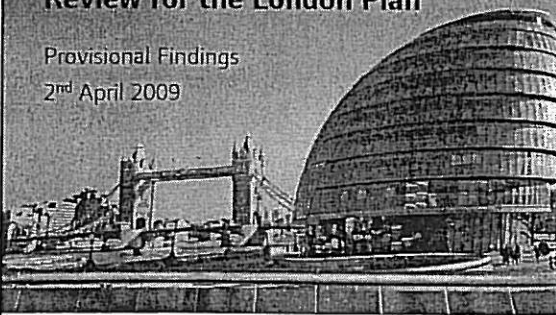


London Town Centre Network Review for the London Plan

Provisional Findings
2nd April 2009



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London Town Centre Network Review for the London Plan

1. Strategic context
2. Methodology for town centre network review
3. Data sources and issues
4. Provisional findings
5. Next steps

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1. Strategic Context

- PPS6
- London Plan (consolidated with alterations since 2004)
- Examination in Public recommendations
- Review of London Plan / EDS / MTS
- Proposed Supplementary Planning Guidance
- London-wide Retail Need Study 2009
- Town Centre Health Checks 2009

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London Town Centre Network (current)



2. Methodology for town centre network review

- (A) Update existing town centre classifications (role and function)
- (B) Update town centres designated as strategic clusters of night time economic activity
- (C) Provide an indicative policy direction for each town centre including the potential for significant growth
- (D) Indicate any potential changes to the network over the Plan period.

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Core Indicators

1. Town centre floorspace (retail, service and leisure) sq.m
2. Total retail floorspace (sq.m)
3. Total comparison goods retail floorspace (sq.m)
4. Comparison goods retail as % of total retail floorspace
5. Convenience goods retail as % of total retail floorspace
6. Leisure Services (sqm)
7. Estimated town centre turnover per annum (£m)
8. Zone A Rental levels (£/sqm)
9. Public Transport Accessibility Level (PTAL)
10. Extent of shopper catchment area (50, 80 and 90%)
11. Modal Split *

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Thresholds and criteria

Core indicators:	Town centre classifications			
	International	Metropolitan	Major	District
1. Total town centre floorspace (retail, service and leisure) sq.m	240,000+	100,000+	50,000+	10-50,000
2. Total retail floorspace (sq.m)	200,000+	85,000+	35,000+	6,000+
3. Total comparison goods retail floorspace (sq.m)	180,000+	65,000+	20,000+	4,000+
4. Comparison goods retail as a percentage of total retail floorspace	85%+	75%+	60%+	<50%
5. Convenience goods retail as a percentage of total retail floorspace	<10%	<15%	<30%	Variable 10-50%
6. Leisure Services (sqm)	250,000+	20,000+	10,000+	2-10,000
7. Estimated town centre turnover per annum (£m)	£4,000m+	£300m+	£100m-300m	<£100m
8. Zone A Rental levels (£/sqm)	£4,000-£8,000	£1,500-£4,000	£1,000-£1,500	£500-£1,000
9. Public Transport Accessibility Level	6	5-6	5-6	3-5
10. Shopper catchment area	International / Regional	Sub-regional	Borough/Local	Borough/Local
11. Modal split	To be confirmed	To be confirmed	To be confirmed	To be confirmed

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Data sources and issues:

- a) Floorspace – Experian GOAD
- b) Estimated turnover – Experian (London Retail Need Study, 2009)
- c) Zone A rentals – Colliers CRE
- d) Public Transport Accessibility Levels – TfL
- e) Shopper catchment areas – Experian (London Retail Need Study, 2009)
- f) Modal split – data issues

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(A) Update existing town centre classifications: (provisional findings)

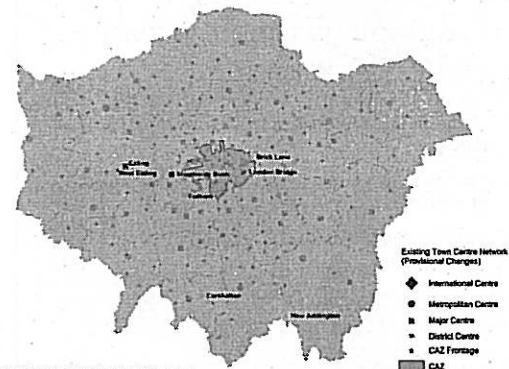
Centre	Borough	Current LP classification	Proposed re-classification
Ealing	Ealing	Metropolitan	Major
West Ealing	Ealing	See Ealing above	New District centre
Shepherd's Bush	Hammersmith & Fulham	District	Metropolitan
Fulham	Hammersmith & Fulham	Major	District
Earl's Court Road	Kensington & Chelsea	District	Local

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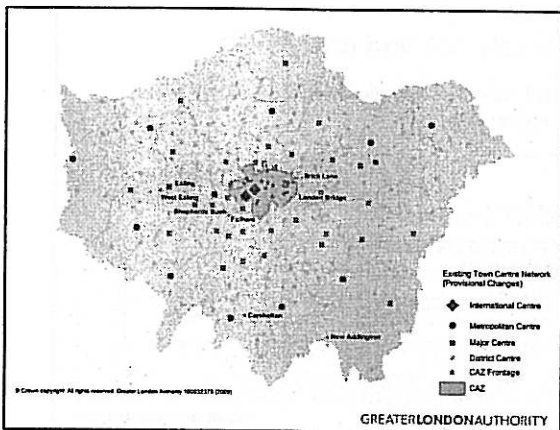
(A) Update existing town centre classifications: (provisional findings)

Centre	Borough	Current LP classification	Proposed re-classification
New Addington	Croydon	Not classified	New District centre
Selsdon	Croydon	Not classified	To be confirmed
Carshalton	Sutton	Not classified	New District centre
Brick Lane	Tower Hamlets	Not classified	New District centre
London Bridge	Southwark	Not classified	New CAZ Frontage

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2. Methodology for town centre network review

- (A) Update existing town centre classifications (role and function)
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Thresholds and criteria

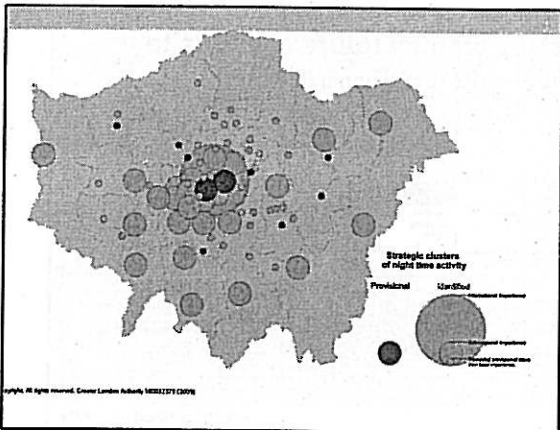
Core Indicators:	Strategic clusters of night time activity		
	International importance	Regional/ Sub-regional importance	More than local importance
1. Total cinema and theatre floorspace (sqm)	50,000	7,500	4,000
2. Total restaurant and cafe floorspace (sqm)	100,000	6,000	3,000
3. Total pubs, bars and night clubs floorspace (sqm)	100,000	7,500	4,000
4. Hotel provision (sq.m)	100,000	5,000	2,500

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(B) Update strategic clusters of night time activities: (provisional findings)

Existing London Plan clusters of night time economy activity	Suggested additional clusters of night time economy activity
<p>All existing LP designations are confirmed by the analysis</p>	<p>(1) - International (2) - Regional/Sub-regional (3) - More than local</p> <ul style="list-style-type: none"> • Barking (3) • Brick Lane (2/3) • Covent Garden (2) • Cricklewood (3) • Harrow (3) • Kilburn (3) • Knightsbridge (2) • Lewisham (3) • Tooting (3) • Woolwich (3)

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2. Methodology for town centre network review

- (A) Update existing town centre classifications (role and function)
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Thresholds and criteria (1)

Core Indicators:	Policy direction		
	High (Strategic Growth)	Medium (Travel Growth)	Low (Consolidation)
1. Gross comparison goods retail floorspace need 2009-2029 (sqm)	30,000+	500-20,000	Under 500
2. Gross comparison goods retail floorspace need as % of existing comparison floorspace	50%+	5-49.9%	Under 5%
3. Gross comparison goods retail floorspace in the pipeline (sqm)	25,000+	500-24,000	Under 500
4. Gross comparison goods retail floorspace in the pipeline as % of existing comparison floorspace (sqm)	25%+	5-24.9%	Under 5%
5. Percentage growth in estimated comparison goods retail turnover, 2009 - 2029	300%+	50-299.9%	Under 50%
6. Identified floorspace capacity to accommodate additional town centre floorspace (sqm)	30,000+	500-29,000	Under 500
7. Identified land capacity to accommodate additional town centre floorspace (ha)	3ha+	0.5-2.9ha	Under 0.5ha
8. Future (2029) Public Transport Accessibility Level (PTAL)	5-6	2-5	1-0
9. Other Policy Designations, eg within Opportunity Area / Inter-Action Area	OA and most AI	Some AI	-
10. Vacant retail floorspace as a percentage of total retail floorspace (%)	Variable	Variable	Variable, but some <5%

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Thresholds and criteria (2)

Supplementary policy direction: town centres in need of regeneration:

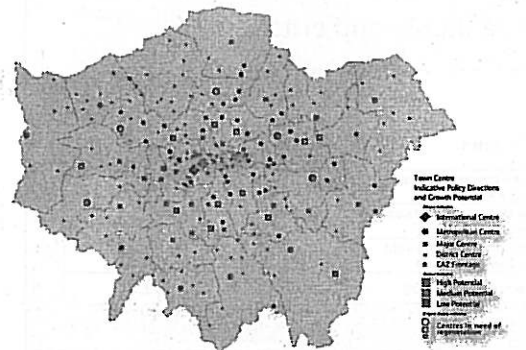
Core Indicators	Supplementary Policy direction
	(R) Regeneration
1. Area for Regeneration (AIR)	Town centre lies partly or wholly within AIR
2. Zone A rental values relative to town centre category	>10% below
3. Estimated turnover relative to town centre category	>10% below
4. Vacant retail floorspace as a percentage of total retail floorspace (%)	Variable, but some >10%

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(C) Indicative policy direction for town centres including growth potential: (provisional findings)

- 12 town centres are provisionally identified in the 'High' potential growth category.
- Six of these are in Outer London, four in Inner London, two in CAZ.
- Majority (90%) of town centres are provisionally classified in the 'Medium' potential growth category.
- Eight centres are provisionally identified in the 'Low' potential growth category.
- 68 centres (about 32%) are provisionally identified as also in need of Regeneration '(R)'

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2. Methodology for town centre network review

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(D) Potential future changes to network: (provisional findings)

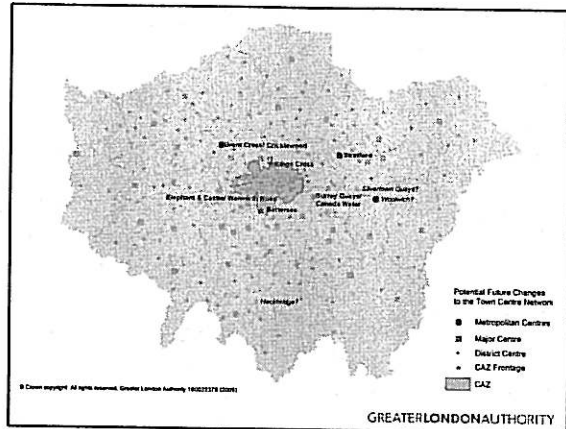
Centre	Borough	Proposed LP classification	Potential future change to classification during Plan period	Notes
Stratford	Newham	Major	Metropolitan	Stratford City proposals under construction
Brent Cross	Barnet	Regional Shopping Centre	Metropolitan	Subject to planning consent, implementation, public transport accessibility, integration with Cockbus and diversification of use to become a fully functioning town centre
Dickenswood	Barnet	District	See Brent Cross	See Brent Cross
Elephant & Castle	Southwark	District	Major	Subject to implementation of regeneration programme at Elephant & Castle and full integration with Walworth Rd.
Walworth Road	Southwark	District	See Elephant & Castle	See Elephant & Castle
Surrey Quays	Southwark	District	Major	Subject to planning consent, implementation and integration with Canada Water
Kings Cross	Camden	Not classified	CAZ Frontage	Upon implementation of retail/office cluster with narrative permission.
Bethnal Green	Wandsworth	Not classified	CAZ Frontage	Subject to resolution of strategic planning issues, consent, public transport connections/implementation.

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(D) Potential future changes to network: (provisional findings)

Centre	Borough	Proposed LP classification	Potential future change to classification during Plan period	Notes
Woolwich	Greenwich	Major	Metropolitan?	Potential to fulfil higher role in network as part of wider regeneration proposals and improvements to public transport accessibility but subject to retail capacity analysis and implementation.
Hackbridge	Sutton	Not classified	District?	Potential new District centre as part of regeneration initiative subject to resolution of strategic planning issues in Core Strategy, consents and implementation.
Silverton Quay	Newham	Not classified	District?	Potential new town centre as part of regeneration initiative?

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Next Steps

(2009)

- 2 April: Borough seminar – Informal consultation on preliminary findings
- 2 April: Town Centre Health Checks Borough input phase launched
- 29 May: Deadline for borough feedback on this informal consultation and health check returns
- June: GLA analyse feedback on consultation and borough health check data inputs
- Autumn: Draft replacement London Plan published for public consultation

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