail floorspace with limited borough-wide capacity for comparison floorspace. Specialist/niche comparison retailing, building on the existing strength's of Portobello Road as a tourist/occasional shopping destination, is likely to be more viable than traditional high street comparison shopping.
- 6.4 We believe Option 1 and/or 2 are the most likely to be viable. If Option 1 is preferred then small shop units of between 50 to 150 sq m gross should be provided. If Option 2 is preferred then a medium size supermarket of up to 1,500 sq m net could be provided supported by small shops units for other local shops and services.
- 6.5 The potential to extend the Portobello Road frontage through housing renewal appears to be good. This area of Portobello Road Special District Centre does not contribute towards the retail function of the centre and is currently a dead frontage within centre detracting from the generally excellent character of Portobello Road. The site would suit retail and community uses, especially where ancillary to the housing that would be developed as part of the housing renewal programme. Any

redevelopment of this area, as a minimum should provide an active shop frontage on to the east side of Portobello Road.

- 6.6 The extension of the active frontage on the east side of Portobello Road could be viable and would represent only a modest increase in the number of shop units and floorspace in the centre (1,500 sq m gross and a 5% increase in the number of shop units). However, if frontages are also extended along Westbourne Grove (north side) then up to 3,000 sq m gross would be required, and this is unlikely to be viable unless a food store is included. A combination of Option 1 and 2 may be required to extend the active frontages along both Portobello Road and Westbourne Grove.
- 6.7 The viability of extending the Portobello Road frontage northwards is more limited. A major redevelopment of the area would be required to create active frontages on to this section of Portobello Road, but the shop units provided would be a significant distance from the prime shopping area in Portobello Road. In our view it would be more difficult to attract operators to this area because pedestrian flows are likely to be much lower.

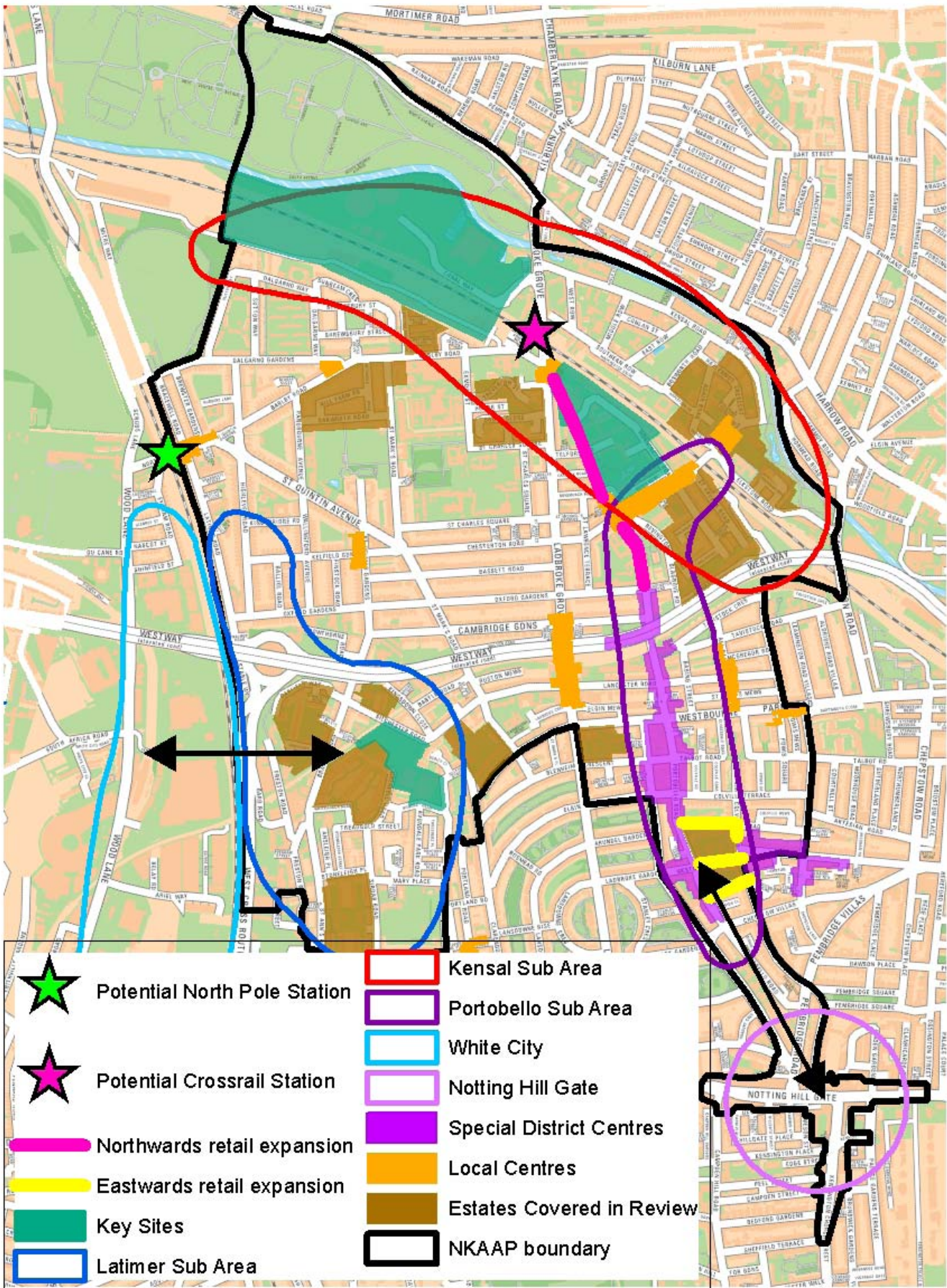
Recommendations

- 6.8 There is scope to extend the retail frontage eastwards as part of the housing renewal of the Portobello Court estate, though any extension of the retail frontage will have to take into consideration a number of key issues surrounding Portobello Road. Therefore in undertaking any extension of the retail frontage our key recommendations are as follows.
- Any retail frontage extension should reflect the scale and nature of Portobello Road and contribute towards creating a both a Special District Centre with distinct uses as well as a centre with a strong local day-to-day function.
 - The scale and nature of development should ensure the different retail characters of Westbourne Grove and Portobello Road are still clearly defined.
 - Development should help to enhance the vitality and viability of Portobello Road by creating active frontages and units that suit the 'retail ecology' of the Special District Centre. Large units should only be provided to improve main and bulk food shopping provision.
 - An eastwards expansion for comparison shopping along Westbourne Grove and/or Lonsdale Road may be unviable, but convenience retail floorspace could be a possibility, which would assist in meeting the identified borough-wide projections.

- Any comparison retail should be limited to niche and independent occupiers to create a distinct and different retail offer to White City and other centres in the Borough.

Appendix 1

North Kensington Area Action Plan
Proposals Map Showing Options for North Kensington



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Appendix 2

Eastward Expansion Options

STREET PLAN



EXPANSION OPTIONS

