LB Hammersmith & Fulham, RB Kensington &
Chelsea and Greater London Authority

EARL'S COURT & WEST KENSINGTON OPPORTUNITY AREA RETAIL NEED ASSESSMENT

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1   INTRODUCTION

Terms of Reference

1.1   The Earl's Court and West Kensington Opportunity Area (ECWKOA), as identified in the emerging replacement London Plan, includes Earl's Court 1 and 2, the West Kensington and Gibbs Green Estate and the Lillie Road depot. The existing site boundary is attached at **Appendix 1**. This site forms part of a wider regeneration area as defined by the LB Hammersmith & Fulham Core Strategy Options and includes Fulham town centre, Earl's Court Centre 2, Lillie Bridge Depot and West Kensington and Gibbs Green Estate.

1.2   Roger Tym & Partners were instructed in July 2010 to undertake a study on the following basis:

> *To provide more detailed additional information on retail need for the Earl's Court and West Kensington regeneration area by:*
> - *Identifying the need for comparison and convenience and food and drink (A3, A4 and A5) use classes floorspace in JRNS Zones 2 (LBHF) and 29 (RBKC) combined and suggesting the most appropriate location based on the possible range of additional population in the area and taking account of the capacity of nearby centres, within LBHF and RBKC, to absorb growth with or without redevelopment that could be encouraged by the Earls Court West Kensington development*
> - *To comment broadly on the quantum and spatial distribution of retail floorspace suggested by the developer in the redevelopment proposals for Earls Court opportunity area, within the context of the retail need calculated for the area*

1.3   In addition, the terms of reference requires the assessment to examine how the need for additional A class uses would increase during the development, assuming accommodation becoming available for occupation between 2014 and 2031.

1.4   We reported our interim findings to the steering group in September 2010 and presented the themes from our work to the promoters of the ECWKOA site in November 2010.

1.5   Against the background of the draft RLP designated opportunity area, the LB Hammersmith & Fulham, the RB Kensington & Chelsea and the GLA have commenced a joint Supplementary Planning Document (SPD) for the area. This SPD is under preparation and once completed will establish a planning framework for the site.

Structure of Report

1.6   In **Section 2**, the published Borough-wide quantitative outputs are reviewed for both the LB Hammersmith and Fulham and the RB Kensington and Chelsea. In **Section 3**, we undertake our assessment of local retail need. **Section 4** reviews physical capacity, whilst **Section 5** assesses local growth options. Finally, in **Section 6**, we comment broadly on the ECWKOA proposals.

2 PUBLISHED BOROUGH WIDE QUANTITATIVE RETAIL OUTPUTS

Evidence Base

2.1 The local evidence base for the LB Hammersmith and Fulham comprises the West London Retail Needs Study (WLRNS) published in 2006 and undertaken by GVA Grimley, its Update (May 2010) and Addendum (December 2010), both undertaken by RTP. For the RB Kensington and Chelsea, the local evidence comprises the Retail and Leisure Needs Study (RLNS) published in 2008 and undertaken by Nathaniel Lichfield and Partners. For both Boroughs, there is also the GLA's suite of documents prepared by Experian for comparison goods (May 2009) and convenience goods (2005).

LB Hammersmith & Fulham

2.2 Our review of the published quantitative outputs for the LB Hammersmith & Fulham rely on the outputs of the WLRNS Update and its Addendum.

Comparison Goods Floorspace

2.3 In the most recent comparison goods projections of Borough-wide comparison goods retail need are within the Addendum to the WLRNS Update. This incorporates two further population scenarios and accounts for residential growth in the ECWKOA. The Borough wide comparison retail need to 2031 within the WLRNS Update and its Addendum are summarised in **Table 2.1**.

Table 2.1 Summary of Comparison Goods Need for LBHF (sqm gross)

	2011	2016	2021	2026	2031
WLRNS Update - Scn C	3,700	36,100	74,500	111,800	154,000
WLRNS Addendum - High Pop Scn C	3,700	37,700	78,400	117,600	161,100
WLRNS Addendum - Low Pop Scn C	3,700	36,700	75,300	112,800	154,400

Source: WLRNS Update & Addendum; all data rounded for consistency.

2.4 Across the whole of the Borough, this indicates that there is a quantitative need of between 36,100 sqm gross and 37,700 sqm gross comparison goods floorspace by 2016, increasing to between 74,500 sqm gross and 78,400 sqm gross in 2021. The post 2021 outputs are indicative and the Borough wide need increases sharply due to the compound effect of expenditure growth.

Convenience Goods Floorspace

2.5 The convenience outputs (with a supermarket sales density) are summarised in **Table 2.2**.

Table 2.2 Summary of Convenience Goods Need for LBHF (sqm gross)

	2011	2016	2021	2026	2031
WLRNS Update - Scn C	1,100	5,200	7,600	10,100	13,100
WLRNS Addendum - High Pop Scn C	1,100	5,500	8,300	11,000	14,100
WLRNS Addendum - Low Pop Scn C	1,100	5,300	7,700	10,200	13,100

Source: WLRNS Update & Addendum; all data rounded for consistency.

2.6   Across the whole of the Borough, this indicates that there is a quantitative need of between 5,200 sqm gross and 5,500 sqm gross convenience goods floorspace by 2016, increasing to between 7,600 sqm gross to 8,300 sqm gross in 2021. It should be noted that scenario C excludes overtrading of existing foodstores and thus potentially there is a qualitative and quantitative need for further floorspace beyond these projections if a transparent case can be presented.

A3, A4 & A5 Floorspace

2.7   The A3-A5 outputs are summarised in **Table 2.3**.

Table 2.3 Summary of A3, A4 & A5 Floorspace Need for LBHF (sqm gross)

	2011	2016	2021	2026	2031
WLRNS Update	700	5,700	11,700	17,900	25,200
WLRNS Addendum - High Pop	700	6,000	12,500	19,100	26,600
WLRNS Addendum - Low Pop	700	5,800	11,900	18,100	25,300

Source: WLRNS Update & Addendum; all data rounded for consistency.

2.8   Across the whole of the Borough, this indicates that there is a quantitative need of between 5,700 sqm gross and 6,000 sqm gross A3-A5 floorspace by 2016, increasing to between 11,900 sqm gross and 12,500 sqm gross in 2021. A3-A5 quantitative projections are necessarily indicative since the methodology for projecting such a wide range of uses is less evolved.

RB Kensington & Chelsea

2.9   Our review of the published quantitative outputs for the RB Kensington & Chelsea relies on the outputs of the RLNS. This provides projections to 2012, 2015, 2020 and 2028. There are no quantitative outputs for A3-A5 floorspace for the Borough; however, as explained above, these are necessarily indicative.

Comparison Goods Floorspace

2.10   The Borough-wide comparison goods outputs from the RLNS are presented in **Table 2.4**.

Table 2.4 Summary of Comparison Goods Floorspace Need for RBKC (sqm gross)

	2012	2015	2020	2028
Low Growth Scenario	5,900	27,300	69,700	144,900
High Growth Scenario	32,100	55,200	101,000	181,700

Source: RLNS; all data rounded for consistency.

2.11   The RLNS includes two scenarios; a high growth constant market share scenario and a low growth adjusted market share scenario. If we look at the medium term outcomes, the quantitative need for additional comparison floorspace across the Borough remains significant - between 27,300 sqm gross and 55,200 sqm gross by 2015, increasing to between 69,700 sqm gross and 101,000 sqm gross by 2020.

Convenience Goods Floorspace

2.12   The Borough-wide convenience goods outputs from the RLNS are presented in **Table 2.5**.

Table 2.5 Summary of Convenience Goods Floorspace Need for RBKC (sqm gross)

	2012	2015	2020	2028
Low Growth Scenario	3,100	5,200	8,300	11,000
High Growth Scenario	11,100	13,400	16,900	19,900

Source: RLNS; all data rounded for consistency.

2.13   As with the comparison assessment, the RLNS includes two scenarios. The high growth scenario where effectively 100% of any overtrading compared to company benchmarks is converted a floorspace need. The low growth scenario also incorporates overtrading but is based on the assumption that effectively increases the company benchmarks by 20% to allow for the higher per capita and accommodation costs in London. This reveals that there is between 5,200 sqm gross and 13,400 sqm gross of convenience floorspace need by 2015, increasing to between 8,300 sqm gross and 16,900 sqm gross by 2020.

Summary

2.14   The quantitative need for additional floorspace has been exhaustively tested at both a London-wide level and a more local Borough-wide level. Due to the recent recession and the adjustment of forecast growth rates, the short term need in the two Boroughs is modest. Furthermore, longer term projections are inevitably more broad brush. However, across the two Boroughs, there remains a significant quantum of quantitative need in the medium term to 2020 or 2021. Since many of the opportunity sites are within regeneration areas and thus will take longer to come forward, we consider that it is appropriate to plan on the basis of the medium term outputs.

3   LOCAL RETAIL NEED ASSESSMENT

Study Area

3.1   This assessment is intended to consider the scale of expenditure and expenditure growth available to support new floorspace in the ECWK OA. The trade draw of any new retail floorspace at ECWK will normally be from a local level, albeit this largely depends on the form and spatial distribution of floorspace eventually proposed. For example, a high street format replicating the provision in Fulham will draw trade primary from Fulham itself. However, a specialist destination such as Covent Garden will draw trade from further a field and is likely to compete with centres such as Kensington High Street and areas of Knightsbridge.

3.2   We have drawn on the study area zones in the WLRNS Update. The WLRNS was, by its nature, more of a sub-regional study; so the challenge has been to relate its coarser analytical geography to a more local area. We have and used the following three zones:

- **Zone 1:** incorporates Fulham and falls within the LB Hammersmith & Fulham.
- **Zone 2:** incorporates Hammersmith and falls within the LB Hammersmith & Fulham.
- **Zone 29:** incorporates Fulham Road (West) and Kensington High Street and falls within the RB of Kensington & Chelsea.

3.3   The ECWKOA falls at the junction of these three zones. This is a wide study area. Nevertheless, it should be recognised that it includes major centres that potentially could absorb the growth identified. Furthermore, it falls within the wider catchment of an emerging metropolitan centre (Shepherd's Bush), whilst the ECWKOA is particularly accessible and access to Central London is convenient. Therefore, these geographical features of the study area are considered carefully in **Sections 4, 5 and 6** of this report.

Methodology

3.4   The local retail need methodology adopts a standard step by step approach and is fully consistent with the approach adopted within the WLRNS Update and PPS4. The full quantitative spreadsheets are attached at **Appendix 2**. The key steps in the quantitative assessment are summarised as follows:

- **Step 1:** per capita expenditure is established for the study area;
- **Step 2:** the per capita data is forecast to the base year (2009) and the forecast years (2011, 2016, 2021, 2026 and 2031);
- **Step 3:** total expenditure for each category is calculated by applying the per capita expenditure to population data for the base year and the forecast years;
- **Step 4:** for the retail assessment an allowance is deducted for special forms of trading (SFT) mainly e-tail;
- **Step 5:** the spending patterns are established for the forecast years;
- **Step 6:** when assessing quantitative need, an allowance is made for 'claims' on the growth in retained expenditure as a result of sales density growth (that is the growth in turnover for existing retailers within existing floorspace);

▪ **Step 7:** the initial residual expenditure pot is calculated, which is potentially available for new retail floorspace;

▪ **Step 8:** apply an estimated sales density (turnover per sqm) to covert residual expenditure to a quantitative need for additional floorspace.

3.5 To ensure that this assessment considers the local growth only, we have not accounted for inflow expenditure from beyond the study area boundary. There will inevitably be high levels of inflow expenditure, particularly to destinations such as Kensington High Street. However, since this is primarily an assessment of local need, we consider that it is inappropriate to rely on this expenditure to support new floorspace in the ECWKOA.

3.6 A further potential source of inflow is from employment commuting into the study area. We note that DP9, on behalf of C&C, have sought to quantify this expenditure based on anticipated worker spending. However, these estimates are uncertain since the higher employment numbers have not been endorsed by the Replacement London Plan and the scale of spending will necessarily be informed by the type of jobs provided. It is also inevitable that some workers will also reside in the study area and thus there is a risk of double counting.

3.7 However, we acknowledge that any significant employment created on the site will be able to support some local convenience and service orientated floorspace. Therefore, we make an allowance for a proportion of inflow when estimating a potential retail floorspace capacity of the ECWKOA site in Section 6.

Key Assumptions

3.8 The assumptions used are consistent with the WLRNS Update and Addendum. These assumptions are presented in **Table 3.1**.

Table 3.1 Key Assumptions with Local Retail Need Assessment

Assumption	Comparison Goods	Convenience Goods	A3-A5
Population	Derived from WLRNS Update & Addendum	Derived from WLRNS Update & Addendum	Derived from WLRNS Update & Addendum
Per capita expenditure growth	0.3% p.a. to 2011, 3.6% p.a. to 2016, 3.2% p.a. to 2021 & 2.8% p.a. to 2031	0.2% p.a. to 2011, 1.1% p.a. to 2016, 0.8% p.a. to 2021 & 0.9% p.a. to 2031	- 0.4% p.a. to 2011, 1.4% p.a. to 2016, 1.8% p.a. to 2031
SFT	8.4% in 2011, 9.6% in 2016, 9.4% in 2021 & 9.1% in 2026 & 2031	2.2% in 2011, 2.4% in 2016, 2.8% in 2021 & 3.0% in 2026 & 2031	N/A
Sales Density Growth	0.1% p.a. to 2011, 1.4% p.a. to 2016, 1.2% p.a. to 2021 & 1.1% p.a. to 2031	0.1% p.a. to 2011, 0.4% p.a. to 2016 & 0.5% p.a. to 2031	0.0% p.a. to 2011, 0.3% p.a. to 2016, 1.8% p.a. to 2031
Sales Density	£4,999 per sqm net in 2011, increasing by the same sales density rate as above	£12,623 per sqm net in 2011, increasing by the same sales density rate as above	£8,065 per sqm gross in 2011, increasing by the same sales density rate as above
Net to Gross Ratio	75%	65%	N/A

Source: RTP Assumptions

3.9   A high and low population scenario has been tested for each category of goods, which is informed by the two set of population projections produced as part of the Addendum to the WLRNS Update. We have also introduced a medium scenario, which is effectively a mid point between the two sets of projections. The population growth for the ECWKOA site, distributed evenly between 2011 and 2031, are as follows:

- **High:** 19,200
- **Medium:** 14,400
- **Low:** 9,600

3.10   It should be noted that for the convenience assessment no overtrading expenditure has been incorporated into the quantitative need assessment. This means that the assessment is assessing local needs purely on the basis of local expenditure growth. The convenience assessment also relies on an average supermarket sales density achieved by one of the main foodstore retailers, namely Tesco, Asda, Sainsbury's, Morrison's, Waitrose and Marks and Spencer.

Local Assessment for Comparison Goods

3.11   The outputs from the local assessment of quantitative need for comparison goods floorspace in the study area is presented at **Table 3.2**.

Table 3.2 Local Quantitative Need for Comparison Goods Floorspace

		2011	2016	2021	2026	2031
High Pop	Net	2,600	18,400	35,400	48,700	63,000
High Pop	Gross	3,500	24,600	47,300	65,000	84,000
Med Pop	Net	2,600	17,600	33,500	45,800	58,900
Med Pop	Gross	3,500	23,400	44,700	61,000	78,500
Low Pop	Net	2,600	16,700	31,600	42,800	54,800
Low Pop	Gross	3,500	22,300	42,100	57,100	73,000

Source: Appendix 2 (outputs are cumulative)

3.12   This exercise reveals that there is quantitative need for between 22,300 sqm gross and 24,600 sqm gross of comparison floorspace in the study area by 2016, increasing to between 42,100 sqm gross and 47,300 sqm gross by 2021. However, as explained in the remainder of this study, it should be borne in mind that existing centres in the catchment will have a claim on this growth.

Sensitivity Assessment for Comparison Goods

3.13   Similar to the approach adopted in the Addendum to the WLRNS Update, the implications of different levels of sales density growth have been tested. The outcome of this sensitivity assessment is presented in **Table 3.3**.

Table 3.3 Sales Density Growth Sensitivity of Comparison Goods Outputs (gross sqm)

	Sales Density Growth	2011	2016	2021	2026	2031
High Pop	Preferred	3,500	24,600	47,300	65,000	84,000
	1.5% from 2011	3,500	23,400	43,500	56,700	70,400
	2.2% from 2011	3,500	18,100	31,700	38,000	44,200
Med Pop	Preferred	3,500	23,400	44,700	61,000	78,500
	1.5% from 2011	3,500	22,300	41,000	52,900	65,300
	2.2% from 2011	3,500	17,000	29,400	34,600	39,700
Low Pop	Preferred	3,500	22,300	42,100	57,100	73,000
	1.5% from 2011	3,500	21,100	38,500	49,100	60,200
	2.2% from 2011	3,500	15,900	27,000	31,200	35,200

Source: Appendix 2 (outputs are cumulative)

3.14   This indicates that if existing retailers improve their sales density to 1.5% or 2.2% per annum, then the quantitative need will reduce. However, since there is relatively little modern floorspace within the study area, this higher level of sales density growth is unlikely to be achieved.

3.15   We have also tested comparison floorspace outputs against a higher comparison sales density, which would be achieved if all the comparison expenditure growth was spent in high quality shops. Therefore, we have assessed the outputs using a sales density of £7,000 per sqm in 2009, increasing using the same sales densities under each of the three sensitivity tests in Table 3.3. We consider this as an alternative in light of the high quality shops in parts of the RB Kensington & Chelsea and the higher sales density adopted is consistent with the sales densities of high quality operators. Furthermore, the exercise recognises the affluence in the local area. The outputs from this exercise are revealed in **Table 3.4**.

Table 3.4 High Quality Sales Density Sensitivity of Comparison Goods Outputs (gross sqm)

	Sales Density Growth	2011	2016	2021	2026	2031
High Pop	Preferred	2,500	17,400	33,400	46,000	59,400
High Pop	1.5% from 2011	2,500	16,600	30,800	40,100	49,800
High Pop	2.2% from 2011	2,500	12,800	22,400	26,900	31,200
Med Pop	Preferred	2,500	16,600	31,600	43,200	55,500
Med Pop	1.5% from 2011	2,500	15,800	29,000	37,400	46,200
Med Pop	2.2% from 2011	2,500	12,000	20,800	24,500	28,100
Low Pop	Preferred	2,500	15,800	29,800	40,400	51,600
Low Pop	1.5% from 2011	2,500	14,900	27,200	34,700	42,600
Low Pop	2.2% from 2011	2,500	11,200	19,100	22,100	24,900

Source: Appendix 2 (outputs are cumulative)

3.16   As is evident from the above table, applying a higher sales density to account for higher quality shops will claim a higher proportion of the residual expenditure and thus the overall quantitative need is lower, including under our preferred sales density growth assumptions. Therefore, the format of development meet the identified expenditure capacity is crucial when considering whether there is quantitative need for a given development.

Local Assessment for Convenience Goods

3.17   The outputs from the local assessment of quantitative need for convenience goods floorspace in the study area is presented at **Table 3.5**.

Table 3.5 Local Quantitative Need for Convenience Goods Floorspace

		2011	2016	2021	2026	2031
High Pop	Net	1,100	3,900	6,100	7,200	8,600
High Pop	Gross	1,800	6,000	9,300	11,100	13,200
Med Pop	Net	1,100	3,600	5,500	6,400	7,400
Med Pop	Gross	1,800	5,500	8,400	9,800	11,400
Low Pop	Net	1,100	3,300	4,800	5,500	6,300
Low Pop	Gross	1,800	5,100	7,500	8,500	9,700

Source: Appendix 2 (outputs are cumulative)

3.18   This exercise reveals that there is quantitative need for between 5,100 sqm gross and
        6,000 sqm gross of convenience floorspace in the study area by 2016, increasing to
        between 7,500 sqm gross and 9,300 sqm gross by 2021.

Local Assessment for A3, A4 & A5 Uses

3.19   The outputs from the local assessment of quantitative need for comparison goods
        floorspace in the study area is presented at **Table 3.5**.

Table 3.6 Local Quantitative Need for A3-A5 Floorspace

		2011	2016	2021	2026	2031
High Pop	Gross	1,400	7,600	14,700	20,300	26,400
Med Pop	Gross	1,400	7,200	13,700	18,800	24,400
Low Pop	Gross	1,400	6,700	12,700	17,300	22,300

Source: Appendix 2 (outputs are cumulative)

3.20   This exercise reveals that there is quantitative need for between 6,700 sqm gross and
        7,600 sqm gross of A3-A5 floorspace in the study area by 2016, increasing to between
        12,700 sqm gross and 14,700 sqm gross by 2021.

Summary

3.21   This assessment reveals that based on population and spending growth within the study
        area there is quantitative need for retail additional floorspace. In combination and based
        on our preferred assumptions (namely our preferred sales density growth and the high
        street format for comparison goods), there is a quantitative need for between 34,100 sqm
        gross and 38,200 sqm gross of A Class (excluding A1 service and A2) floorspace by
        2016, increasing to between 62,300 sqm gross and 71,300 sqm gross by 2021. The
        spatial implications of this growth and how it could be accommodated is explored in the
        following sections.

4 PHYSCIAL CAPACITY ASSESSMENT

Methodology

4.1   In order to make spatial recommendations for whether some of the retail growth identified can be absorbed within existing centres, it is necessary to consider the physical opportunities within and on the edge of the existing town centres. This is an initial assessment and it is expected that further assessments will be undertaken by both Boroughs when considering site allocations. In assessing physical capacity, we have taken into account the PPS4 guidance for local planning authorities to identify an appropriate range of sites to accommodate need (EC5.1), to identify sites through the sequential approach (EC5.2) and give preference to sites that serve the needs of deprived areas (EC5.3).

4.2   Our assessment of physical capacity focuses on the main centres in the two Boroughs. We have relied on published data as well as identifying some sites ourselves. The detailed record of each site can be found at **Appendix 3**. The assessment also considers the potential for growth presented by the ECWKOA masterplan process. This study has not considered the viability of any development opportunities identified.

Potential Development Opportunities within Centres

4.3   Our appraisal of potential development sites has focussed on nine centres across the two Boroughs. In the LB Hammersmith and Fulham we focussed on the three centres of Shepherd's Bush, Hammersmith and Fulham whilst in the RB Kensington and Chelsea we focussed on the centres of Knightsbridge, King's Road East, High Street Kensington and Fulham Road West. Furthermore, given their position on the edge of the ECWKOA, we have considered the scope for growth in the more local centres of Earl's Court Road (in RBKC) and West Kensington (in LBHF).

LB Hammersmith & Fulham

4.4   Development opportunities in the main centres in the LB Hammersmith and Fulham are identified at **Appendix 3**.   Generally, these are more suitable for development in the medium or long term. Each site that we have assessed has constraints that would need to be overcome to facilitate retail development. The sites are mainly occupied and in use, but are characterised by poor quality buildings and appear appropriate for redevelopment.

4.5   The sites at Shepherd's Bush Market; Hammersmith town hall and Cineworld site; and around the junction of Lillie Road and North End Road are all large sites where retail or retail-led mixed use development could be appropriate. However all three locations are currently occupied and in multiple use (and potentially in multiple ownership), indicating likely problems in terms of land assembly. Therefore, none of these sites can realistically be developed in the very short term, instead they should be considered for either long term or phased medium term development.

4.6   In the short term, the Hammersmith Palais and Shepherd's Bush Pavilion sites have development potential, as both are large unoccupied buildings. However both have

constraints to redevelopment. The Pavilion has been earmarked for development as a hotel soon, whilst there is an extant permission on it which includes 583 sqm of retail. We understand that there is a new application in the pipeline for a similar scheme with no retail element. The site is also a Grade II listed building and falls within the Shepherd's Bush conservation area.

4.7   The Palais may represent short term opportunity, although in retail terms it is hampered slightly by the fact that the ground floor is safeguarded by the UDP for leisure uses. An expired application from 2002 would have included no retail element at all. An application currently under consideration at appeal includes only a maximum of 195 sqm of retail space. The building is also a building of merit, falling within the Hammersmith Broadway conservation area.

4.8   West Kensington is defined as a key local shopping centre in the UDP. It has little comparison provision (with no national multiples); instead the centre is dominated by small convenience stores, as well as a medium-sized Co-operative store, and by restaurants / takeaways. Most of the retail stock is average quality, either single storey or ground floor retail with residential above. There are no obvious development sites in West Kensington; however it could be upgraded as part of the ECWK opportunity area proposals.

RB Kensington & Chelsea

4.9   The environmental quality of the centres in the RB Kensington and Chelsea is particularly high. Knightsbridge and High Street Kensington are noted for the quality of their fabric, including several noteworthy historic buildings, and King's Road East is also mainly good quality, and contains some historic buildings. However, this will necessarily constrain any future growth in these centres and the growth opportunities that we have identified are generally long term.

4.10   The development opportunities we have identified in Kensington and Chelsea are mainly medium or long term opportunities rather than short term. The sites are generally smaller then those in Hammersmith and Fulham.

4.11   In our view the strongest opportunity for development in the Borough is the King's Road, Sydney Street and Farmers Market site on the edge of the King's Road East centre boundary. We consider the site has potential for mixed use development including retail, and it has been allocated in the submission core strategy as a site for new retail floorspace. However should development come forward it is likely the Farmers Market part of the site would need to be excluded, unless the market could be relocated.

4.12   The site at clearings 1 and 11, Draycott Avenue, Denyer Street and Mossop Street in Knightsbridge is a large, mostly disused building providing potential for retail development. The building itself is in adequate condition and therefore could be reused, although the site is allocated for mixed use including retail space. A temporary permission for retail use has been granted for use of the building for retail; although this expired in 2004, it nonetheless indicates retail use is considered acceptable on the site.

4.13   We have identified four possible development opportunities in Fulham Road West - between Finborough Road and Ifield Road; 214 to 224 Fulham Road; corner of Redcliffe Road and Fulham Road; and between Drayton Gardens and Thistle Grove. These are all smaller than 0.1 ha, and all consist of ground floor retail units fronting the high street with housing above. Whilst this means all sites are likely to be relatively easily developable in the short-term, they do not represent opportunities for large scale retail or mixed use development in the medium or long term, which restrict the format of development possible.

4.14   Earl's Court Road is a smaller centre and we have only identified one development opportunity opposite the Earl's Court Road exit to the underground station. However, due to its position, it is possible that this centre could be upgraded following the ECWKOA proposals.

Masterplan Opportunities

4.15   The ECWKOA masterplan introduces opportunities for retail floorspace growth that could potentially meet some of the local need that has been identified within our assessment. The opportunity area is a large site and extends to the edge of Fulham (an in part within the centre) and to the edge of West Kensington and towards Earl's Court Road. The masterplanning process is ongoing. We acknowledge that some local convenience or service retail provision meet the needs of the new population in the opportunity area are appropriate. However, we consider that the linkages to existing centres are crucial and we consider that any larger scale growth should be directed to existing centres first.

Summary

4.16   In general, there is physical capacity for growth in the centres within and outside the study area that could be used to absorb the growth identified and we are aware of other out of centre proposals that, if approved, could also claim some of the capacity. However, there are very few town or edge of centre sites that could come forward without any public sector intervention through an allocation or to facilitate land assembly. In general, the opportunities for growth are more apparent within the LB Hammersmith and Fulham centres, with the centres in RB Kensington and Chelsea more constrained. However, given that there we are considering growth up to 2021 there remain opportunities to invest in the existing centres across both Boroughs.

4.17   There is an opportunity for growth within the ECWKOA through the masterplanning process. Larger scale growth in the opportunity area should be directed to existing centres. However, we appreciate that local convenience or service orientated floorspace is appropriate, subject to sufficient integration with existing centres where necessary.

5 SPATIAL DISTRIBUTION OF LOCAL GROWTH

Policy Context

5.1 Policy EC3.1 of PPS4 states that regional planning bodies (in this case the Greater London Authority) and local planning authorities should, inter alia, define a network and hierarchy of centres that is resilient to future economic changes. It should meet the needs of their catchments having made choices about which centres will accommodate any identified need for growth in town centre uses, considering their expansion where necessary, taking into account the need to avoid an over concentration of growth in centres.

5.2 Policy EC3.1 also states that identified deficiencies in the network of centres should be addressed by promoting new centres to function at a higher level in the hierarchy or designating new centres, where necessary giving priority to deprived areas. It requires plan makers to make choices about which centres will accommodate any identified need and ensure that extensions to centres are carefully integrated with existing centres.

5.3 The strategic network of larger centres is defined by the London Plan (consolidated with Alterations since 2004) and the draft replacement London Plan (October 2009) is also relevant. Within the study area, there are the major centres of Hammersmith, Fulham and Kings Road East, whilst Knightsbridge is an international centre. Furthermore, the study area falls within the catchment of both Shepherd's Bush (an emerging metropolitan centre) and Kensington High Street (as a major centre).

5.4 London Plan Policy 3D.2 states that DPDs should encourage additional comparison capacity in larger town centres and convenience goods capacity in smaller centres of appropriate scale, especially District centres, to secure a sustainable pattern of retail provision. This policy is broadly echoed in the RLP in Policy 4.8 that states LDFs should bring forward capacity for additional comparison goods retailing in international, metropolitan and major centres and support convenience retail, particularly in district, neighbourhood and more local centres, to secure a sustainable pattern of provision and strong lifetime neighbourhoods.

5.5 The more local network of centres is defined with the relevant emerging Core Strategy DPDs for both the LB Hammersmith and Fulham and RB Kensington & Chelsea.

Local Need for New Floorspace

5.6 The local quantitative need for additional retail and A3-A5 floorspace within the study area is as follows:

- Between 22,300 sqm gross and 24,600 sqm gross of comparison floorspace in the study area by 2016, increasing to between 42,100 sqm gross and 47,300 sqm gross by 2021.

- Between 5,100 sqm gross and 6,000 sqm gross of convenience floorspace in the study area by 2016, increasing to between 7,500 sqm gross and 9,300 sqm gross by 2021.

▪ Between 6,700 sqm gross and 7,600 sqm gross of A3-A5 floorspace in the study area by 2016, increasing to between 12,700 sqm gross and 14,700 sqm gross by 2021

5.7 These are global quantitative need outputs within the study area. Inevitably, existing centres will have a claim on this growth in order to support their own vitality and viability. As a theoretical exercise, we have used our assessment of shopping patterns to distribute the total floorspace need (i.e. comparison, convenience and A3-A5) based on their existing market shares of centres and their surroundings. In distributing the quantitative need, we have taken the medium population scenario outputs.

Table 5.1 Theoretical Distribution of Study Area Total Quantitative Need (sqm gross)

	%	2016	2021	2026	2031
Hammersmith (Zone 2)	18%	6,600	12,200	16,400	20,900
Fulham (Zone 1)	27%	9,900	18,300	24,500	31,300
K&C South (Zone 29)	54%	19,600	36,300	48,700	62,100
Total	100%	36,100	66,800	89,600	114,300

Source: RLNS; all data rounded for consistency.

5.8 Although theoretical, this exercise indicates that the southern centres in RB Kensington and Chelsea will attract a large proportion of the growth in the study area if constant market shares are applied. Therefore the ability for centres such as Kensington High Street, Knightsbridge and Kings Road East (the latter two centres slightly encroach in zone 29) is crucial to considering whether this growth could be met elsewhere. This growth can also be used to regenerate the major centres of both Hammersmith and Fulham.

5.9 Shepherd's Bush falls outside the study area, which includes Westfield shopping centre. This is the most modern floorspace in the area and if no new floorspace comes forward for the centres mentioned above, it is likely that Westfield will absorb more of the expenditure growth in the medium and long term (i.e. achieve a higher sales density increase than we have forecast in our capacity assessment) than otherwise expected. The consequence of this is that larger centres will become more dominant to the detriment of secondary and tertiary locations as consumers look for more choice and retailers seek modern floorspace. Therefore, we consider that it is important to invest in secondary destinations across London to ensure that the network of centres is protected, which is consistent with PPS4.

5.10 The DP9 studies to date suggest that the Borough-wide studies undertaken to date do not incorporate the indigenous spend from the planned developments in ECWKOA, although this update does include an allowance for population growth in the opportunity area. However, we consider that spend generated from the opportunity area should primarily be used to support growth in existing centres.

Location of Growth & Accessibility

5.11 **Figures 13 and 14** plot the scale of population growth to 2021 and to 2031. As is evident from these plans, the population growth is focused on zones 1 and 2 in both the medium term (to 2021) and the longer term (to 2031). Indeed, zone 29 is forecast to experience a declining population in the longer term between 2021 and 2031. However, due to the high population density and level of per capita expenditure in zone 29, there is still forecast to be a considerable scale of expenditure growth in this zone that actually exceeds that forecast in zones 1 and 2. Therefore, although the population growth is focused on the LB Hammersmith and Fulham part of the study area, there is growth throughout that will be available to support new floorspace within the existing centres. This more local assessment of growth is fully consistent with the forecasts within the Borough wide assessments summarised in **Section 2**.

5.12 Furthermore, the PTAL of the study area is plotted at **Figure 15** and the IMD ranking at **Figure 16**. In broad terms, this analysis reveals the following:

- The most accessible parts of the study area are focused around Hammersmith, across zone 29 (i.e. near Kensington High Street, Earl's Court and South Kensington. However, in addition, the northern part of Fulham and the areas surrounding Earl's Court and West Kensington has a high PTAL level, whilst to the south of the Borough the area surrounding Fulham High Street and Putney Bridge is also highly accessible.

- There are areas of relative deprivation in and surrounding Hammersmith. Importantly, there are also pockets of deprivation to the north of Fulham and surrounding both West Kensington and Earls Court (i.e. incorporating the ECWK OA). There is also a pocket of relative deprivation to the south of zone 29 (around Battersea Bridge).

5.13 The scale of growth and the levels of deprivation and accessibility indicate that priority should be given the development in both Hammersmith and the northern part of Fulham town centre.

Initial Physical Capacity Considerations

5.14 As explained in **Section 3**, there are development opportunities across the study area and importantly within existing centres. These sites should be the priority for growth under the sequential approach.

5.15 In respect of Hammersmith, the whole of the centre is within a regeneration area and there are a number of opportunity sites in the centre. The key requirement for Hammersmith is to upgrade its retail offer in order to maintain its position as a major centre and to meet the needs of the growing population. We consider that there is an opportunity to regenerate Hammersmith and there is sufficient physical capacity to enable this to be achieved in the plan period.

5.16 Although part of a regeneration area, Fulham is the most constrained of the three larger centres in the Borough and is surrounded by residential properties. This prevents major development, particularly in the southern part of the centre. However, we have identified opportunities for intensification and upgrade of existing stock to the north of the centre, which could meet the needs of the growing population and provide access to shops from

5.16 the pockets of deprivation in the area. In particular, there is scope to regenerate and re-vitalise North End Road and there is an opportunity to tap into the regeneration planned on the ECWKOA.

5.17 The opportunities for growth in centres within the RB Kensington & Chelsea are generally longer term, with centres such as Knightsbridge, Kings Road East and Kensington High Street being subject to constraints such as a surrounding high density of residential development and environmental designations. However, such longer term development opportunities often need local support to progress and we expect there are opportunities to deliver growth and encourage investment within the plan period to meet some of the identified needs.

5.18 As part of our assessment, we have also considered the scope for redevelopment and expansion in the smaller centres of West Kensington and Earl's Court Road. Although there are no larger scale development opportunities, there is a potential to upgrade the retail provision in these two centres using some of the spending growth generated within the ECWKOA.

Deficiencies in Network of Centres

5.19 **Figure 17** plots a 400m[1] walking access to all centres within the two Boroughs. Similarly, we have plotted the hierarchy of centres in **Figures 1 and 11**. The 400m analysis is broad brush since it does not take into account the function of the different centres, nor the service provision in each centre. However, this analysis indicates that in broad terms there is no clear deficiency in centres in the south of the two Boroughs, albeit there is a pocket of deficiency to the north of the ECWKOA site.

5.20 Considering the distribution of centres in Figure 11, there is no clear deficiency in the network of centres surrounding the ECWKOA. Since Shepherd's Bush has been elevated to metropolitan centre in the RLP, there is no district centre in the LB Hammersmith and Fulham. However, potential residents and workers within any new development in the ECWKOA will have access to district centre facilities in Fulham itself, Earl's Court Road and surrounding local centres. Therefore, based on this analysis, we find no support to justify a new district or major centre with the ECWKOA site.

Broad Spatial Recommendations

Comparison Goods

5.21 For comparison floorspace, we take our lead from London Plan and direct growth to international, metropolitan and major centres. Taking the mid point of the local quantitative projections, the mid point of the growth is for 23,400 sqm gross of comparison floorspace by 2016 increasing to 44,700 sqm gross by 2021. The priority for the majority of this growth should be to support existing centres.

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[1] Based on RBKC's estimate of an appropriate walking distance to shops and service

5.22 We recommend positive support for the regeneration of Hammersmith and the northern part of Fulham in the LB Hammersmith and Fulham and Kensington High Street in the RB Kensington and Chelsea. Furthermore, it is noted that there is high quality shopping provision in the area (including Westfield and Knightsbridge just outside the study area). Therefore, it is important that the shopping provision in both Hammersmith and Fulham can fulfil the needs of the local population as well as fulfilling their 'major centre' shopping function.

Convenience Goods

5.23 Taking the mid point of our forecasts, in terms of convenience floorspace the assessment found there to be a quantitative need for just approximately 5,500 sqm gross by 2016, increasing to 8,400 sqm gross by 2021. This is sufficient to support at least one new food superstore in the study area if it is accommodated in one development. The London Plan (existing and draft RLP) directs convenience floorspace growth to district centres. However, we consider there is capacity to provide further foodstore provision in the study area and, subject to compliance with PPS4 policy, we expect that a new foodstore could be accommodated as part of the ECWKOA proposals. However, this should be positioned within the site to prioritise linkages with existing centres.

Potential Policy Mechanisms

5.24 When distributing floorspace to centres and allocating sites in DPDs, we recommend that policy controls be included in relation to the following:

- Ensure that any applications that meet the need identified are subject to an impact assessment where necessary. This is particularly important with any schemes that exceed the growth forecast, are of a scale that mean the centre will function at a higher level in the hierarchy or are edge-of-centre (i.e. on the edge of the primary shopping area) or out of centre.
- Spatial distribution of retail floorspace
- Range of goods (i.e. comparison and convenience)
- Size of retail units

6   BROAD COMMENTS ON ECWKOA PROPOSALS

Context

6.1   Considering emerging proposals, we must rely on what the draft replacement London Plan tells us and information we have been passed by the Councils and from submissions from developers to the London Plan and core strategy consultations as well as recent emerging masterplan consultation documents. There seems to be some conflicts between the representations and the presentation. Our understanding of the proposals for the ECWK OA is as follows:

- The draft RLP proposed some 7,000 jobs and 2,000 new homes, whilst C&C have sought to increase this to 24,000 jobs and 8,000 new homes.

- Submissions to the draft RLP consultation from C&C indicates that there is scope for between 15,836 and 66,699 sqm gross of retail and leisure floorspace functioning as either a district or major centre, whilst more recent consultation documents indicate the scale of floorspace will be towards the lower end of this range focusing on a high street format along the east west link across the site

- The LDFs for both LB Hammersmith & Fulham and RB Kensington and Chelsea envisage only limited new retail floorspace within the site to meet day to day needs arising from the new residential floorspace; we understand developer representations echo those to the London Plan

6.2   Our broad comments on the ECWK proposals are therefore necessarily based on a moving set of circumstances as the SPD is in progress. The strategic planning basis for the scale of growth in the site is uncertain whilst a masterplanning process is also ongoing. We also understand a transport assessment has been commissioned that investigates the potential for growth from a highway and accessibility perspective. Therefore, our comments are necessarily restricted due to these constraints and are based solely on the retail planning policy implications of the emerging proposals.

Policy Challenges

6.3   If a new standalone centre of either a district or major scale is promoted through the plan making process, then there are a series of policy challenges that must be overcome; including satisfying the need, sequential and impact policies. PPS4 (EC3.1b.i) indicates that a new centre should be addressed where there is an identified deficiency in the network of centres. Our initial analysis has not revealed a clear deficiency in larger centres in this area, nor has the London Plan (existing or draft RLP) at the strategic level or either of the emerging Core Strategy DPDs for either the LB Hammersmith and Fulham or the RB Kensington and Chelsea.

6.4   It is appreciated that the draft RLP recognises that potential for a strategic leisure, cultural and visitor attraction and strategically significant offices should be explored together with retail, hotels and supporting social infrastructure on the site. The Core Strategy for the RB Kensington and Chelsea envisages a neighbourhood centre on the site, whilst the emerging Core Strategy for the LB Hammersmith and Fulham expects shopping facilities

to meet day to day needs only. Therefore, whilst we appreciate that there is scope for retail floorspace on the opportunity area site, it is clear that there is no policy support at a strategic or local level for a new large centre on the site.

6.5   PPS4 is clear in Policy EC5.1 that when selecting sites at the plan making stage, local planning authorities should:

- Base their approach on the identified need for development;

- Identify the appropriate scale of development;

- Apply the sequential approach to site selection;

- Assess the impact of sites on existing centres;

- Consider other considerations such as physical regeneration, employment opportunities or increased investment in an area of social inclusion.

6.6   We consider that there is a need for new floorspace, although the scale of need to be directed to ECWKOA is affected by the ability of existing centres to first absorb growth as well as the amount of jobs and housing provided on the opportunity area site. Similarly, we appreciate that strong regeneration benefits can be put forward to support retail floorspace on the site.

6.7   In terms of compliance with the sequential approach, part of the site falls on the edge of Fulham town centre whilst the site also is adjacent to Earl's Court Road and West Kensington lower order centres. We would expect the majority of floorspace growth to be directed to Fulham as a major centre, with more limited growth directed to smaller centres. A significant quantum of floorspace that is not directed towards any of the existing centres is unlikely to comply with the sequential approach.

6.8   A further obstacle to the plan led support for a stand alone centre of district or major centre scale within the site - that is not integrated with an existing centre - will be its impact on existing centres.

Main Options for ECWK Growth

6.9   As explained in **Section 5**, our recommendations are that the majority of the growth identified should be directed to the existing centres. We have found no clear case for a new district or major centre. However, we appreciate that there will be on-site growth which will be able to support some local floorspace; also retail can assist in delivering regeneration.

6.10   In broad terms, we consider that there are effectively three retail options that could be promoted on the ECWKOA site. These are as follows:

- **Option A: Limited Growth** - effectively one minor neighbourhood centre within the site, with limited additional retail provision elsewhere in the site.

- **Option B: Dispersed Growth** - one minor neighbourhood centre plus the upgrade of existing centres on the edge of the site.

- **Option C: Centralised Growth:** one larger new centre meeting the local needs in one centralised stand alone destination.

6.11 We have deliberately not quantified the floorspace associated with each option since these will depend on many factors, including the form of retailing being considered. However, within the sections below we have considered a theoretical capacity for the site. Based on our initial considerations of the geography of the site, we expect that Option C to be unacceptable in light of the likely impact from additional floorspace growth on existing centres and the importance placed by national guidance on protecting the vitality and viability of such centres.

Broad Comments on Emerging Proposals

6.12 The emerging proposals are in their infancy and effectively comprise initial submissions to the draft RLP and initial consultation documents. Therefore our comments on the proposals are necessarily constrained by what we know already. In the wider area, we have no doubt there is sufficient spending to support the scale of floorspace growth being considered by the developers if a large proportion of this growth is directed to the ECWKOA. The question is whether this should be accommodated within a new centre or whether it should be absorbed by existing centres; or a combination of both.

6.13 The retail policy approach towards additional retail floorspace within the site is likely to be dependent on a number of themes, including:

- **Distribution:** the proposed scale, form and distribution of new retail floorspace across the site and its integration with existing centres (if applicable).
- **Composition**: how the proposed retail floorspace will be broken down between A1 (convenience, comparison and service uses), A2-A5 and other town centre uses.
- **Phasing**: the likely opening dates of new floorspace and phasing of retail development alongside the proposed residential and office elements of the proposals
- **Profile**: whether the scheme is a typical high street retail format; or is intended to be a retail destination that might attract longer distance trade.

6.14 In essence, the answers to these questions will influence the trading characteristics of the new floorspace and consequently the likely impact of the development on existing centres.

6.15 In terms of the PPS4 justification for a new centre, based on our assessment, we have concluded there is no gap in a major centre provision in this area since there is adequate access to higher order centres. In respect of district centres, there is access to such facilities in the major and lower order centres. We can potentially see justification for a lower order centre of neighbourhood function within the site. However, given that the site is effectively on the edge of Fulham, we expect that any major floorspace growth proposed should be directed towards enhancing or expanding Fulham, to comply with the sequential approach and in order to regenerate that centre. The site is also on the edge of both West Kensington and Earl's Court Road, which would also benefit from investment and improvement.

6.16 To expand our views on Fulham, our initial advice is that the role of the area on the edge of Fulham (at the junction of Lillie Road and North End Road) should be carefully considered as a focus for retail development. This is an edge of centre site (and in part

within the town centre boundary) and therefore when applying the sequential approach to local growth, this area would be a priority for retail and other town centre floorspace. Since we are advising at the plan making stage, the ownership of the corner site should not be a determining factor in planning for the future of this centre.

6.17   Finally, given that this is a major centre, there is an opportunity to tap into Fulham's need for new floorspace and to achieve a level of growth more commensurate with a major centre. This introduces an opportunity for a higher level of growth than is likely to be acceptable as a stand alone centre elsewhere in the site.

Theoretical Retail Floorspace Capacity for ECWKOA

6.18   Taking the assessment further, we have been instructed to assess the scale of the floorspace that could be achieved on the ECWKOA. Our assessment is a top-down approach and we have commented broadly on the emerging proposals in the above paragraphs. The developers will be undertaking their own more localised bottom up assessment to support a planning application. Therefore, our assessment is based on a potential theoretical capacity that could be achieved on the site, without prejudice to the requirements to satisfy PPS4 and our comments on scale, composition, phasing and profile above.

6.19   In estimating a theoretical capacity, we must make some assumptions about how the capacity in the study area will be distributed and how much is available to support floorspace growth in the opportunity area. Since Fulham is the nearest major centre, we firstly adopt the market share of this centre alongside any other destinations in zone 1. The reason we have included other destinations in zone 1 is that we appreciate that the opportunity area is also on the edge of other small centres in zones 2 and 29, but the market shares of these destinations are not presented in sufficient detail. Therefore, allowing for the additional market share of small destinations in zone 1 is reasonable compromise and ensures that the draw from the wider local hierarchy surrounding the site is recognised.

6.20   We also test an enhanced market share, where the Fulham/zone 1 share is increased by 50% to allow for claw back of expenditure from other destinations through a higher quality format scheme. It is expected this claw back will be diverted from destinations in the RB Kensington and Chelsea due to the constrained nature of the physical capacity of these centres.

6.21   The following steps are undertaken, which build on our local assessment of need undertaken in Section 4.

- **Step 1:** Establish the residual expenditure in 2016 and 2021 in the study area for comparison, convenience and A3-A5 expenditure

- **Step 2:** Apply a market share to this expenditure, initially using a Fulham/Zone 1 market share and then applying an enhanced market share inflated by 50% to establish the amount of potentially available expenditure in the study area to accommodate floorspace growth in the opportunity area

- **Step 3:** Estimate the amount of inflow expenditure from beyond the study area, which is spending from commuters and tourists; we have estimated this at 30% and is higher than Fulham achieves at the moment and is similar to what is achieved in Hammersmith

- **Step 4:** Apply sales densities to the residual expenditure (both available expenditure in the study area plus inflow) to calculate a net requirement and convert this to gross, using identical assumptions as applied in Section 3; with the enhanced market share we have applied the high quality comparison sales density since this type of floorspace will be necessary to achieve the claw back estimates

- **Step 5:** Present the floorspace capacity outputs as rounded figures, allowing for A1 service (i.e. hairdressers, travel agents) and A2 units (i.e. banks) as 10% of the total floorspace capacity

6.22 The details of this approach can be found in Tables 15 and 16 of Appendix 2. The summarised theoretical capacity for A1-A5 floorspace within the opportunity area (in aggregate under the three population scenarios) for the two market share scenarios are presented at **Table 6.1**.

Table 6.1 Potential A1-A5 Floorspace Capacity for ECWKOA (sqm gross)

	Market Share Scenario	2016	2021
High Pop	Fulham/Zone 1 Market Share	14,200	27,200
	Enhanced Market Share	18,000	34,100
Med Pop	Fulham/Zone 1 Market Share	13,300	25,300
	Enhanced Market Share	17,000	31,800
Low Pop	Fulham/Zone 1 Market Share	12,700	23,600
	Enhanced Market Share	16,000	29,300

Source: Appendix 2

6.23 Under the Fulham market share approach, this analysis reveals that there is capacity for between 12,700 and 14,200 sqm gross of A1-A5 floorspace by 2016, increasing to between 23,600 and 27,200 sqm gross by 2021. If we use the enhanced market share, the capacity increases to between 16,000 sqm and 18,000 sqm of A1-A5 floorspace by 2016, increasing to between 29,300 and 34,100 by 2021.

6.24 Whilst this assessment reveals a potential floorspace capacity for the opportunity area, some of this capacity could be met through sites developed outside the boundary of the opportunity area within the existing centres of Fulham, Earl's Court Road and West Kensington. Furthermore, since we have adopted the market share of Fulham to disaggregate this growth, we expect that the largest proportion of this floorspace should be directed to sites within or on the edge of Fulham town centre first, consistent with the requirements of the sequential approach.

6.25   Simply because there is a theoretical capacity for additional floorpsace on the opportunity area does not mean that a scheme of this scale is acceptable in impact terms under PPS4. The acceptability of any developments meeting this capacity in impact terms will be dependent on the acceptability of any developments under our key themes of distribution, composition, phasing and profile and compliance with the impact tests in PPS4.

Recommendations

6.26   Based on our initial consideration of the emerging proposals, our preference is effectively a variation of option B. **Table 6.2** below outlines the four nodes shown on the initial masterplan publications alongside an internal node and the addition of North End Road along with our suggested commentary on the scale and characteristics of floorspace. This is presented graphically at **Figure 6.1** using the consultation documentation from the masterplanning process.

Table 6.2 Initial Preferred Local Growth Option

Broad Location	Scale of Floorspace Growth
North End Road/Lillie Road/Edge of Fulham town centre	Main concentration of new floorspace
Upper part of North End Road [Star Road]	Limited or possibly no provision
West Kensington	Small scale local provision
Warwick Road	Small scale local provision
West Brompton	Small scale local provision
New Central Hub within ECWKOA Site	Small scale local provision

Source: RTP Assessment

Figure 6.1 Potential Spatial Distribution of Retail Growth
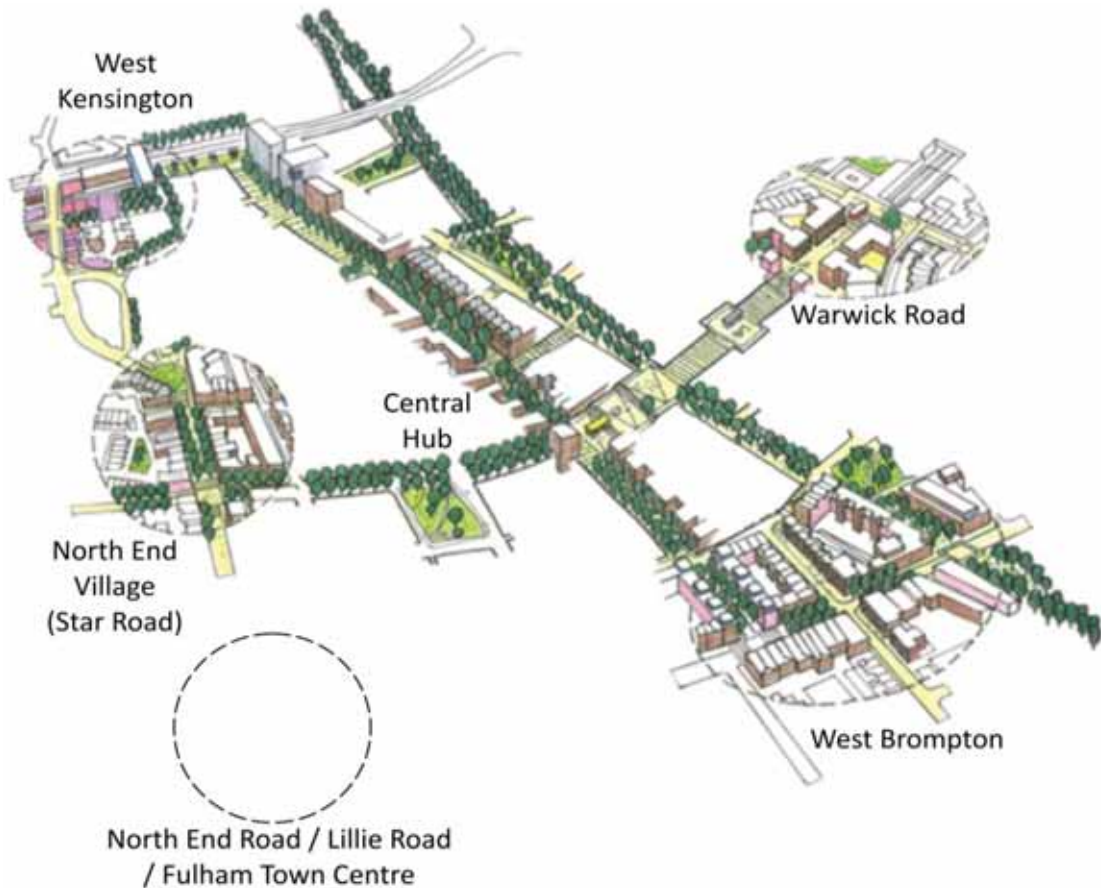
6.27   It is too early to distribute floorspace growth to these nodes. However, based on our initial considerations of the issues, we favour an organic approach to development, rather than (a) large single development(s) in order to ensure adequate integration with existing centres and to mitigate any impact that does occur. Therefore, the phasing and timescales of the commercial floorspace should be developed accordingly. However, the impact from any new floorspace will need to be thoroughly tested in order to ensure that the any new development is policy compliant and does not harm any existing centres.

Next Steps for the SPD

6.28   Our broad comments have outlined some of the challenges that face the deployment of new floorspace in the ECWKOA. Our initial recommendations are that there should be a focus on using this opportunity to regenerate Fulham whilst allowing modest growth in other peripheral local centres to form a wider hierarchy of centres or provision to meet locally derived needs.

6.29   It is appreciated that it will be necessary to form an east west link across the site in order to improve permeability and it is expected that some commercial floorspace could be accommodated in this link as part of a place making exercise. However, any lack of integration between significant new retail floorspace with Fulham and other centres will be contentious. Therefore, the scale and distribution of this floorspace should be controlled

in order to ensure that the majority of growth is directed to existing centres initially to ensure their vitality and viability is protected and enhanced.

6.30   Our advice on the next steps for both the SPD and the masterplanning process are as follows:

   i)   Influence the distribution of floorspace, though the masterplanning process

   ii)   Plan for a policy compliant appraisal and introduce policy controls within the SPD that ensure applications for additional retail floorspace within the ECWKOA are compliant with the preferred option for the spatial distribution of growth and are accompanied by an impact assessment.

   iii) Ensure that the key themes of distribution, composition, phasing and profile are transparently and robustly justified.

   iv)   Frame a set of locational criteria for the layout and form of new floorspace that maximises the linkages with existing centres.

   v)   Introduce policy controls to ensure that any negative impacts are adequately mitigated through the development management process.

APPENDIX 1

Earls Court & West Kensington Opportunity Area Boundary
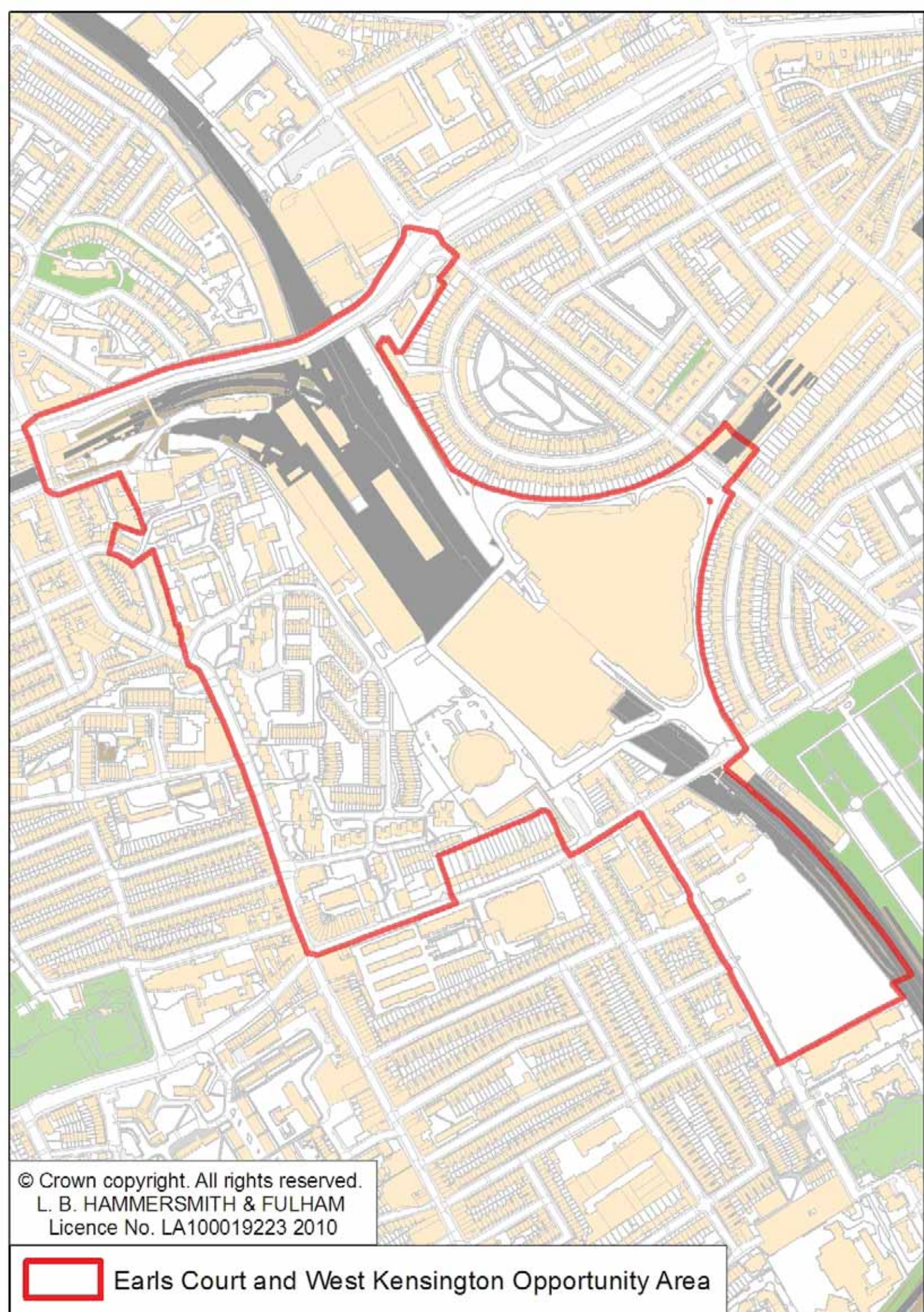
Earls Court and West Kensington Opportunity Area

APPENDIX 2

Quantitative Spreadsheets

Earl's Court & West Kensington Local Retail Need Assessment
Table 1: Population Projections

Year	High Scenario [1]					Medium Scenario [2]					Low Scenario [3]			
	Zone 1	Zone 2	Zone 29	Total		Zone 1	Zone 2	Zone 29	Total		Zone 1	Zone 2	Zone 29	Total
2009	61,924	60,340	81,755	206,027		61,924	60,340	81,755	204,018		61,924	60,340	81,755	204,018
Per annum growth 2009 - 2011 (%)	1.3%	0.2%	2.5%			1.3%	0.2%	2.5%			1.3%	0.2%	2.5%	
2011	63,500	60,608	85,940	212,059		63,500	60,608	85,940	210,048		63,500	60,608	85,940	210,048
Per annum growth 2011 - 2016 (%)	1.8%	1.4%	0.3%			1.5%	1.1%	0.3%			1.2%	0.8%	0.3%	
2016	69,580	64,837	87,289	223,722		68,505	64,004	87,289	219,798		67,430	63,170	87,289	217,890
Per annum growth 2016 - 2021 (%)	1.4%	1.2%	0.0%			1.1%	0.9%	0.0%			0.9%	0.6%	0.0%	
2021	74,497	68,939	87,183	232,641		72,494	67,069	87,183	226,746		70,491	65,199	87,183	222,873
Per annum growth 2021 - 2026 (%)	1.0%	0.7%	-0.8%			0.8%	0.5%	-0.8%			0.5%	0.3%	-0.8%	
2026	78,270	71,213	83,925	235,433		75,339	68,732	83,925	227,995		72,408	66,251	83,925	222,584
Per annum growth 2026 - 2031 (%)	0.9%	0.6%	-0.7%			0.7%	0.5%	-0.7%			0.5%	0.3%	-0.7%	
2031	81,732	73,466	81,103	238,332		77,935	70,388	81,103	229,427		74,139	67,311	81,103	222,553
Numeric Change 2009-2011	1,576	268	4,186	6,030		1,576	268	4,186	6,030		1,576	268	4,186	6,030
Percentage Change 2009-2011 (%)	2.5%	0.4%	5.1%			2.5%	0.4%	5.1%			2.5%	0.4%	5.1%	
Numeric Change 2011-2016	6,080	4,229	1,349	11,658		5,005	3,396	1,349	9,750		3,930	2,563	1,349	7,842
Percentage Change 2011-2016 (%)	9.6%	7.0%	1.6%			7.9%	5.6%	1.6%			6.2%	4.2%	1.6%	
Numeric Change 2016-2021	4,917	4,102	-106	8,913		3,989	3,065	-106	6,948		3,061	2,028	-106	4,983
Percentage Change 2016-2021 (%)	7.1%	6.3%	-0.1%			5.8%	4.8%	-0.1%			4.5%	3.2%	-0.1%	
Numeric Change 2021-2026	3,773	2,273	-3,259	2,787		2,845	1,663	-3,259	1,249		1,917	1,052	-3,259	-289
Percentage Change 2021-2026 (%)	5.1%	3.3%	-3.7%			3.9%	2.5%	-3.7%			2.7%	1.6%	-3.7%	
Numeric Change 2026-2031	3,462	2,253	-2,822	2,893		2,596	1,657	-2,822	1,431		1,731	1,060	-2,822	-31
Percentage Change 2026-2031 (%)	4.4%	3.2%	-3.4%			3.4%	2.4%	-3.4%			2.4%	1.6%	-3.4%	
Numeric Change 2009-2021	**12,573**	**8,599**	**5,429**	**26,602**		**10,570**	**6,729**	**5,429**	**22,728**		**8,567**	**4,859**	**5,429**	**18,855**
Percentage Change 2009-2021 (%)	**20.3%**	**14.3%**	**6.6%**			**17.1%**	**11.2%**	**6.6%**			**13.8%**	**8.1%**	**6.6%**	
Numeric Change 2009-2031	**19,808**	**13,126**	**-652**	**32,282**		**16,012**	**10,048**	**-652**	**25,408**		**12,216**	**6,970**	**-652**	**18,534**
Percentage Change 2009-2031 (%)	**32.0%**	**21.8%**	**-0.8%**			**25.9%**	**16.7%**	**-0.8%**			**19.7%**	**11.6%**	**-0.8%**	

Notes:
(1) Population projections based on 2007 Oxford Economics base data, projected using growth rates derived from the GLA's 2008 Ward Level Population Projections Low and ONS 2006 based sub-national population projections.

Earl's Court & West Kensington Local Retail Need Assessment
Table 2: Per capita expenditure on comparison goods (£)

Year	Zone 1	Zone 2	Zone 29	UK Average
2009	4,973	4,784	7,181	3,091
Difference fron UK Average (%)	60.9%	54.8%	132%	-
Per annum growth 2009 - 2011 (%)	0.3%	0.3%	0.3%	0.3%
2011	5,004	4,814	7,225	3,111
Per annum growth 2011 - 2016 (%)	3.6%	3.6%	3.6%	3.6%
2016	5,961	5,735	8,608	3,706
Per annum growth 2016 - 2021 (%)	3.2%	3.2%	3.2%	3.2%
2021	6,989	6,724	10,091	4,345
Per annum growth 2021 - 2026 (%)	2.8%	2.8%	2.8%	2.8%
2026	8,024	7,719	11,586	4,988
Per annum growth 2026 - 2031 (%)	2.8%	2.8%	2.8%	2.8%
2031	9,212	8,862	13,301	5,726

Notes:
(1) Per capita expenditure by zone from 2007 is obtained from Pitney Bowes Business Insight/Oxford Economics (PBBI/OE) using our in-house GIS (MapInfo) system. This is projected to the base year (2009) and the forecast years using per annum growth rates derived from PBBI/OE and Experian (as explained in Appendix 4 of the WLRNS Update 2010). These are applied consistently across all zones.

All monetary values held as constant 2007 prices. Annual growth rates rounded to one decimel point.

Earl's Court & West Kensington Local Retail Need Assessment
Table 3: Total comparison expenditure 2009-2031

Year	High Population Scenario					Medium Population Scenario					Low Population Scenario			
	Zone 1	Zone 2	Zone 29	Total		Zone 1	Zone 2	Zone 29	Total		Zone 1	Zone 2	Zone 29	Total
Total 2009 (including SFT)	307.9	288.7	587.1	**1,183.7**		307.9	288.7	587.1	**1,183.7**		307.9	288.7	587.1	**1,183.7**
Deduction for SFT in 2009 at 7.4%	22.8	21.4	43.4	**87.6**		22.8	21.4	43.4	**87.6**		22.8	21.4	43.4	**87.6**
Total 2009 (excluding SFT)	285.2	267.3	543.6	**1,096.1**		285.2	267.3	543.6	**1,096.1**		285.2	267.3	543.6	**1,096.1**
Total 2011 (including SFT)	317.7	291.8	620.9	**1,230.4**		317.7	291.8	620.9	**1,230.4**		317.7	291.8	620.9	**1,230.4**
Deduction for SFT in 2011 at 8.4%	26.7	24.5	52.2	**103.4**		26.7	24.5	52.2	**103.4**		26.7	24.5	52.2	**103.4**
Total 2011 (excluding SFT)	291.0	267.3	568.8	**1,127.1**		291.0	267.3	568.8	**1,127.1**		291.0	267.3	568.8	**1,127.1**
Total 2016 (including SFT)	414.8	371.8	751.3	**1,538.0**		408.4	367.1	751.3	**1,526.8**		402.0	362.3	751.3	**1,515.6**
Deduction for SFT in 2016 at 9.6%	39.8	35.7	72.1	**147.6**		39.2	35.2	72.1	**146.6**		38.6	34.8	72.1	**145.5**
Total 2016 (excluding SFT)	375.0	336.2	679.2	**1,390.3**		369.2	331.8	679.2	**1,380.2**		363.4	327.5	679.2	**1,370.1**
Total 2021 (including SFT)	520.6	463.5	879.8	**1,864.0**		506.6	451.0	879.8	**1,837.4**		492.6	438.4	879.8	**1,810.8**
Deduction for SFT in 2021 at 9.4%	48.9	43.6	82.7	**175.2**		47.6	42.4	82.7	**172.7**		46.3	41.2	82.7	**170.2**
Total 2021 (excluding SFT)	471.7	420.0	797.1	**1,688.8**		459.0	408.6	797.1	**1,664.7**		446.3	397.2	797.1	**1,640.6**
Total 2026 (including SFT)	628.0	549.7	972.3	**2,150.0**		604.5	530.6	972.3	**2,107.4**		581.0	511.4	972.3	**2,064.7**
Deduction for SFT in 2026 at 9.1%	57.1	50.0	88.5	**195.7**		55.0	48.3	88.5	**191.8**		52.9	46.5	88.5	**187.9**
Total 2026 (excluding SFT)	570.9	499.7	883.8	**1,954.4**		549.5	482.3	883.8	**1,915.6**		528.1	464.9	883.8	**1,876.8**
Total 2031 (including SFT)	752.9	651.1	1,078.7	**2,482.7**		717.9	623.8	1,078.7	**2,420.5**		682.9	596.5	1078.7	**2,358.2**
Deduction for SFT in 2031 at 9.1%	68.5	59.2	98.2	**225.9**		65.3	56.8	98.2	**220.3**		62.1	54.3	98.2	**214.6**
Total 2031 (excluding SFT)	684.4	591.8	980.6	**2,256.8**		652.6	567.0	980.6	**2,200.2**		620.8	542.2	980.6	**2,143.6**
Growth 2009-2011	5.9	-0.1	25.2	**31.0**		5.9	-0.1	25.2	**31.0**		5.9	-0.1	25.2	**31.0**
Growth 2011-2016	83.9	68.9	110.4	**263.2**		78.1	64.6	110.4	**253.1**		72.3	60.2	110.4	**243.0**
Growth 2016-2021	96.7	83.8	117.9	**298.4**		89.9	76.7	117.9	**284.5**		83.0	69.7	117.9	**270.5**
Growth 2021-2026	99.2	79.7	86.7	**265.6**		90.5	73.7	86.7	**250.9**		81.8	67.7	86.7	**236.2**
Growth 2026-2031	113.5	92.1	96.7	**302.4**		103.1	84.8	96.7	**284.6**		92.7	77.4	96.7	**266.8**
Growth 2009-2021	**186.5**	**152.6**	**253.5**	**592.7**		**173.9**	**141.2**	**253.5**	**568.6**		**161.2**	**129.8**	**253.5**	**544.5**
Growth 2009-2031	**399.2**	**324.5**	**437.0**	**1,160.7**		**367.4**	**299.7**	**437.0**	**1,104.1**		**335.6**	**274.9**	**437.0**	**1,047.5**

Notes:
(1) The 2009 expenditure and subsequent figures for the forecast years and are the products of multiplying the data presented in Table 1 (population) by Table 2 (per capita comparison goods expenditure) and presented separately for the high, medium and low population scenarios.
(2) A decuction is made for a percentage of expenditure for Special Forms of Trading (SFT) (i.e. mail order, TV and internet shopping) from the total expenditure. We have adopted the comparison goods SFT projections in Appendix 3 of Experian Retail Planner Note 7.1 (August 2009).

All monetary values are held constant at 2007 prices.

Earl's Court & West Kensington Local Retail Need Assessment
Table 4: Comparison Goods Zonal Market Share & Spending Patterns in 2009

| Zone | Destination | Market Share [1] | | | | Spending Patterns [2] | | | | |
		Zone 1	Zone 2	Zone 29		Zone 1	Zone 2	Zone 29	Total (£m)	Total (%)
1	Fulham	17.3%	4.5%	1.1%		49.3	11.9	5.8	67.1	6.1%
1	Other/Neighbourhood Centres Zone 1	5.2%	2.9%	0.8%		14.9	7.7	4.6	27.2	2.5%
2	Hammersmith	4.6%	24.4%	1.0%		13.2	65.2	5.5	84.0	7.7%
2	Other/Neighbourhood Centres Zone 2	0.2%	2.4%	0.9%		0.4	6.5	4.7	11.7	1.1%
29	Destinations in Zone 29	18.8%	16.7%	39.3%		53.7	44.6	213.4	311.8	28.4%
	Total inside study area	**46.2%**	**50.8%**	**43.1%**		**131.7**	**135.9**	**234.1**	**501.7**	**45.8%**
	Total outside study area	**53.8%**	**49.2%**	**56.9%**		**153.5**	**131.4**	**309.5**	**594.4**	**54.2%**
	TOTAL	100.0%	100.0%	100.0%		**285.2**	**267.3**	**543.6**	**1,096.1**	**100.0%**

Notes:
(1) Market shares are derived from the WLRNS Update 2010
(2) Product of 2009 expenditure (Table 3) and the zonal market shares (see 1 above)

All monetary values are held constant at 2007 prices.

Earl's Court & West Kensington Local Retail Need Assessment
Table 5a: Comparison Goods Local Retail Need - High Population Scenario
HIGH STREET SALES DENSITY

		2009	2011	2016	2021	2026	2031
A	Total study area comparison expenditure (£m)	1,096.1	1,127.1	1,390.3	1,688.8	1,954.4	2,256.8
B	Study area market share (%)	45.8%	45.8%	45.8%	45.8%	45.8%	45.8%
C	Retained expenditure (£m) (=A*B)	501.7	515.9	636.4	773.0	894.6	1,033.0
D	Study area derived turnover (£m)	501.7	502.9	537.8	571.6	602.6	635.3
E	Residual expenditure (£m) (=C-D)	0.0	13.0	98.6	201.4	291.9	397.7
F	Assumed sales density for new comparison floorspace (£/sqm)	4,987	4,999	5,346	5,682	5,990	6,315
G	Net comparison quantitative need (sqm net) (=H/I)	0	2,599	18,437	35,443	48,740	62,974
H	Gross comparison quantitative need (=J/75%)	0	3,465	24,582	47,257	64,987	83,966

Notes:
A. Total spending in the study area (Table 3)
B. Study area market share (Table 4)
C. Product of the market share and the total study area expenditure
D. Turnover of stores derived from study area, increasing by 0.1% per annum to 2011, 1.4% per annum to 2016, 1.2% per annum to 2021 and 1.1% per annum to 2031.
E. Retained expenditure less turnover of floorspace.
F. The assumed sales density to calculate floorspace requirement taken from Experian Retail Planner Briefing Note 7.1 as a sales density for in-town modern floorspace, which increased by the same level of sales density growth described at (D).
G. Net quantitative need calculated by the division of residual expenditure by assumed sales density
H. Gross requirements at 75% net to gross ratio.

All monetary values are held constant at 2007 prices.

Earl's Court & West Kensington Local Retail Need Assessment
Table 5b: Comparison Goods Local Retail Need - Medium Population Scenario
HIGH STREET SALES DENSITY

		2009	2011	2016	2021	2026	2031
A	Total study area comparison expenditure (£m)	1,096.1	1,127.1	1,380.2	1,664.7	1,915.6	2,200.2
B	Study area market share (%)	45.8%	45.8%	45.8%	45.8%	45.8%	45.8%
C	Retained expenditure (£m) (=A*B)	501.7	515.9	631.8	762.0	876.8	1,007.1
D	Study area derived turnover (£m)	501.7	502.9	537.8	571.6	602.6	635.3
E	Residual expenditure (£m) (=C-D)	0.0	13.0	93.9	190.4	274.2	371.8
F	Assumed sales density for new comparison floorspace (£/sqm)	4,987	4,999	5,346	5,682	5,990	6,315
G	Net comparison quantitative need (sqm net) (=H/I)	0	2,599	17,571	33,503	45,776	58,873
H	Gross comparison quantitative need (=J/75%)	0	3,465	23,428	44,671	61,035	78,498

Notes:
A. Total spending in the study area (Table 3)
B. Study area market share (Table 4)
C. Product of the market share and the total study area expenditure
D. Turnover of stores derived from study area, increasing by 0.1% per annum to 2011, 1.4% per annum to 2016, 1.2% per annum to 2021 and 1.1% per annum to 2031.
E. Retained expenditure less turnover of floorspace.
F. The assumed sales density to calculate floorspace requirement taken from Experian Retail Planner Briefing Note 7.1 as a sales density for in-town modern floorspace, which increased by the same level of sales density growth described at (D).
G. Net quantitative need calculated by the division of residual expenditure by assumed sales density
H. Gross requirements at 75% net to gross ratio.

All monetary values are held constant at 2007 prices.

Earl's Court & West Kensington Local Retail Need Assessment
Table 5c: Comparison Goods Local Retail Need - Low Population Scenario
HIGH STREET SALES DENSITY

		2009	2011	2016	2021	2026	2031
A	Total study area comparison expenditure (£m)	1,096.1	1,127.1	1,370.1	1,640.6	1,876.8	2,143.6
B	Study area market share (%)	45.8%	45.8%	45.8%	45.8%	45.8%	45.8%
C	Retained expenditure (£m) (=A*B)	501.7	515.9	627.1	750.9	859.1	981.2
D	Study area derived turnover (£m)	501.7	502.9	537.8	571.6	602.6	635.3
E	Residual expenditure (£m) (=C-D)	0.0	13.0	89.3	179.3	256.4	345.9
F	Assumed sales density for new comparison floorspace (£/sqm)	4,987	4,999	5,346	5,682	5,990	6,315
G	Net comparison quantitative need (sqm net) (=H/I)	0	2,599	16,705	31,564	42,812	54,772
H	Gross comparison quantitative need (=J/75%)	0	3,465	22,273	42,085	57,083	73,029

Notes:
A. Total spending in the study area (Table 3)
B. Study area market share (Table 4)
C. Product of the market share and the total study area expenditure
D. Turnover of stores derived from study area, increasing by 0.1% per annum to 2011, 1.4% per annum to 2016, 1.2% per annum to 2021 and 1.1% per annum to 2031.
E. Retained expenditure less turnover of floorspace.
F. The assumed sales density to calculate floorspace requirement taken from Experian Retail Planner Briefing Note 7.1 as a sales density for in-town modern floorspace, which increased by the same level of sales density growth described at (D).
G. Net quantitative need calculated by the division of residual expenditure by assumed sales density
H. Gross requirements at 75% net to gross ratio.

Earl's Court & West Kensington Local Retail Need Assessment
Table 5d: Comparison Goods Local Retail Need - High Population Scenario
HIGH QUALITY SALES DENSITY

		2009	2011	2016	2021	2026	2031
A	Total study area comparison expenditure (£m)	1,096.1	1,127.1	1,390.3	1,688.8	1,954.4	2,256.8
B	Study area market share (%)	45.8%	45.8%	45.8%	45.8%	45.8%	45.8%
C	Retained expenditure (£m) (=A*B)	501.7	515.9	636.4	773.0	894.6	1,033.0
D	Study area derived turnover (£m)	501.7	502.9	537.8	571.6	602.6	635.3
E	Residual expenditure (£m) (=C-D)	0.0	13.0	98.6	201.4	291.9	397.7
F	Assumed sales density for new comparison floorspace (£/sqm)	7,052	7,069	7,560	8,035	8,470	8,930
G	Net comparison quantitative need (sqm net) (=H/I)	0	1,838	13,037	25,063	34,466	44,532
H	Gross comparison quantitative need (=J/75%)	0	2,450	17,383	33,418	45,955	59,376

Notes:
A. Total spending in the study area (Table 3)
B. Study area market share (Table 4)
C. Product of the market share and the total study area expenditure
D. Turnover of stores derived from study area, increasing by 0.1% per annum to 2011, 1.4% per annum to 2016, 1.2% per annum to 2021 and 1.1% per annum to 2031.
E. Retained expenditure less turnover of floorspace.
F. The assumed sales density to calculate floorspace requirement taken from Experian Retail Planner Briefing Note 7.1 as a sales density for in-town modern floorspace, which increased by the same level of sales density growth described at (D).
G. Net quantitative need calculated by the division of residual expenditure by assumed sales density
H. Gross requirements at 75% net to gross ratio.

All monetary values are held constant at 2007 prices.

Earl's Court & West Kensington Local Retail Need Assessment
Table 5e: Comparison Goods Local Retail Need - Medium Population Scenario
HIGH QUALITY SALES DENSITY

		2009	2011	2016	2021	2026	2031
A	Total study area comparison expenditure (£m)	1,096.1	1,127.1	1,380.2	1,664.7	1,915.6	2,200.2
B	Study area market share (%)	45.8%	45.8%	45.8%	45.8%	45.8%	45.8%
C	Retained expenditure (£m) (=A*B)	501.7	515.9	631.8	762.0	876.8	1,007.1
D	Study area derived turnover (£m)	501.7	502.9	537.8	571.6	602.6	635.3
E	Residual expenditure (£m) (=C-D)	0.0	13.0	93.9	190.4	274.2	371.8
F	Assumed sales density for new comparison floorspace (£/sqm)	7,052	7,069	7,560	8,035	8,470	8,930
G	Net comparison quantitative need (sqm net) (=H/I)	0	1,838	12,425	23,692	32,370	41,632
H	Gross comparison quantitative need (=J/75%)	0	2,450	16,567	31,589	43,160	55,509

Notes:
A. Total spending in the study area (Table 3)
B. Study area market share (Table 4)
C. Product of the market share and the total study area expenditure
D. Turnover of stores derived from study area, increasing by 0.1% per annum to 2011, 1.4% per annum to 2016, 1.2% per annum to 2021 and 1.1% per annum to 2031.
E. Retained expenditure less turnover of floorspace.
F. The assumed sales density to calculate floorspace requirement taken from Experian Retail Planner Briefing Note 7.1 as a sales density for in-town modern floorspace, which increased by the same level of sales density growth described at (D).
G. Net quantitative need calculated by the division of residual expenditure by assumed sales density
H. Gross requirements at 75% net to gross ratio.

All monetary values are held constant at 2007 prices.

Earl's Court & West Kensington Local Retail Need Assessment
Table 5f: Comparison Goods Local Retail Need - Low Population Scenario
HIGH QUALITY SALES DENSITY

		2009	2011	2016	2021	2026	2031
A	Total study area comparison expenditure (£m)	1,096.1	1,127.1	1,370.1	1,640.6	1,876.8	2,143.6
B	Study area market share (%)	45.8%	45.8%	45.8%	45.8%	45.8%	45.8%
C	Retained expenditure (£m) (=A*B)	501.7	515.9	627.1	750.9	859.1	981.2
D	Study area derived turnover (£m)	501.7	502.9	537.8	571.6	602.6	635.3
E	Residual expenditure (£m) (=C-D)	0.0	13.0	89.3	179.3	256.4	345.9
F	Assumed sales density for new comparison floorspace (£/sqm)	7,052	7,069	7,560	8,035	8,470	8,930
G	Net comparison quantitative need (sqm net) (=H/I)	0	1,838	11,813	22,320	30,274	38,732
H	Gross comparison quantitative need (=J/75%)	0	2,450	15,750	29,760	40,366	51,642

Notes:
A. Total spending in the study area (Table 3)
B. Study area market share (Table 4)
C. Product of the market share and the total study area expenditure
D. Turnover of stores derived from study area, increasing by 0.1% per annum to 2011, 1.4% per annum to 2016, 1.2% per annum to 2021 and 1.1% per annum to 2031.
E. Retained expenditure less turnover of floorspace.
F. The assumed sales density to calculate floorspace requirement taken from Experian Retail Planner Briefing Note 7.1 as a sales density for in-town modern floorspace, which increased by the same level of sales density growth described at (D).
G. Net quantitative need calculated by the division of residual expenditure by assumed sales density
H. Gross requirements at 75% net to gross ratio.

Earl's Court & West Kensington Local Retail Need Assessment
Table 5g: Comparison Goods Local Retail Need - High Population Scenario - SENSITIVITY - 1.5% SD GROWTH
HIGH STREET SALES DENSITY

		2009	2011	2016	2021	2026	2031
A	Total study area comparison expenditure (£m)	1,096.1	1,127.1	1,390.3	1,688.8	1,954.4	2,256.8
B	Study area market share (%)	45.8%	45.8%	45.8%	45.8%	45.8%	45.8%
C	Retained expenditure (£m) (=A*B)	501.7	515.9	636.4	773.0	894.6	1,033.0
D	Study area derived turnover (£m)	501.7	502.9	541.8	583.6	628.7	677.3
E	Residual expenditure (£m) (=C-D)	0.0	13.0	94.6	189.3	265.8	355.6
F	Assumed sales density for new comparison floorspace (£/sqm)	4,987	4,999	5,385	5,801	6,250	6,733
G	Net comparison quantitative need (sqm net) (=H/I)	0	2,599	17,570	32,639	42,534	52,824
H	Gross comparison quantitative need (=J/75%)	0	3,465	23,426	43,519	56,712	70,432

Notes:
A. Total spending in the study area (Table 3)
B. Study area market share (Table 4)
C. Product of the market share and the total study area expenditure
D. Turnover of stores derived from study area, increasing by 0.1% per annum to 2011, 1.5% per annum to 2031
E. Retained expenditure less turnover of floorspace.
F. The assumed sales density to calculate floorspace requirement taken from Experian Retail Planner Briefing Note 7.1 as a sales density for in-town modern floorspace, which increased by the same level of sales density growth described at (D).
G. Net quantitative need calculated by the division of residual expenditure by assumed sales density
H. Gross requirements at 75% net to gross ratio.

All monetary values are held constant at 2007 prices.

Earl's Court & West Kensington Local Retail Need Assessment
Table 5h: Comparison Goods Local Retail Need - Medium Population Scenario - SENSITIVITY - 1.5% SD GROWTH
HIGH STREET SALES DENSITY

		2009	2011	2016	2021	2026	2031
A	Total study area comparison expenditure (£m)	1,096.1	1,127.1	1,380.2	1,664.7	1,915.6	2,200.2
B	Study area market share (%)	45.8%	45.8%	45.8%	45.8%	45.8%	45.8%
C	Retained expenditure (£m) (=A*B)	501.7	515.9	631.8	762.0	876.8	1,007.1
D	Study area derived turnover (£m)	501.7	502.9	541.8	583.6	628.7	677.3
E	Residual expenditure (£m) (=C-D)	0.0	13.0	90.0	178.3	248.1	329.7
F	Assumed sales density for new comparison floorspace (£/sqm)	4,987	4,999	5,385	5,801	6,250	6,733
G	Net comparison quantitative need (sqm net) (=H/I)	0	2,599	16,710	30,740	39,694	48,977
H	Gross comparison quantitative need (=J/75%)	0	3,465	22,280	40,986	52,925	65,303

Notes:
A. Total spending in the study area (Table 3)
B. Study area market share (Table 4)
C. Product of the market share and the total study area expenditure
D. Turnover of stores derived from study area, increasing by 0.1% per annum to 2011, 1.5% per annum to 2031
E. Retained expenditure less turnover of floorspace.
F. The assumed sales density to calculate floorspace requirement taken from Experian Retail Planner Briefing Note 7.1 as a sales density for in-town modern floorspace, which increased by the same level of sales density growth described at (D).
G. Net quantitative need calculated by the division of residual expenditure by assumed sales density
H. Gross requirements at 75% net to gross ratio.

All monetary values are held constant at 2007 prices.

Earl's Court & West Kensington Local Retail Need Assessment
Table 5I: Comparison Goods Local Retail Need - Low Population Scenario
HIGH STREET SALES DENSITY

		2009	2011	2016	2021	2026	2031
A	Total study area comparison expenditure (£m)	1,096.1	1,127.1	1,370.1	1,640.6	1,876.8	2,143.6
B	Study area market share (%)	45.8%	45.8%	45.8%	45.8%	45.8%	45.8%
C	Retained expenditure (£m) (=A*B)	501.7	515.9	627.1	750.9	859.1	981.2
D	Study area derived turnover (£m)	501.7	502.9	541.8	583.6	628.7	677.3
E	Residual expenditure (£m) (=C-D)	0.0	13.0	85.4	167.3	230.3	303.8
F	Assumed sales density for new comparison floorspace (£/sqm)	4,987	4,999	5,385	5,801	6,250	6,733
G	Net comparison quantitative need (sqm net) (=H/I)	0	2,599	15,850	28,840	36,853	45,130
H	Gross comparison quantitative need (=J/75%)	0	3,465	21,134	38,453	49,137	60,174

Notes:
A. Total spending in the study area (Table 3)
B. Study area market share (Table 4)
C. Product of the market share and the total study area expenditure
D. Turnover of stores derived from study area, increasing by 0.1% per annum to 2011, 1.5% per annum to 2031
E. Retained expenditure less turnover of floorspace.
F. The assumed sales density to calculate floorspace requirement taken from Experian Retail Planner Briefing Note 7.1 as a sales density for in-town modern floorspace, which increased by the same level of sales density growth described at (D).
G. Net quantitative need calculated by the division of residual expenditure by assumed sales density
H. Gross requirements at 75% net to gross ratio.

Earl's Court & West Kensington Local Retail Need Assessment
Table 5j: Comparison Goods Local Retail Need - High Population Scenario - SENSITIVITY - 1.5% SD GROWTH
HIGH QUALITY SALES DENSITY

		2009	2011	2016	2021	2026	2031
A	Total study area comparison expenditure (£m)	1,096.1	1,127.1	1,390.3	1,688.8	1,954.4	2,256.8
B	Study area market share (%)	45.8%	45.8%	45.8%	45.8%	45.8%	45.8%
C	Retained expenditure (£m) (=A*B)	501.7	515.9	636.4	773.0	894.6	1,033.0
D	Study area derived turnover (£m)	501.7	502.9	541.8	583.6	628.7	677.3
E	Residual expenditure (£m) (=C-D)	0.0	13.0	94.6	189.3	265.8	355.6
F	Assumed sales density for new comparison floorspace (£/sqm)	7,052	7,069	7,615	8,204	8,838	9,521
G	Net comparison quantitative need (sqm net) (=H/I)	0	1,838	12,424	23,081	30,078	37,354
H	Gross comparison quantitative need (=J/75%)	0	2,450	16,566	30,774	40,104	49,805

Notes:
A. Total spending in the study area (Table 3)
B. Study area market share (Table 4)
C. Product of the market share and the total study area expenditure
D. Turnover of stores derived from study area, increasing by 0.1% per annum to 2011, 1.5% per annum to 2031
E. Retained expenditure less turnover of floorspace.
F. The assumed sales density to calculate floorspace requirement taken from Experian Retail Planner Briefing Note 7.1 as a sales density for in-town modern floorspace, which increased by the same level of sales density growth described at (D).
G. Net quantitative need calculated by the division of residual expenditure by assumed sales density
H. Gross requirements at 75% net to gross ratio.

All monetary values are held constant at 2007 prices.

Earl's Court & West Kensington Local Retail Need Assessment
Table 5k: Comparison Goods Local Retail Need - Medium Population Scenario - SENSITIVITY - 1.5% SD GROWTH
HIGH QUALITY SALES DENSITY

		2009	2011	2016	2021	2026	2031
A	Total study area comparison expenditure (£m)	1,096.1	1,127.1	1,380.2	1,664.7	1,915.6	2,200.2
B	Study area market share (%)	45.8%	45.8%	45.8%	45.8%	45.8%	45.8%
C	Retained expenditure (£m) (=A*B)	501.7	515.9	631.8	762.0	876.8	1,007.1
D	Study area derived turnover (£m)	501.7	502.9	541.8	583.6	628.7	677.3
E	Residual expenditure (£m) (=C-D)	0.0	13.0	90.0	178.3	248.1	329.7
F	Assumed sales density for new comparison floorspace (£/sqm)	7,052	7,069	7,615	8,204	8,838	9,521
G	Net comparison quantitative need (sqm net) (=H/I)	0	1,838	11,816	21,737	28,069	34,634
H	Gross comparison quantitative need (=J/75%)	0	2,450	15,755	28,983	37,425	46,178

Notes:
A. Total spending in the study area (Table 3)
B. Study area market share (Table 4)
C. Product of the market share and the total study area expenditure
D. Turnover of stores derived from study area, increasing by 0.1% per annum to 2011, 1.5% per annum to 2031
E. Retained expenditure less turnover of floorspace.
F. The assumed sales density to calculate floorspace requirement taken from Experian Retail Planner Briefing Note 7.1 as a sales density for in-town modern floorspace, which increased by the same level of sales density growth described at (D).
G. Net quantitative need calculated by the division of residual expenditure by assumed sales density
H. Gross requirements at 75% net to gross ratio.

All monetary values are held constant at 2007 prices.

Earl's Court & West Kensington Local Retail Need Assessment
Table 5l: Comparison Goods Local Retail Need - Low Population Scenario
HIGH QUALITY SALES DENSITY

		2009	2011	2016	2021	2026	2031
A	Total study area comparison expenditure (£m)	1,096.1	1,127.1	1,370.1	1,640.6	1,876.8	2,143.6
B	Study area market share (%)	45.8%	45.8%	45.8%	45.8%	45.8%	45.8%
C	Retained expenditure (£m) (=A*B)	501.7	515.9	627.1	750.9	859.1	981.2
D	Study area derived turnover (£m)	501.7	502.9	541.8	583.6	628.7	677.3
E	Residual expenditure (£m) (=C-D)	0.0	13.0	85.4	167.3	230.3	303.8
F	Assumed sales density for new comparison floorspace (£/sqm)	7,052	7,069	7,615	8,204	8,838	9,521
G	Net comparison quantitative need (sqm net) (=H/I)	0	1,838	11,208	20,394	26,060	31,914
H	Gross comparison quantitative need (=J/75%)	0	2,450	14,945	27,192	34,747	42,552

Notes:
A. Total spending in the study area (Table 3)
B. Study area market share (Table 4)
C. Product of the market share and the total study area expenditure
D. Turnover of stores derived from study area, increasing by 0.1% per annum to 2011, 1.5% per annum to 2031
E. Retained expenditure less turnover of floorspace.
F. The assumed sales density to calculate floorspace requirement taken from Experian Retail Planner Briefing Note 7.1 as a sales density for in-town modern floorspace, which increased by the same level of sales density growth described at (D).
G. Net quantitative need calculated by the division of residual expenditure by assumed sales density
H. Gross requirements at 75% net to gross ratio.

Earl's Court & West Kensington Local Retail Need Assessment
Table 5m: Comparison Goods Local Retail Need - High Population Scenario - SENSITIVITY - 2.2% SD GROWTH
HIGH STREET SALES DENSITY

		2009	2011	2016	2021	2026	2031
A	Total study area comparison expenditure (£m)	1,096.1	1,127.1	1,390.3	1,688.8	1,954.4	2,256.8
B	Study area market share (%)	45.8%	45.8%	45.8%	45.8%	45.8%	45.8%
C	Retained expenditure (£m) (=A*B)	501.7	515.9	636.4	773.0	894.6	1,033.0
D	Study area derived turnover (£m)	501.7	502.9	560.7	625.2	697.0	777.1
E	Residual expenditure (£m) (=C-D)	0.0	13.0	75.7	147.8	197.5	255.8
F	Assumed sales density for new comparison floorspace (£/sqm)	4,987	4,999	5,573	6,214	6,928	7,725
G	Net comparison quantitative need (sqm net) (=H/I)	0	2,599	13,577	23,789	28,513	33,119
H	Gross comparison quantitative need (=J/75%)	0	3,465	18,103	31,719	38,017	44,159

Notes:
A. Total spending in the study area (Table 3)
B. Study area market share (Table 4)
C. Product of the market share and the total study area expenditure
D. Turnover of stores derived from study area, increasing by 0.1% per annum to 2011, 2.2% per annum to 2031
E. Retained expenditure less turnover of floorspace.
F. The assumed sales density to calculate floorspace requirement taken from Experian Retail Planner Briefing Note 7.1 as a sales density for in-town modern floorspace, which increased by the same level of sales density growth described at (D).
G. Net quantitative need calculated by the division of residual expenditure by assumed sales density
H. Gross requirements at 75% net to gross ratio.

All monetary values are held constant at 2007 prices.

Earl's Court & West Kensington Local Retail Need Assessment
Table 5n: Comparison Goods Local Retail Need - Medium Population Scenario - SENSITIVITY - 2.2% SD GROWTH
HIGH STREET SALES DENSITY

		2009	2011	2016	2021	2026	2031
A	Total study area comparison expenditure (£m)	1,096.1	1,127.1	1,380.2	1,664.7	1,915.6	2,200.2
B	Study area market share (%)	45.8%	45.8%	45.8%	45.8%	45.8%	45.8%
C	Retained expenditure (£m) (=A*B)	501.7	515.9	631.8	762.0	876.8	1,007.1
D	Study area derived turnover (£m)	501.7	502.9	560.7	625.2	697.0	777.1
E	Residual expenditure (£m) (=C-D)	0.0	13.0	71.0	136.8	179.8	229.9
F	Assumed sales density for new comparison floorspace (£/sqm)	4,987	4,999	5,573	6,214	6,928	7,725
G	Net comparison quantitative need (sqm net) (=H/I)	0	2,599	12,747	22,016	25,950	29,766
H	Gross comparison quantitative need (=J/75%)	0	3,465	16,996	29,354	34,600	39,688

Notes:
A. Total spending in the study area (Table 3)
B. Study area market share (Table 4)
C. Product of the market share and the total study area expenditure
D. Turnover of stores derived from study area, increasing by 0.1% per annum to 2011, 2.2% per annum to 2031
E. Retained expenditure less turnover of floorspace.
F. The assumed sales density to calculate floorspace requirement taken from Experian Retail Planner Briefing Note 7.1 as a sales density for in-town modern floorspace, which increased by the same level of sales density growth described at (D).
G. Net quantitative need calculated by the division of residual expenditure by assumed sales density
H. Gross requirements at 75% net to gross ratio.

All monetary values are held constant at 2007 prices.

Earl's Court & West Kensington Local Retail Need Assessment
Table 5o: Comparison Goods Local Retail Need - Low Population Scenario

		2009	2011	2016	2021	2026	2031
A	Total study area comparison expenditure (£m)	1,096.1	1,127.1	1,370.1	1,640.6	1,876.8	2,143.6
B	Study area market share (%)	45.8%	45.8%	45.8%	45.8%	45.8%	45.8%
C	Retained expenditure (£m) (=A*B)	501.7	515.9	627.1	750.9	859.1	981.2
D	Study area derived turnover (£m)	501.7	502.9	560.7	625.2	697.0	777.1
E	Residual expenditure (£m) (=C-D)	0.0	13.0	66.4	125.8	162.0	204.0
F	Assumed sales density for new comparison floorspace (£/sqm)	4,987	4,999	5,573	6,214	6,928	7,725
G	Net comparison quantitative need (sqm net) (=H/I)	0	2,599	11,916	20,242	23,388	26,414
H	Gross comparison quantitative need (=J/75%)	0	3,465	15,888	26,990	31,184	35,218

Notes:
A. Total spending in the study area (Table 3)
B. Study area market share (Table 4)
C. Product of the market share and the total study area expenditure
D. Turnover of stores derived from study area, increasing by 0.1% per annum to 2011, 2.2% per annum to 2031.
E. Retained expenditure less turnover of floorspace.
F. The assumed sales density to calculate floorspace requirement taken from Experian Retail Planner Briefing Note 7.1 as a sales density for in-town modern floorspace, which increased by the same level of sales density growth described at (D).
G. Net quantitative need calculated by the division of residual expenditure by assumed sales density
H. Gross requirements at 75% net to gross ratio.

Earl's Court & West Kensington Local Retail Need Assessment
Table 5m: Comparison Goods Local Retail Need - High Population Scenario - SENSITIVITY - 2.2% SD GROWTH
HIGH STREET SALES DENSITY

		2009	2011	2016	2021	2026	2031
A	Total study area comparison expenditure (£m)	1,096.1	1,127.1	1,390.3	1,688.8	1,954.4	2,256.8
B	Study area market share (%)	45.8%	45.8%	45.8%	45.8%	45.8%	45.8%
C	Retained expenditure (£m) (=A*B)	501.7	515.9	636.4	773.0	894.6	1,033.0
D	Study area derived turnover (£m)	501.7	502.9	560.7	625.2	697.0	777.1
E	Residual expenditure (£m) (=C-D)	0.0	13.0	75.7	147.8	197.5	255.8
F	Assumed sales density for new comparison floorspace (£/sqm)	7,052	7,069	7,881	8,787	9,797	10,924
G	Net comparison quantitative need (sqm net) (=H/I)	0	1,838	9,601	16,822	20,162	23,420
H	Gross comparison quantitative need (=J/75%)	0	2,450	12,802	22,430	26,883	31,227

Notes:
A. Total spending in the study area (Table 3)
B. Study area market share (Table 4)
C. Product of the market share and the total study area expenditure
D. Turnover of stores derived from study area, increasing by 0.1% per annum to 2011, 2.2% per annum to 2031
E. Retained expenditure less turnover of floorspace.
F. The assumed sales density to calculate floorspace requirement taken from Experian Retail Planner Briefing Note 7.1 as a sales density for in-town modern floorspace, which increased by the same level of sales density growth described at (D).
G. Net quantitative need calculated by the division of residual expenditure by assumed sales density
H. Gross requirements at 75% net to gross ratio.

All monetary values are held constant at 2007 prices.

Earl's Court & West Kensington Local Retail Need Assessment
Table 5n: Comparison Goods Local Retail Need - Medium Population Scenario - SENSITIVITY - 2.2% SD GROWTH
HIGH STREET SALES DENSITY

		2009	2011	2016	2021	2026	2031
A	Total study area comparison expenditure (£m)	1,096.1	1,127.1	1,380.2	1,664.7	1,915.6	2,200.2
B	Study area market share (%)	45.8%	45.8%	45.8%	45.8%	45.8%	45.8%
C	Retained expenditure (£m) (=A*B)	501.7	515.9	631.8	762.0	876.8	1,007.1
D	Study area derived turnover (£m)	501.7	502.9	560.7	625.2	697.0	777.1
E	Residual expenditure (£m) (=C-D)	0.0	13.0	71.0	136.8	179.8	229.9
F	Assumed sales density for new comparison floorspace (£/sqm)	7,052	7,069	7,881	8,787	9,797	10,924
G	Net comparison quantitative need (sqm net) (=H/I)	0	1,838	9,014	15,568	18,350	21,049
H	Gross comparison quantitative need (=J/75%)	0	2,450	12,018	20,758	24,467	28,065

Notes:
A. Total spending in the study area (Table 3)
B. Study area market share (Table 4)
C. Product of the market share and the total study area expenditure
D. Turnover of stores derived from study area, increasing by 0.1% per annum to 2011, 2.2% per annum to 2031
E. Retained expenditure less turnover of floorspace.
F. The assumed sales density to calculate floorspace requirement taken from Experian Retail Planner Briefing Note 7.1 as a sales density for in-town modern floorspace, which increased by the same level of sales density growth described at (D).
G. Net quantitative need calculated by the division of residual expenditure by assumed sales density
H. Gross requirements at 75% net to gross ratio.

All monetary values are held constant at 2007 prices.

Earl's Court & West Kensington Local Retail Need Assessment
Table 5o: Comparison Goods Local Retail Need - Low Population Scenario

		2009	2011	2016	2021	2026	2031
A	Total study area comparison expenditure (£m)	1,096.1	1,127.1	1,370.1	1,640.6	1,876.8	2,143.6
B	Study area market share (%)	45.8%	45.8%	45.8%	45.8%	45.8%	45.8%
C	Retained expenditure (£m) (=A*B)	501.7	515.9	627.1	750.9	859.1	981.2
D	Study area derived turnover (£m)	501.7	502.9	560.7	625.2	697.0	777.1
E	Residual expenditure (£m) (=C-D)	0.0	13.0	66.4	125.8	162.0	204.0
F	Assumed sales density for new comparison floorspace (£/sqm)	7,052	7,069	7,881	8,787	9,797	10,924
G	Net comparison quantitative need (sqm net) (=H/I)	0	1,838	8,427	14,314	16,539	18,678
H	Gross comparison quantitative need (=J/75%)	0	2,450	11,235	19,085	22,051	24,904

Notes:
A. Total spending in the study area (Table 3)
B. Study area market share (Table 4)
C. Product of the market share and the total study area expenditure
D. Turnover of stores derived from study area, increasing by 0.1% per annum to 2011, 2.2% per annum to 2031.
E. Retained expenditure less turnover of floorspace.
F. The assumed sales density to calculate floorspace requirement taken from Experian Retail Planner Briefing Note 7.1 as a sales density for in-town modern floorspace, which increased by the same level of sales density growth described at (D).
G. Net quantitative need calculated by the division of residual expenditure by assumed sales density
H. Gross requirements at 75% net to gross ratio.

Earl's Court & West Kensington Local Retail Need Assessment
Table 6: Per capita expenditure on convenience goods (£)

Year	Zone 1	Zone 2	Zone 29	UK Average
2009	2,692	2,622	3,755	1,801
Difference fron UK Average (%)	49.4%	45.6%	108.5%	-
Per annum growth 2009 - 2011 (%)	0.2%	0.2%	0.2%	0.2%
2011	2,702	2,632	3,769	1,808
Per annum growth 2011 - 2016 (%)	1.1%	1.1%	1.1%	1.1%
2016	2,847	2,774	3,972	1,905
Per annum growth 2016 - 2021 (%)	0.8%	0.8%	0.8%	0.8%
2021	2,962	2,885	4,132	1,982
Per annum growth 2021 - 2026 (%)	0.9%	0.9%	0.9%	0.9%
2026	3,097	3,018	4,321	2,073
Per annum growth 2026 - 2031 (%)	0.9%	0.9%	0.9%	0.9%
2031	3,239	3,156	4,519	2,168

Notes:
(1) Per capita expenditure by zone from 2007 is obtained from Pitney Bowes Business Insight/Oxford Economics (PBBI/OE) using our in-house GIS (MapInfo) system. This is projected to the base year (2009) and the forecast years using per annum growth rates derived from PBBI/OE and Experian (as explained in Appendix 4 of the WLRNS Update 2010). These are applied consistently across all zones.

All monetary values held as constant 2007 prices. Annual growth rates rounded to one decimel point.

Earl's Court & West Kensington Local Retail Need Assessment
Table 7: Total convenience expenditure 2009-2031

Year	High Population Scenario					Medium Population Scenario					Low Population Scenario			
	Zone 1	Zone 2	Zone 29	Total		Zone 1	Zone 2	Zone 29	Total		Zone 1	Zone 2	Zone 29	Total
Total 2009 (including SFT)	166.7	158.2	307.0	631.9		166.7	158.2	307.0	631.9		166.7	158.2	307.0	631.9
Deduction for SFT in 2009 at 2.0%	3.3	3.1	6.0	12.3		3.3	3.1	6.0	12.3		3.3	3.1	6.0	12.3
Total 2009 (excluding SFT)	163.4	155.2	301.0	619.6		163.4	155.2	301.0	619.6		163.4	155.2	301.0	619.6
Total 2011 (including SFT)	171.6	159.5	323.9	655.0		171.6	159.5	323.9	655.0		171.6	159.5	323.9	655.0
Deduction for SFT in 2011 at 2.2%	3.8	3.5	7.1	14.4		3.8	3.5	7.1	14.4		3.8	3.5	7.1	14.4
Total 2011 (excluding SFT)	167.8	156.0	316.8	640.6		167.8	156.0	316.8	640.6		167.8	156.0	316.8	640.6
Total 2016 (including SFT)	198.1	179.8	346.7	724.6		195.0	177.5	346.7	719.2		192.0	175.2	346.7	713.9
Deduction for SFT in 2016 at 2.7%	5.2	4.8	9.2	19.2		5.2	4.7	9.2	19.1		5.1	4.6	9.2	18.9
Total 2016 (excluding SFT)	192.9	175.1	337.5	705.4		189.9	172.8	337.5	700.2		186.9	170.6	337.5	695.0
Total 2021 (including SFT)	220.6	198.9	360.2	779.8		214.7	193.5	360.2	768.4		208.8	188.1	360.2	757.1
Deduction for SFT in 2021 at 2.8%	6.2	5.6	10.1	21.8		6.0	5.4	10.1	21.5		5.8	5.3	10.1	21.2
Total 2021 (excluding SFT)	214.5	193.3	350.1	757.9		208.7	188.1	350.1	746.9		202.9	182.9	350.1	735.9
Total 2026 (including SFT)	242.4	214.9	362.6	819.9		233.4	207.4	362.6	803.4		224.3	199.9	362.6	786.8
Deduction for SFT in 2026 at 3.0%	7.2	6.3	10.7	24.2		6.9	6.1	10.7	23.7		6.6	5.9	10.7	23.2
Total 2026 (excluding SFT)	235.3	208.5	351.9	795.8		226.5	201.3	351.9	779.7		217.7	194.0	351.9	763.6
Total 2031 (including SFT)	264.8	231.8	366.5	863.1		252.5	222.1	366.5	841.1		240.2	212.4	366.5	819.1
Deduction for SFT in 2031 at 3.0%	7.8	6.8	10.8	25.5		7.4	6.6	10.8	24.8		7.1	6.3	10.8	24.2
Total 2031 (excluding SFT)	256.9	225.0	355.7	837.6		245.0	215.6	355.7	816.3		233.1	206.2	355.7	794.9
Growth 2009-2011	4.4	0.9	15.8	21.0		4.4	0.9	15.8	21.0		4.4	0.9	15.8	21.0
Growth 2011-2016	25.1	19.0	20.7	64.8		22.1	16.8	20.7	59.6		19.1	14.5	20.7	54.3
Growth 2016-2021	21.6	18.3	12.6	52.5		18.8	15.3	12.6	46.7		16.0	12.3	12.6	40.9
Growth 2021-2026	20.8	15.2	1.8	37.8		17.8	13.2	1.8	32.8		14.7	11.2	1.8	27.7
Growth 2026-2031	21.7	16.5	3.7	41.9		18.5	14.3	3.7	36.6		15.4	12.1	3.7	31.3
Growth 2009-2021	**51.0**	**38.2**	**49.1**	**138.3**		**45.3**	**32.9**	**49.1**	**127.3**		**39.5**	**27.7**	**49.1**	**116.3**
Growth 2009-2031	**93.5**	**69.8**	**54.7**	**218.0**		**81.6**	**60.4**	**54.7**	**196.7**		**69.6**	**51.0**	**54.7**	**175.3**

Notes:
(1) The 2009 expenditure and subsequent figures for the forecast years and are the products of multiplying the data presented in Table 1 (population) by Table 6 (per capita convenience goods expenditure) and presented separately for the high and low population scenarios.
(2) A decuction is made for a percentage of expenditure for Special Forms of Trading (SFT) (i.e. mail order, TV and internet shopping) from the total expenditure. We have adopted the comparison goods SFT projections in Appendix 3 of Experian Retail Planner Note 7.1 (August 2009).

All monetary values are held constant at 2007 prices.

Earl's Court & West Kensington Local Retail Need Assessment

Table 8: Convenience Goods Zonal Market Share & Spending Patterns in 2009

| Zone | Destination | Market Share [1] | | | | Spending Patterns [2] | | | | |
		Zone 1	Zone 2	Zone 29		Zone 1	Zone 2	Zone 29	Total (£m)	Total (%)
1	Sainsbury's, Townsmead Road, Fulham	22.8%	4.9%	1.9%		37.3	7.5	5.8	50.6	6.8%
1	Waitrose, North End Road, Fulham	25.3%	3.9%	1.9%		41.4	6.0	5.8	53.3	7.1%
1	Fulham (other stores)	15.8%	3.0%	2.0%		25.8	4.6	6.0	36.5	4.9%
1	Neighbourhood centres/other (LBHF)	4.7%	0.3%	1.3%		7.8	0.4	4.0	12.1	1.6%
1	Out of centre (LBHF)	1.6%	0.0%	0.0%		2.6	0.0	0.0	2.6	0.3%
2	Sainsbury's, Kings Mall, Hammersmith	1.9%	9.3%	0.0%		3.1	14.4	0.0	17.5	2.3%
2	Tesco, Shepherds Bush Road, Hammersmith	1.9%	26.2%	0.0%		3.1	40.7	0.0	43.8	5.8%
2	Hammersmith (other stores)	0.0%	8.8%	0.4%		0.0	13.7	1.1	14.8	2.0%
2	Neighbourhood centres/other (LBHF)	1.6%	5.9%	0.0%		2.6	9.2	0.0	11.8	1.6%
29	Sainsbury's, West End Air Terminal	0.0%	0.0%	10.1%		0.0	0.0	30.3	30.3	4.0%
29	Tesco Metro, High Street, Kensington	0.0%	0.0%	1.0%		0.0	0.0	2.9	2.9	0.4%
29	Waitrose, Gloucester Arcade, Gloucester Rd	0.0%	0.0%	6.5%		0.0	0.0	19.6	19.6	2.6%
29	Waitrose, High Street, Kensington	0.0%	0.0%	12.4%		0.0	0.0	37.3	37.3	5.0%
29	Waitrose, Kings Road, Chelsea	0.0%	0.0%	15.9%		0.0	0.0	48.0	48.0	6.4%
29	Other Zone 29 (RBKC)	0.0%	0.0%	22.5%		0.0	0.0	67.7	67.7	9.0%
	Total inside study area	75.7%	62.2%	75.9%		123.7	96.5	228.6	448.8	59.8%
	Total outside study area	24.3%	37.8%	24.1%		69.4	101.0	130.8	301.2	40.2%
	TOTAL	100.0%	100.0%	100.0%		193.1	197.5	359.4	750.0	100.0%

Notes:
(1) Market shares are derived from the WLRNS Update 2010
(2) Product of 2009 expenditure (Table 7) and the zonal market shares (see 1 above)

All monetary values are held constant at 2007 prices.

Earl's Court & West Kensington Local Retail Need Assessment
Table 9a: Convenience Goods Local Retail Need - High Population Scenario
SUPERSTORE SALES DENSITY

		2009	2011	2016	2021	2026	2031
A	Total study area comparison expenditure (£m)	619.6	640.6	705.4	757.9	795.8	837.6
B	Study area market share (%)	72.4%	72.4%	72.4%	72.4%	72.4%	72.4%
C	Retained expenditure (£m) (=A*B)	448.8	464.0	510.9	549.0	576.4	606.7
D	Study area derived turnover (£m)	448.8	449.6	460.6	469.1	478.9	488.9
E	Residual expenditure (£m) (=C-D)	0.0	14.4	50.4	79.9	97.5	117.8
F	Assumed sales density for new comparison floorspace (£/sqm)	12,623	12,645	12,955	13,194	13,470	13,752
G	Net comparison quantitative need (sqm net) (=H/I)	0	1,142	3,887	6,056	7,237	8,564
H	Gross comparison quantitative need (=J/65%)	0	1,757	5,980	9,316	11,133	13,176

Notes:
A. Total spending in the study area (Table 7)
B. Study area market share (Table 8)
C. Product of the market share and the total study area expenditure
D. Turnover of stores derived from study area, increasing by 0.1% per annum to 2011, 0.5% per annum to 2016, 0.4% per annum to 2031.
E. Retained expenditure less turnover of floorspace.
F. The assumed sales density to calculate floorspace requirement is an average of the six largest foodstore retailers and is increased by the same level of sales density growth described at (D).
G. Net quantitative need calculated by the division of residual expenditure by assumed sales density
H. Gross requirements at 65% net to gross ratio.

All monetary values are held constant at 2007 prices.

Earl's Court & West Kensington Local Retail Need Assessment
Table 9b: Convenience Goods Local Retail Need - Medium Population Scenario
SUPERSTORE SALES DENSITY

		2009	2011	2016	2021	2026	2031
A	Total study area comparison expenditure (£m)	619.6	640.6	700.2	746.9	779.7	816.3
B	Study area market share (%)	72.4%	72.4%	72.4%	72.4%	72.4%	72.4%
C	Retained expenditure (£m) (=A*B)	448.8	464.0	507.2	541.0	564.7	591.2
D	Study area derived turnover (£m)	448.8	449.6	460.6	469.1	478.9	488.9
E	Residual expenditure (£m) (=C-D)	0.0	14.4	46.6	71.9	85.8	102.3
F	Assumed sales density for new comparison floorspace (£/sqm)	12,623	12,645	12,955	13,194	13,470	13,752
G	Net comparison quantitative need (sqm net) (=H/I)	0	1,142	3,594	5,451	6,372	7,439
H	Gross comparison quantitative need (=J/65%)	0	1,757	5,530	8,386	9,804	11,445

Notes:
A. Total spending in the study area (Table 7)
B. Study area market share (Table 8)
C. Product of the market share and the total study area expenditure
D. Turnover of stores derived from study area, increasing by 0.1% per annum to 2011, 0.5% per annum to 2016, 0.4% per annum to 2031.
E. Retained expenditure less turnover of floorspace.
F. The assumed sales density to calculate floorspace requirement is an average of the six largest foodstore retailers and is increased by the same level of sales density growth described at (D).
G. Net quantitative need calculated by the division of residual expenditure by assumed sales density
H. Gross requirements at 65% net to gross ratio.

All monetary values are held constant at 2007 prices.

Earl's Court & West Kensington Local Retail Need Assessment
Table 9c: Convenience Goods Local Retail Need - Low Population Scenario
SUPERSTORE SALES DENSITY

		2009	2011	2016	2021	2026	2031
A	Total study area comparison expenditure (£m)	619.6	640.6	695.0	735.9	763.6	794.9
B	Study area market share (%)	72.4%	72.4%	72.4%	72.4%	72.4%	72.4%
C	Retained expenditure (£m) (=A*B)	448.8	464.0	503.4	533.0	553.1	575.8
D	Study area derived turnover (£m)	448.8	449.6	460.6	469.1	478.9	488.9
E	Residual expenditure (£m) (=C-D)	0.0	14.4	42.8	63.9	74.2	86.8
F	Assumed sales density for new comparison floorspace (£/sqm)	12,623	12,645	12,955	13,194	13,470	13,752
G	Net comparison quantitative need (sqm net) (=H/I)	0	1,142	3,302	4,847	5,508	6,314
H	Gross comparison quantitative need (=J/65%)	0	1,757	5,080	7,456	8,474	9,714

Notes:
A. Total spending in the study area (Table 7)
B. Study area market share (Table 8)
C. Product of the market share and the total study area expenditure
D. Turnover of stores derived from study area, increasing by 0.1% per annum to 2011, 0.5% per annum to 2016, 0.4% per annum to 2031.
E. Retained expenditure less turnover of floorspace.
F. The assumed sales density to calculate floorspace requirement is an average of the six largest foodstore retailers and is increased by the same level of sales density growth described at (D).
G. Net quantitative need calculated by the division of residual expenditure by assumed sales density
H. Gross requirements at 65% net to gross ratio.

All monetary values are held constant at 2007 prices.

Earl's Court & West Kensington Local Retail Need Assessment
Table10: Per capita expenditure on food and drink leisure services (£)

Year	Zone 1	Zone 2	Zone 29	UK Average
2009	2,442	2,358	3,514	1,234
Difference fron UK Average (%)	97.9%	91.1%	184.8%	-
Per annum growth 2009 - 2011 (%)	-0.4%	-0.4%	-0.4%	-0.4%
2011	2,422	2,339	3,486	1,224
Per annum growth 2011 - 2016 (%)	1.4%	1.4%	1.4%	1.4%
2016	2,597	2,507	3,737	1,312
Per annum growth 2016 - 2021 (%)	1.8%	1.8%	1.8%	1.8%
2021	2,839	2,741	4,085	1,435
Per annum growth 2021 - 2026 (%)	1.8%	1.8%	1.8%	1.8%
2026	3,104	2,997	4,466	1,568
Per annum growth 2026 - 2031 (%)	1.8%	1.8%	1.8%	1.8%
2031	3,393	3,276	4,883	1,715

Notes:
(1) Per capita expenditure by zone from 2007 is obtained from Pitney Bowes Business Insight/Oxford Economics (PBBI/OE) using our in-house GIS (MapInfo) system. This is projected to the base year (2009) and the forecast years using per annum growth rates derived from PBBI/OE and Experian (as explained in Appendix 4 of the WLRNS Update 2010). These are applied consistently across all zones.

All monetary values held as constant 2007 prices. Annual growth rates rounded to one decimel point.

Year	High Population Scenario					Medium Population Scenario					Low Population Scenario			
	Zone 1	Zone 2	Zone 29	Total		Zone 1	Zone 2	Zone 29	Total		Zone 1	Zone 2	Zone 29	Total
Total 2009	151.2	142.3	287.3	**580.8**		151.2	142.3	287.3	**580.8**		151.2	142.3	287.3	**580.8**
Total 2011	153.8	141.7	299.6	**595.1**		153.8	141.7	299.6	**595.1**		153.8	141.7	299.6	**595.1**
Total 2016	180.7	162.5	326.2	**669.4**		177.9	160.5	326.2	**664.5**		175.1	158.4	326.2	**659.6**
Total 2021	211.5	189.0	356.2	**756.6**		205.8	183.8	356.2	**745.8**		200.1	178.7	356.2	**735.0**
Total 2026	242.9	213.4	374.8	**831.2**		233.8	206.0	374.8	**814.6**		224.7	198.5	374.8	**798.1**
Total 2031	277.4	240.7	396.0	**914.1**		264.5	230.6	396.0	**891.1**		251.6	220.5	396.0	**868.1**
Growth 2009-2011	2.6	-0.5	12.3	**14.3**		2.6	-0.5	12.3	**14.3**		2.6	-0.5	12.3	**14.3**
Growth 2011-2016	26.9	20.8	26.6	**74.3**		24.1	18.7	26.6	**69.4**		21.3	16.6	26.6	**64.5**
Growth 2016-2021	30.8	26.4	30.0	**87.2**		27.9	23.4	30.0	**81.3**		25.0	20.3	30.0	**75.4**
Growth 2021-2026	31.4	24.4	18.7	**74.6**		28.0	22.1	18.7	**68.8**		24.6	19.8	18.7	**63.1**
Growth 2026-2031	34.4	27.3	21.2	**82.9**		30.6	24.6	21.2	**76.5**		26.8	22.0	21.2	**70.0**
Growth 2009-2021	**60.3**	**46.7**	**68.9**	175.8		**54.6**	**41.6**	**68.9**	165.0		**48.9**	**36.4**	**68.9**	154.2
Growth 2009-2031	**126.1**	**98.4**	**108.7**	333.3		**113.2**	**88.3**	**108.7**	310.3		**100.4**	**78.3**	**108.7**	287.3

Notes:
(1) The 2009 expenditure and subsequent figures for the forecast years and are the products of multiplying the data presented in Table 1 (population) by Table 10 (per capita convenience goods expenditure) and presented separately for the high and low population scenarios.

All monetary values are held constant at 2007 prices.

Earl's Court & West Kensington Local Retail Need Assessment
Table 12: Food and Drink Leisure Zonal Market Share & Spending Patterns in 2009

Zone	Destination	Market Share [1]				Spending Patterns [2]				
		Zone 1	Zone 2	Zone 29		Zone 1	Zone 2	Zone 29	Total (£m)	Total (%)
1	Fulham	32.0%	7.9%	5.8%		57.8	12.8	18.9	89.5	13.4%
1	Other/Neighbourhood Centres Zone 1	17.2%	5.0%	1.4%		31.0	8.1	4.6	43.7	6.5%
2	Hammersmith	1.5%	37.4%	0.0%		2.7	60.8	0.0	63.4	9.5%
2	Other/Neighbourhood Centres Zone 2	1.3%	4.1%	0.0%		2.3	6.7	0.0	9.0	1.3%
29	Destinations in Zone 29	22.9%	14.2%	54.7%		41.4	23.0	178.3	242.7	36.3%
	Total inside study area	**74.8%**	**68.5%**	**61.9%**		**135.2**	**111.4**	**201.8**	**448.4**	**67.0%**
	Total outside study area	**25.2%**	**31.5%**	**38.1%**		**45.5**	**51.2**	**124.3**	**221.0**	**33.0%**
	TOTAL	100.0%	100.0%	100.0%		**180.7**	**162.5**	**326.2**	**669.4**	**100.0%**

Notes:
(1) Market shares are derived from the WLRNS Update 2010
(2) Product of 2009 expenditure (Table 11) and the zonal market shares (see 1 above)

All monetary values are held constant at 2007 prices.

Earl's Court & West Kensington Local Retail Need Assessment
Table 13a: Food and Drink Leisure Local Retail Need - High Population Scenario

		2009	2011	2016	2021	2026	2031
A	Total study area A3-A5 expenditure (£m)	580.8	595.1	669.4	756.6	831.2	914.1
B	Study area market share (%)	77.2%	77.2%	77.2%	77.2%	77.2%	77.2%
C	Retained expenditure (£m) (=A*B)	448.4	459.5	516.8	584.1	641.7	705.7
D	Study area derived turnover (£m)	448.4	448.4	454.4	462.2	470.1	478.2
E	Residual expenditure (£m) (=C-D)	0.0	11.1	62.4	122.0	171.6	227.5
F	Assumed sales density for new A3-A5 floorspace (£/sqm)	8,065	8,065	8,173	8,313	8,456	8,601
G	Gross A3-A5 quantitative need	0	1,372	7,638	14,670	20,290	26,449

Notes:
A. Total spending in the study area (Table 11)
B. Study area market share (Table 12)
C. Product of the market share and the total study area expenditure
D. Turnover of floorspace derived from study area, increasing by 0.0% per annum to 2011, 0.3% per annum to 2031.
E. Retained expenditure less turnover of floorspace.
F. The assumed sales density is derived from the performance of existing floorspace in the WLRNS 2010
G. Gross quantitative need calculated by the division of residual expenditure by assumed sales density

Earl's Court & West Kensington Local Retail Need Assessment
Table 13b: Food and Drink Leisure Local Retail Need - Medium Population Scenario

		2009	2011	2016	2021	2026	2031
A	Total study area A3-A5 expenditure (£m)	580.8	595.1	664.5	745.8	814.6	891.1
B	Study area market share (%)	77.2%	77.2%	77.2%	77.2%	77.2%	77.2%
C	Retained expenditure (£m) (=A*B)	448.4	459.5	513.0	575.8	628.9	688.0
D	Study area derived turnover (£m)	448.4	448.4	454.4	462.2	470.1	478.2
E	Residual expenditure (£m) (=C-D)	0.0	11.1	58.7	113.6	158.8	209.8
F	Assumed sales density for new A3-A5 floorspace (£/sqm)	8,065	8,065	8,173	8,313	8,456	8,601
G	Gross A3-A5 quantitative need	0	1,372	7,177	13,666	18,781	24,388

Notes:
A. Total spending in the study area (Table 11)
B. Study area market share (Table 12)
C. Product of the market share and the total study area expenditure
D. Turnover of floorspace derived from study area, increasing by 0.0% per annum to 2011, 0.3% per annum to 2031.
E. Retained expenditure less turnover of floorspace.
F. The assumed sales density is derived from the performance of existing floorspace in the WLRNS 2010
G. Gross quantitative need calculated by the division of residual expenditure by assumed sales density

All monetary values are held constant at 2007 prices.

Earl's Court & West Kensington Local Retail Need Assessment
Table 13c: Food and Drink Leisure Local Retail Need - Low Population Scenario

		2009	2011	2016	2021	2026	2031
A	Total study area comparison expenditure (£m)	580.8	595.1	659.6	735.0	798.1	868.1
B	Study area market share (%)	77.2%	77.2%	77.2%	77.2%	77.2%	77.2%
C	Retained expenditure (£m) (=A*B)	448.4	459.5	509.3	567.4	616.2	670.3
D	Study area derived turnover (£m)	448.4	448.4	454.4	462.2	470.1	478.2
E	Residual expenditure (£m) (=C-D)	0.0	11.1	54.9	105.3	146.0	192.0
F	Assumed sales density for new A3-A5 floorspace (£/sqm)	8,065	8,065	8,173	8,313	8,456	8,601
G	Gross A3-A5 quantitative need	0	1,372	6,715	12,661	17,271	22,326

Notes:
A. Total spending in the study area (Table 11)
B. Study area market share (Table 12)
C. Product of the market share and the total study area expenditure
D. Turnover of floorspace derived from study area, increasing by 0.0% per annum to 2011, 0.3% per annum to 2031.
E. Retained expenditure less turnover of floorspace.
F. The assumed sales density is derived from the performance of existing floorspace in the WLRNS 2010
G. Gross quantitative need calculated by the division of residual expenditure by assumed sales density

Earl's Court & West Kensington Local Retail Need Assessment
Table 14a: Summary
HIGH STREET SALES DENSITY FOR COMPARISON FLOORSPACE

	High Population Scenario						Medium Population Scenario						Low Population Scenario				
	2011	2016	2021	2026	2031		2011	2016	2021	2026	2031		2011	2016	2021	2026	2031
A1 Comparison (net)	2,600	18,400	35,400	48,700	63,000		2,600	17,600	33,500	45,800	58,900		2,600	16,700	31,600	42,800	54,800
A1 Comparison (gross)	3,500	24,600	47,300	65,000	84,000		3,500	23,400	44,700	61,000	78,500		3,500	22,300	42,100	57,100	73,000
A1 Convenience (net)	1,100	3,900	6,100	7,200	8,600		1,100	3,600	5,500	6,400	7,400		1,100	3,300	4,800	5,500	6,300
A1 Convenience (gross)	1,800	6,000	9,300	11,100	13,200		1,800	5,500	8,400	9,800	11,400		1,800	5,100	7,500	8,500	9,700
A3-A5 (gross)	1,400	7,600	14,700	20,300	26,400		1,400	7,200	13,700	18,800	24,400		1,400	6,700	12,700	17,300	22,300
Total (gross)	6,700	38,200	71,300	96,400	123,600		6,700	36,100	66,800	89,600	114,300		6,700	34,100	62,300	82,900	105,000

Earl's Court & West Kensington Local Retail Need Assessment
Table 14b: Summary
HIGH QUALITY SALES DENSITY FOR COMPARISON FLOORSPACE

	High Population Scenario						Medium Population Scenario						Low Population Scenario				
	2011	2016	2021	2026	2031		2011	2016	2021	2026	2031		2011	2016	2021	2026	2031
A1 Comparison (net)	1,800	13,000	25,100	34,500	44,500		1,800	12,400	23,700	32,400	41,600		1,800	11,800	22,300	30,300	38,700
A1 Comparison (gross)	2,500	17,400	33,400	46,000	59,400		2,500	16,600	31,600	43,200	55,500		2,500	15,800	29,800	40,400	51,600
A1 Convenience (net)	1,100	3,900	6,100	7,200	8,600		1,100	3,600	5,500	6,400	7,400		1,100	3,300	4,800	5,500	6,300
A1 Convenience (gross)	1,800	6,000	9,300	11,100	13,200		1,800	5,500	8,400	9,800	11,400		1,800	5,100	7,500	8,500	9,700
A3-A5 (gross)	1,400	7,600	14,700	20,300	26,400		1,400	7,200	13,700	18,800	24,400		1,400	6,700	12,700	17,300	22,300
Total (gross)	5,700	31,000	57,400	77,400	99,000		5,700	29,300	53,700	71,800	91,300		5,700	27,600	50,000	66,200	83,600

Earl's Court & West Kensington Local Retail Need Assessment
Table 15a: Potential Floorspace Capacity in 2016 for Opportunity Area
FULHAM/ZONE 1 MARKET SHARE LED APPROACH USING HIGH STREET SALES DENSITY FOR COMPARISON FLOORSPACE

		Total Expenditure Capacity (£m)	Fulham/zone 1's share of study area spend (%)	Available Expenditure (£m)	Inflow %	Inflow (£m)	Total Available Expenditure (£m)	Sales Density (£ per sqm)	Net Capacity (sqm)	Gross Capacity (sqm)
High Population	A1 Comparison	98.6	18.8%	18.5	30.0%	7.9	26.5	5,346	4,948	6,598
	A1 Convenience	50.4	34.6%	17.4	30.0%	7.5	24.9	12,955	1,919	2,952
	A3-A5	62.4	29.7%	18.6	30.0%	8.0	26.5	8,173	N/A	3,243
	Total									**12,793**
Med Population	A1 Comparison	93.9	18.8%	17.6	30.0%	7.6	25.2	5,346	4,716	6,288
	A1 Convenience	46.6	34.6%	16.1	30.0%	6.9	23.0	12,955	1,775	2,730
	A3-A5	58.7	29.7%	17.4	30.0%	7.5	24.9	8,173	N/A	3,047
	Total									**12,065**
Low Population	A1 Comparison	89.3	18.8%	16.8	30.0%	7.2	24.0	5,346	4,483	5,978
	A1 Convenience	42.8	34.6%	14.8	30.0%	6.3	21.1	12,955	1,630	2,508
	A3-A5	54.9	29.7%	16.3	30.0%	7.0	23.3	8,173	N/A	2,851
	Total									**11,337**

Earl's Court & West Kensington Local Retail Need Assessment
Table 15b: Potential Floorspace Capacity in 2016 for Opportunity Area
ENHANCED MARKET SHARE APPROACH USING HIGH QUALITY SALES DENSITY FOR COMPARISON FLOORSPACE

		Total Expenditure Capacity (£m)	Enhanced share of study area spend (%)	Available Expenditure (£m)	Inflow %	Inflow (£m)	Total Available Expenditure (£m)	Sales Density (£ per sqm)	Net Capacity (sqm)	Gross Capacity (sqm)
High Population	A1 Comparison	98.6	28.2%	27.8	30.0%	11.9	39.7	7,615	5,210	6,947
	A1 Convenience	50.4	51.8%	26.1	30.0%	11.2	37.3	12,955	2,878	4,428
	A3-A5	62.4	44.6%	27.8	30.0%	11.9	39.8	8,173	N/A	4,864
	Total									**16,240**
Med Population	A1 Comparison	93.9	28.2%	26.5	30.0%	11.3	37.8	7,615	4,966	6,621
	A1 Convenience	46.6	51.8%	24.1	30.0%	10.3	34.5	12,955	2,662	4,095
	A3-A5	58.7	44.6%	26.1	30.0%	11.2	37.4	8,173	N/A	4,571
	Total									**15,287**
Low Population	A1 Comparison	89.3	28.2%	25.2	30.0%	10.8	36.0	7,615	4,721	6,295
	A1 Convenience	42.8	51.8%	22.2	30.0%	9.5	31.7	12,955	2,445	3,762
	A3-A5	54.9	44.6%	24.5	30.0%	10.5	35.0	8,173	N/A	4,277
	Total									**14,334**

Earl's Court & West Kensington Local Retail Need Assessment
Table 15c: Potential Floorspace Capacity in 2021 for Opportunity Area
FULHAM/ZONE 1 MARKET SHARE LED APPROACH USING HIGH STREET SALES DENSITY FOR COMPARISON FLOORSPACE

		Total Expenditure Capacity (£m)	Fulham/zone 1's share of study area spend (%)	Available Expenditure (£m)	Inflow %	Inflow (£m)	Total Available Expenditure (£m)	Sales Density (£ per sqm)	Net Capacity (sqm)	Gross Capacity (sqm)
High Population	A1 Comparison	201.4	18.8%	37.8	30.0%	16.2	54.0	5,346	10,110	13,480
	A1 Convenience	79.9	34.6%	27.6	30.0%	11.8	39.4	12,955	3,045	4,684
	A3-A5	122.0	29.7%	36.2	30.0%	15.5	51.8	8,173	N/A	6,336
	Total									**24,500**
Med Population	A1 Comparison	190.4	18.8%	35.8	30.0%	15.3	51.1	5,346	9,557	12,743
	A1 Convenience	71.9	34.6%	24.9	30.0%	10.7	35.5	12,955	2,741	4,217
	A3-A5	113.6	29.7%	33.8	30.0%	14.5	48.2	8,173	N/A	5,902
	Total									**22,861**
Low Population	A1 Comparison	179.3	18.8%	33.7	30.0%	14.4	48.1	5,346	9,004	12,005
	A1 Convenience	63.9	34.6%	22.1	30.0%	9.5	31.6	12,955	2,437	3,749
	A3-A5	105.3	29.7%	31.3	30.0%	13.4	44.7	8,173	N/A	5,468
	Total									**21,222**

Earl's Court & West Kensington Local Retail Need Assessment
Table 15d: Potential Floorspace Capacity in 2021 for Opportunity Area
ENHANCED MARKET SHARE APPROACH USING HIGH QUALITY SALES DENSITY FOR COMPARISON FLOORSPACE

		Total Expenditure Capacity (£m)	Enhanced share of study area spend (%)	Available Expenditure (£m)	Inflow %	Inflow (£m)	Total Available Expenditure (£m)	Sales Density (£ per sqm)	Net Capacity (sqm)	Gross Capacity (sqm)
High Population	A1 Comparison	201.4	28.2%	56.7	30.0%	24.3	81.1	7,615	10,646	14,195
	A1 Convenience	79.9	51.8%	41.4	30.0%	17.8	59.2	12,955	4,567	7,027
	A3-A5	122.0	44.6%	54.4	30.0%	23.3	77.7	8,173	N/A	9,503
	Total									**30,725**
Med Population	A1 Comparison	190.4	28.2%	53.6	30.0%	23.0	76.6	7,615	10,063	13,418
	A1 Convenience	71.9	51.8%	37.3	30.0%	16.0	53.3	12,955	4,111	6,325
	A3-A5	113.6	44.6%	50.6	30.0%	21.7	72.4	8,173	N/A	8,853
	Total									**28,596**
Low Population	A1 Comparison	179.3	28.2%	50.5	30.0%	21.7	72.2	7,615	9,481	12,641
	A1 Convenience	63.9	51.8%	33.1	30.0%	14.2	47.4	12,955	3,655	5,624
	A3-A5	105.3	44.6%	46.9	30.0%	20.1	67.0	8,173	N/A	8,202
	Total									**26,467**

Earl's Court & West Kensington Local Retail Need Assessment

Table 16a: Summary Capacity for Opportunity Area to 2016 and 2021 - Fulham/Zone 1 Market Share

HIGH STREET SALES DENSITY FOR COMPARISON FLOORSPACE

	High Pop			Medium Pop			Low Pop	
	2016	2021		2016	2021		2016	2021
A1 Comparison (net)	4,900	10,100		4,700	9,600		4,500	9,000
A1 Comparison (gross)	6,600	13,500		6,300	12,700		6,000	12,000
A1 Convenience (net)	1,900	3,000		1,800	2,700		1,600	2,400
A1 Convenience (gross)	3,000	4,700		2,700	4,200		2,500	3,700
A3-A5 (gross)	3,200	6,300		3,000	5,900		2,900	5,500
A1 Service/A2 (10% of total) (gross)	1,400	2,700		1,300	2,500		1,300	2,400
TOTAL A1-A5 (gross)	**14,200**	**27,200**		**13,300**	**25,300**		**12,700**	**23,600**

Earl's Court & West Kensington Local Retail Need Assessment

Table 16b: Summary Capacity for Opportunity Area to 2016 and 2021 - Enhanced Market Share

HIGH QUALITY SALES DENSITY FOR COMPARISON FLOORSPACE

	High Pop			Medium Pop			Low Pop	
	2016	2021		2016	2021		2016	2021
A1 Comparison (net)	5,200	10,600		5,000	10,100		4,700	9,500
A1 Comparison (gross)	6,900	14,200		6,600	13,400		6,300	12,600
A1 Convenience (net)	2,900	4,600		2,700	4,100		2,400	3,700
A1 Convenience (gross)	4,400	7,000		4,100	6,300		3,800	5,600
A3-A5 (gross)	4,900	9,500		4,600	8,900		4,300	8,200
A1 Service/A2 (10% of total) (gross)	1,800	3,400		1,700	3,200		1,600	2,900
TOTAL A1-A5 (gross)	**18,000**	**34,100**		**17,000**	**31,800**		**16,000**	**29,300**

APPENDIX 3

Record of Site Appraisals
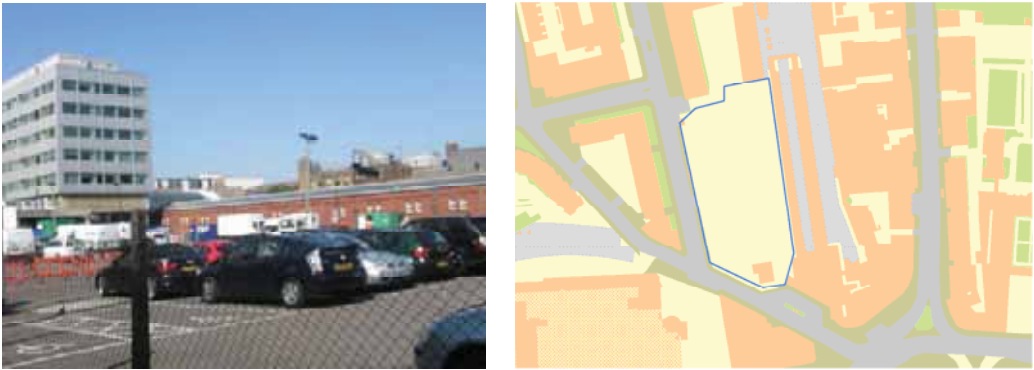
SITE APPRAISAL PROFORMAS

Name of Centre:	Shepherds Bush
Site Name:	Shepherds Bush Market, Uxbridge Road
RTP Reference:	HF001
Photo & Indicative Boundary:	
Site Description:	This is a 2.62 ha privately owner town centre site and is part of the Wider White City Opportunity Area, including a former library building.
Key Constraints:	Access by car is poor and there is no available parking in the vicinity, although it is opposite Shepherd's Bush Market underground station and well served by buses. The site is adjacent to two conservation areas. According to the Draft Planning and Regeneration Brief for the site, any redevelopment proposal could have difficulties due to the housing along one side - including impacts on daylight and overlooking.
Development Opportunity:	Due to its location, this site could be redeveloped for retail purposes. However its configuration and surrounding residential uses are likely to cause obstacles in the short term and will need to be overcome if a viable scheme is to be promoted.
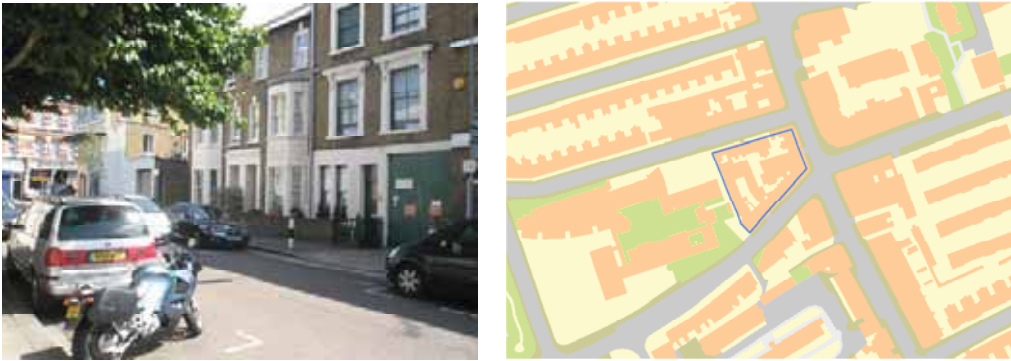
Name of Centre:	Hammersmith
Site Name:	Town Hall and Cineworld site
RTP Reference:	HF002
Photo & Indicative Boundary:	
Site Description:	This is a 1.33 ha town centre site comprising a car park, cinema, the Pocklington housing Estate and the Friends Meeting House as well as the Town Hall extension. An application (2010/03465/FUL) has been submitted for the demolition of all buildings and construction of new civic offices, a civic square, a block of 320 residential dwellings, a foodstore, five other retail units (within Use Classes A1, A3 and A4) and a new pedestrian footbridge to Furnivall Gardens.
Key Constraints:	Access by car is good (from King Street) and although it is a five minute walk from Hammersmith underground station it is well served by buses. The site includes a car park. The eastern half of the site is within the King Street East conservation area and the entire site is within an archaeological priority area. The cinema building is on the local list.
Development Opportunity:	We consider this an appropriate site for a mixed use development, including some retail and leisure uses.

Name of Centre:	Hammersmith
Site Name:	Kings Mall and Ashcroft Square Estate, King Street
RTP Reference:	HF003
Photo & Indicative Boundary:	
Site Description:	This is a 3.96 ha town centre site, comprising a shopping centre, housing estate, multi-storey car park and offices.
Key Constraints:	Access by car is good and the site includes a multi-storey car park. The site is less than 2 minute's walk from the underground station and well served by buses. However the site is currently in use and mixed ownership could cause prevent land assembly.
Development Opportunity:	The poor quality of the buildings means redevelopment would be desirable with the most appropriate use being retail-led mixed use with residential and/or office space. If ownership constraints can be overcome, we see no reason the whole site should be developed.

Name of Centre:	Fulham
Site Name:	Earls Court Exhibition Centre 2, Lillie Bridge Depot, West Kensington and Gibbs Green estates, and adjacent land
RTP Reference:	HF004
Photo & Indicative Boundary:	
Site Description:	This is a 8.55 ha site, located 147m from the town centre boundary, comprising part of the Earl's Court exhibition centre as well as housing, industrial and railway land.
Key Constraints:	Some parts of the site are more accessible than others due to its size. Ownership of the site is mixed, which causes land assembly constraints. No redevelopment of the exhibition centre will be possible before 2012 as it is to be used for the Olympics.
Development Opportunity:	This site forms part of the ECWK Opportunity Area and therefore a mixed use development is likely to be acceptable.

Name of Centre:	Hammersmith
Site Name:	Hammersmith and City Line Station Car Park
RTP Reference:	HF005
Photo & Indicative Boundary:	
Site Description:	This is a 0.63 ha town centre site, comprising the station car park and is allocated for mixed use development under policy HTC7 of the UDP. Application 2007/02005/FUL has been approved for redevelopment of a mixed use building over basement, ground and eleven upper floors, containing office, retail, restaurant and cinema uses.
Key Constraints:	The site is currently a car park, part of which could be retained to provide parking, and is adjacent to the Hammersmith & City line underground station and less than a minute's walk from the Piccadilly line station and bus station.
Development Opportunity:	In light of the approved development, this site is suitable for a mixed use development to include office, retail, restaurant and cinema uses.

Name of Centre:	Hammersmith
Site Name:	Hammersmith Palais, Shepherd's Bush Road
RTP Reference:	HF006
Photo & Indicative Boundary:	
Site Description:	This is a 0.41 ha town centre site comprising a vacant former live music venue, known in the UDP as Site F. Application 2000/01537/FUL was granted in 2002 for a redevelopment incorporating leisure, cafe/restaurant and office space. The time limit was later extended but expired in November this year. Application 2009/02040/FUL was refused consent for a scheme comprising leisure, potentially some retail and student accommodation. The refusal was upheld at appeal in July.
Key Constraints:	The ground floor is safeguarded for leisure use under policy HTC7 of the UDP, whilst the site falls within the Hammersmith Broadway conservation area. Access by car is good although there is no parking close by and the site is less than two minutes walk from the underground stations and well served by buses. The building is listed as a building of merit.
Development Opportunity:	This site is suitable for a mixed use development.

Name of Centre:	Fulham
Site Name:	88-90 Lillie Road, 230- 236 North End Road & 5A Bramber Rd
RTP Reference:	HF007
Photo & Indicative Boundary:	
Site Description:	This is a 0.2 ha town centre site comprising mainly retail with some residential and parking, adjacent to a primary school.
Key Constraints:	Access by car is good (from North End Road) although the nearest tube station is over 5 minutes walk away.
Development Opportunity:	The most appropriate use would be mixed retail and housing. It may be desirable to redevelop just the retail element.

Name of Centre:	Hammersmith
Site Name:	The Triangle
RTP Reference:	HF008
Photo & Indicative Boundary:	
Site Description:	0.3ha town centre site, comprising office buildings and some small shop units.
Key Constraints:	Although access by car would not be a problem, compared to other sites considered it is not as good. The site is within 2 minute's walk of both tube stations and immediately opposite the Hammersmith & City line station car park.
Development Opportunity:	Retail or mixed use with offices would be the most appropriate use. However the office buildings appear to be fairly new, therefore redevelopment may be considered undesirable.

Name of Centre:	Hammersmith
Site Name:	Holcombe Place
RTP Reference:	HF009
Photo & Indicative Boundary:	
Site Description:	This is a 0.39 ha town centre site comprising shop units with flats above,
Key Constraints:	Access by car from King Street is good, although the closest parking is by the town hall, and the site is within 5 minute's walk of the tube stations and well served by buses. The site is within the King Street East conservation area and is located within an Archaeological Priority Area.
Development Opportunity:	The poor quality of the buildings means redevelopment would be desirable, the most appropriate use being retail-led mixed use with residential.
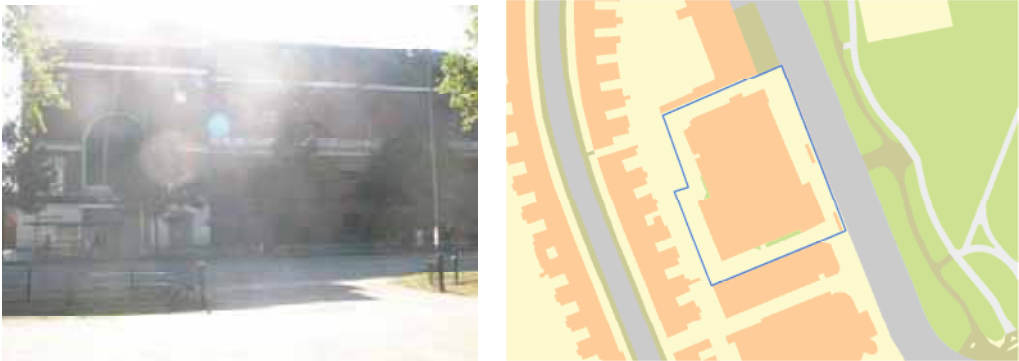
Name of Centre:	Fulham
Site Name:	South West corner of Lillie Road and North End Road
RTP Reference:	HF010
Photo & Indicative Boundary:	
Site Description:	This is a 1.26 ha town centre site comprising retail, residential and offices. There is a high level of vacancy, especially in the parade of shops fronting North End Road.
Key Constraints:	Access by car is good (from North End Road) although the nearest underground station is over 5 minute's walk away and there is no parking in the immediate vicinity.
Development Opportunity:	This site would benefit from a comprehensive mixed use redevelopment to include some retail uses at the ground floor level.

Name of Centre:	Fulham
Site Name:	Between Thaxton Road and Lillie Road
RTP Reference:	HF011
Photo & Indicative Boundary:	
Site Description:	This is a 0.41ha town centre site comprising a housing estate, some retail and a telephone exchange.
Key Constraints:	Access by car is good (from North End Road) although the nearest tube station is over 5 minute's walk away. Part of the site is a car park, which could be retained.
Development Opportunity:	The most appropriate use would be mixed use with both housing and retail elements.

Name of Centre:	Hammersmith
Site Name:	Hammersmith Embankment Phase 2
RTP Reference:	HF012
Photo & Indicative Boundary:	
Site Description:	This is a 3.1ha site 190m from the town centre boundary, currently vacant land allocated for employment led mixed use development. Application 2006/03176/FUL has been given consent for a mix of offices, residential, retail, restaurants and café and a Water Sports facility. It is reasonable to assume work on this has started, as the application refers to "demolition of existing buildings" and there are currently no buildings on site.
Key Constraints:	Access by car is reasonable. There is no parking around the site, although ample parking is to be included as part of the development, and it is a good 10 minute's walk from the tube station, and a few minute's walk from the bus services on Fulham Palace Road. The site is within the Fulham Reach Conservation area and an Archaeological Priority Area, and borders on the Thames Policy Area.
Development Opportunity:	The site is best suited to a mixed use scheme comprising offices, residential, retail, restaurants and café and a Water Sports facility.

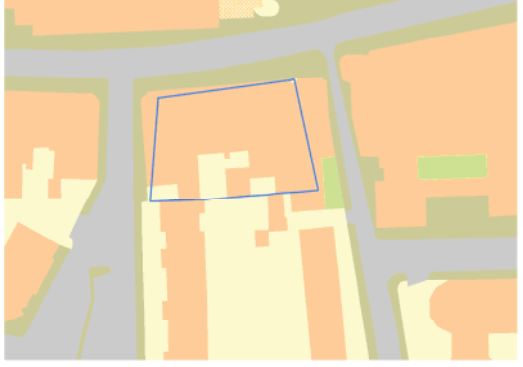|	
Name of Centre:	West Kensington
Site Name:	North End Road, opposite Beaumont Crescent
RTP Reference:	HF013
Photo & Indicative Boundary:	
Site Description:	This is a 0.07 ha site bordering the town centre, comprising a row of retail units - all except one of which were vacant at the time of our survey - and offices above.
Key Constraints:	Access by car is good (from North End Road) and the site includes a limited amount of parking. The site is within the Barons Court conservation area.
Development Opportunity:	The high vacancy rate suggests redevelopment would be necessary; the most appropriate use would be retail or retail with some office stock.

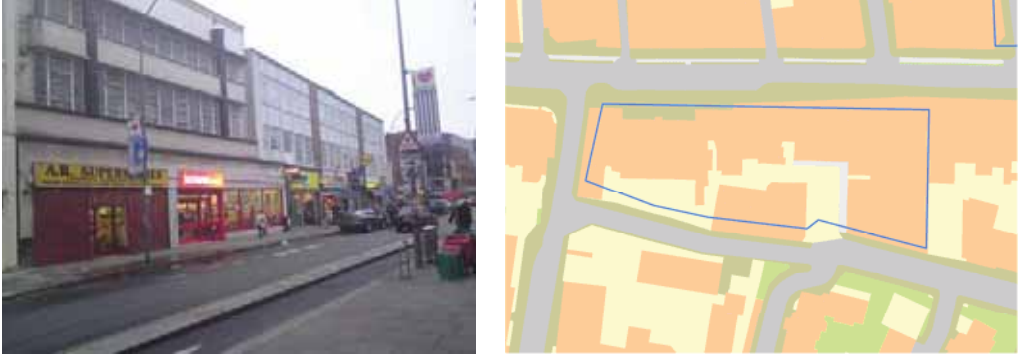|	
Name of Centre:	West Kensington
Site Name:	Between Talgarth Road and railway bridge
RTP Reference:	HF014
Photo & Indicative Boundary:	
Site Description:	This is a 0.08ha town centre site, comprising retail units with housing above. Application 2007/02850/FUL has permission for demolition of 80 North End Road and erection of a replacement infill building, including a terrace at roof level, comprising medical or health services use at basement and ground floor level (Class D1a) and residential on the upper floors.
Key Constraints:	Access by car is good, as the site is located at the crossroads of North End Road and Talgarth Road, although there is no parking in the immediate vicinity. The site is directly opposite West Kensington tube station and well served by buses. The site is within the Barons Court conservation area.
Development Opportunity:	The most appropriate redevelopment would be mixed use with retail and housing elements.

Name of Centre:	Shepherds Bush
Site Name:	The Pavilion
RTP Reference:	HF015
Photo & Indicative Boundary:	
Site Description:	This is a 0.35ha town centre site comprising one building, originally a cinema and most recently used as a bingo hall but unoccupied since 2001 and now infrequently used for one-off events.

The site has planning consent (2005/00831/FUL) for a 186 bedroom hotel; 583 sqm of retail space and a bar/servery at ground floor level; leisure facilities comprising conference/ banqueting, auditorium, meeting and exhibition space in basement floors 1 and 2, and health club/ spa/ gym/ swimming pool in basement floor 3 with mezzanine level, totalling 3000 sq.m.

Application 2009/02635/FUL is pending for a similar scheme including a 242 bedroom hotel and no retail element, as well as reduced leisure space. |
| Key Constraints: | Access by car is reasonable although congestion around Shepherd's Bush Green can be a problem and there is no parking in the immediate vicinity. The site is within 5 minute's walk of both Shepherd's Bush and Shepherd's Bush Market tube stations and well served by buses.

The building is a Grade II listed building, and falls within the Shepherd's Bush conservation area. |
| Development Opportunity: | The location is unsuitable for residential - as it is next to a Walkabout pub - but ideal for leisure, perhaps with a retail element. |

Name of Centre:	Hammersmith
Site Name:	Shops underneath Brook House and 227 Shepherds Bush Road
RTP Reference:	HF016
Photo & Indicative Boundary:	
Site Description:	This is a 0.26ha town centre site comprising retail units beneath offices.
Key Constraints:	Access by car is good although there is no parking close by, and the site is less than two minutes walk from the Hammersmith tube stations and well served by buses.
Development Opportunity:	There is potential for a mixed use office-led scheme with retail on the ground floor, although if the current office accommodation is considered good quality this would not be desirable. Alternatively the ground floor could be redeveloped for retail while retaining the offices.

Name of Centre:	Fulham
Site Name:	Coomer Place car park
RTP Reference:	HF017
Photo & Indicative Boundary:	
Site Description:	This is a 0.2ha town centre site comprising a car park behind North End Road.
Key Constraints:	Access by car from North End Road is reasonable and the site is a car park, part of which could be retained for parking. However, given the size this would not leave much of the site for redevelopment. The nearest tube station is within 5 minute's walk.
Development Opportunity:	The site could potentially be developed for mixed use with housing since it is in a residential area.

Name of Centre:	Hammersmith
Site Name:	Angel Walk / King Street
RTP Reference:	HF018
Photo & Indicative Boundary:	
Site Description:	This is a 0.09ha town centre site comprising retail units beneath housing.
Key Constraints:	Access by car from King Street is good, although the closest parking is by the town hall, and the site is within 5 minute's walk of the tube stations and well served by buses.
Development Opportunity:	There is potential to redevelop the poor quality shops and housing for retail, leisure or mixed use retail with housing.

Name of Centre:	Hammersmith
Site Name:	King Street opposite Cambridge Grove
RTP Reference:	HF019
Photo & Indicative Boundary:	
Site Description:	This is a 0.36ha town centre site comprising a row of retail units with a mix of housing, offices and a college above, as well as a block of housing (Down Place) behind.
Key Constraints:	Access by car from King Street is good, although the closest parking is by the town hall, and the site is within 5 minute's walk of the tube stations and well served by buses. The site is within the King Street East conservation area and an Archaeological Priority Area.
Development Opportunity:	There is potential for a mixed use office- or residential-led scheme with retail on the ground floor. Alternatively the ground floor could be redeveloped for retail while retaining the uses above. It may be undesirable to include Down Place in any scheme considered.

Name of Centre:	High Street Kensington
Site Name:	High Street Kensington underground station
RTP Reference:	KC001
Photo & Indicative Boundary:	
Site Description:	This is a 2.4 ha site in the town centre, comprising the underground station and retail uses within and surrounding it. It is allocated for retail, residential and business in the Kensington & Chelsea UDP
Key Constraints:	The site is fully occupied by retail and there is not much scope for redevelopment, at least in the short term. The possibility of redevelopment is hampered by the necessity to retain the station.
Development Opportunity:	The site has been identified by the NLP retail study and K&C UDP as having potential for high density redevelopment for retail with residential and offices above it.

Name of Centre:	Knightsbridge
Site Name:	South Kensington Underground Station Site
RTP Reference:	KC003
Photo & Indicative Boundary:	
Site Description:	This 0.7ha site consists of South Kensington underground station (a Grade II listed building) and some retail units. It is 250m from the town centre and falls within a conservation area. The site is allocated in the UDP for Business, retail, hotel, leisure and residential with improvements to the station. A planning application for development of retail, financial and professional services, food & drink, business, residential and a new underground station has been approved.
Key Constraints:	Half of the site consists of railway tracks The site is within Thurloe/Smith's Charity conservation area and South Kensington underground station is a listed building
Development Opportunity:	There is potential for redevelopment for a mix of business, retail, hotel, leisure and residential uses with a new station.

Name of Centre:	Knightsbridge
Site Name:	49-93 Pelham Street
RTP Reference:	KC004
Photo & Indicative Boundary:	
Site Description:	This is a 0.66ha site, 220m from the town centre. Retail already occupies half of the site (the newer building fronting Brompton Road); the rest of the site is occupied by residential and other buildings (including one occupied by London underground). The site is allocated for retail, business and residential
Key Constraints:	The site is within the Thurloe/Smith's charity conservation area
Development Opportunity:	Potential uses of the site are retail, business and residential.

Name of Centre:	Knightsbridge
Site Name:	Clearings 1 and 11, Draycott Avenue, Denyer Street, Mossop Street
RTP Reference:	KC005
Photo & Indicative Boundary:	
Site Description:	This 0.34 ha site, 360m from the town centre, comprises a large, mostly disused building (although part is used by John Lewis Direct) in adequate condition. The site is allocated in the UDP for residential, business, retail, food and drink and open space (although not in the submission core strategy) and the clearings part of the site was the subject of a draft SPD, currently being revised in light of the core strategy. The draft SPD identified the site as an opportunity for mixed use development. A temporary planning permission was granted for retail on the ground, first, second and third floors. This expired in October 2004.
Key Constraints:	No key constraints.
Development Opportunity:	There is potential for redevelopment for retail, as evidenced by the previous planning permission granted for retail in part of the building, or mixed use in keeping with the draft SPD.

Name of Centre:	King's Road East
Site Name:	Chelsea Farmer's Market
RTP Reference:	KC006
Photo & Indicative Boundary:	
Site Description:	The site is a farmer's market and therefore has an existing retail function. It is 0.3 ha and adjacent to the town centre. The site is part of a larger site in the UDP allocated for social and community facilities including a GP surgery/medical day centre and affordable housing Planning permission was granted on 19/12/2002 for the renewal of a temporary permission for use as Garden Centre, Farmer's Market, ancillary shopping and cafes (REF:PP/02/02235). A condition was imposed that the use permitted would only be retained until 1/12/2007.
Key Constraints:	The site is an edge of centre site, very close to Kings Road so has good linkages with the existing centre. The availability of the site for redevelopment is uncertain as there is a potential need to relocate the existing market.
Development Opportunity:	There is potential for high density mixed use development including retail, residential and community/health/social facilities relating to the hospital.
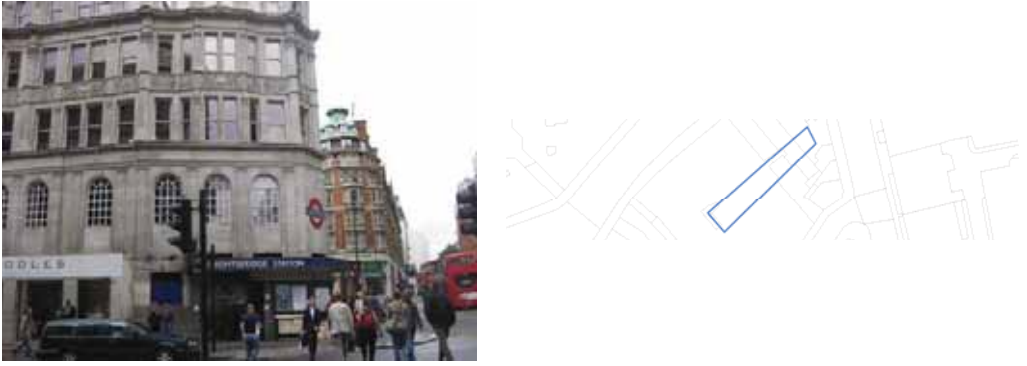
Name of Centre:	Kensington High Street
Site Name:	Odeon Cinema and Post Office
RTP Reference:	KC008
Photo & Indicative Boundary:	
Site Description:	This site is 0.5 ha and is adjacent to the town centre. Currently there are an occupied cinema and a post office on the site. A planning application was submitted in April 2007 for the demolition of the existing building with retention and restoration of the façade to provide a new cinema with 35 residential units and five town houses. This application was granted subject to a s106 agreement. A condition was imposed on the application that the development should not be used for any other use other than a cinema (REF: PP/07/01071).
Key Constraints:	Provision of a new cinema and potential removal of the post office, which may need to be relocated, would be required if redevelopment were to take place The availability of the Post Office part of the site for redevelopment is uncertain. The site is allocated in the UDP for a cinema and housing including affordable housing. The cinema part of the site is within a conservation area but the Post office part of the site is just outside it.
Development Opportunity:	There is potential for high density mixed use development, including retail at ground floor, a replacement cinema and residential to the rear of the site.

Name of Centre:	Earls Court
Site Name:	Earls Court 1, Exhibition Centre
RTP Reference:	KC009
Photo & Indicative Boundary:	
Site Description:	The site is currently in use as an exhibition centre used for concerts, exhibition shows and sporting events. The Earls Court One building was constructed in the 1930s. The site is 8 ha and 310m away from the town centre.
Key Constraints:	The site is an edge of centre site within close proximity of Earl's Court Road district centre and has good access to Earl's Court and West Brompton underground stations. Availability of the site for redevelopment is uncertain and retention of the existing building may be desirable.
Development Opportunity:	The site could potentially be developed for a large scale, mixed use development, including retail, offices and residential and the retention of some sort of exhibition function.

Name of Centre:	Knightsbridge
Site Name:	Park Tower Hotel
RTP Reference:	KC010
Photo & Indicative Boundary:	
Site Description:	The site is on the edge of the centre, occupied by a hotel with a casino on the ground floor. The building is a multi storey 1960s concrete tower. The ground floor of the hotel has been identified in the Kensington & Chelsea Core Strategy as a possible location for new retail.
Key Constraints:	The ground floor of the hotel is currently in use as a casino - availability for redevelopment for retail is therefore uncertain.
Development Opportunity:	There is potential to redevelop the ground floor of the hotel for retail floorspace.

Name of Centre:	Knightsbridge
Site Name:	Pavilion Road car park
RTP Reference:	KC011
Photo & Indicative Boundary:	
Site Description:	This edge of centre site's current use is a multi storey car park, located just off Brompton Road and surrounded by residential. It is a grey, concrete, unattractive building. The site is within the Proposed Central Area in the UDP
Key Constraints:	The site is currently in use as a car park (NCP)
Development Opportunity:	The site offers potential for local shopping or social community facilities on the ground floor.
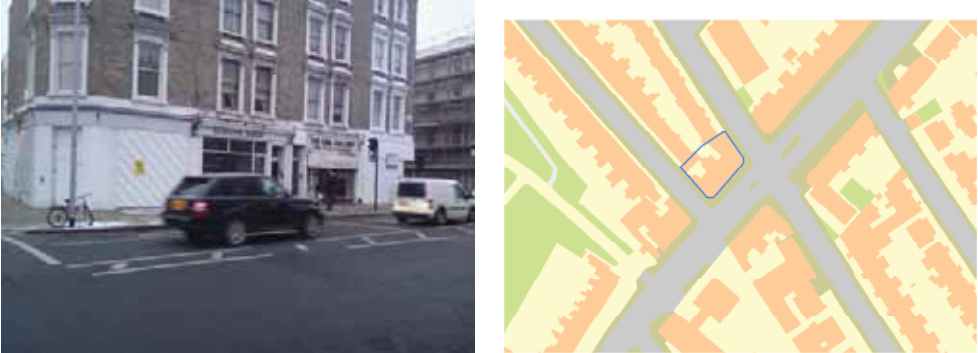
Name of Centre:	Knightsbridge
Site Name:	Behind Knightsbridge tube station
RTP Reference:	KC012
Photo & Indicative Boundary:	
Site Description:	The site is within the defined Knightsbridge centre. It has been identified in the draft core strategy as a site with potential for new retail floorspace but hard to identify where this could be developed.
Key Constraints:	The site is within a conservation area.
Development Opportunity:	There is potential for retail development.

Name of Centre:	Kings Road East
Site Name:	King's Road, Sydney Street and Farmers Market
RTP Reference:	KC013
Photo & Indicative Boundary:	
Site Description:	This 0.76 ha site is adjacent to the town centre boundary, and is made up of a car park, farmers market [see site KC006] and an office block. It has been identified in the submission core strategy as a site for new retail floorspace. The Chelsea farmer's market part of the site has been identified in the retail study undertaken by NLP as a development opportunity site for high density mixed use development including retail.
Key Constraints:	Availability of the market part of the site for redevelopment is uncertain as there is potentially a need to relocate the existing market.
Development Opportunity:	There is potential to develop significant amounts of retail use at street level.
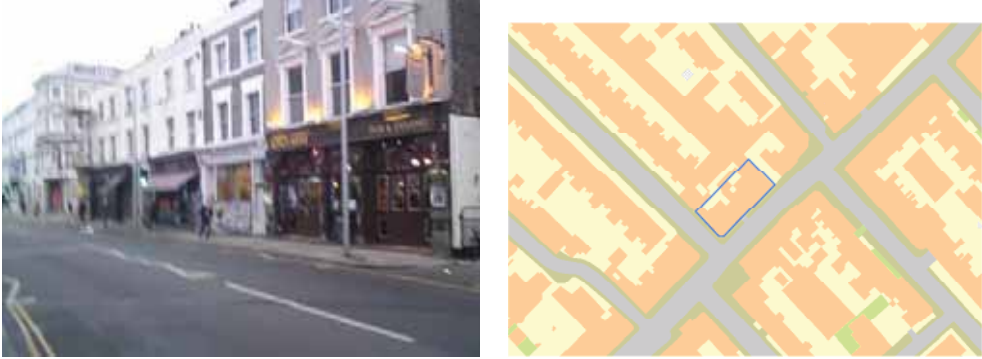
Name of Centre:	Earl's Court
Site Name:	Site opposite tube station entrance (Earls court road entrance)
RTP Reference:	KC014
Photo & Indicative Boundary:	
Site Description:	This 0.07 ha town centre site comprises poor quality building / frontage opposite Earls Court tube station. It is currently occupied by retail (post office/café). There are no relevant planning applications or allocations.
Key Constraints:	There are no key constraints.
Development Opportunity:	There is potential to redevelop for retail.
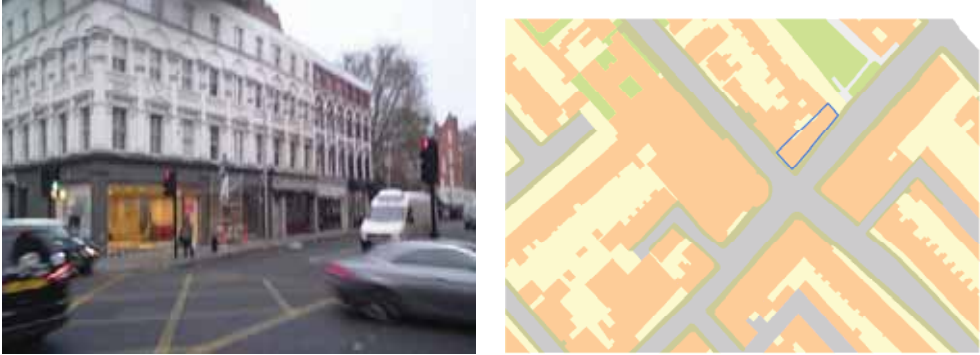
Name of Centre:	Kensington High Street
Site Name:	Commonwealth Institute
RTP Reference:	KC015
Photo & Indicative Boundary:	
Site Description:	This 1.4 ha site is adjacent to the town centre and was previously the commonwealth institute (used for exhibitions) - it is now vacant.
	The site is allocated a Strategic Site in the Submission Core Strategy. The document considers it should be retained for public institutional arts or cultural use, preferably as an exhibition space. A planning application has been granted (subject to S106 agreements) for such a scheme.
Key Constraints:	The building is listed, and the site is in a conservation area.
	The council want to retain the building for cultural use.
Development Opportunity:	Retail development is highly unlikely as the council wish to retain its current use, although redevelopment for cultural use could include ancillary small scale retail provision.

Name of Centre:	Fulham Road West
Site Name:	Between Finborough Road and Ifield Road
RTP Reference:	KC016
Photo & Indicative Boundary:	
Site Description:	This is a 0.05ha edge-of-centre site comprising four retail units beneath residential. The surrounding uses are mainly residential.
Key Constraints:	Access by car is good and it is well served by buses, although there is no parking in the vicinity and it is a 10 minute walk from the nearest tube station. The site is within the Boltons conservation area. Two of the four retail units are vacant.
Development Opportunity:	There is a potential opportunity for retail development, possibly with replacement residential.

Name of Centre:	Fulham Road West
Site Name:	214 to 224 Fulham Road
RTP Reference:	KC017
Photo & Indicative Boundary:	
Site Description:	This is a 0.06ha site comprising a row of shops beneath poor quality residential, opposite Chelsea & Westminster hospital and surrounded by retail and residential uses.
Key Constraints:	Access by car is good and it is well served by buses, although there is no parking in the vicinity and it is a 10-15 minute walk from the nearest tube station. The site is within the Boltons conservation area. All retail units are currently occupied.
Development Opportunity:	There is a potential opportunity for retail development, possibly with replacement residential.

Name of Centre:	Fulham Road West
Site Name:	Corner of Redcliffe Road and Fulham Road
RTP Reference:	KC018
Photo & Indicative Boundary:	
Site Description:	This is a 0.03ha site comprising a row of shops and a pub beneath poor quality residential, next to a gym and surrounded by retail and residential uses.
Key Constraints:	Access by car is good and it is well served by buses, although there is no parking in the vicinity and it is a 10-15 minute walk from the nearest tube station. The site is within the Boltons conservation area. All units are currently occupied.
Development Opportunity:	There is a potential opportunity for retail development, possibly with replacement residential.

Name of Centre:	Fulham Road West
Site Name:	Between Drayton Gardens and Thistle Grove
RTP Reference:	KC019
Photo & Indicative Boundary:	
Site Description:	This is a 0.05ha site comprising retail beneath residential, next to a cinema and surrounded by retail and residential uses.
Key Constraints:	Access by car is good and it is well served by buses, although there is no parking in the vicinity and it is a 10-15 minute walk from the nearest tube station. Although not in a conservation area, the site borders on both the Boltons and Thurloe/Smith's Charity conservation areas. All retail units are currently occupied.
Development Opportunity:	There is a potential opportunity for retail development, possibly with replacement residential, however both the retail and residential stock appears good quality.

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PLANS

Figure 1 - Hierarchy of Centres in LBHF & RBKC

Legend:
- ● International Centre
- ■ Emerging Metropolitan Centre
- ▼ Major Centre
- ▭ Study Zones
- ▭ Borough Boundaries

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Figure 2 - Major Foodstore Provision in LBHF & RBKC

Study Zones

Borough Boundaries
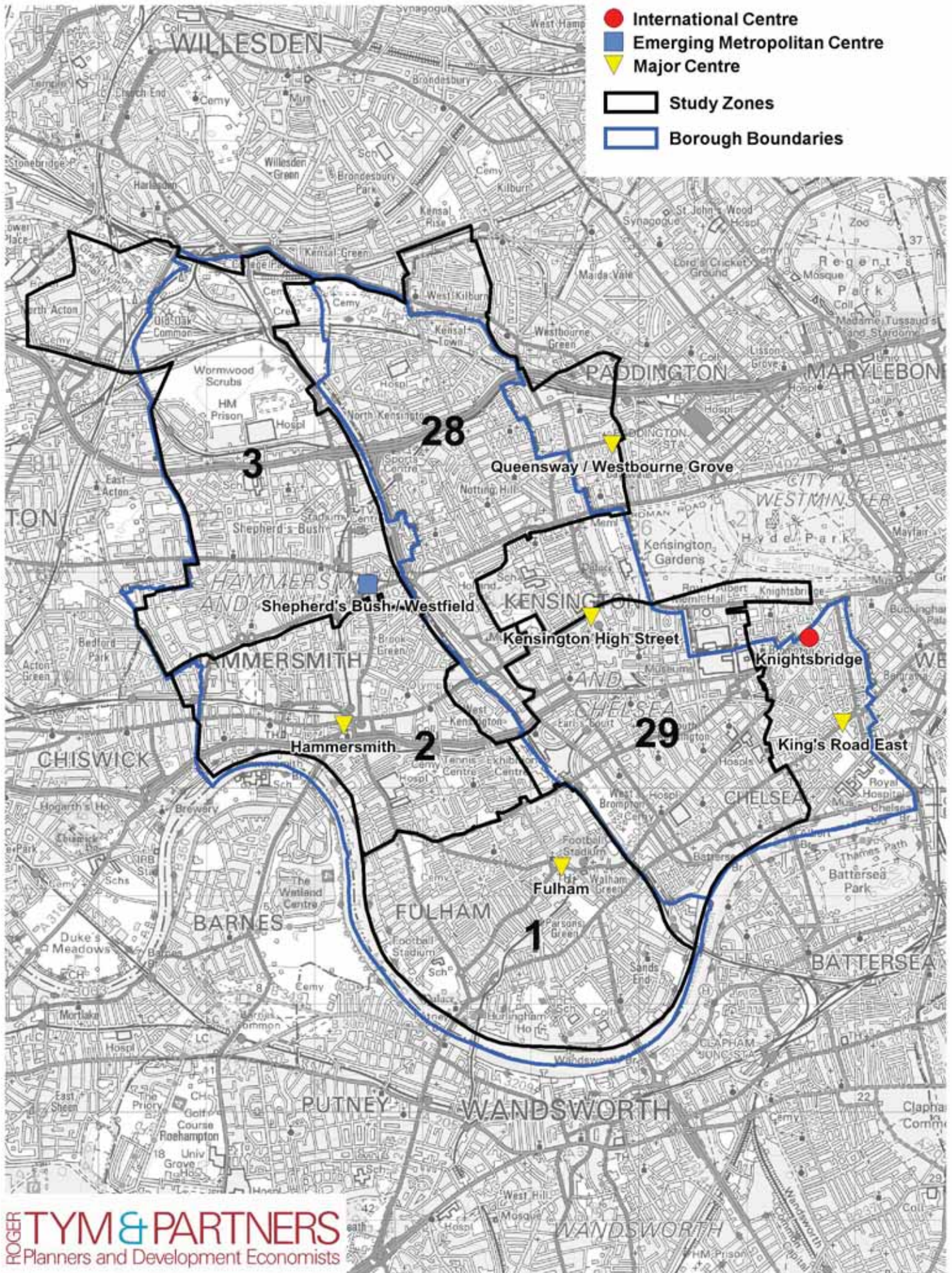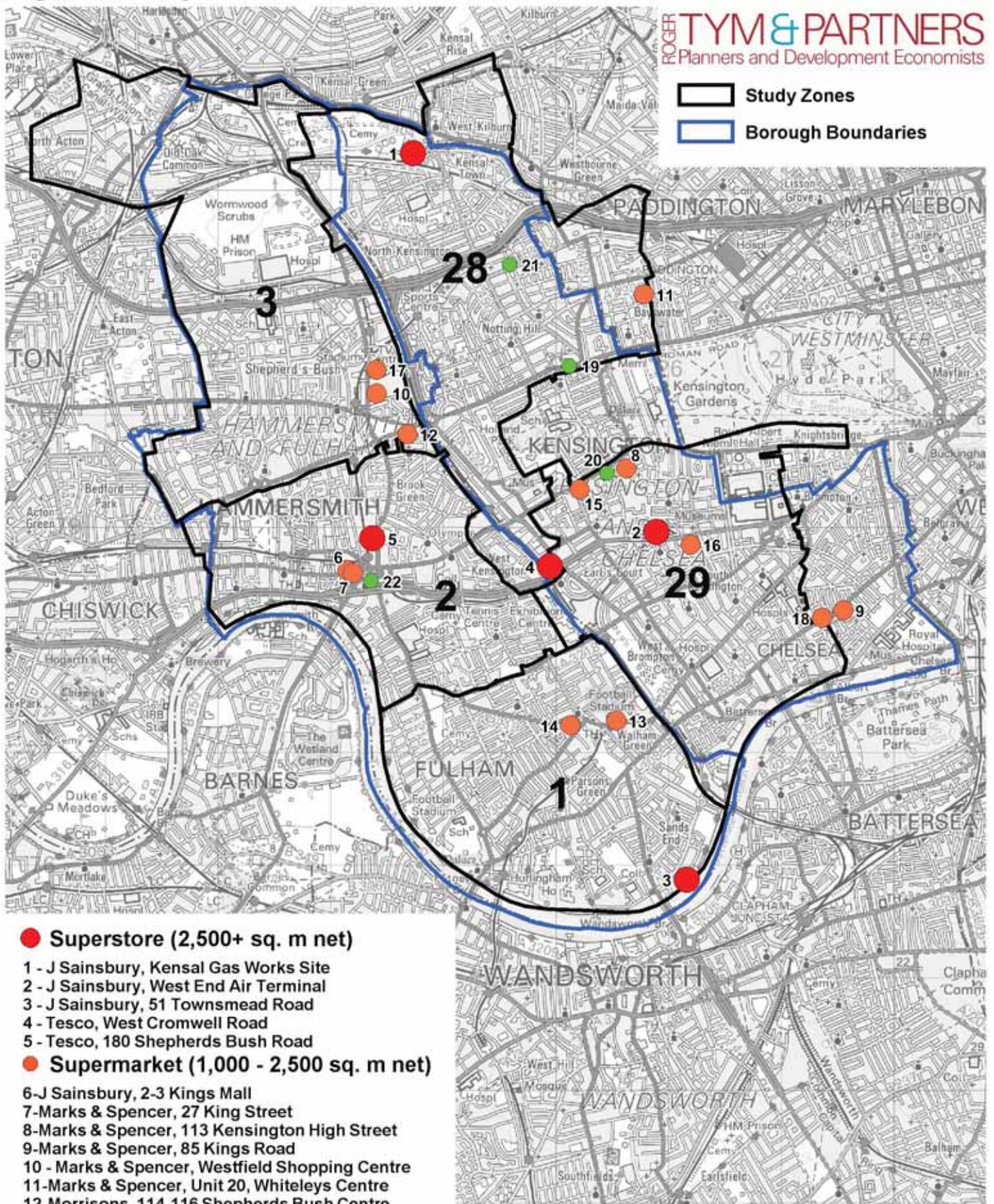
● **Superstore (2,500+ sq. m net)**

1 - J Sainsbury, Kensal Gas Works Site
2 - J Sainsbury, West End Air Terminal
3 - J Sainsbury, 51 Townsmead Road
4 - Tesco, West Cromwell Road
5 - Tesco, 180 Shepherds Bush Road

● **Supermarket (1,000 - 2,500 sq. m net)**

6 - J Sainsbury, 2-3 Kings Mall
7 - Marks & Spencer, 27 King Street
8 - Marks & Spencer, 113 Kensington High Street
9 - Marks & Spencer, 85 Kings Road
10 - Marks & Spencer, Westfield Shopping Centre
11 - Marks & Spencer, Unit 20, Whiteleys Centre
12 - Morrisons, 114-116 Shepherds Bush Centre
13 - Sainsbury's Central, Fulham Road
14 - Waitrose, 380-384 North End Road
15 - Waitrose, 243 High Street
16 - Waitrose, Gloucester Arcade
17 - Waitrose, Westfield Shopping Centre
17 - Waitrose, 196-198 Kings Road

● **Other Foodstores (500 - 1,000 sq. m net)**

18 - Tesco Express, 114-120 Notting Hill Gate
19 - Tesco Metro, Kensington Metro
20 - Tesco Metro, 224-226 Portobello Road
21 - Tesco Metro, 13-16 Broadway Centre,

Figure 3 - Regeneration Areas in LBHF & RBKC

Legend:
- Regeneration Areas
- Study Zones
- Borough Boundaries

Old Oak Common and Hythe Road

White City

Hammersmith Town Centre and Riverside

Earls Court 1

Earls Court 2

South Fulham Riverside

3

28

2

29

1

Figure 4 - Opportunity Areas in LBHF & RBKC

Legend:
- Opportunity Areas
- Study Zones
- Borough Boundaries

Figure 5 - Development Opportunities in Shepherd's Bush

Legend:
- Centres
- Development Opportunity Sites

Shepherd's Bush / Westfield

HF015

HF001

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Figure 6 - Development Opportunities in Hammersmith

Legend:
- **Centres**
- **Development Opportunity Sites**

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Figure 7 - Development Opportunities in Fulham

Legend:
- Centres
- Development Opportunity Sites

HF011
HF007
HF010
HF017

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Fulham

Figure 8 - Development Opportunities in West Kensington & Earl's Court

Legend:
- Centres
- Development Opportunity Sites

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Earl's Court Road

KC014

West Kensington

HF014

HF013

HF004

KC009

Figure 9 - Development Opportunities in Knightsbridge

Legend:
- **Centres**
- **Development Opportunity Sites**

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Figure 10 - Development Opportunities in King's Road East

KC004

Fulham
Road East

KC005

King's Road
East

KC013

KC006

King's Road

Centres

**Development
Opportunity Sites**

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Figure 10a - Development Opportunities in Fulham Road West

Fulham Road West

KC019

KC018

KC017

KC016

Centres

Development Opportunity Sites

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Figure 11 - Development Opportunities in Kensington High Street

Kensington High Street

KC001

KC015

KC008

Centres

Development Opportunity Sites

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Figure 12 - Hierarchy of Centres in Zones 1, 2 & 29

Shepherd's Bush / Westfield

Kensington High Street

Knightsbridge

2

South Kensington

Hammersmith

CHISWICK

HAMMERSMITH

West Kensington

Earl's Court Road

Fulham Road East

CHELSEA

King's Road East

29

Fulham Road West

West Brompton

Fulham

Walham Green

FULHAM

1

Parsons Green

Sands End

BATTERSEA

Legend:

- 🟥 International Centre
- 🟦 Emerging Metropolitan Centre
- 🟨 Major Centre
- 🟩 District Centre
- 🔴 Local / Neighbourhood Centres
- ⬛ Study Zones
- 🟦 Borough Boundaries

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Figure 13 - Foodstore Provision in Zones 1, 2 & 29

Shepherd's Bush / Westfield

Kensington High Street

KENSINGTON

Knightsbridge

South Kensington

CHISWICK

HAMMERSMITH

Hammersmith

West Kensington

Earl's Court Road

Fulham Road East

King's Road East

Fulham Road West

Fulham

FULHAM

BATTERSEA

Sands End

● Superstore (2,500+ sq. m net)
1 - J Sainsbury, West End Air Terminal
2 - J Sainsbury, 51 Townsmead Road
3 - Tesco, 180 Shepherds Bush Road
4 - Tesco, West Cromwell Road

● Supermarket (1,000 - 2,500 sq. m net)
5 - J Sainsbury, 2-3 Kings Mall
6 - Marks & Spencer, 113 Kensington High Street
7 - Marks & Spencer, 27 King Street
8 - Sainsbury's Central, Fulham Road
9 - Waitrose, 380-384 North End Road
10 - Waitrose, 243 High Street
11 - Waitrose, Gloucester Arcade
12 - Waitrose, 196-198 Kings Road

● Other Foodstores (500 - 1,000 sq. m net)
13 - Tesco Metro, Kensington Metro
14 - Tesco Metro, 13-16 Broadway Centre

● Small Foodstores (0 - 500 sq. m net)
15 - Co-operative Food, 88-90 North End Road
16 - Iceland, 290/302 North End Road
17 - Iceland Extra, 111/117 King Street
18 - Sainsbury's Local, 179-183 Fulham Palace Road
19 - Sainsbury's Local, 160 Earls Court Road
20 - Sainsbury's Local, 295-297 Fulham Road
21 - Sainsbury's Local, 340-345 North End Road
22 - Simply Food, 25 Jerdan Place
23 - Simply Food, 289-291 Fulham Road
24 - Simply Food, 266/268 Earls Court Road
25 - Simply Food, 161 Talgarth Road
26 - Simply Food, Unit 1 The Boulevard
27 - Tesco Express, 700-702 Fulham Road

28 - Tesco Express, 601 Kings Road
29 - Tesco Express, 327-343 King Street
30 - Tesco Express, 112 North End Road
31 - Tesco Express, 248 Fulham Road
32 - Tesco Express, 206 Earls Court Road
33 - Tesco Express, 50-52 Old Brompton Road
34 - Tesco Express, 87-93 Gloucester Road
35 - Tesco Express, 107-109 Gloucester Road
36 - Tesco Express, 279b Kings Road
37 - Tesco Express, 174-176 Fulham Road
38 - Tesco Express, 335-337 Fulham Palace Road
39 - Tesco Express, 459 Fulham Road

▬ Study Zones

▬ Borough Boundaries

▢ International, Metropolitan, Major & District Centres

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Figure 14a - Population Growth by Ward for Zones 1, 2 & 29 to 2021: High Scenario

Shepherd's Bush / Westfield

Kensington High Street

Knightsbridge

2

South Kensington

Earl's Court Road

Fulham Road East

29

King's Road East

Fulham Road West

CHISWICK

Hammersmith

Fulham

1

BATTERSEA

FULHAM

Legend:
�	10,000 to 15,000
	5,000 to 10,000
	2,500 to 5,000
	1,000 to 2,500
	0 to 1,000
	-1,000 to 0
	-2,000 to -1,000
	-3,500 to -2,000

— Study Zones

— Borough Boundaries

- - - International, Metropolitan, Major & District Centres

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Figure 14b - Population Growth by Ward for Zones 1, 2 & 29 to 2021: Low Scenario

Shepherd's Bush / Westfield

Kensington High Street

Knightsbridge

2

South Kensington

CHISWICK

Earl's Court Road

Hammersmith

Fulham Road East

29

King's Road East

Fulham Road West

Fulham

BATTERSEA

FULHAM

1

	10,000 to 15,000
	5,000 to 10,000
	2,500 to 5,000
	1,000 to 2,500
	0 to 1,000
	-1,000 to 0
	-2,000 to -1,000
	-3,500 to -2,000

Study Zones

Borough Boundaries

International, Metropolitan, Major & District Centres

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Figure 15a - Population Growth by Ward for Zones 1, 2 & 29 to 2031: High Scenario

Shepherd's Bush / Westfield

Kensington High Street

Knightsbridge

2

South Kensington

Hammersmith

CHISWICK

Earl's Court Road

Fulham Road East

29

King's Road East

Fulham Road West

Fulham

1

FULHAM

BATTERSEA

Legend:

🟥	10,000 to 15,000
🟧	5,000 to 10,000
🟧	2,500 to 5,000
🟨	1,000 to 2,500
🟨	0 to 1,000
🟨	-1,000 to 0
🟦	-2,000 to -1,000
🟦	-3,500 to -2,000

▭ **Study Zones**

▭ **Borough Boundaries**

▭ **International, Metropolitan, Major & District Centres**

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Figure 15b - Population Growth by Ward for Zones 1, 2 & 29 to 2031: Low Scenario

Legend:
- 10,000 to 15,000
- 5,000 to 10,000
- 2,500 to 5,000
- 1,000 to 2,500
- 0 to 1,000
- -1,000 to 0
- -2,000 to -1,000
- -3,500 to -2,000

— Study Zones
— Borough Boundaries
- - - International, Metropolitan, Major & District Centres

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Figure 16 - IMD for Zones 1, 2 & 29
(Compared to all LSOAs in London)

Shepherd's Bush / Westfield

Kensington High Street

Knightsbridge

2

South Kensington

Hammersmith

CHISWICK

Earl's Court Road

Fulham Road East

29

King's Road East

CHEL

Fulham Road West

Fulham

FULHAM

1

BATTERSEA

Legend
- 0 to 20% (Most Deprived)
- 20 to 40%
- 40 to 60%
- 60 to 80%
- 80 to 100% (Least Deprived)
- Study Zones
- Borough Boundaries
- International, Metropolitan, Major & District Centres

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Figure 17 - PTAL for Zones 1, 2 & 29

Shepherd's Bush / Westfield

2

Kensington High Street

Knightsbridge

South Kensington

CHISWICK

Hammersmith

Earl's Court Road

Fulham Road East

29

King's Road East

Fulham Road West

CHELSEA

Fulham

FULHAM

1

BATTERSEA

Legend

- PTAL Level 1 (Low)
- PTAL Level 2
- PTAL Level 3
- PTAL Level 4
- PTAL Level 5
- PTAL Level 6 (High)
- Study Zones
- Borough Boundaries
- International, Metropolitan, Major & District Centres

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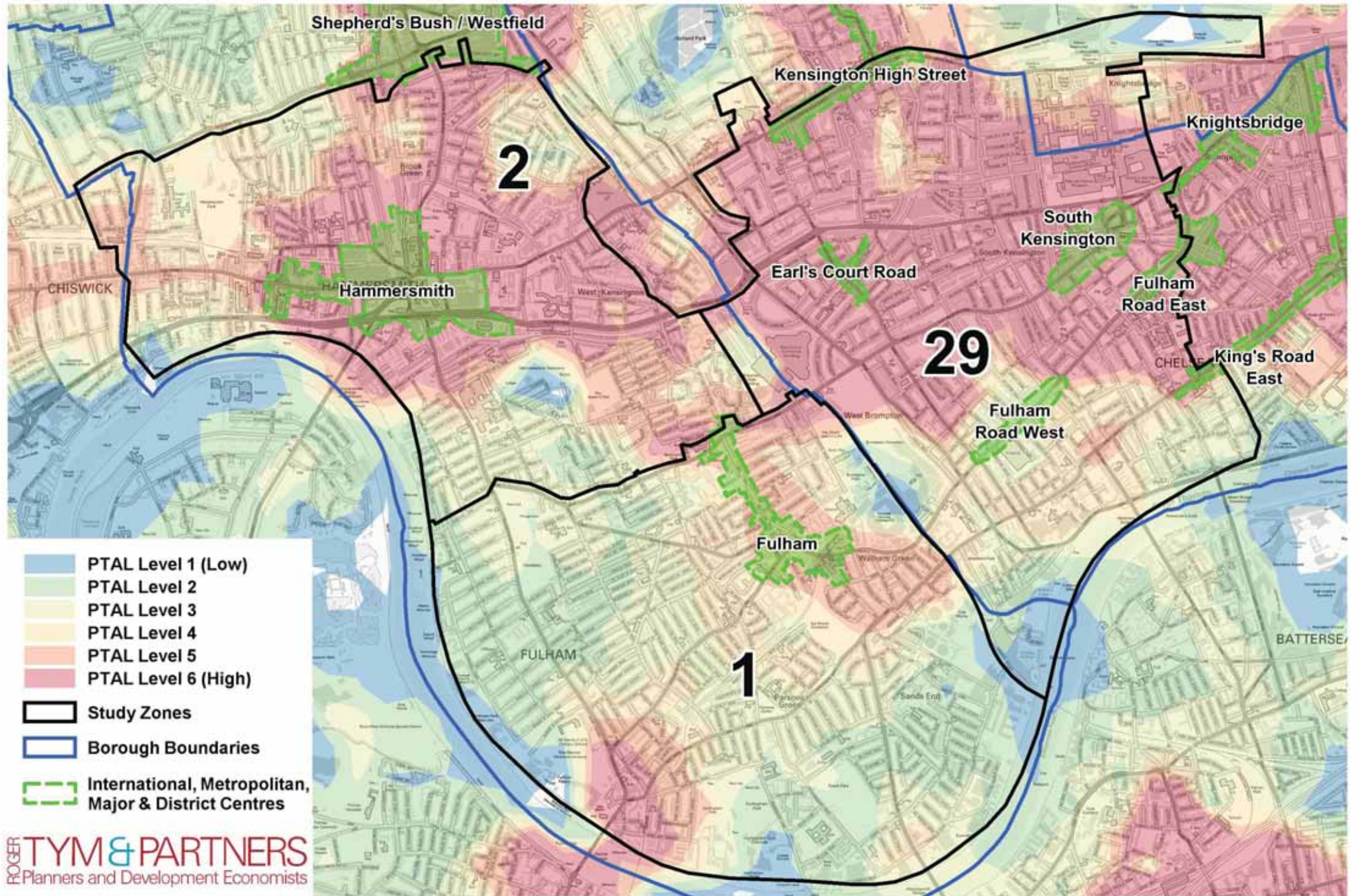
Figure 18 - Access to Local Shops

Within 400m Walk of Local Shops

Study Zones

Borough Boundaries

◆ **International, Metropolitan & Major Centres**

WILLESDEN

PADDINGTON

MARYLEBONE

CITY OF WESTMINSTER

3

28

Queensway / Westbourne Grove

Shepherd's Bush / Westfield

Kensington High Street

Knightsbridge

Hammersmith

2

29

King's Road East

CHISWICK

Fulham

BARNES

1

BATTERSEA

PUTNEY

WANDSWORTH