

# Appendix 2: Individual Town Centre Health Check Reports

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# Town Centre Health Check individual reports structure

An individual assessment has been produced for each designated centre and primary shopping areas falling within the WESRPA. Every report has been structured as follows:

## **Introduction**

### **2017 land use analysis**

- a. Ground floor land use map (2017)
- b. Range of units and floorspace analysis (2017)
- c. Frontage analysis (2017) (*for centres with both primary and secondary frontages only*)

### **Comparative land use analysis**

- a. Comparative range of units and floorspace analysis
- b. Comparative comparison/convenience split analysis

### **2018 site survey**

1. Accessibility and pedestrian flows
2. Range of units and floorspace qualitative analysis
  - a. Area description, land uses and retail provision
  - b. Vacant units
3. State of the State of the Town Centre (*or primary shopping area within the WERSPA*) environmental quality assessment
  - a. Public Realm
  - b. Cleanliness, safety and security
  - c. Identity and users

### **Performance and policy recommendations**

### **Recommended boundary changes**

The 2017 land use analysis section presents a snapshot of the centre (or primary shopping area) and provides insight on the range of land uses<sup>1</sup> within a centre. Whenever a centre's designation comprised both primary and secondary frontages, these have been looked into separately to assess the effectiveness of policies and associated designations and whether these reflected a distinct function. This section looks at the following range of uses: town centre uses (A1-A5, C1, D1, D2, Sui Generis), B1 (Business), B8 (Storage and distribution), C3 (Residential) and Vacant.

The comparative land use analysis section of this report looks at the evolution of the centre across the years. It uses land use data from surveys carried out between 1997 and 2017<sup>2</sup>. Given previous surveys had specifically looked into town centre uses (A1-A5, C1, D1, D2, Sui

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<sup>1</sup> Based on observed uses as surveyed by Experian GOAD.

<sup>2</sup> The availability of data changes for each centre as Town Centre Health Check studies were not carried out for all of Westminster's centres in a certain year of survey. Appendix 1 provides an overview of Westminster's Town Centre Health Checks organised per year of survey.

Generis) and vacant units, the comparative analysis only looks at these land uses. For this reason, figures in the 2017 land use analysis section will sometimes differ from the figures for 2017 – as they capture additional uses.

The comparative analysis recognises the changes to the categorisation of A3 uses since the 2002 surveys<sup>3</sup>. Therefore, direct comparisons between the results of all surveys are not always possible. The study has therefore focussed on changes from the previous round of Town Centre Health Checks for each specific centre.

The 2018 site survey section relies on officer observations and provides a qualitative analysis of the function, character and health of the centre. As the site surveys were carried out at a specific moment in time, inconsistent findings<sup>4</sup> were reviewed against previous surveys, officer knowledge, and published data (e.g. by the relevant local Business Improvement District (BID)) to remove potential errors.

Finally, an assessment of the performance of the centre in light of the findings of the individual Town Centre Health Check and a comparison with findings from previous studies are made. This is followed by policy recommendations and where appropriate recommended boundary changes.

Reports marked with the ♦ symbol have been reviewed and updated in November 2019 following consultation on the draft Westminster City Plan 2019-2040 (Regulation 19 stage) where issues were identified.

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<sup>3</sup> It should be noted that the Use Classes Order has changed since the 2002 Health Check Reports were undertaken, and Class A3 has now been broken down into three categories; Class A3 – restaurants/cafés, Class A4 – pubs/bars and Class A5 hot-food takeaways.

<sup>4</sup> These mostly relate to footfall found at a specific time of the day not being in line with the average level of footfall in the specific centre.

# Town Centre Health Check individual reports data analysis methodology

## a) 2017 land use analysis

- Ground floor land use map (2017)
  - The ground floor land use maps 2017 have been produced by Westminster City Council (WCC) using the council's GIS data (collected through land uses surveys) and Experian GOAD 2017 data.
- Range of units and floorspace analysis (2017)
  - The figures have been produced by WCC using the council's database and Experian GOAD 2017 data.
  - The floorspace figures include A1, A2, A3, A4, A5, B1, B2, B8, C1, C2, C2A, C3, D1, D2 and Sui Generis. Unclassified land uses were removed from the analysis (these include entrances, Underground stations, car parks and garages).
  - The total ground floor floorspace is based on ground floor occupation.
  - While non-rounded figures can be found in the 'Ground floor total number of units and floorspace by land use' table, these have been rounded in the report's text for ease of read.
- Frontage analysis (2017)
  - The figures have been produced by WCC using the council's database and Experian GOAD 2017 data.

## b) Comparative Land use analysis

- Comparative range of units and floorspace analysis
  - The figures have been produced by WCC using the council's database and Experian GOAD 2017 data.
  - Land uses B1 and C3 have not been included in this section as they were not recorded in the previous years and it was not possible to analyse their variation.
- Comparative comparison/convenience split analysis
  - This section contains Comparison/Convenience land use data from the 1997, 2002, 2007/2008 and 2013/2014 Town Centre Health Checks'.
  - In analysing the A1 uses, the council has used the data provided by Experian who gathered and categorised the data following the National Retail Planning Forum's / the Classification of individual consumption by purpose (COICOP):
    - Convenience goods:
      - 1 Food and non-alcoholic beverages
      - 2.2 Tobacco
      - 2.1 Alcoholic beverages (off-trade)
      - 9.5.2 Newspapers and periodicals
      - 5.6.1 Non-durable household goods

*Notes: 100% of non-durable household goods is included; because although this category includes a small proportion of goods which have sometimes been considered as comparison goods, any deduction to account for this would be somewhat arbitrary and not based on firm information.*

- Comparison goods:
  - 3.1.1, 3.1.2, 3.1.3 Clothing materials & garments
  - 3.2.1 Shoes & other footwear
  - 4.3.1 Materials for maintenance & repair of dwellings
  - 5.1.1, 5.1.2 Furniture & furnishings; carpets & other floorcoverings
  - 5.2 Household textiles
  - 5.3.1 Major household appliances, whether electric or not
  - 5.3.2 Small electric household appliances
  - 5.5.1, 5.5.2 Tools & miscellaneous accessories
  - 5.4 Glassware, tableware & household utensils
  - 6.1.1, 6.1.2 Medical goods & other pharmaceutical products
  - 6.1.3 Therapeutic appliances & equipment
  - 7.1.3 Bicycles
  - 9.1.4 Recording media
  - 9.2.2, 9.3.1, 9.3.2 Games, toys & hobbies; sport & camping equipment; musical instruments
  - 9.3.3 Gardens, plants & flowers
  - 9.3.4 Pets & related products
  - 9.5.1, 9.5.3, 9.5.4 Books & stationery
  - 8.2, 9.1.1, 9.1.2, 9.1.3 Audio-visual, photographic and information processing equipment
  - 12.1.2, 12.1.3 Appliances for personal care
  - 12.3.1 Jewellery, watches & clocks
  - 12.3.2 Other personal effects

*Notes: This does not include COICOP categories 3.1.4 and 3.2.2, which cover the small expenditure on repairs to clothing and footwear, which are considered to be services. This means that heel bars and dry cleaners (the latter often providing garment repair services in addition to cleaning) would have to be excluded from floorspace when undertaking retail capacity forecasting, for compatibility with the expenditure definition.*

*In addition to the COICOP categories, Experian has also included services (such as hairdressers and beauty salons) within the comparison use category.*

### **c) 2018 Site survey**

All designated centres from District Shopping Centres to the higher tiers of the hierarchy have been surveyed in 2018. Site surveys have also covered a number of primary shopping areas that are not designated shopping centres (Carnaby Street, Soho, Chinatown, Shaftesbury, the wider Covent Garden area and Great Portland Street) because of their relevant contribution to the function of the West End. In addition, a series of light-touch surveys have been carried out for seven Local Centres which a preliminary analysis of 2017 land use data found to have a higher-than-average level of vacancy.

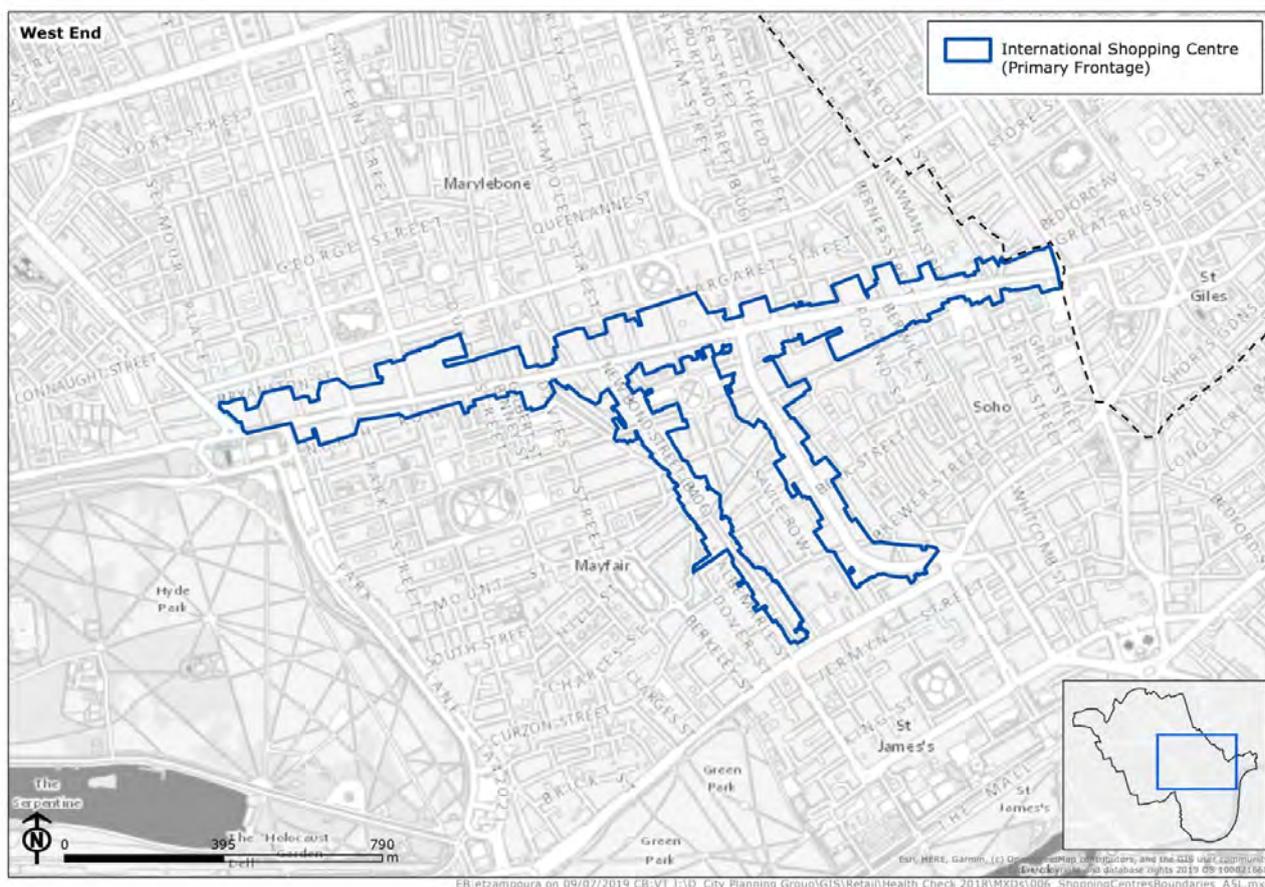
All the shopping centres have been surveyed by Westminster City Council's officers. During the site visits, a qualitative analysis of the centre was undertaken using a standardised questionnaire paying special attention to:

- Range of land uses at ground floor level
- Retail area characteristics and quality
- Number and clusters of vacant units
- Location characteristics (public realm quality, cleanliness, security, accessibility)
- Local identity and users
- Existing Town Centre and frontage boundaries
- Evening and night-time economy.

# SECTION A: INTERNATIONAL SHOPPING CENTRES

## The West End

### International Shopping Centre boundary, West End (2017)



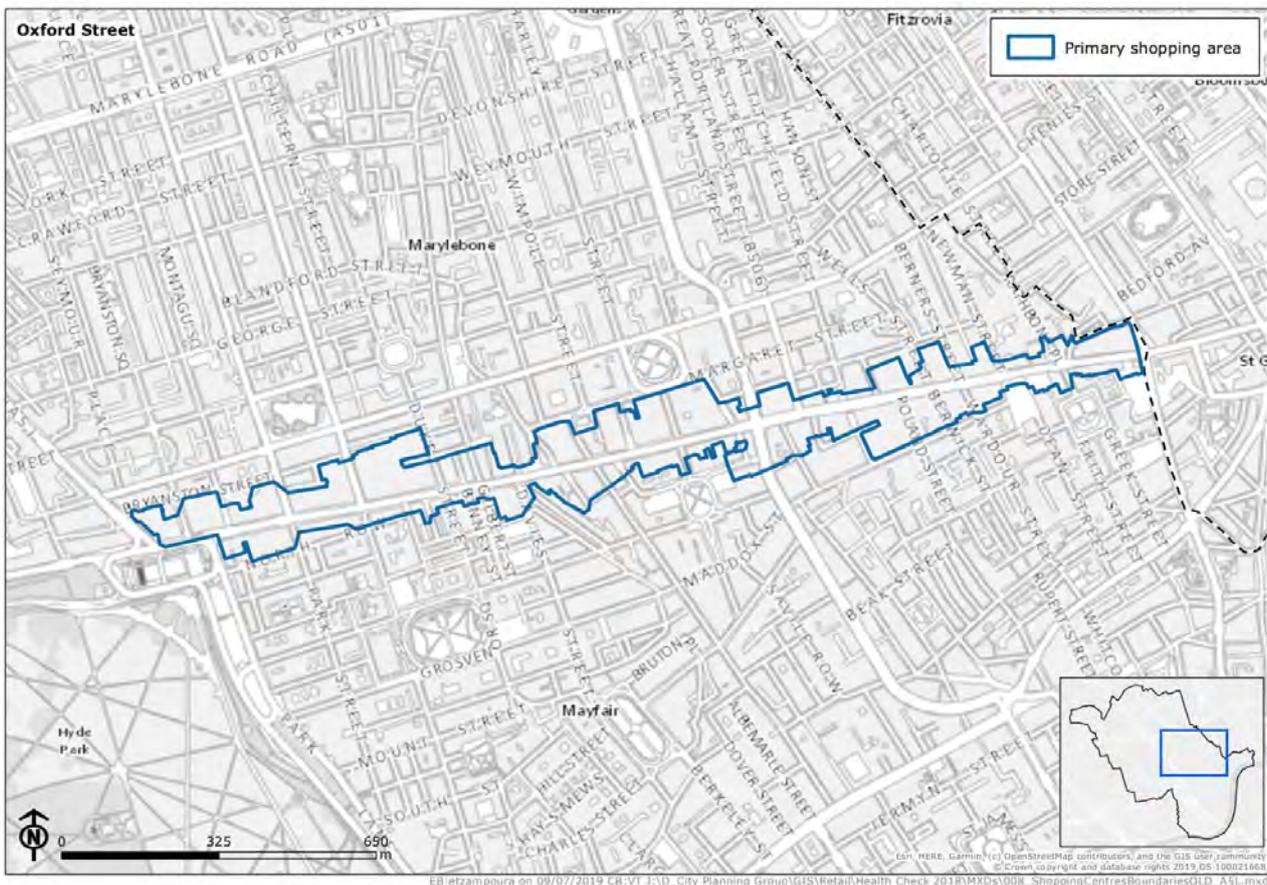
The West End International Shopping Centre comprises the following areas:

- Oxford Street
- Regent Street
- Bond Street

These areas have been individually assessed as part of the Town Centre Health Checks Report 2018-19.

## 1.0. West End – Oxford Street

Map 1.0: Primary shopping area boundary, West End – Oxford Street (2017)



### 1.1. Introduction

Oxford Street is a primary shopping area within the designated 'West End International Shopping Centre' and is within the CAZ.

Oxford Street is a long linear shopping area extending approximately two kilometres from east to west, along the A40. The street contains four of the busiest Underground stations in the city: Marble Arch, Bond Street, Oxford Circus and Tottenham Court Road (from West to East along Oxford Street). Oxford Street is closely linked to the adjacent primary shopping areas of Regent Street and Bond Street, as well as smaller shopping areas, which together provide a shopping destination in the West End.

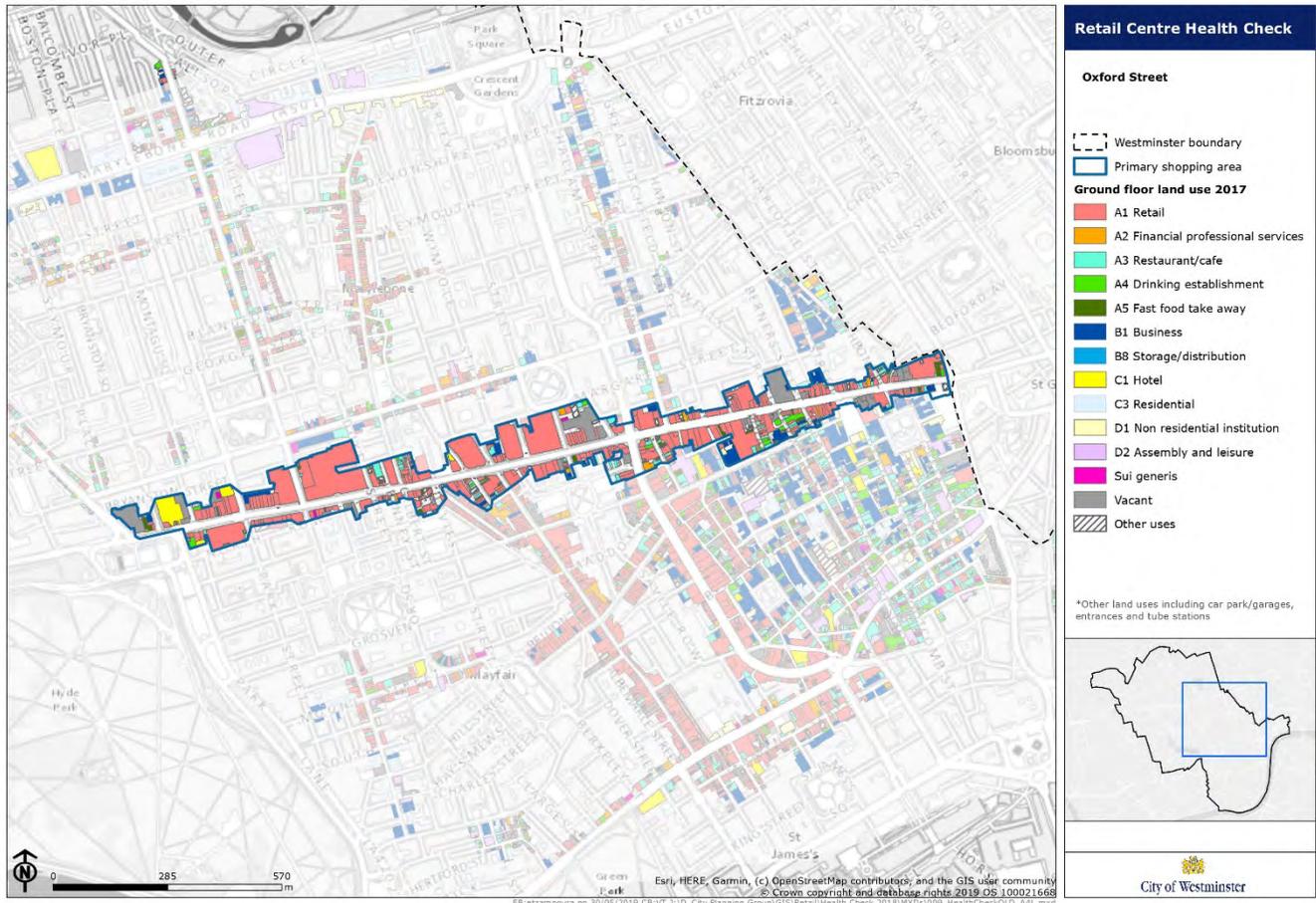
The area benefits from its reputation as probably the most famous shopping street in the country, containing many flagship retail destinations. The length of the street means that the character and function in terms of the type of retail on offer varies considerably in different parts of the street, along with the public realm and general atmosphere.

## 1.2. 2017 Land use analysis

### 1.21. Ground floor land use map (2017)

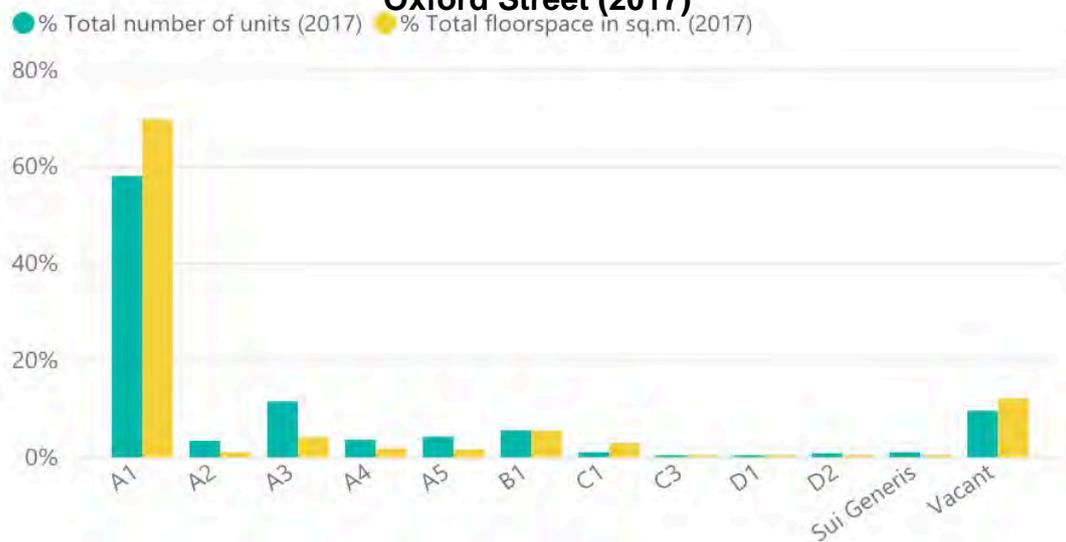
In 2017, 466 total units were identified at ground floor level. The surveyed area covered 161,322 sq m

**Map 1.1: Ground floor land use map, West End – Oxford Street (2017)**



### 1.22. Range of units and floorspace analysis (2017)

**Figure 1.2: Ground floor total number of units and floorspace by land use, West End – Oxford Street (2017)**



The predominant use in this area is A1, with 271 units accounting for 70% of the overall floorspace and for 58% of the total units. B1 and A3 units follow with 25 and 54 units, making five and four percent of the total floorspace respectively. Other uses in the area include a limited amount of A2, A4, A5, C1, C3, D1, D2, and Sui Generis.

The 2017 survey recorded 45 vacant units which account for 10% of the total units and for 12% of the overall floorspace. The 2018 site survey has found a number of ongoing large-scale redevelopments on Oxford Street, including those linked with the provision of the new Elizabeth Line (Crossrail 1) stations, which are affecting the vacancy rate.

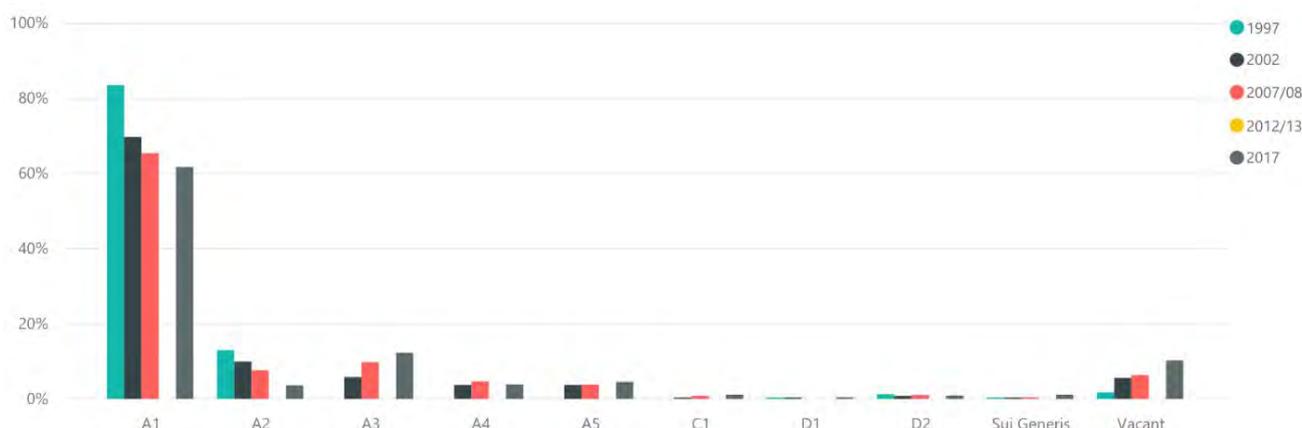
**Table 1.3: Ground floor total number of units and floorspace by land use, West End – Oxford Street (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	271	58.15%	112,675.03	69.84%
A2	16	3.43%	1,639.86	1.02%
A3	54	11.59%	6,748.21	4.18%
A4	17	3.65%	2,911.11	1.80%
A5	20	4.29%	2,670.28	1.66%
B1	26	5.58%	8,929.77	5.54%
C1	5	1.07%	4,739.19	2.94%
C3	1	0.21%	108.22	0.07%
D1	2	0.43%	274.44	0.17%
D2	4	0.86%	325.89	0.20%
Sui Generis	5	1.07%	538.60	0.33%
Vacant	45	9.66%	19,761.36	12.25%
<b>Total</b>	<b>466</b>	<b>100%</b>	<b>161,321.97</b>	<b>100%</b>

### 1.3. Comparative land use analysis

#### 1.3.1. Comparative range of units and floorspace analysis

**Figure 1.4: Proportion of units by land use, West End – Oxford Street (2017)<sup>5</sup>**



<sup>5</sup> There is no data available for 2012/13 for this centre.

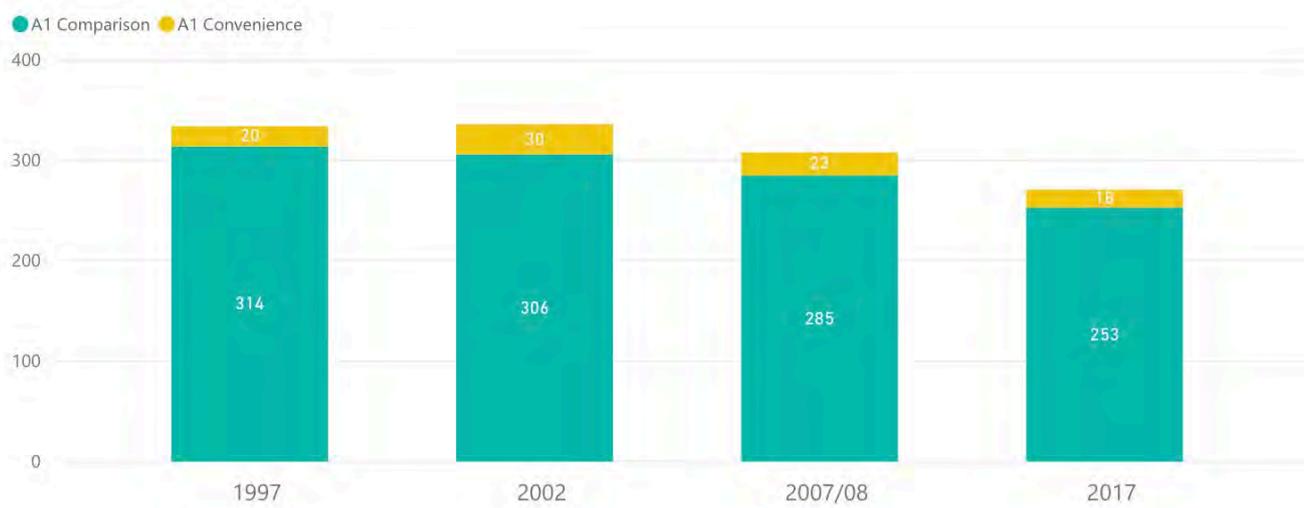
The number of A1 units has shown a steady reduction since the 2002 record of 336 units, with the latest 2017 survey recording 271 A1 units in this area. Proportionally, however, A1 uses have remained stable whilst a growth was recorded for A3 uses, which doubled between 2002 and 2017. There are currently 54 A3 units on Oxford Street, accounting for 12% of the total units. Conversely, land use surveys have recorded a steady loss in A2 uses moving from 52 units (13%) to just 16 units (4%).

Vacancies recorded a continuous increase across the years surveyed, moving from 2% vacant units in 1997 to 10% in 2017.

### 1.32. Comparative comparison/convenience split analysis

**Figure 1.5: Number of comparison and convenience A1 units by year, West End – Oxford Street (2017)**

The area has had a consistent comparison to convenience split across the years surveyed.



Oxford Street has been A1 comparison-led since 1997. Records show how the number of A1 units has shrunk over the years, which may indicate that smaller units have progressively been merged into larger ones in this area.

## 1.4. 2018 Site Survey

### 1.4.1. Accessibility and pedestrian flows

The number of Underground lines and buses serving the area means that this area is highly accessible via public transport. Four major Underground stations are located on the street: Marble Arch (Central line) at the west end of the street, Bond Street (Jubilee, Central lines) between Marble arch and Oxford Circus (Central, Victoria, Bakerloo lines) towards the centre of the street, and Tottenham Court Road (Central, Northern lines) at the eastern boundary of the street. Bond Street and Tottenham Court Road will also provide access to the Elizabeth Line service when operational.

Several bus routes directly serve Oxford Street, connecting with nearly all parts of central London. The main central part of Oxford Street is only open to buses and taxis to manage congestion on this narrow and heavily used central route. Nonetheless, bus and taxi traffic is still heavy and vehicular congestion very frequent.

Pedestrian flow is high all along Oxford Street, in particular near Oxford Circus and near all Underground station entrances. Pedestrians seem to predominantly move along the main

street, whilst there is not much dwelling on the public highway due to the busy nature of both street and pavements.



## 1.42. Range of units and floorspace qualitative analysis

### 1.421. Area description, land uses and retail provision

The area presents a diverse retail offer, which includes a good range in prices spanning from high end department stores to more affordable high street retailers. Retail on Oxford Street has a strong focus on clothing and accessories. Department stores on Oxford Street are long established and include Selfridges, John Lewis, Marks & Spencer, Debenhams, House of Fraser, D H Evans, and Bourne & Hollingsworth. High street retailers are mostly multiples and include the likes of Zara, H&M, Topshop, Primark, River Island, Gap, Forever 21, Uniqlo, and Sports Directs. A number of phone and electronic retailers such as Carphone Warehouse, Curry's PC World, O2, and Vodafone are also present on Oxford Street. Some high street beauty retailers are also found in the area, and include: The Body Shop, Benefit, Lush, and Boots.

The Dyson Demo shop is new to Oxford Street and serves to showcase new products and give potential customers a chance to test them. This appears to be in line with a new drive towards experimental stores aimed at urban audiences.

A number of souvenir shops was noted along the street, particularly in the vicinity of the main Underground stations.

The survey has found a poor range of food and drink offer in the immediate area, with most of the A3 and A4 units found towards the edge of the area, off the main street. A stronger food and drink offer is found in clusters immediately beyond the boundary of the area, particularly on and around James Street for the western portion of the area, and around Great Castle Street to the north and in the neighbouring Soho and Carnaby Street areas to the south of the eastern portion of the area.



### 1.422. Vacant units

A number of vacancies due to ongoing large redevelopment schemes were observed along Oxford Street, particularly to the east of Oxford Circus. These sites include 1, 45, 341-349 and 425 Oxford Street.

Apart from these large sites, there was no other vacancy cluster observed at the time of visit.



### 1.43. State of the primary shopping area environmental quality assessment

#### 1.431 Public realm

The public realm was found to be of low quality and inadequate for the number of people using the area every day. Although the pavements are quite wide, the pedestrian environment is very busy due to the sheer number of users, to encroachment from some shops (especially those catering to tourists) and large development sites.

The area lacks in amenities for its visitors, particularly in terms of limited resting space (benches) and public toilets.

Traffic congestion along Oxford Street contributes to the sense of clutter and to air pollution making Oxford Street one of the areas with the highest known concentration of Nitrogen Dioxide (NO<sub>2</sub>) in London.



#### 1.432 Cleanliness, safety and security

Cleanliness was judged to be average along Oxford Street. Some evidence of litter and some commercial refuse bags awaiting collection were observed at the time of visit.

The level of safety and security was judged to be average. Although there are numerous CCTV cameras outside shops along the Oxford Street stretch, the area performs poorly on road safety.



### 1.433 Identity and users

The area is a known tourist and retail destination, and numerous international tourists and visitors were observed at the time of visit. The area is also extensively used by London-based shoppers and visitors, as well as by local workers.

The site survey has found evidence of several artists and buskers performing along the western portion of Oxford Street.



## 1.5. Performance summary and recommendations

- The area is considered to be 'healthy'. Oxford Street is an internationally renowned destination for comparison shopping catering for a variety of audiences, thanks to the area's varied offer from high end department stores to more affordable high street retailers.
- The level of vacancies is marginally above the average for the International Shopping Centres, however the 2017 vacancy record appears to be largely affected by several large sites that are undergoing redevelopment.
- The area scored average on cleanliness and would benefit from improved street cleansing.
- The public realm was found to be inadequate, particularly because of its cluttered and unpleasant pedestrian environment.

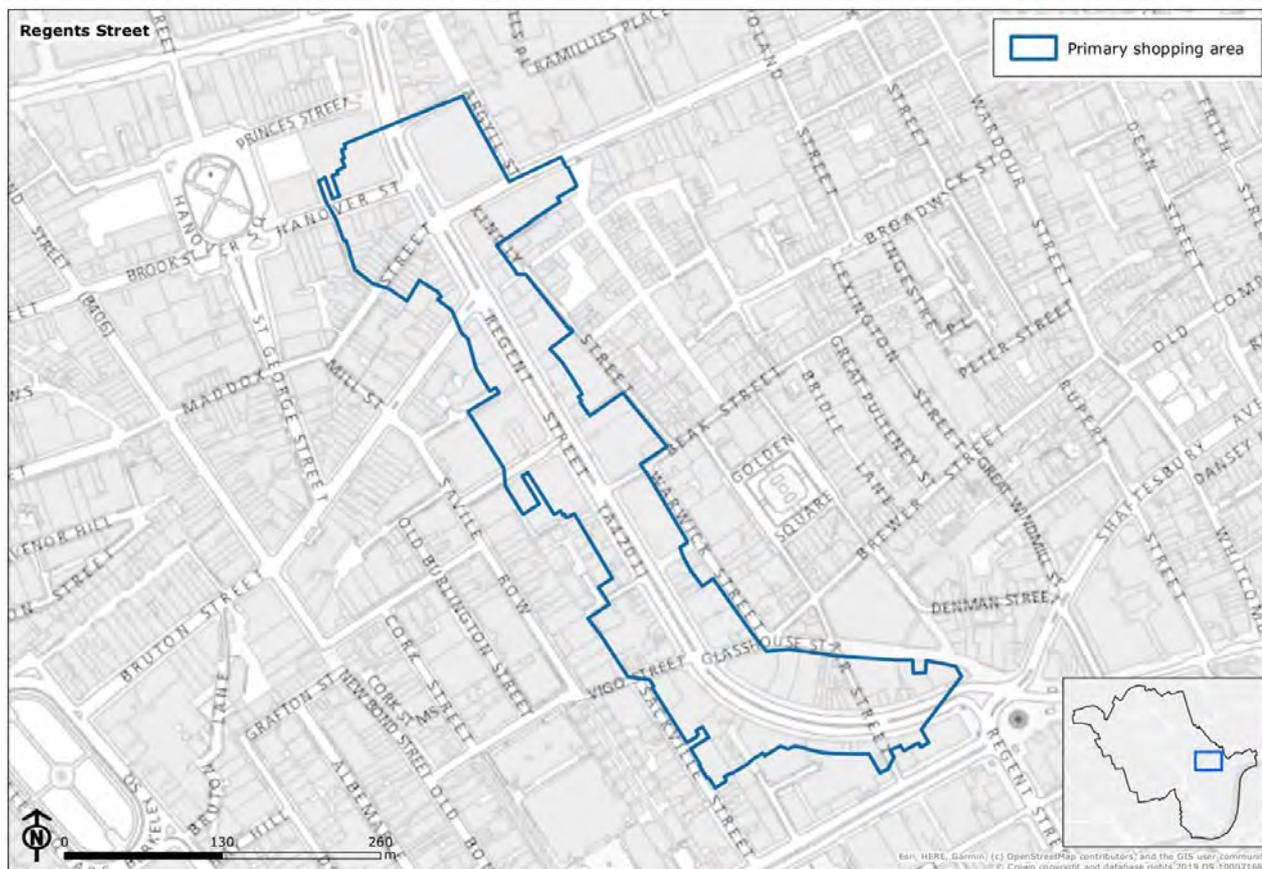
- Traffic congestion and pollution from buses and taxis negatively impacts on the quality of the area.

## **1.6. Recommended boundary changes**

No boundary changes are recommended.

## 2.0. West End – Regent Street

Map 2.0: Primary shopping area boundary, West End – Regent Street (2017)



### 2.1. Introduction

Regent Street is a primary shopping area within the designated 'West End International Shopping Centre' and it falls within the CAZ.

Regent Street is a large linear shopping area extending approximately one kilometre north to south, along the A4201. The area is within close proximity to Oxford Circus and Piccadilly Circus Underground stations. The area is closely linked to surrounding shopping areas such as Oxford Street, Carnaby Street and Piccadilly which provide an overall shopping destination.

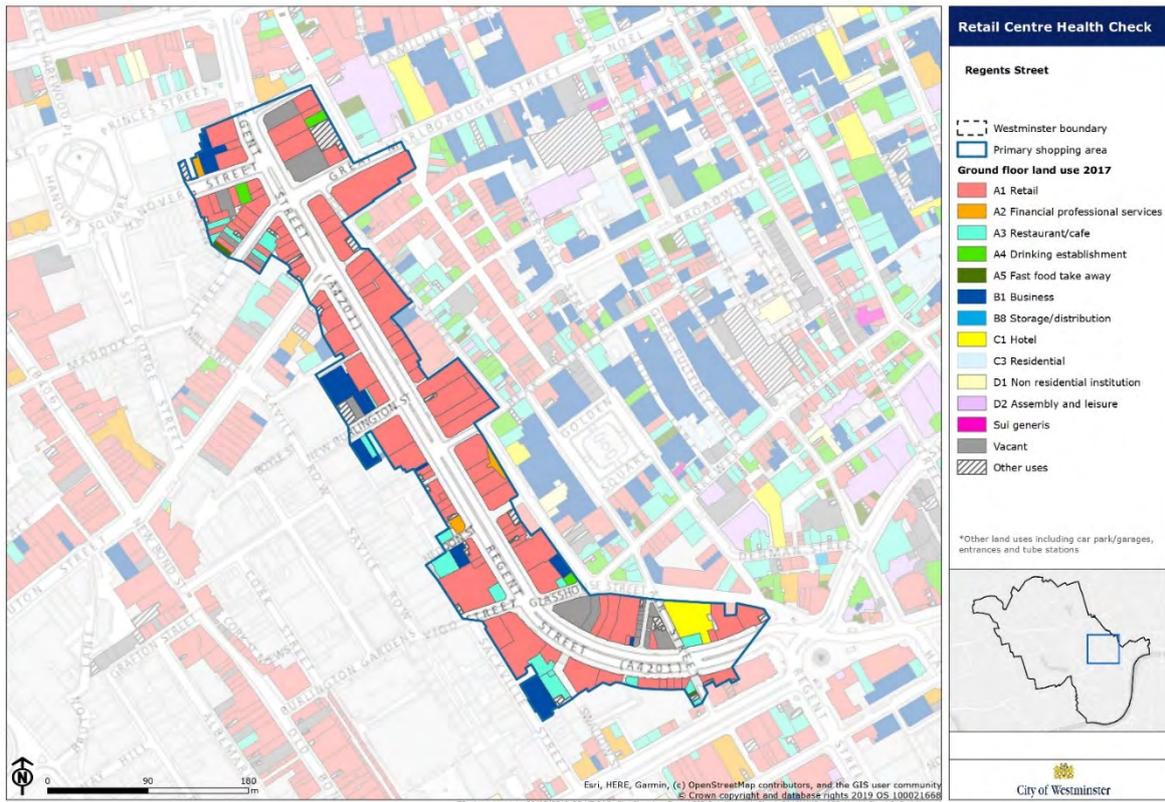
The London Palladium, Liberty department store, the Apple store and Hamley's toy store attract high numbers of visitors to the area. Regent Street is also architecturally significant with many fine buildings along its entire length. Regent Street is one of the most iconic streets in the West End, attracting many tourists and domestic shoppers.

### 2.2. 2017 Land use analysis

#### 2.2.1. Ground floor land use map (2017)

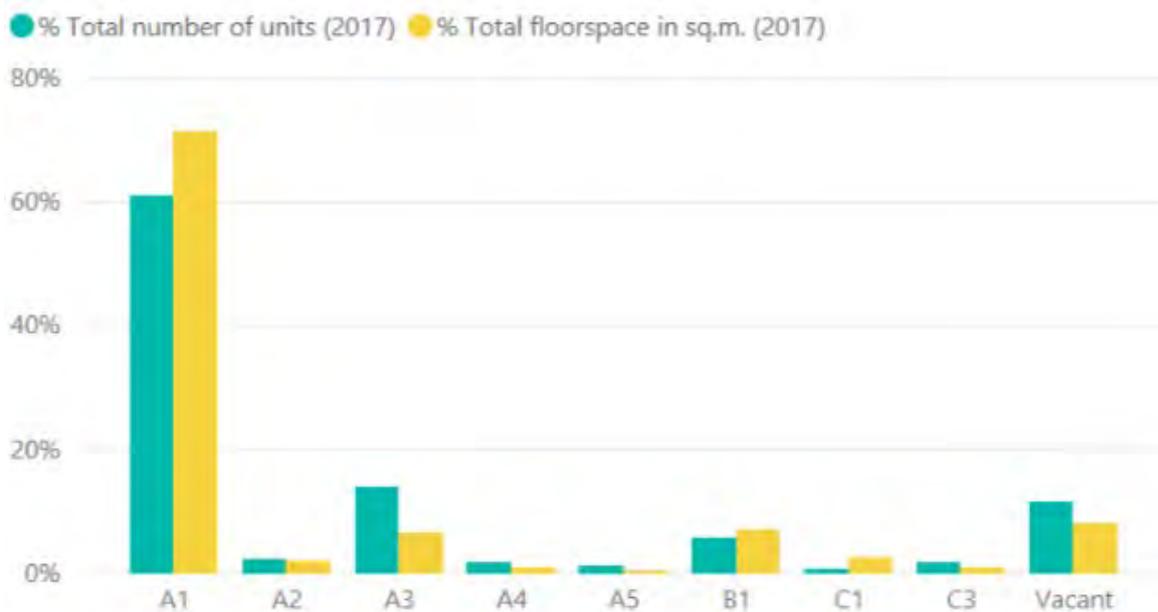
In 2017, 173 total units were identified at ground floor level. The surveyed area covered 46,706 sq m

## Map 2.1: Ground floor land use map, West End – Regent Street (2017)



### 2.22. Range of units and floorspace analysis (2017)

Figure 2.2: Ground floor total number of units and floorspace by land use, West End – Regent Street (2017)



The predominant use in this area is A1, with 106 units accounting for 71% of the overall floorspace and for 61% of all units. A3 and B1 uses follow, both accounting for 7% of the floorspace with 24 and ten units, making 14% and 6% of the total units respectively. Other uses in the area include a limited amount of A2, A4, A5, C1, and C3.

The 2017 survey recorded 20 vacant units which account for 12% of the total number of units and 8% of the overall floorspace. The 2018 site survey has found a limited number of vacancies, most of which are linked to refurbishment works.

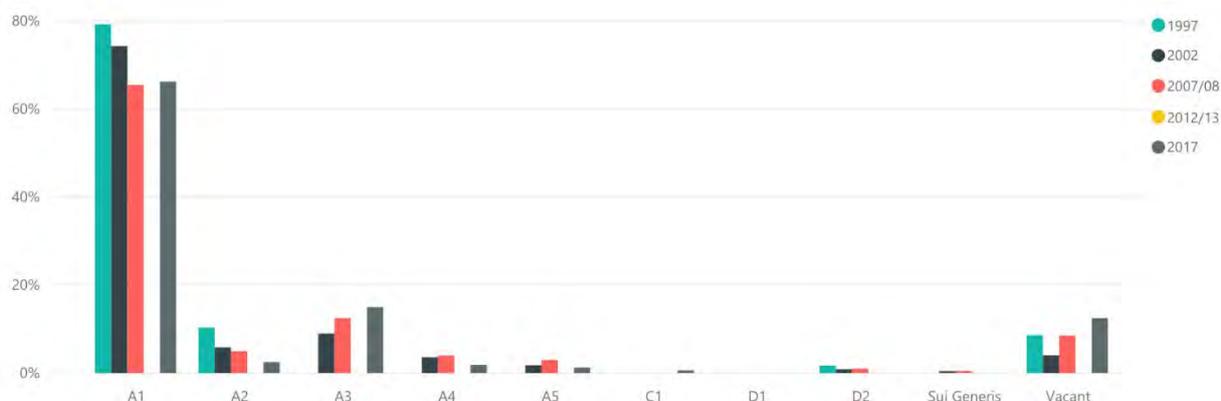
**Table 2.3: Ground floor total number of units and floorspace by land use, West End – Regent Street (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	106	61.27%	33,372.80	71.45%
A2	4	2.31%	926.62	1.98%
A3	24	13.87%	3,063.16	6.56%
A4	3	1.73%	467.40	1.00%
A5	2	1.16%	122.10	0.26%
B1	10	5.78%	3,302.97	7.07%
C1	1	0.58%	1,129.16	2.42%
C3	3	1.73%	480.78	1.03%
Vacant	20	11.56%	3,840.98	8.22%
<b>Total</b>	<b>173</b>	<b>100%</b>	<b>46,705.97</b>	<b>100%</b>

## 2.3. Comparative land use analysis

### 2.31. Comparative range of units and floorspace analysis

**Figure 2.4: Proportion of units by land use, West End – Regent Street (2017)<sup>6</sup>**



The overall number of units has shrunk from 232 in 1997 to just 160 in 2017, which suggests that a likely amalgamation into larger units has occurred over the last three decades.

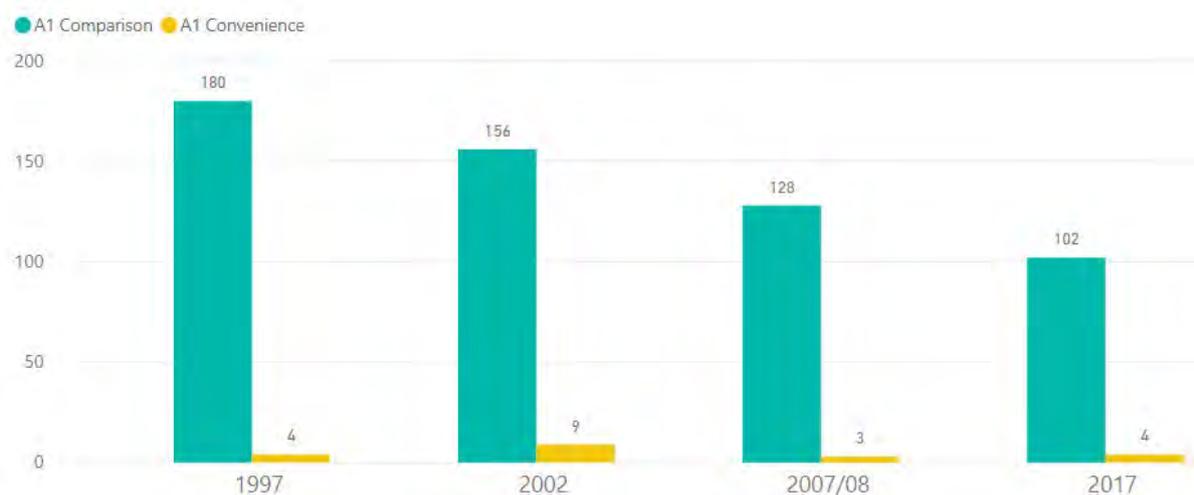
A1 uses have by large remained the predominant use, despite experiencing a drop from 184 units which account for 79% of the total in 1997 to 106 units making 66% of all units in 2017. The second largest use is A3, which has grown steadily since 2002, with 20 units recorded (9% of all units) rising to 24 units in 2017 (15% of all units). Conversely, over the years surveyed, the area has experienced a steady loss in A2 units, which have shrunk by 60% since 1997, with just four units recorded in 2017 accounting for 2% of the total units. Other marginally shrinking uses are A4 and A5. The 2017 survey has found no record of D2 uses in this area.

<sup>6</sup> There is no data available for 2012/13 for this centre.

The level of vacancy in this area has been fluctuating over the years surveyed. The 2017 survey recorded 20 vacant units, making 12% of the total units.

### 2.32. Comparative comparison/convenience split analysis

**Figure 2.5: Number of comparison and convenience A1 units by year, West End – Regent Street (2017)**



The area has had a consistent comparison to convenience split across the years surveyed. Regent Street has been A1 comparison-led since 1997. Records show how the total number of A1 units has shrunk over the years, which suggests that the overall loss of units in the area has been largely due to the loss of A1 units and that smaller units may have progressively been merged into larger ones.

## 2.4. 2018 Site Survey

### 2.4.1. Accessibility and pedestrian flows

Regent Street is well connected to all parts of the city due to its central location and good public transport links. Two very busy Underground stations serve Regent Street, with Oxford Circus (Bakerloo, Central, Victoria lines) located towards the northern end of the street, and Piccadilly Circus (Bakerloo, Piccadilly lines) to the south end of the street. Both stations become very congested at peak hours, with shoppers, visitors and workers from the many offices in the area converging on these interchange stations.

Many bus routes also run along Regent Street, which acts as a key artery for bus travel connecting the north and south of the central area. The bus routes cover many parts of London, linking the area to other parts of the city such as Crystal Palace and Deptford far to the south, the City of London to the east, and Camden Town to the north, all via direct bus routes.

Pedestrian flow is high near Oxford Circus and Piccadilly Circus Underground station entrances. Regent Street is also very accessible on foot from other central areas such as Soho, Covent Garden, Oxford Street and the Royal Parks.



## 2.42. Range of units and floorspace qualitative analysis

### 2.421 Area description, land uses and retail provision

The area presents a diverse retail offer, which includes a good range in prices spanning from high end department stores to mid-range high street retailers. Retail on Regent Street has a strong focus on clothing and accessories, but also features some technology retailers.

Most of the area's retail offer consists of large units hosting flagship stores including Apple, Bose, Nespresso, Burberry and Polo Ralph Lauren, as well as international high street brands such as H&M, Mango, Levi's, Anthropologie and Uniqlo. The area also features the historic Liberty department store and the renowned Hamley's toys store. Most of the area's food and beverage offer is found off the main artery, on secondary streets.



### 3.422 Vacant units

A limited amount of vacancies were observed in the area, mostly concentrated at the southern end. Some units are awaiting new tenants while the majority appeared to be undergoing refurbishment.



## 2.43. State of the primary shopping area environmental quality assessment

### 2.431 Public realm

The area's public realm was found to be of average quality. Although the pavements are relatively wide, the sheer number of pedestrians mean that they are often busy. The pedestrian experience is further affected by the lack of amenities for its visitors, such as opportunities to rest, limited crossing opportunities and the overpowering presence of traffic, predominantly made up of buses.



### 2.432 Cleanliness, safety and security

Cleanliness was judged to be high, with no visible litter observed at the time of visit. The area also feels naturally safe and has a high level of security, with CCTV and security staff in most of the units.

### 2.433 Identity and users

The area is generally very busy and attracts mainly visitors and tourists, due to it being a well-established retail and tourist destination in Central London and its proximity to Oxford Street, Carnaby Street and Piccadilly Circus. The concentration of clothing and accessories retailers also make it attractive for purpose-specific shopping trips for Londoners and local workers.



## 2.5. Performance summary and recommendations

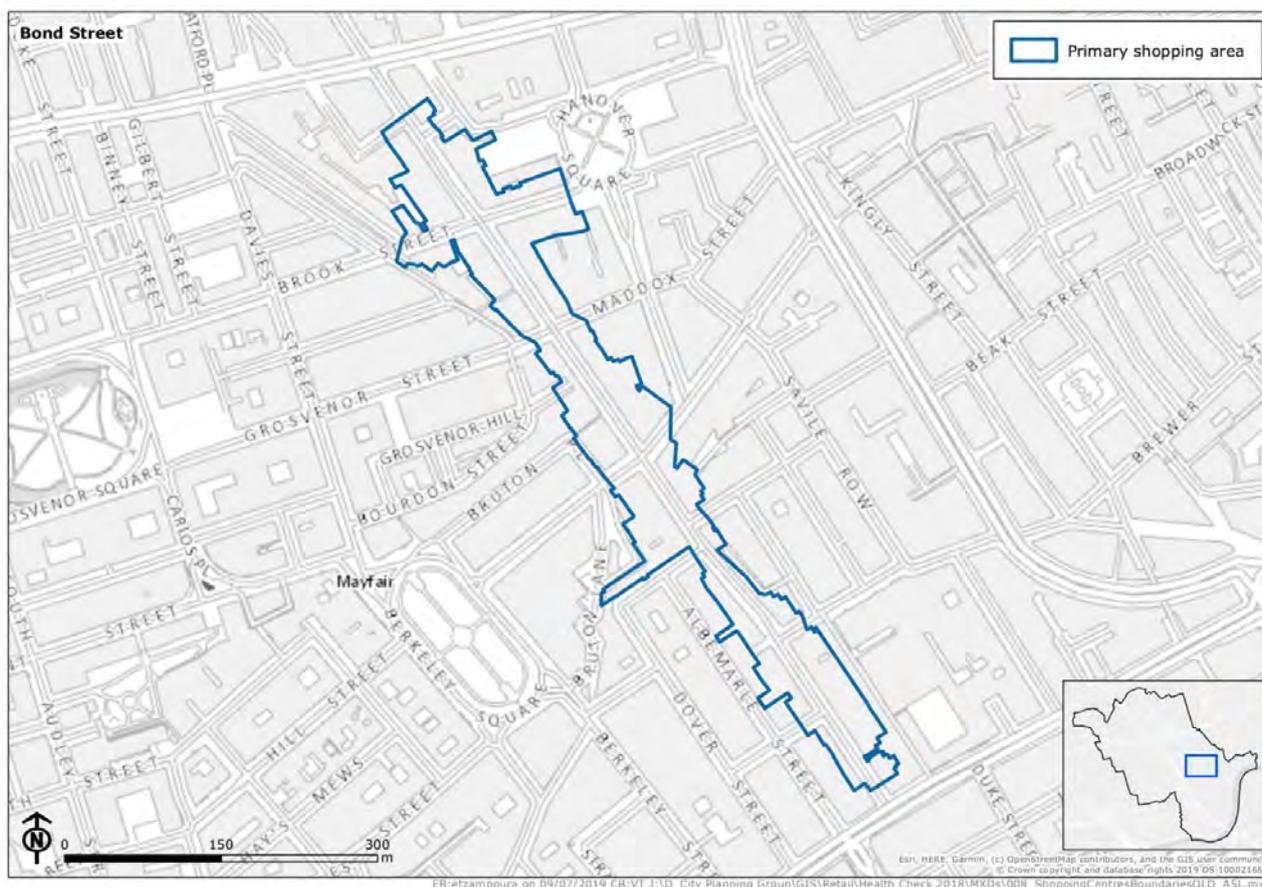
- The area is considered to be 'healthy'. Regent Street is an internationally renowned shopping destination, with a very good comparison retail offer consisting of multiple retailers and flagship stores.
- The number of vacancies is contained and appears to be largely due to redevelopment and upgrading works.
- The level of traffic congestion and lack of amenity space negatively affects the pedestrian experience.

## 2.6. Recommended boundary changes

No boundary changes are recommended.

### 3.0. West End – Bond Street

Map 3.0: Primary shopping area boundary, West End – Bond Street (2017)



#### 3.1. Introduction

Bond Street is a primary shopping area within the designated ‘West End International Shopping Centre’ and is within the CAZ.

The area includes Old and New Bond Street and a number of side streets, creating a large linear area extending north to south from Oxford Street at the northern end, to Piccadilly to the south.

Bond Street has an international reputation for the high-end and specialist retail stores located along Old and New Bond Street. Many of these are international jewellers and fashion houses, along with high end department stores and other specialist retailers, including the Sotheby’s auction house.

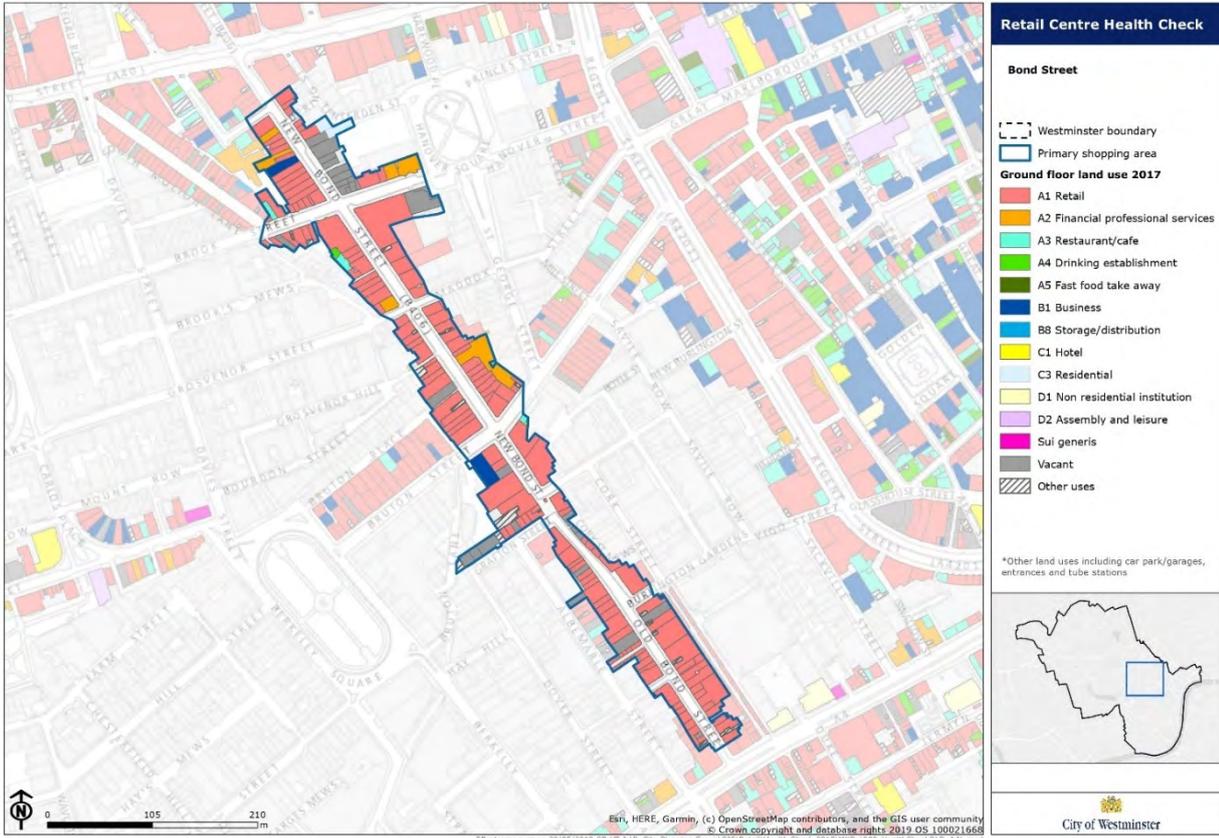
Bond Street benefits from its central location by allowing visitors and tourists to move easily between other neighbouring major shopping area such as Oxford Street and Regent Street. Its proximity to the office area of Mayfair helps to increase the number of visitors to the area.

### 3.2. 2017 Land use analysis

#### 3.21. Ground floor land use map (2017)

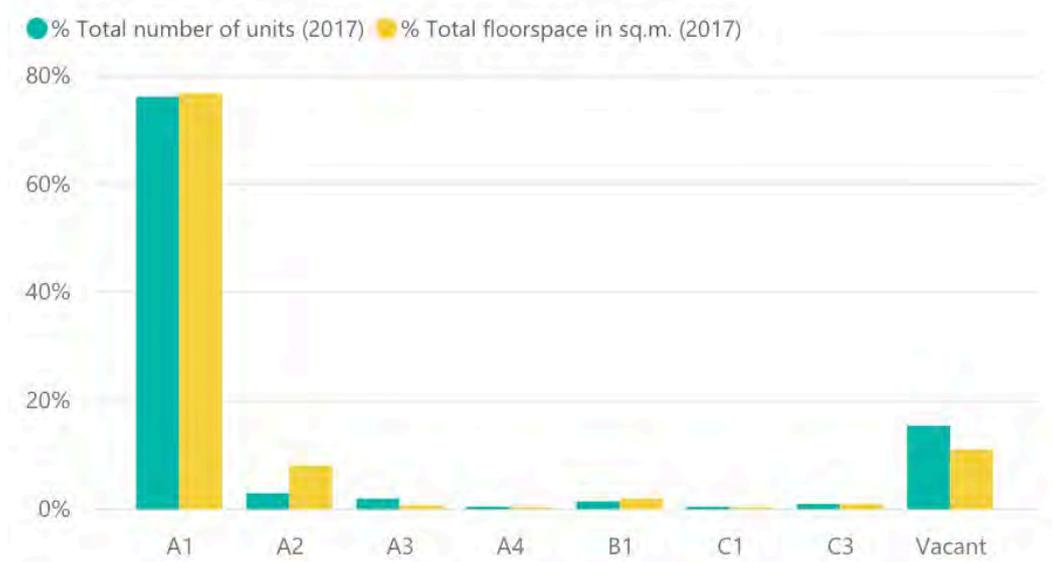
In 2017, 201 total units were identified at ground floor level. The surveyed area covered 40,923 sq m

**Map 3.1: Ground floor land use map, West End – Bond Street (2017)**



#### 3.22. Range of units and floorspace analysis (2017)

**Figure 3.2: Ground floor total number of units and floorspace by land use, West End – Bond Street (2017)**



Bond Street is A1-led, with A1 uses accounting for 77% of the total floorspace of the area. Six A2 units have also been recorded in the area, making 8% of the floorspace. Other recorded uses include a limited amount of A3, A4, B1, C1, and C3. The 2017 survey recorded 31 vacant units within the area, making 15% of the total number of units and 11% of the overall floorspace. The 2018 site survey has found that approximately a third of the vacant units are currently under alteration as part of the major redevelopment scheme of a large block stretching from New Bond Street to Hanover Square, which will also incorporate a new Crossrail station.

**Table 3.3: Ground floor total number of units and floorspace by land use, West End – Bond Street (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	153	76.12%	31,430.65	76.80%
A2	6	2.99%	3,327.71	8.13%
A3	4	1.99%	312.75	0.76%
A4	1	0.50%	76.18	0.19%
B1	3	1.49%	818.06	2.00%
C1	1	0.50%	18.56	0.05%
C3	2	1.00%	425.86	1.04%
Vacant	31	15.42%	4,513.47	11.03%
<b>Total</b>	<b>201</b>	<b>100%</b>	<b>40,923.24</b>	<b>100%</b>

### 3.3. Comparative land use analysis

#### 3.3.1. Comparative range of units and floorspace analysis

**Figure 3.4: Proportion of units by land use, West End – Bond Street (2017)<sup>7</sup>**

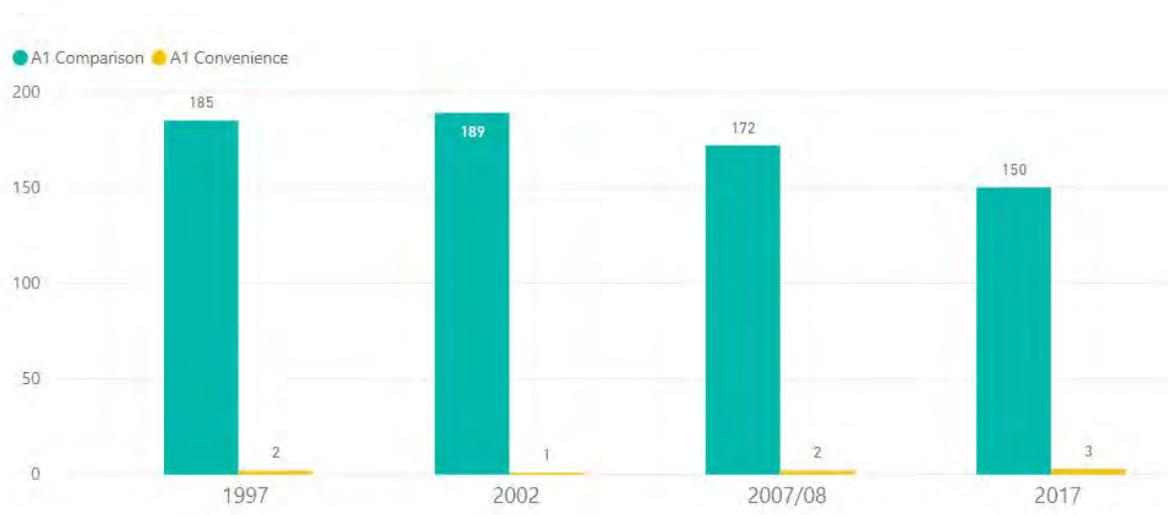


A1 uses have dominated the landscape of Bond Street across the years surveyed and have always accounted for around 80% of the total number of the area’s units, with the latest figure being 86%. The 2017 figure shows a drop from 174 to 153 A1 units since the previous survey, which makes just a 2% relative loss on the proportion of units occupied by A1 uses. The proportion of A2, A3, and C1 uses has remained stable while there is no longer any A5, D1, and Sui Generis use in the area. The number of vacancies in the area has increased from 21 to 31 units between 2007/08 and 2017.

<sup>7</sup> There is no data available for 2012/13 for this centre.

### 3.32. Comparative comparison/convenience split analysis

**Figure 3.5: Number of comparison and convenience A1 units by year, West End – Bond Street (2017)**



The area has had a consistent comparison to convenience split across the years surveyed. Bond Street has been A1 comparison-led since 1997. Records show how the total number of A1 units has shrunk over the years, which suggests that the overall loss of units in the area has been largely due to the loss of A1 units and that smaller units may have progressively been merged into larger ones.

### 3.4. 2018 Site Survey

#### 3.4.1. Accessibility and pedestrian flows

The area is highly accessible via public transport, with Bond Street station (Central, Jubilee lines) on Oxford Street, on the northern end of the area, and Green Park (Jubilee, Piccadilly and Victoria lines) and Piccadilly Circus (Piccadilly and Bakerloo lines) to the southern edge of the area.

A number of buses also serve Regent Street and Oxford Street, which are a five-minute walk away from the area. The area has a moderately intense vehicular traffic, with cars, taxis, and private vans observed at the time of visit. On street parking spaces are currently present on the southern portion of New Bond Street, however ongoing public realm improvement work and the introduction of a Parking Restriction Zone suggest that the new setting will likely feature a more rational and reduced level of long-term parking in this area.

The area was found to have an overall average level of pedestrian flow. Due to the layout of the streets, New Bond Street is largely used as the main connecting road between Oxford Street to the north and Piccadilly to the south.



### 3.42 Range of units and floorspace qualitative analysis

#### 3.421 Area description, land uses and retail provision

The area is predominantly focused on comparison retail, and it hosts many international high-end fashion, jewellery and accessory retailers, and a number of art galleries.

The northern end of New Bond Street up to Brook Street hosts more mid-range retailers (e.g. Russell & Bromley, LK Bennett, Victoria's Secret) which is likely to cater for visitors to Oxford Street, whilst from there south is the largest concentration of luxury clothing brands (e.g. Prada, Louis Vuitton, Chanel, Dior). The southernmost end of the area appears to be more focused on jewellery and accessories, with shops of the likes of Tiffany & Co, Cartier and Bulgari.

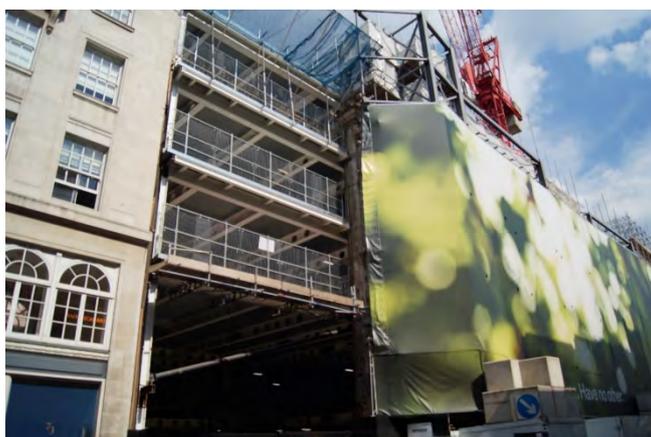
A number of specialist retailers are also present in the Royal Arcade and two auction houses, Bonhams and the renowned Sotheby's, are also located on New Bond Street.



#### 3.422 Vacant units

There is no significant level of vacancy in the area. Most of the vacant units observed were undergoing alteration or were being upgraded.

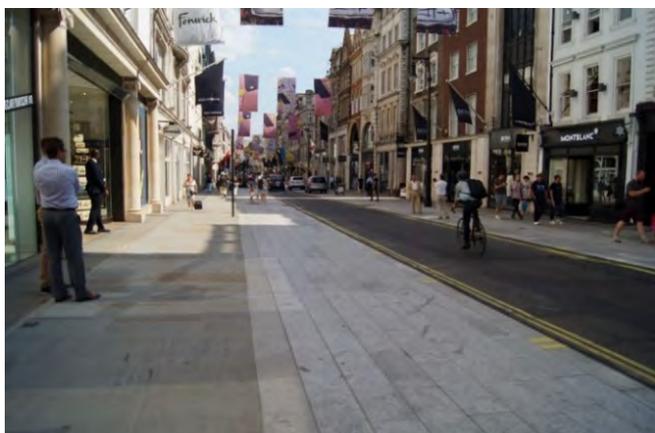
One larger site between New Bond Street, Brook Street and Hanover Square was undergoing redevelopment and will provide a mix of office, residential and retail uses. The site of this project (the 'Hanover Place Masterplan') will also house a new Crossrail station.



### 3.43 State of the primary shopping area environmental quality assessment

#### 3.431 Public realm

The public realm of New Bond Street and of the adjoining streets has been recently undergoing a major upgrade to provide an improved pedestrian environment along the whole stretch of the area. This includes larger pavements, redesigned junctions, pedestrian crossing improvements and a north to south one-way system on New Bond Street. The public realm improvements have also been complemented by the introduction of a Restricted Parking Zone on New Bond Street and the adjoining streets. The quality of the public realm is now very high, providing for an improved pedestrian experience and increased accessibility for all users.



#### 3.432 Cleanliness, safety and security

Some minimal rubbish and fly tipping were observed at the northern end of the area, just off Oxford Street. A very limited amount of commercial refuse bags awaiting collection was also observed. The rest of the area is extremely clean and well maintained. The area feels very safe and has a high level of security, with visible CCTV cameras and security staff at shop entrances.



### 3.433 Identity and users

Most of the stores are flagship stores for renowned high-end international brands. The users of this area seem to be mostly tourists although some workers were also observed.



## 3.5. Performance summary and recommendations

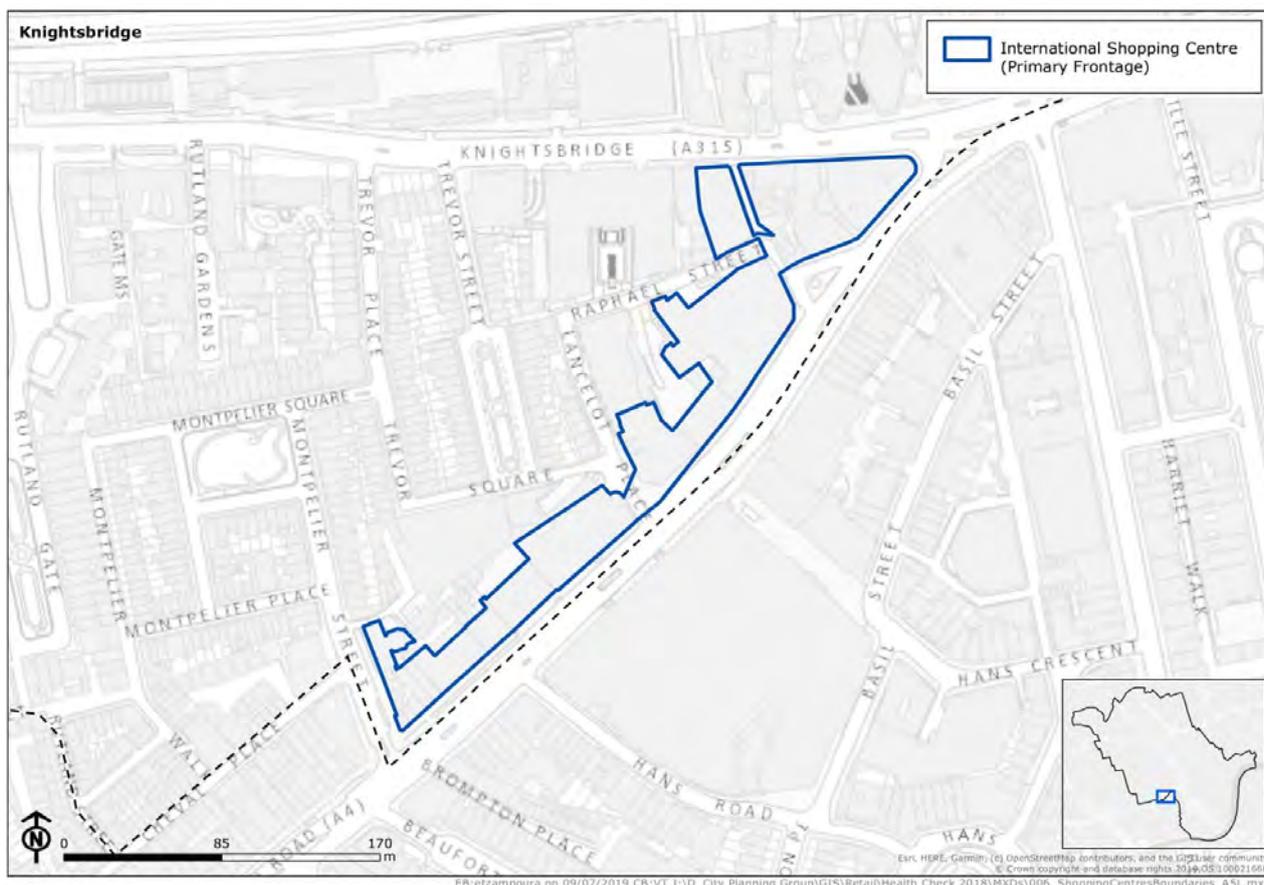
- The area is considered to be 'healthy' and mainly comprises high-end and luxury stores, mainly focusing on clothing and jewellery, and other specialist retailers. The area also hosts two important auction houses. The area mostly caters for high end visitors looking to shop from renowned international brands.
- Although the 2017 land use survey recorded 15% of the total number of units as being vacant, the 2018 site survey has found the majority of these were from sites under alteration. Around a third of the vacancies were due to the large Hanover Square redevelopment.
- The quality of the area has improved recently thanks to the public realm improvements that have also been complemented by the introduction of a Restricted Parking Zone.

## 3.6. Recommended boundary changes

No boundary changes are recommended.

## 4.0. Knightsbridge

Map 4.0: International Shopping Centre boundary, Knightsbridge (2017)



### 4.1. Introduction

Knightsbridge is a designated 'International Shopping Centre' located towards the western boundary of Westminster and is within the CAZ.

It is a linear centre but only the northern portion of the International Shopping Centre falls within Westminster as most of it falls within the Royal Borough of Kensington and Chelsea (RBKC). This report only considers the area that lies within Westminster.

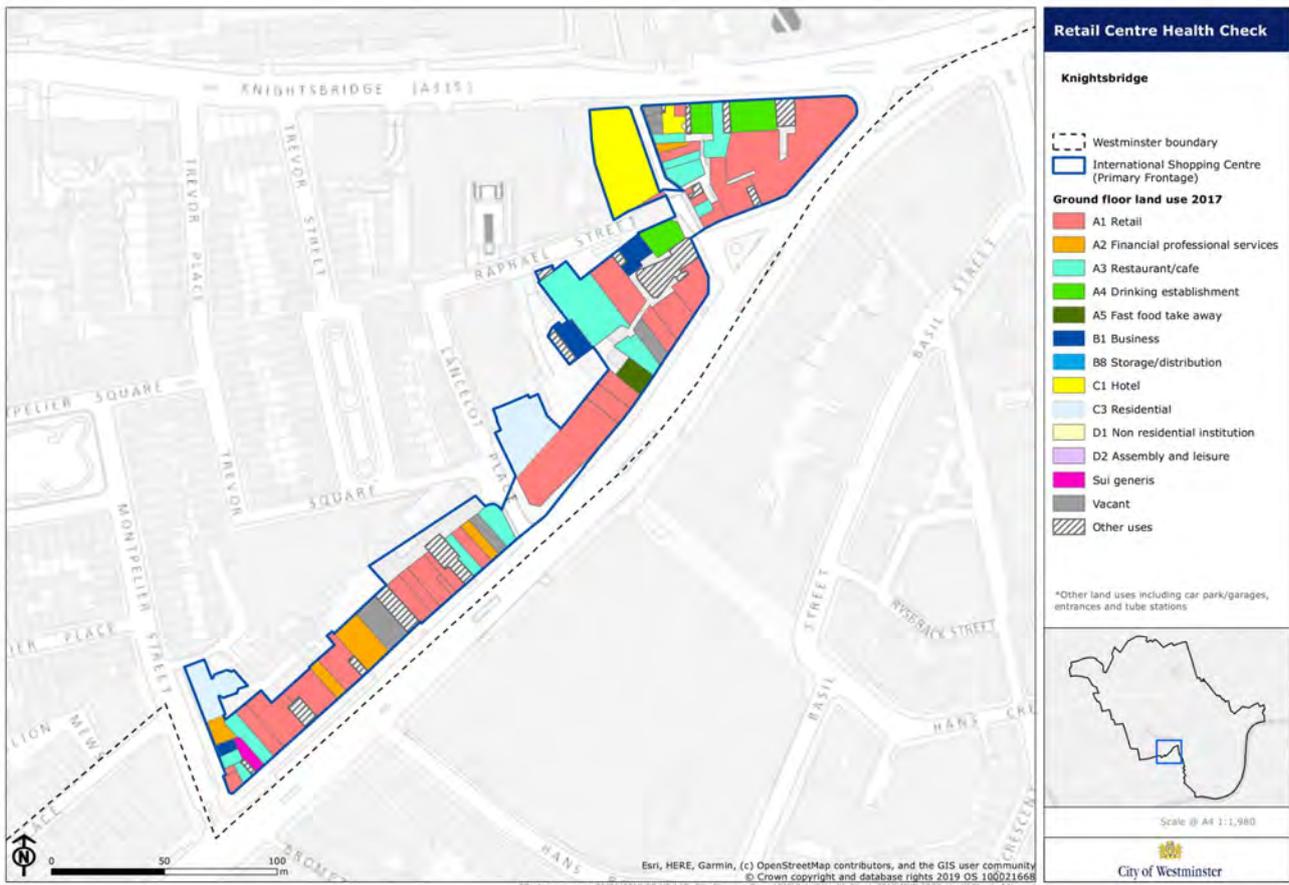
Knightsbridge is within close proximity to Knightsbridge and Hyde Park Corner Underground stations and is close to a range of tourist attractions such as Hyde Park, the Royal Albert Hall, the Science Museum, the Natural History Museum and the Victoria & Albert Museum. The renowned Harrods and Harvey Nichols department stores are located within the RBKC portion of the International Centre. Overall, the area is a shopping and tourist destination. Knightsbridge is within close proximity to Knightsbridge and Hyde Park Corner underground stations and is close to a range of tourist attractions such as Hyde Park, the Royal Albert Hall, the Science Museum, the Natural History Museum and the Victoria & Albert Museum. The renowned Harrods and Harvey Nichols department stores are located within the RBKC portion of the International Centre. Overall, the area is a shopping and tourist destination.

## 4.2. 2017 Land use analysis

### 4.21. Ground floor land use map (2017)

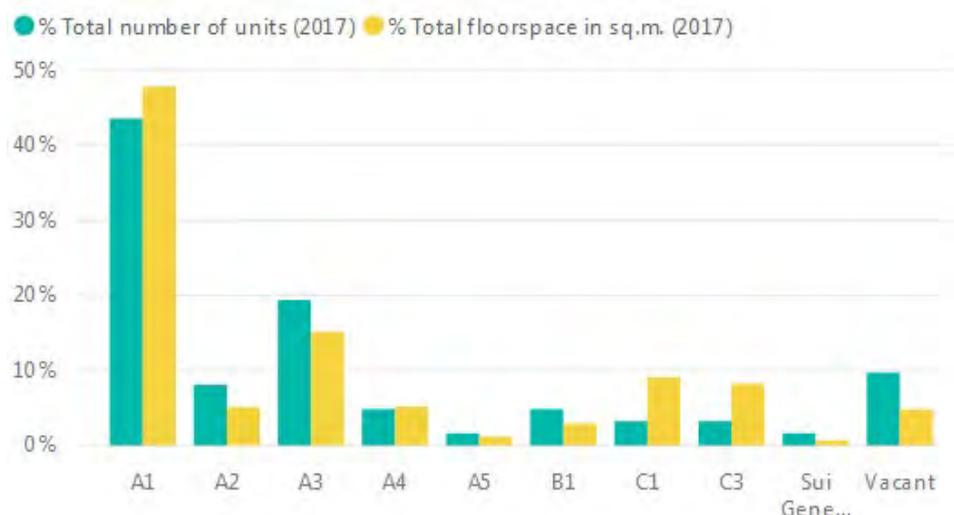
In 2017, 62 total units were identified at ground floor level. The surveyed area covered 11,959 sq m

**Map 4.1: Ground floor land use map, Knightsbridge (2017)**



#### 4.22. Range of units and floorspace analysis (2017)

**Figure 4.2: Ground floor total number of units and floorspace by land use, Knightsbridge (2017)**



The centre is shop-led with 27 A1 units recorded in 2017. These account for 44% of all units within the centre and for 48% of the overall floorspace. A3 uses represent 19% of all the units and 15% of the floorspace in 2017. The area also accommodates five A2 units, three A4 units and one A5 unit. Three B1 units have also been recorded, accounting for 8% of the floorspace. The 2017 survey recorded six vacant units, accounting for 10% of all units and 5% of the overall floorspace. The units were in the northern end (adjacent to Knightsbridge road) and along Brompton Road. The 2018 site survey has found that most vacant units have been occupied or are in the process of being renovated or let.

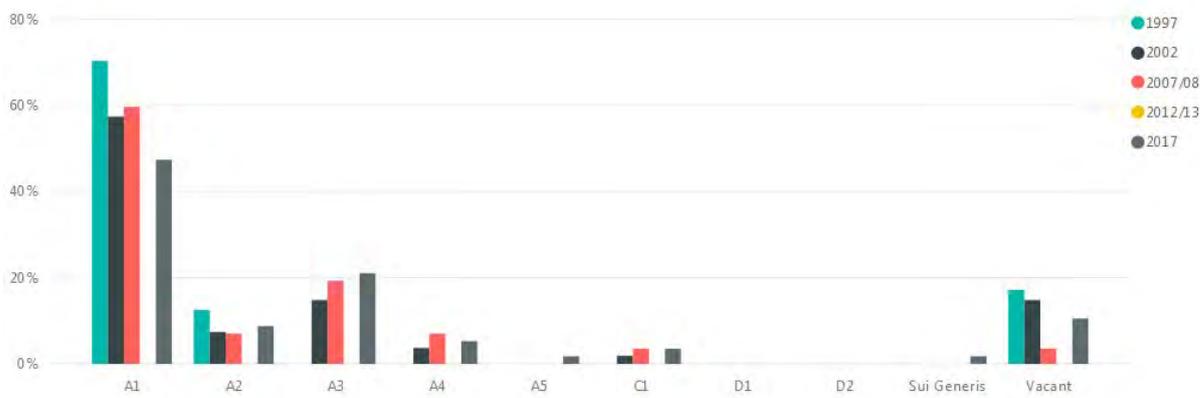
**Table 4.3: Ground floor total number of units and floorspace by land use, Knightsbridge (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	27	43.55%	5,720.22	47.83%
A2	5	8.06%	610.30	5.10%
A3	12	19.35%	1,810.53	15.14%
A4	3	4.84%	617.65	5.16%
A5	1	1.61%	140.39	1.17%
B1	3	4.84%	345.66	2.89%
C1	2	3.23%	1,084.70	9.07%
C3	2	3.23%	979.81	8.19%
Sui Generis	1	1.61%	79.67	0.67%
Vacant	6	9.68%	570.06	4.77%
<b>Total</b>	<b>62</b>	<b>100%</b>	<b>11,959.00</b>	<b>100%</b>

### 4.3. Comparative land use analysis

#### 4.31. Comparative range of units and floorspace analysis

**Figure 4.4: Proportion of units by land use, Knightsbridge (2017)<sup>8</sup>**

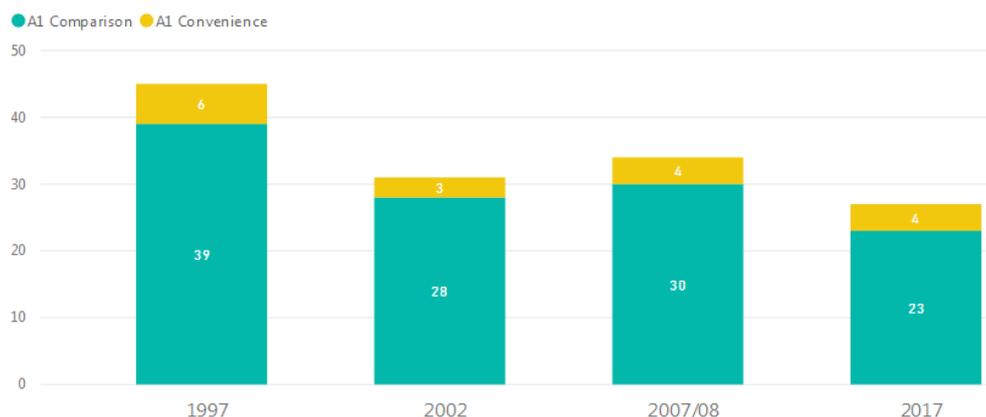


The proportion of A1 uses has decreased between 1997 and 2017. While there has been a relatively steady decrease in A1 units over this time, a healthy supply of approximately 44% of units remains. However, an increase in the number of A3 units has been recorded and there are more cafés and restaurants than ever: in 2017, A3 units accounted for 21% of the units (12 units).

The vacancy level decreased between 1997 and 2007/2008 but has since then slightly increased: six vacant units were recorded in 2017, accounting for 11% of the floorspace.

#### 4.32. Comparative comparison/convenience split analysis

**Figure 4.5: Number of comparison and convenience A1 units by year, Knightsbridge (2017)**



The centre has had a consistent comparison to convenience split across the years surveyed. Kingsbridge has been A1 comparison-led since 1997 although a small proportion of convenience shops remain present.

<sup>8</sup> There is no data available for 2012/13 for this centre.

## 4.4. 2018 Site Survey

### 4.41. Accessibility and pedestrian flows

The area is highly accessible via public transport, with Knightsbridge station (Piccadilly line) at the northern edge of the centre. Hyde Park Corner station (Piccadilly line) and South Kensington station (Piccadilly, District and Circle lines) are also within walking distance. A number of buses also serve the centre. The area has a moderately intense vehicular traffic, with cars, taxis, private vans, coaches and buses observed at the time of visit. The area was found to have a high level of pedestrian flow, particularly along Brompton Road which is largely used by shoppers and tourists.



### 4.42 Range of units and floorspace qualitative analysis

#### 4.421 Area description, land uses and retail provision

Knightsbridge is focused on comparison retail, and it hosts many high-end fashion stores with big floorplates (e.g. Burberry, Lacoste, Guess) in the eastern portion. This portion of the centre is well-maintained, and the shops have attractive frontages.

The middle portion of the centre features a mix of high-street brands (e.g. Topshop) but also some souvenir shops, which are opposite Harrods. The middle section and western section of the street also feature several banks, small supermarkets, cafés, betting shops and a shisha bar.

The presence of uses such as banks and convenience shopping in the western portion of the centre appears to provide a functional local convenience role for surrounding communities and workers. These units also support shoppers and tourists that visit the area or that stay in the hotels located in the vicinity.

#### 4.422 Vacant units

There is no significant level of vacancy in the area. All units appeared to be occupied or in the process of being let when the 2018 site survey was carried out.



#### 4.43 State of the shopping centre environmental quality assessment

##### 4.431 Public realm

The public realm was found to be of low quality and inadequate for the number of people using the centre every day. The pedestrian environment is very busy because of the high number of users but also due to encroachment from commercial uses and street clutter particularly in the western section of the centre. The area lacks amenities for its visitors, particularly in terms of limited resting space (benches) and public toilets. Brompton Road is heavily trafficked and provides for a car-dominated environment. Traffic congestion along the street also contributes to the sense of clutter and to air pollution, which negatively impact on the pedestrian experience.

##### 4.432 Cleanliness, safety and security

Cleanliness was judged to be average along the centre. Several examples of commercial waste awaiting collection were observed during the site visit however little evidence of litter, broken glass or street fouling was observed during the site visit. Due to the nature of the retail offer in the eastern part of the centre, many units had on site security guards and visible CCTV cameras. The generally area feels safe and secure.



#### 4.433 Identity and users

The area is a known tourist and retail destination, and numerous international tourists and visitors were observed at the time of visit. Due to its more mixed offer, the western portion of the centre appears to also cater for workers and residents with cafés and convenience retail.



### 4.5. Performance summary and recommendations

- The centre is considered to be ‘healthy’. Knightsbridge is an internationally renowned destination for comparison shopping that mostly attracts international visitors and high-end shoppers. The western portion of the centre accommodates a wider mix of uses that appear to complement and support the core comparison retail function. The mix of uses should be monitored to ensure Knightsbridge remains a prime comparison retail destination.
- Although the 2017 survey recorded a small number of vacant units, the 2018 site survey found that all the units were occupied or ready to be let.
- The area scored average on cleanliness and would benefit from improved street cleansing.
- The public realm was found to be inadequate, particularly because of its cluttered and unpleasant pedestrian environment.
- Traffic congestion and pollution from vehicular traffic negatively impacts on the quality of the area.

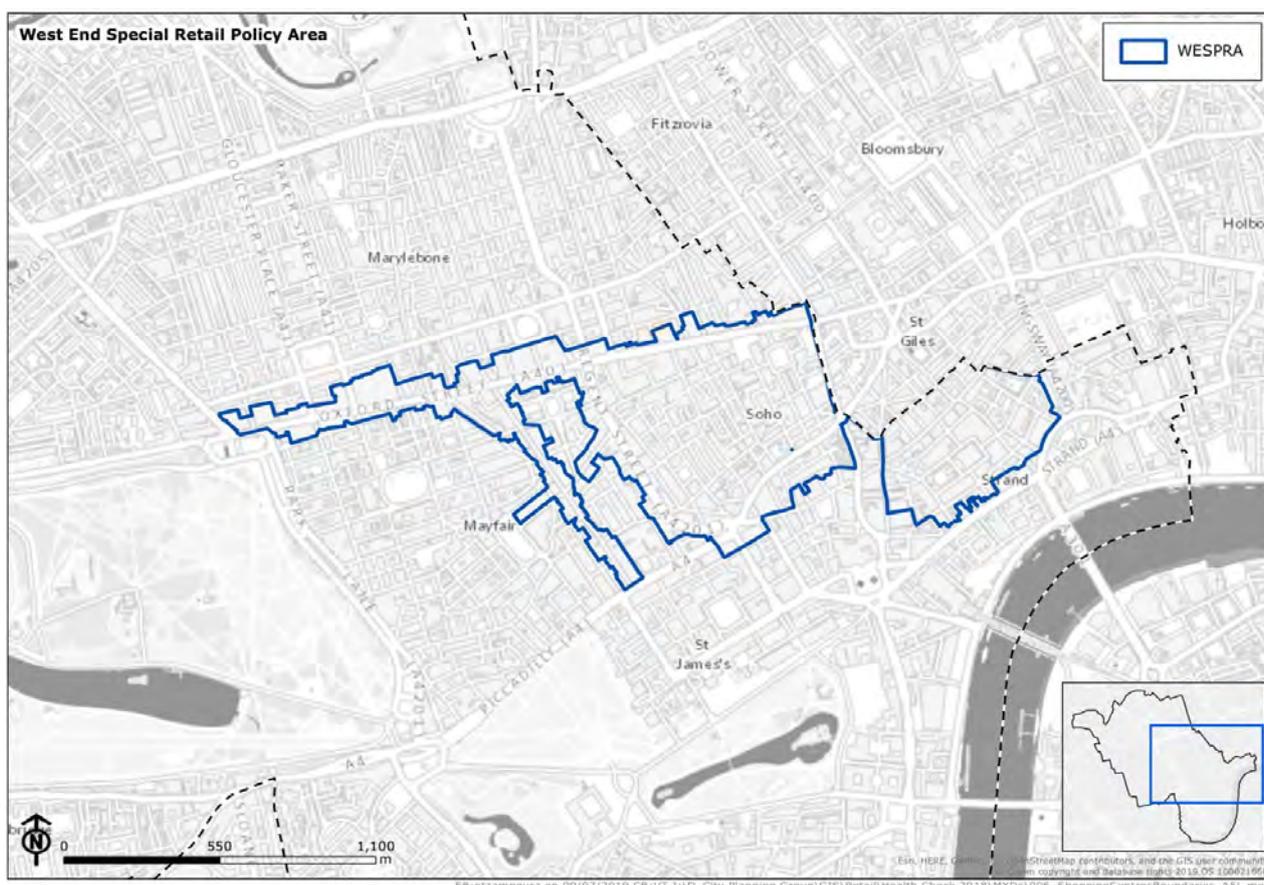
### 4.6. Recommended boundary changes

No boundary changes are recommended.

## SECTION B: West End Special Retail Policy Area (WESRPA)

### 5.0. West End Special Retail Policy Area (WESRPA)

Map 5.0: West End Special Retail Policy Area (2017)



#### 5.1. Introduction

The 'West End Special Retail Policy Area' (WESRPA) comprises the following areas:

- Oxford Street
- Regent Street
- Bond Street
- Soho
- Shaftesbury Avenue
- Carnaby Street
- Chinatown
- Covent Garden

The WESRPA is a policy designation that covers a large portion of Westminster's West End, one of London's most iconic parts of the city that caters for visitors, workers and residents. The WESRPA includes the 'West End International Shopping Centre' and a number of primary shopping areas distinct in character and function, such as Soho and Covent Garden. The primary shopping areas within the WESRPA have been individually assessed as part of the Town Centre Health Checks Report 2018-19<sup>9</sup>.

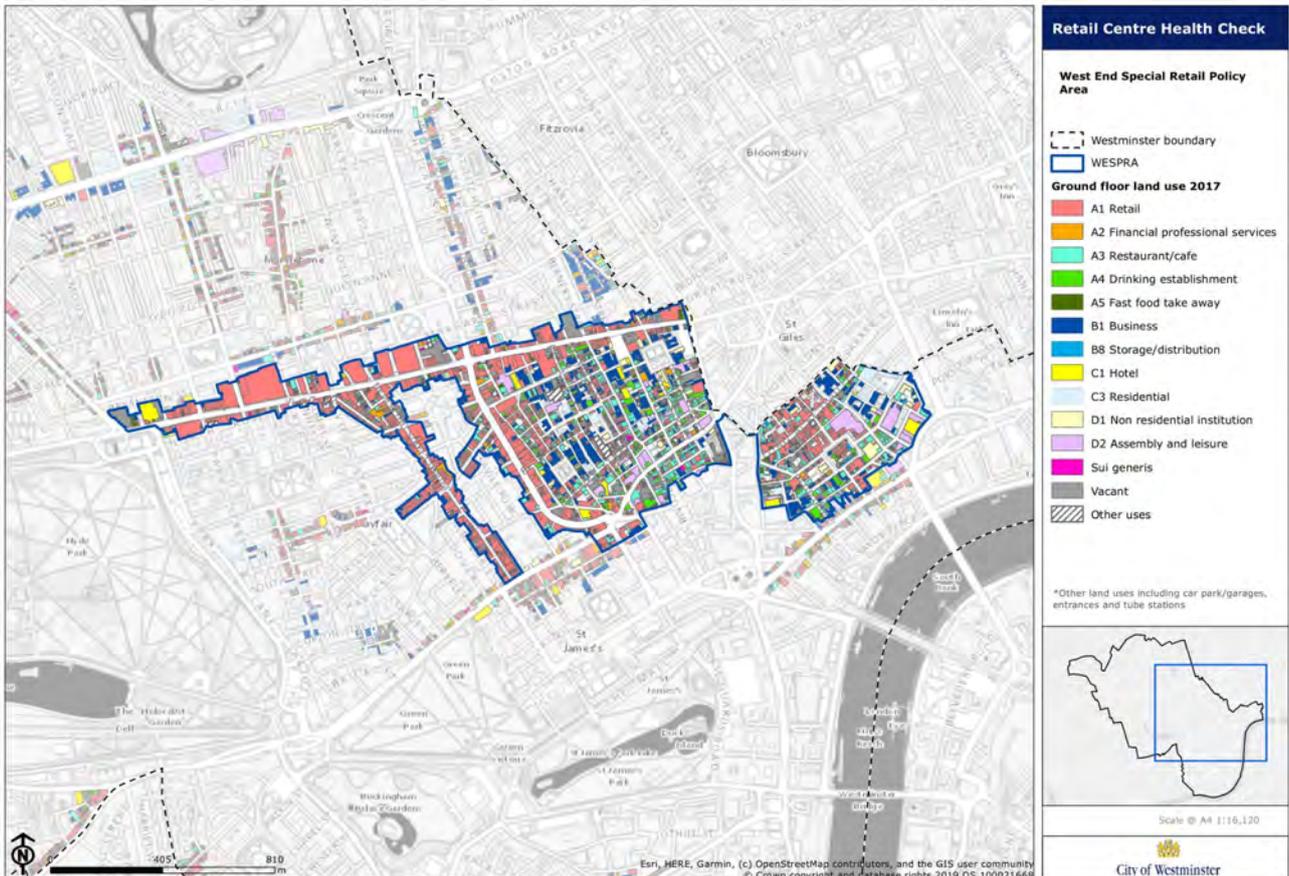
<sup>9</sup> Oxford Street, Regent Street and Bond Street have been analysed as part of the West End International Shopping Centre (Section A, Appendix 2).

## 5.2. 2017 Land use analysis

### 5.2.1 Ground floor land use map (2017)

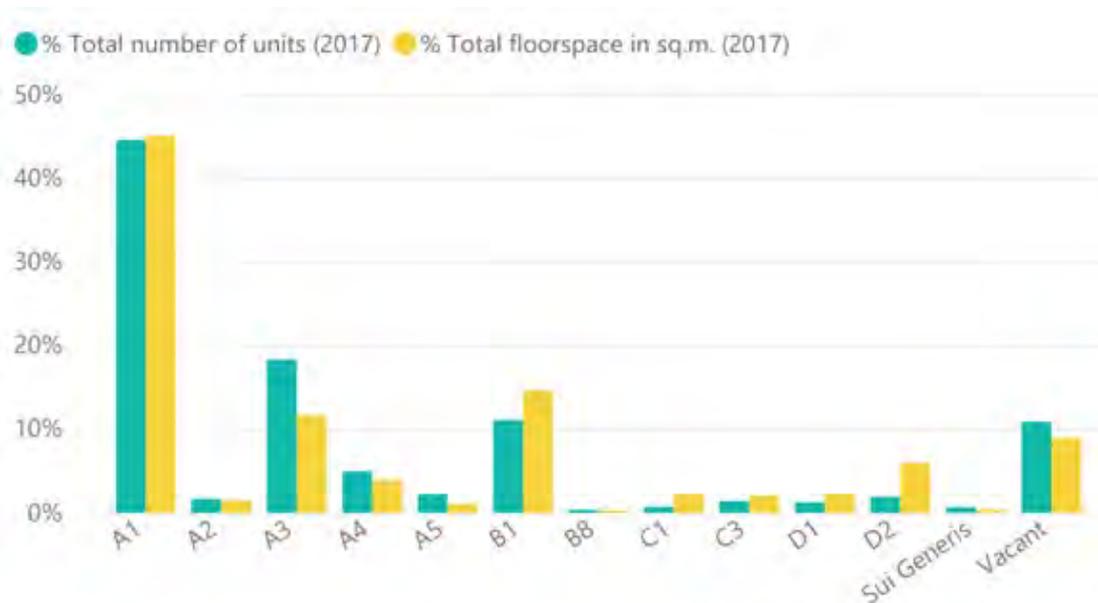
In 2017, 2965 total units were identified at ground floor level. The surveyed area covered 608,732 sq m

**Figure 5.1: Ground floor land use map, West End Special Retail Policy Area (2017)**



### 5.2.2 Range of units and floorspace analysis (2017)

**Figure 5.2: Ground floor total number of units and floorspace, West End Special Retail Policy Area (2017)**



The West End Special Retail Policy Area is shop-led with 1321 A1 units recorded in 2017. These account for 45% the overall floorspace at ground floor level.

The second largest use is B1 with 329 units making 15% of the total floorspace, followed by A3 uses with 543 units covering 12% of the area's floorspace. Other uses recorded in this area include a limited amount of A2, A4, A5, B8, C1, C3, D1, D2 and Sui Generis.

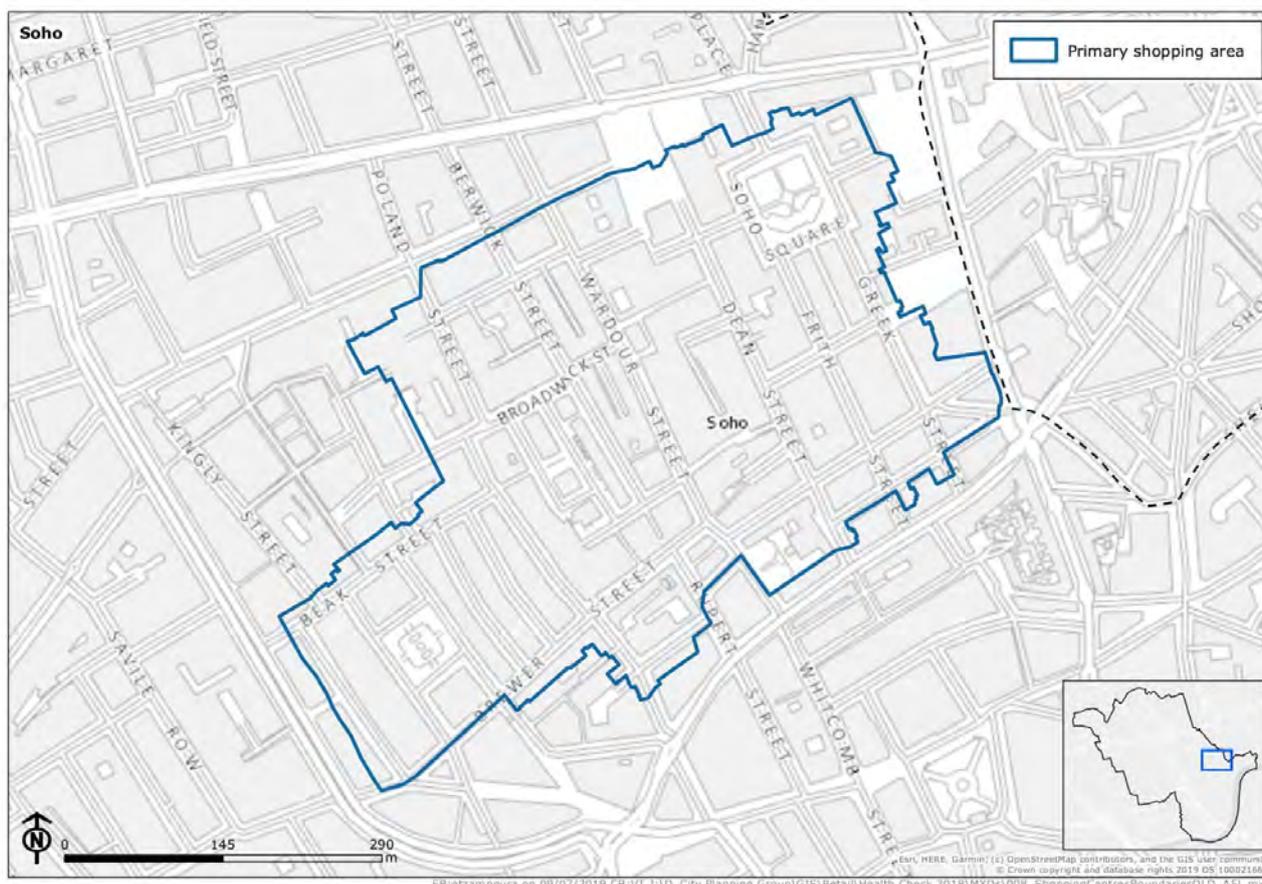
The 2017 survey recorded 323 vacant units in this area, accounting for 11% of the total number of units and 9% of the overall floorspace.

**Table 5.3: Ground floor total number of units and floorspace by land use, West End Special Retail Policy Area (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	1321	44.55%	274422.58	45.08%
A2	49	1.65%	8962.30	1.47%
A3	543	18.31%	71038.32	11.67%
A4	147	4.96%	23910.60	3.93%
A5	66	2.23%	6501.49	1.07%
B1	329	11.10%	89163.38	14.65%
B8	10	0.34%	888.57	0.15%
C1	21	0.71%	13756.51	2.26%
C3	42	1.42%	12691.54	2.08%
D1	37	1.25%	14266.43	2.34%
D2	57	1.92%	36355.16	5.97%
Sui Generis	20	0.67%	2179.88	0.36%
Vacant	323	10.89%	54595.41	8.97%
<b>Total</b>	<b>2965</b>	<b>100%</b>	<b>608732.18</b>	<b>100%</b>

## 6.0. WERSPA – Soho

Map 6.0: Primary shopping area boundary, WERSPA – Soho (2017)



### 6.1. Introduction

Soho is a primary shopping area within the designated West End Special Retail Policy Area and is within the CAZ.

Soho is a large area bound by Oxford Street to the north, Shaftesbury Avenue to the south, Regent Street to the west and Charing Cross Road to the east. The area is located within close proximity to Piccadilly Circus and Oxford Circus Underground stations and numerous tourist destinations, such as Theatreland and Chinatown, which helps to attract visitors to the area.

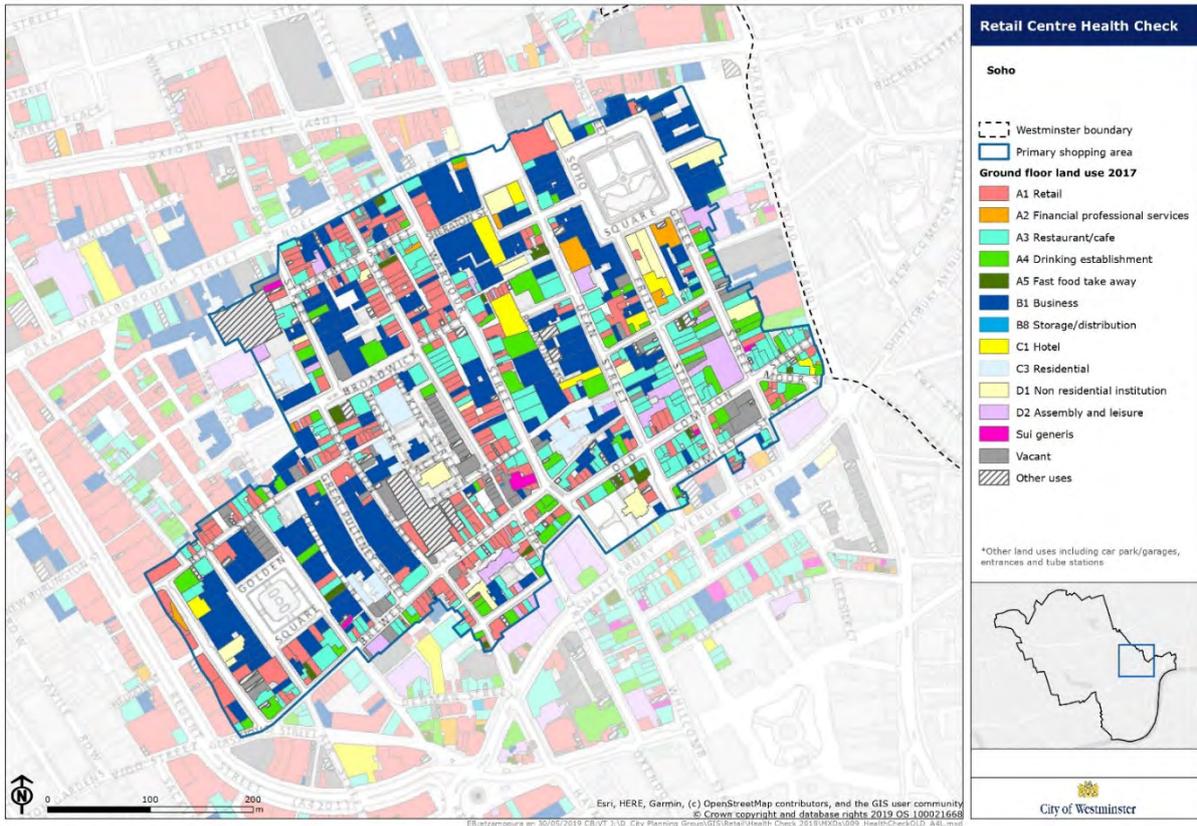
Soho is itself a large shopping and entertainment area which attracts a wide variety of people due to its atmosphere, historic environment and variety of boutiques, nightclubs, restaurants and bars. The area also contains considerable office space, and a wide range of independent retailers. The area provides services for its residential population and local workers.

## 6.2. 2017 Land use analysis

### 6.21. Ground floor land use map (2017)

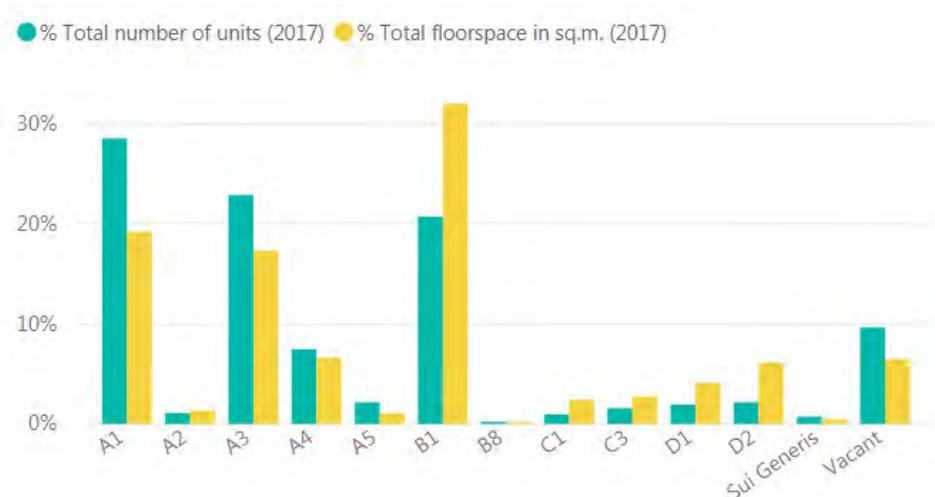
In 2017, 830 total units were identified at ground floor level. The surveyed area covered 132,396 sq m

**Map 6.1: Ground floor land use map, WERSPA – Soho (2017)**



### 6.22. Range of units and floorspace analysis (2017)

**Figure 6.2: Ground floor total number of units and floorspace by land use, WERSPA – Soho (2017)**



The largest street level use in Soho is A1, with 237 units recorded in 2017, accounting for 29% of the total number of units but just 19% of the area's floorspace. A1 is followed by A3 uses with 190 units making 23% of the total number of units and 17% the overall floorspace.

The 2017 survey also recorded 172 B1 units, accounting for 21% of the total number of units and 32% of the overall floorspace. These different units and floorspace proportions suggest that, although B1 units are smaller in number particularly when compared to A1 units, office units are generally larger and take up more floorspace whilst retail units tend to be of smaller size in this area.

Also of note are A4 uses with 62 units recorded in 2017, making 7% of the total number of units and 7% of the overall floorspace. Soho has a strong evening and night time economy and is recognised as one of the key entertainment locations in the capital. A3 and A4 uses together account for nearly 24% of all floor space, which is higher than the CAZ average. Eighteen D2 units were also recorded in this area in 2017, accounting for 6% of the floorspace and 2% of the total number of units. Other uses in this centre include a limited amount of A2, A5, C1, C3, D1 and Sui generis.

In 2017, 80 vacant units were recorded accounting for 6% of the floorspace. The 2018 site survey has found that most vacant units are ongoing development.

**Table 6.3: Ground floor total number of units and floorspace by land use, WERSPA – Soho (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	237	28.55%	25,444.82	19.22%
A2	9	1.08%	1,766.43	1.33%
A3	190	22.89%	22,949.55	17.33%
A4	62	7.47%	8,795.36	6.64%
A5	18	2.17%	1,421.11	1.07%
B1	172	20.72%	42,391.37	32.02%
B8	1	0.12%	12.98	0.01%
C1	8	0.96%	3,191.11	2.41%
C3	13	1.57%	3,643.28	2.75%
D1	16	1.93%	5,439.13	4.11%
D2	18	2.17%	8,142.42	6.15%
Sui Generis	6	0.72%	614.29	0.46%
Vacant	80	9.64%	8,584.53	6.48%
<b>Total</b>	<b>830</b>	<b>100%</b>	<b>132,396.38</b>	<b>100%</b>

## 6.3. Comparative land use analysis

### 6.31. Comparative range of units and floorspace analysis

Figure 6.4: Proportion of units by land use, WERSPA – Soho (2017)<sup>10</sup>



The number of A1 units has remained mostly stable across the years surveyed, ranging from a minimum of 221 units in 1997 to a 256-unit peak in 2007/08. Currently, there are 237 A1 units, making 37% of the total number of units. In terms of proportions, however, A1 units have experienced a considerable shrinkage between 1997 and 2002, while they have remained mostly stable between 2002 and 2007/08, only to experience a further minor drop in the 2017 survey.

A1 is still the major use in Soho, however land use records show how A3 uses have emerged and accounted for 27% of the total units in 2002 and have since then continued to experience a steady marginal growth, reaching 30% in 2017. There is a likely negative correlation between the drop in A1 uses and the emergence of A3 units in this area. A5 units have also experienced a steady marginal growth across the years surveyed.

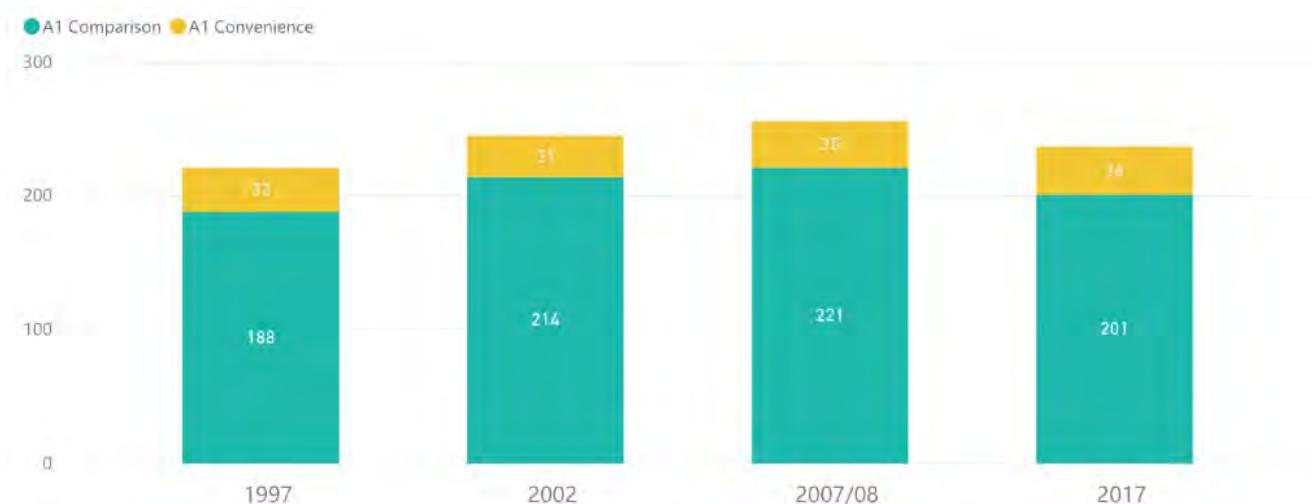
A4 uses have also expanded between 2002 and 2007/08 but have shown a decline in the latest record. Other uses which have experienced a decline in this area are A2, D2 and Sui Generis.

Vacancies appear to have peaked in 2017 with 80 units accounting for 12% of the total number of units, compared to a previously stable trend between 1997 and 2007/08.

<sup>10</sup> There is no data available for 2012/13 for this centre.

## 6.32. Comparative comparison/convenience split analysis

Figure 7.5: Number of comparison and convenience A1 units by year, WERSPA – Soho (2017)



The centre has had a consistent comparison to convenience split across the years surveyed. The centre retains a stable proportion of convenience units.

## 6.4. 2018 Site Survey

### 6.41. Accessibility and pedestrian flows

Soho is well connected by several Underground stations that are situated on the borders of the shopping area. Oxford Circus (Bakerloo, Victoria, Central lines) is located in the north west corner of the area, Piccadilly Circus (Bakerloo, Piccadilly lines) is located in the south west corner of the area, while Tottenham Court Road (Northern, Central lines) station is located in the north east corner of the area. Covent Garden and Leicester Square stations are also within walking distance.

No bus routes run directly through Soho, because the road network is very narrow, and traffic is controlled by a one-way system. However, many bus routes serve the bordering roads of Oxford Street, Regent Street, Shaftsbury Avenue and Charing Cross Road.

Movement through Soho is predominantly by foot; however, the site visit has found a moderate amount of traffic mostly from delivery vans operating in the area and on street parking was also present on most streets.

The site visit found pedestrian flow to be average, although it is reasonable to expect more activity in the evening and at night, given the role of Soho as an evening and night time economy area.

## **6.42 Range of units and floorspace qualitative analysis**

### *6.421 Area description, land uses and retail provision*

The area presents a mix of uses, the largest proportion of which comprises shops, restaurants and cafés, and office spaces. There is a strong independent presence in Soho compared to the rest of Westminster which includes a number of live music venues and drinking establishments.

The site survey has found that shops are mostly focused on the western edge, towards Carnaby Street and Oxford Street and around Berwick Street and Brewer Street. The area presents a number of special uses, including records shops on Berwick Street and a cluster of specialist adult shops between Berwick Street market, Brewer Street and Rupert Street, to the south east of the area. A number of LGBT-orientated bars and clubs are particularly clustered along Old Compton Street, to the south of the area. Restaurants and cafés are also more present in the south east of the area, whilst clusters of office spaces are found around Soho Square and Golden Square.

Numerous shops, restaurants and cafés also seem to focus on daytime activities and cater for visitors as well as for the local working and living population.

Also of note in the area are several community uses, the Berwick Street market and a number of health centres.

The area is generally characterised by small units, with the exception of some larger office plates.

### *6.422 Vacant units*

Most of the vacant units observed at the time of visit were undergoing redevelopment. A large concentration of vacancies was found along the Berwick Street market, at 90-104 Berwick Street. The site is currently undergoing redevelopment which will include a new hotel, new homes including affordable flats and improved shop units.

## **6.43 State of the primary shopping area environmental quality assessment**

### *6.431 Public realm*

The quality of the public realm was judged as average. There is public amenity space in Soho, in the form of several historic squares and gardens which are used by local workers and visitors during the day. However, the squares suffer from clutter and weak landscaping. The area has narrow footways, often with uneven pavement and often cluttered, particularly due to a number of ongoing highway maintenance works in the area. Dropped kerbs, however, are widely present, making the area relatively accessible to users with reduced mobility. On the other hand, there are not many defined safe crossings, but this does not seem to constitute a major issue as users of the area seem to walk relatively freely and cross the street at any point.

There is significant on street parking, and an intense delivery activity during the day, which detracts from the quality of the area.

#### *6.432 Cleanliness, safety and security*

Cleanliness was judged to be average, with some areas performing better than others. Some litter and commercial waste awaiting collection were found during the time of visit. The level of safety and security was judged to be average, with CCTV installed in the area but no visible police presence during the day. Depending on the street, there is a mixed feeling of safety.

#### *6.433 Identity and users*

The area is a known tourist and retail destination, and numerous visitors were observed at the time of the visit. The area also caters for workers, residents and people from around London that are attracted by its leisure offer and unique character. Evidence of rough sleeping and street drinkers was found at the time of visit and anti-social behaviour was noticed particularly on side streets.

### **6.5. Performance summary and recommendations**

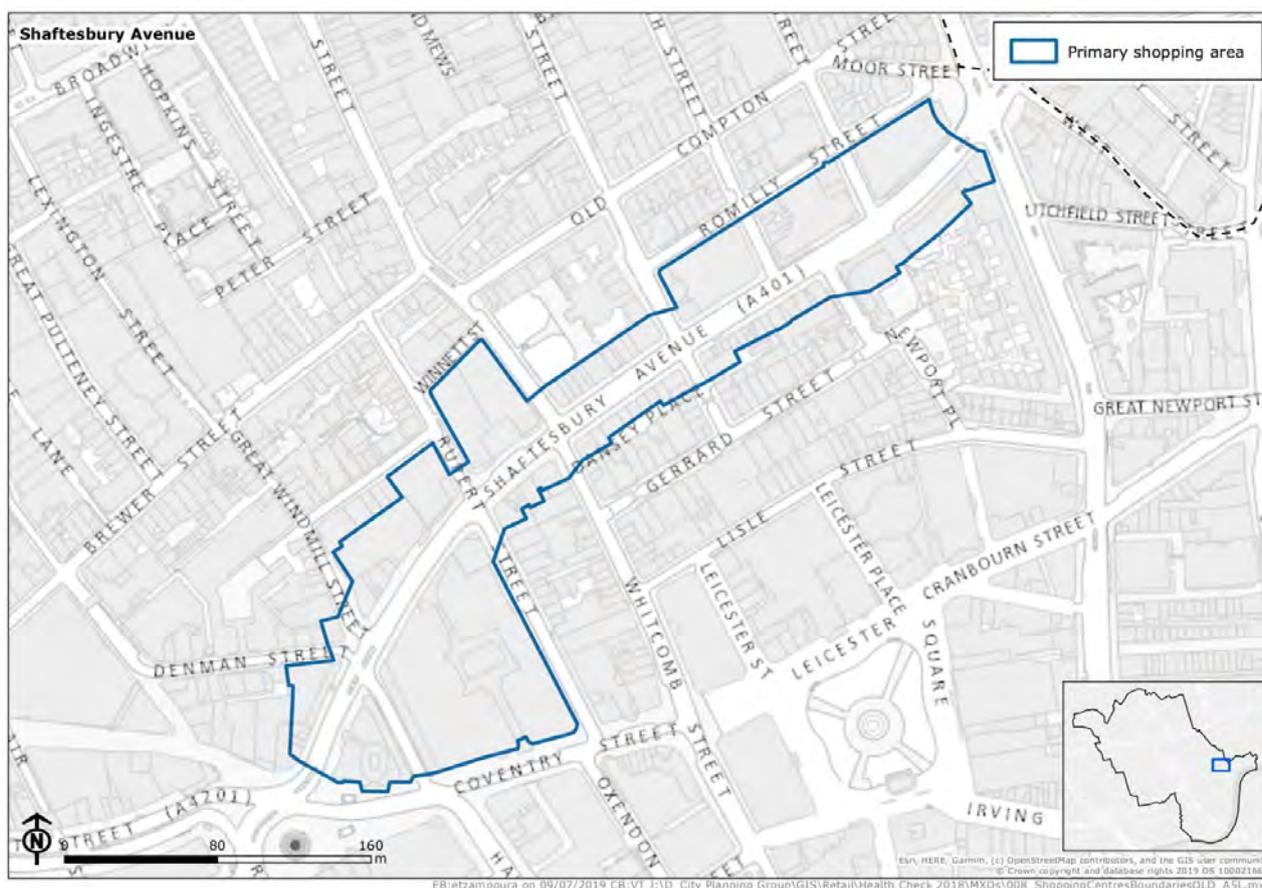
- The area is considered to be 'healthy'. Soho is a known destination for specialist shopping focused around record and adult shops. The centre also has a strong leisure and entertainment offer with several restaurant and cafés, drinking establishments and entertainment uses that contribute to its evening and night time economy.
- Most of the vacancies observed were due to the 90-104 Berwick Street redevelopment and are therefore not considered to be of concern.
- The public realm quality is average, Soho could benefit from improved cleanliness and landscaping.

### **6.6. Recommended boundary changes**

No boundary changes are recommended.

## 7.0. WERSPA – Shaftesbury Avenue

Map 7.0: Primary shopping area boundary, WERSPA – Shaftesbury Avenue (2017)



### 7.1. Introduction

Shaftesbury Avenue is a primary shopping area within the designated West End Special Retail Policy Area and is within the CAZ.

Shaftesbury Avenue is a linear entertainment and shopping area, extending southwest to northeast from Piccadilly Circus at the western end of the street to Cambridge Circus and the city boundary at the eastern end. The area is within close proximity to Piccadilly Circus Underground station and numerous tourist destinations such as Chinatown and Soho which attract visitors to the area.

Shaftesbury Avenue is renowned for its number of theatres and other entertainment venues. There are also many shops, bars and restaurants along Shaftesbury Avenue, including many oriental shops and restaurants where the area borders Chinatown.

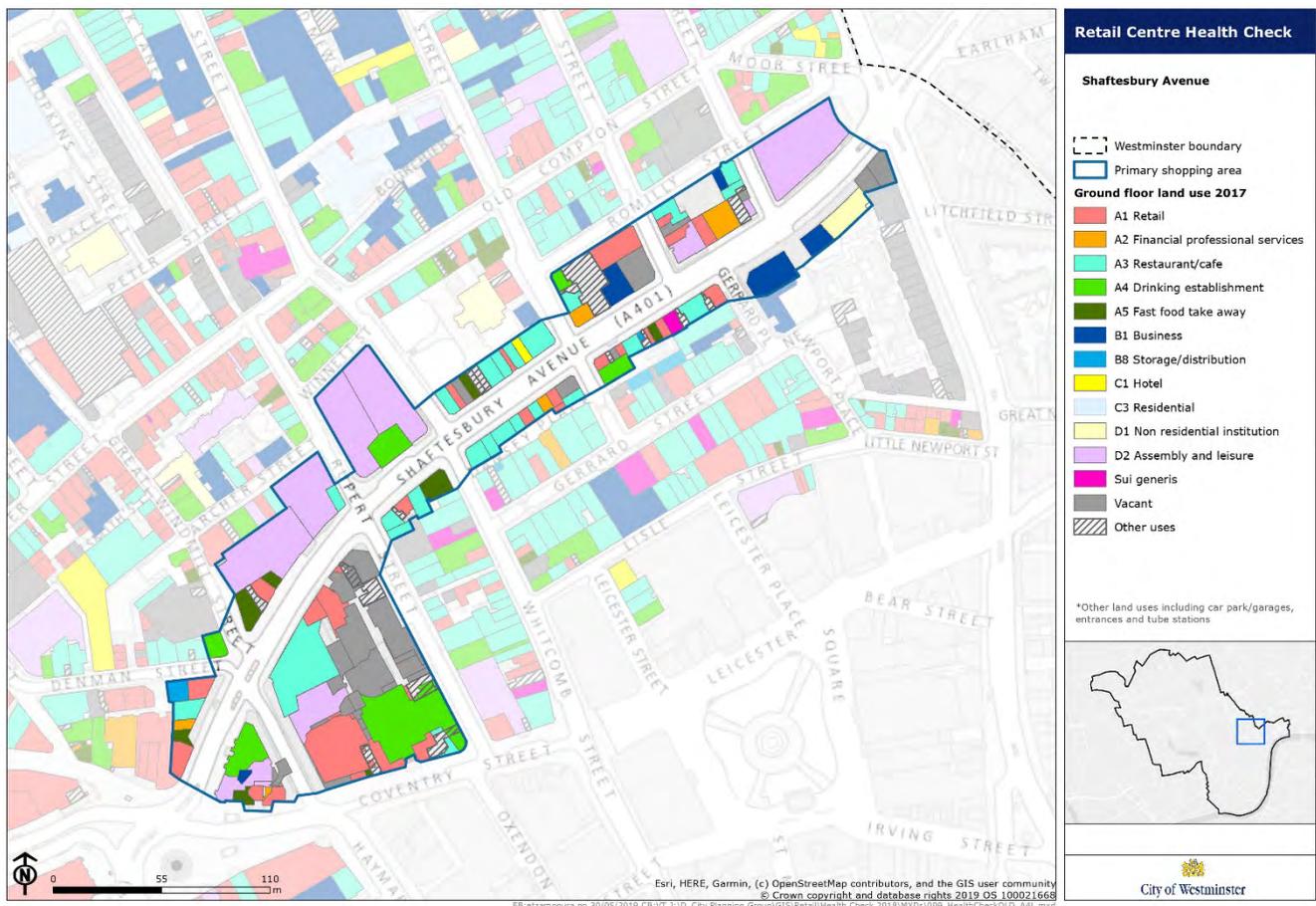


## 7.2. 2017 Land use analysis

### 7.2.1. Ground floor land use map (2017)

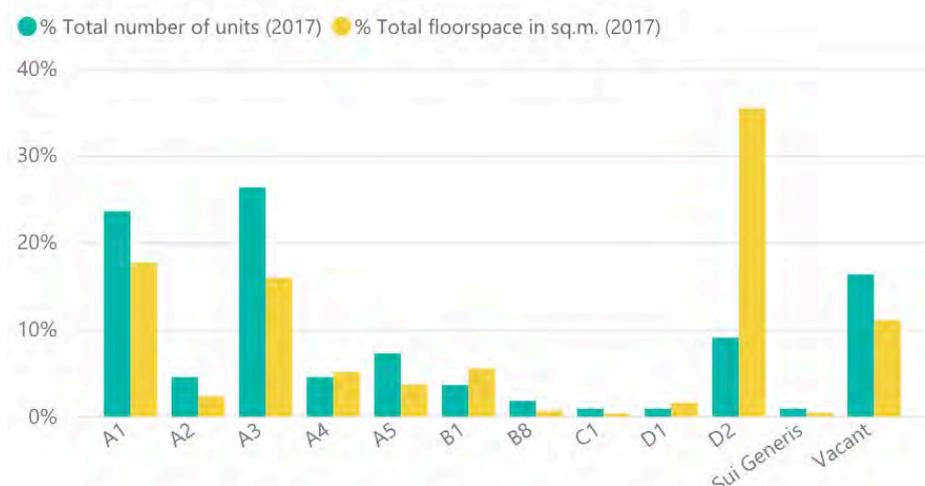
In 2017, 110 total units were identified at ground floor level. The surveyed area covered 18,467 sq m

**Map 7.1: Ground floor land use map, WERSPA – Shaftesbury Avenue (2017)**



## 7.22. Range of units and floorspace analysis (2017)

**Figure 7.2: Ground floor total number of units and floorspace by land use, WERSPA – Shaftesbury Avenue (2017)**



The predominant land use in Shaftesbury Avenue is D2 with 10 units making 35% of the total floorspace. These include a number of theatres, cinemas and a casino which generally have large floorplates.

A good balance of A1 and A3 uses complement the entertainment offer. The 2017 survey recorded 26 A1 units and 29 A3 units, making 18% and 16% of the total floorspace respectively.

Other uses in this centre include a limited amount of A2, A4, A5, B1, B8, C1, D1 and Sui Generis.

There were 18 vacant units in 2017, accounting for 16% of the total units and 11% of the overall floorspace. The 2018 site survey has found that the largest portion of vacant units is clustered in a block to the south of the area which is ongoing development.

**Table 7.3: Ground floor total number of units and floorspace by land use, WERSPA – Shaftesbury Avenue (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	26	23.64%	3,275.98	17.74%
A2	5	4.55%	430.52	2.33%
A3	29	26.36%	2,949.33	15.97%
A4	5	4.55%	946.20	5.12%
A5	8	7.27%	680.30	3.68%
B1	4	3.64%	1,019.76	5.52%
B8	2	1.82%	122.10	0.66%
C1	1	0.91%	62.35	0.34%
D1	1	0.91%	297.42	1.61%
D2	10	9.09%	6,550.76	35.47%
Sui Generis	1	0.91%	79.85	0.43%
Vacant	18	16.36%	2,052.19	11.11%
<b>Total</b>	<b>110</b>	<b>100%</b>	<b>18,466.76</b>	<b>100%</b>

## 7.3. Comparative land use analysis

### 7.31. Comparative range of units and floorspace analysis

**Figure 7.4: Proportion of units by land use, WERSPA – Shaftesbury Avenue (2017)<sup>11</sup>**



The centre has experienced a steady reduction in A1 units across the years surveyed, moving from 45 units in 1997 to 26 units in 2017, representing a nearly 50% drop. In 2017, A1 units accounted for 25% of the total number of units.

There were no A3 uses recorded before 2002, when 20 units (19% of the total units) were found and the figure has steadily increased to 29 units in 2017 when they accounted for 28% of the total number of units.

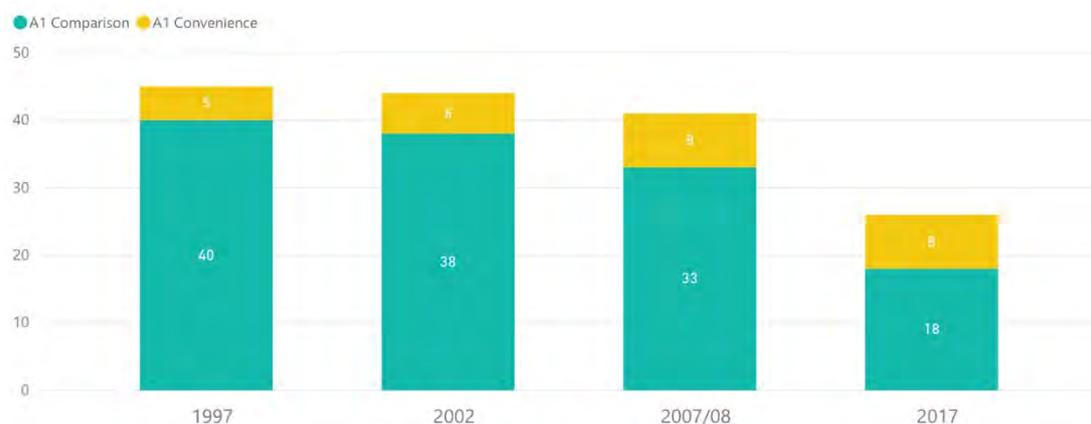
A5 uses have quadrupled since the last survey, with the 2017 land use survey recording eight A5 units accounting for 8% of the total units of the area.

A2 and A4 units have shrunk since the last survey and currently account for 5% of the total units each.

Vacancies have steadily increased since 2002 and currently account for 18% of the total units with 17 units.

### 7.32. Comparative comparison/convenience split analysis

**Figure 7.5: Number of comparison and convenience A1 units by year, WERSPA – Shaftesbury Avenue (2017)**



<sup>11</sup> There is no data available for 2012/13 for this centre.

The area has had a consistent comparison to convenience split across the years surveyed. Shaftesbury Avenue has been A1 comparison-led since 1997. However, the overall number of A1 units has shrunk considerably between 1997 and 2017 as has the proportion of comparison uses which suggests that the units which have disappeared were of comparison retail.

## **7.4. 2018 Site Survey**

### **7.41. Accessibility and pedestrian flows**

The nearest Underground stations are Piccadilly Circus (Piccadilly, Bakerloo lines) to the west and Leicester Square (Northern, Piccadilly lines) to the east.

The area is directly served by a number of bus routes which operate along Shaftesbury Avenue.

The area appears to be mainly accessed on foot, particularly due to the close link to Chinatown to the south and Soho to the north, which are both predominantly visited on foot. Visitors to these areas tend to move from one area to another during their visit. Although the site visit has found pedestrian flows to be average, the number of entertainment uses on Shaftesbury Avenue itself means that pedestrian flows are often heavy, especially in relation to the area's evening and night-time function.

### **7.42 Range of units and floorspace qualitative analysis**

#### *7.421 Area description, land uses and retail provision*

The area is well known as an entertainment and tourist destination as reflected in the proportions of entertainment uses. The area is home to five theatres – the Queen's Theatre, Gielgud Theatre, Palace Theatre, Lyric Theatre and Apollo Theatre – as well as several cinemas including the Curzon and Picture House Central and a casino.

A number of restaurants are also found especially in the middle section of Shaftesbury Avenue, complementing the entertainment uses of the area.

A large proportion of A1 units consist of souvenir and gift shops, whilst Asian stores to the south of Shaftesbury Avenue present a more varied mix including convenience stores, travel agents and natural health shops. Shaftesbury Avenue also has a number of banks and bureaux de change to cater for the tourists visiting the area.

The Trocadero, which used to be one of the main attractions of the area, has been closed since 2014. The street level units are now being used mostly as souvenir shops.

The number of tourist and souvenir shops, money exchange outlets and one betting shop on Shaftesbury Avenue contribute to a low-quality retail offer.



#### 7.422 Vacant units

The largest proportion of vacant units is clustered in a block to the south of the area, which was previously home to the Trocadero. Other vacant units to the eastern end of the area belong to the Centre Cross site that has been recently developed, extending from Chinatown into Shaftesbury Avenue.



### 7.43 State of the primary shopping area environmental quality assessment

#### 7.431 Public realm

The public realm was found to be of low quality. Shaftesbury Avenue is traffic dominated and pavements are cluttered by encroachment from tourist and souvenir shops. The ongoing works on the Trocadero also negatively affect pedestrian flows to some extent, due to the presence of scaffolding.

#### 7.432 Cleanliness, safety and security

The area scores average in terms of cleanliness. Some evidence of refuse bags and cardboard boxes left on the street was found.

The centre was judged to have an average level of security. There were no visible security measures in place, however security staff were present at most entertainment venues

### *7.433 Identity and users*

The centre is mainly used by tourists and visitors due to its entertainment offer and close proximity to other tourist destinations, and to a lesser extent by local residents and workers. Some evidence of anti-social behaviour, street drinking and rough sleeping was found.

## **7.5. Performance summary and recommendations**

- The area is considered to have a 'neutral' performance. Shaftesbury Avenue is a mixed-use area predominantly serving visitors and to a lesser extent residents and workers. The area's theatres are the main attractors, which are complemented by a good food and beverage offer. However, A1 uses are generally of low quality and largely consist of souvenir shops.
- Since its closure in 2014, the Trocadero entertainment centre has not been replaced by a comparable offer. Most of the vacancies recorded for this area are located on this site.
- The area scored low on public realm quality, whilst its cleanliness and security were judged to be average.
- Traffic congestion and pollution negatively impacts on the quality of the area.

## **7.6. Recommended boundary changes**

No boundary changes are recommended.

## 8.0. WERSPA – Carnaby Street

Map 8.0: Primary shopping area boundary, WERSPA – Carnaby Street (2017)



### 8.1. Introduction

Carnaby Street is a primary shopping area within the designated West End Special Retail Policy Area and is within the CAZ.

Carnaby Street is a shopping area, located to the east of Regent Street and bounded to the east and south by Soho. The area is located in close proximity to Oxford Street and Regent Street and to a number of attractions, such as the London Palladium and the London College of Music. The street is close to Oxford Circus and Piccadilly Circus Underground stations and numerous tourist destinations, such as Soho.

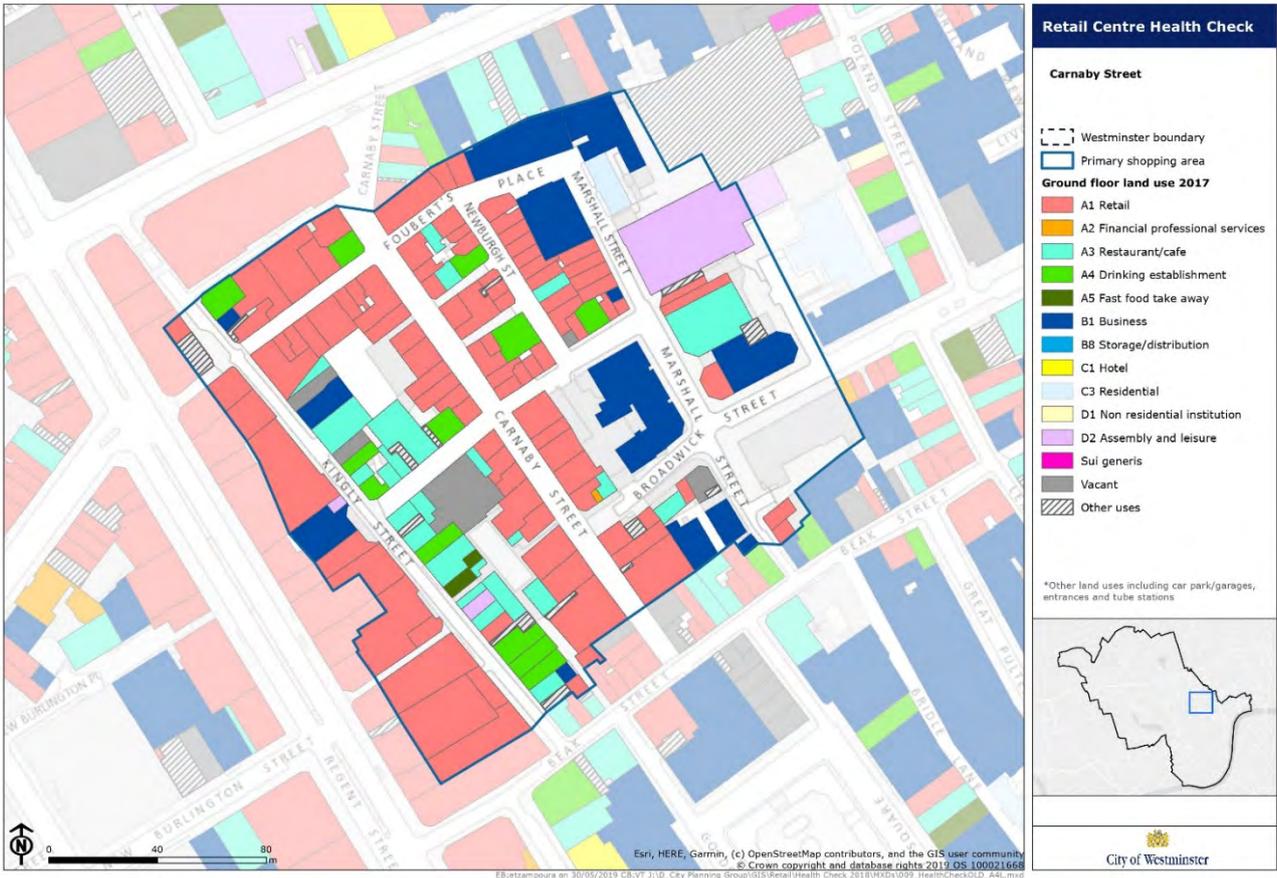
Carnaby Street is pedestrian friendly and contains a mix of uses which help attract people to the centre during the day to shop mainly clothes and during the evening thanks to its entertainment uses.

## 8.2. 2017 Land use analysis

### 8.2.1. Ground floor land use map (2017)

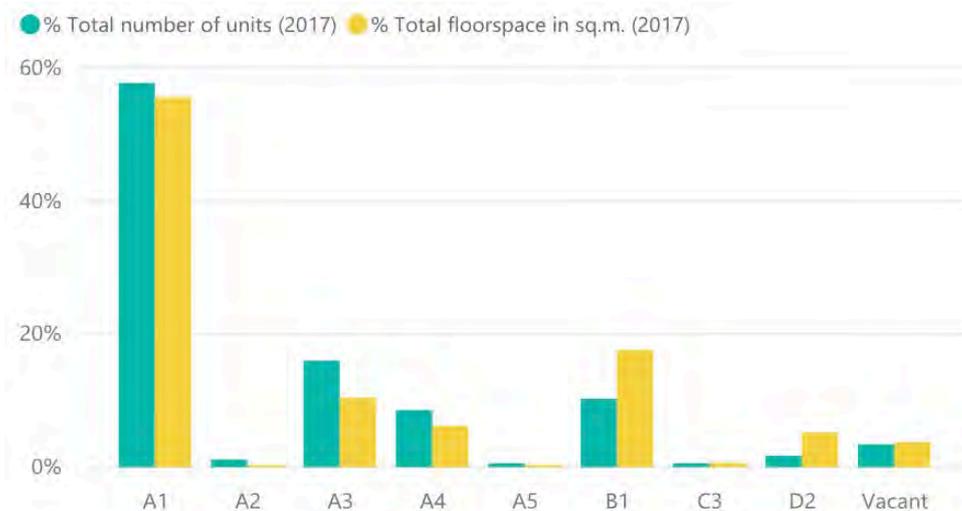
In 2017, 175 total units were identified at ground floor level. The surveyed area covered 28,708 sq m

**Map 8.1: Ground floor land use map, WERSPA – Carnaby Street (2017)**



### 8.2.2. Range of units and floorspace analysis (2017)

**Figure 8.2: Ground floor total number of units and floorspace by land use, WERSPA – Carnaby Street (2017)**



Carnaby Street is shop-led with 101 A1 units recorded in 2017. These account for 58% of all units within the area and for 56% of the overall floorspace at ground floor level.

A3 is the second largest use by type in the area with 28 units, making 16% of the total number of units and 10% of the overall floorspace in the area, followed by B1 with 18 units and A4 uses with 15 units (respectively 18% and 6% of the total floorspace). Other uses recorded include a limited amount of A2, A5, C3 and D2.

There were six vacant units in 2017, accounting for 3% of all units and 4% of the overall floorspace. The 2018 site survey found that there were no vacant units in the area.

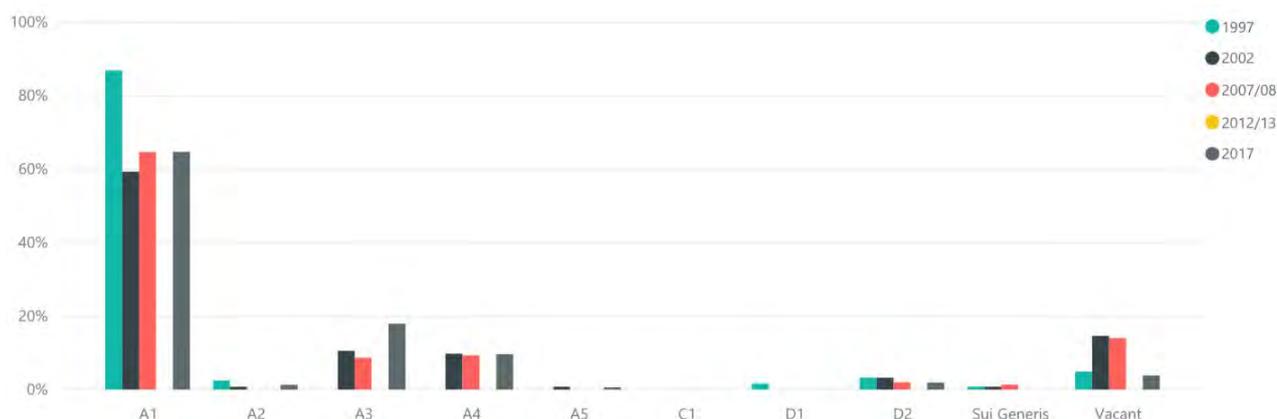
**Table 8.3: Ground floor total number of units and floorspace by land use, WERSPA – Carnaby Street (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	101	57.71%	15,956.60	55.58%
A2	2	1.14%	60.29	0.21%
A3	28	16.00%	2,989.24	10.41%
A4	15	8.57%	1,787.51	6.23%
A5	1	0.57%	90.79	0.32%
B1	18	10.29%	5,053.34	17.60%
C3	1	0.57%	185.39	0.65%
D2	3	1.71%	1,493.09	5.20%
Vacant	6	3.43%	1,091.73	3.80%
<b>Total</b>	<b>175</b>	<b>100%</b>	<b>28,707.98</b>	<b>100%</b>

### 8.3. Comparative land use analysis

#### 8.3.1. Comparative range of units and floorspace analysis

**Figure 8.4: Proportion of units by land use, WERSPA – Carnaby Street (2017)<sup>12</sup>**



<sup>12</sup> There is no data available for 2012/13 for this centre.

The area is A1-led and after a considerable shrinkage between 1997 and 2002, the proportion of A1 uses has remained mostly stable, especially since the last survey period in 2007/08.

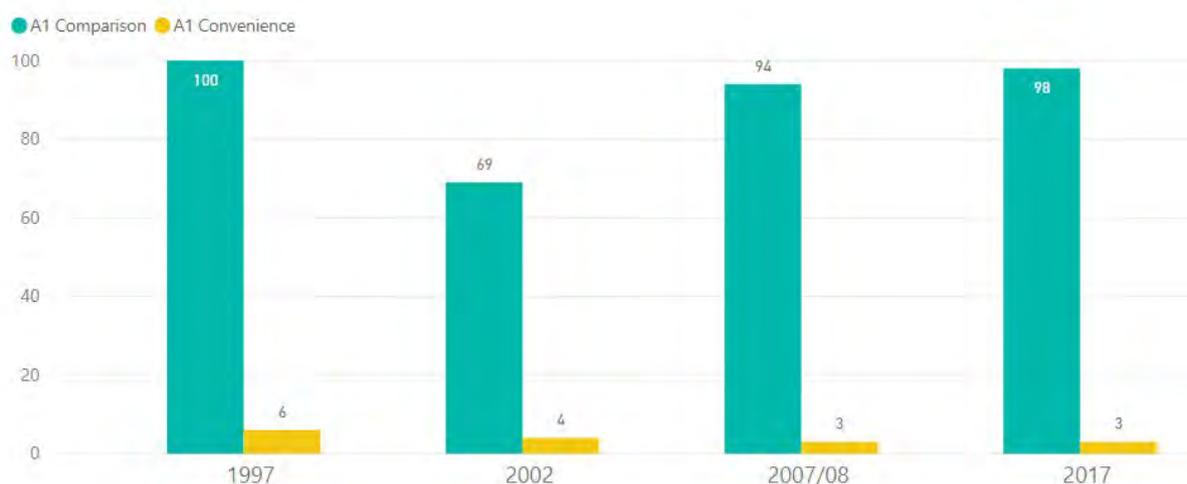
A3 uses have more than doubled since the last survey with an increase of 15 units, reaching 18% of the total number of units in the 2017 survey. The amount of A2 and D2 uses has remained largely stable across the years surveyed, with each making just up to 1 to 2% of the total floorspace. Some uses have disappeared since the previous surveys; there is no record of D1 or Sui Generis uses in this area in 2017.

The centre recorded a high level of vacancies in the 2002 and 2007/08 survey periods with 18 and 21 units respectively, which have since dropped proportionally by 70%, indicating a trend of recovery.

The total number of units within the boundary of this area has shown a marginal but steady growth across the years surveyed, moving from 122 units in 1997 to 156 units in 2017, possibly indicating a trend towards smaller units.

### 8.32. Comparative comparison/convenience split analysis

**Figure 8.5: Number of comparison and convenience A1 units by year, WERSPA – Carnaby Street (2017)**



The area has had a consistent comparison to convenience split across the years surveyed. Carnaby Street has been A1 comparison-led since 1997. The number of A1 convenience uses has remained stable across the years.

## 8.4. 2018 Site Survey

### 8.41. Accessibility and pedestrian flows

The area is well served by transport links, due to its close proximity to Oxford Circus Underground station (Bakerloo, Central and Victoria lines) and to a significant number of bus lines serving the nearby Oxford Street and Regent Street.

Almost the whole area is pedestrianised or has pedestrian priority, which makes it very accessible and easy to navigate on foot, creating a secure, relaxed atmosphere on the street, making it attractive to visitors. Pedestrian flow is high with higher pedestrian density on Carnaby Street itself and lower pedestrian traffic on side streets.

## 8.42 Range of units and floorspace qualitative analysis

### 8.421 Area description, land uses and retail provision

Carnaby Street is an internationally renowned comparison retail destination, focusing on a mid to higher end offer. Most shops appear to be multiple retailers from well-known brands (e.g. Nike, Dr Martens, Vans, Puma) and the offer seems to mainly cater for younger audiences. All shop fronts are well maintained.

The retail offer is complemented by a good number of restaurants and cafés, predominantly chain stores. These are mostly concentrated around Kingly Court and along Kingly Street, as well as some drinking establishments.

The Marshall Street Leisure Centre is the only community use which falls within the boundaries of the Carnaby Street area.



### 8.422 Vacant units

No vacant units were observed during the site visit.

## 8.43 State of the primary shopping area environmental quality assessment

### 8.431 Public realm

The quality of the public realm was judged as high. There is no clutter on the main Carnaby Street, whilst there are lots of tables and chairs from the food and drink establishments on the side roads off Carnaby Street.

Compared to other parts of the West End, this area appears to be overall more landscaped. The area is mainly pedestrianised and there are many shared spaces with pedestrian priority, making it accessible to pedestrians and to people with reduced mobility. This gives the streets a wider feel than most of the Soho area, and street clutter from tables and chairs is less inhibitive to pedestrian flows.



#### 8.432 *Cleanliness, safety and security*

Cleanliness was judged to be high along Carnaby Street. Some evidence of litter and some commercial refuse bags awaiting collection were observed at the time of visit. The level of safety and security was judged to be high.

#### 8.433 *Identity and users*

The area is a retail and entertainment destination which is mainly used by visitors during the day while it caters for a more mixed audience as an evening and night-time economy centre as part of the wider West End.

### 8.5. Performance summary and recommendations

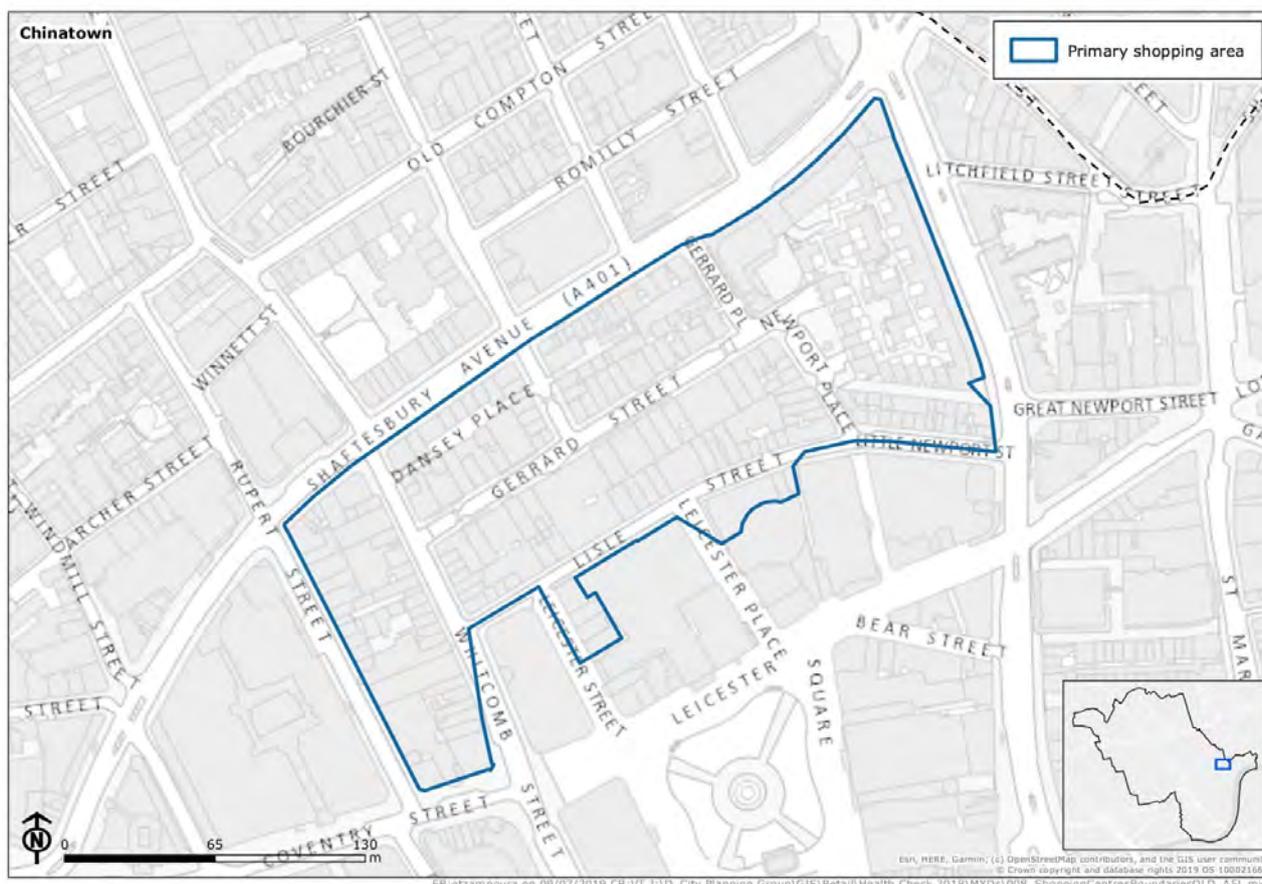
- The area is considered to be 'healthy'. Carnaby Street is a shopping destination, with well-known international brands and high-quality retailers attracting mainly tourists and younger customers. The proportion of food and drink uses has increased, suggesting a trend towards a more leisure and entertainment focused offer.
- The centre has a very low level of vacancies, which is among the lowest in Westminster and in the WESPRA.
- The high quality of the public realm and wide degree of pedestrianisation make this area very accessible and pleasant to visit and to dwell in.

### 8.6. Recommended boundary changes

No boundary changes are recommended.

## 9.0. WERSPA – Chinatown

Map 9.0: Primary shopping area boundary, WERSPA – Chinatown (2017)



### 9.1. Introduction

Chinatown is a primary shopping area within the designated 'West End Special Retail Policy Area' and is within the CAZ.

Chinatown is a shopping and leisure area located to the north of Leicester Square and in close proximity to other shopping, leisure and entertainment attractions located in areas such as Shaftesbury Avenue, Piccadilly Circus, Soho and Covent Garden.

The unique character and specialised shopping offer, together with Chinatown's central location, attract a significant number of visitors to the area, which is typified by the large number of Asian restaurants, supermarkets and other facilities. The oriental architecture and design make Chinatown a stimulating area to visit. The area is also home to key facilities for the local Chinese population, making it a community hub in addition to its role as a shopping and entertainment centre.

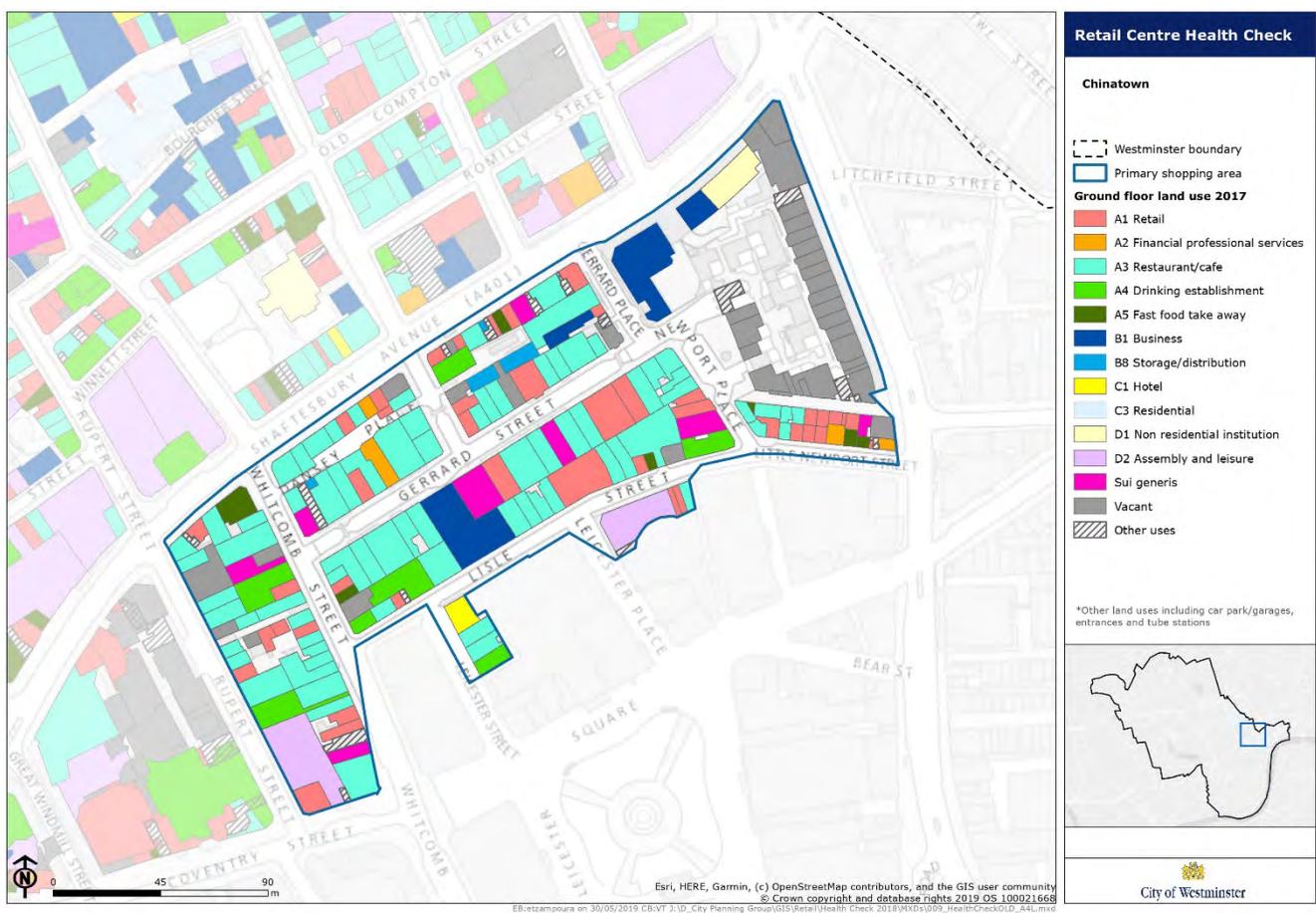


## 9.2. 2017 Land use analysis

### 9.2.1. Ground floor land use map (2017)

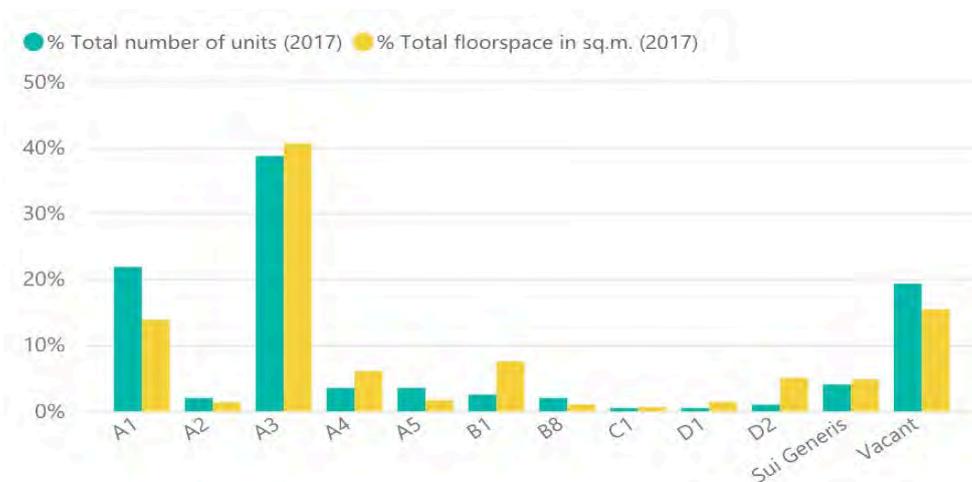
In 2017, 196 total units were identified at ground floor level. The surveyed area covered 20,721 sq m

**Map 9.1: Ground floor land use map, WERSPA – Chinatown (2017)**



## 9.22. Range of units and floorspace analysis (2017)

**Figure 9.2: Ground floor total number of units and floorspace by land use, WERSPA – Chinatown (2017)**



The predominant use in this area is A3 with 76 units which account for 39% of the total number of units and for 41% of all floorspace. A1 follows with 43 units making 22% of the total units and 14% of the overall floorspace.

A smaller proportion of land is taken up by A4, B1, D2 and Sui Generis uses which make between five and 8% of the floorspace each. Other uses include a limited amount of A2, A5, B8, C1, and D1.

The 2017 land use survey recorded a relatively high level of vacancy in this area with 38 units, accounting for 19% of the total units and 15% of the overall floorspace. The 2018 site survey has found that a number of these units have now been let to Asian-style food and beverage businesses, however a high proportion is still vacant despite having been completed for approximately two quarters of the year.

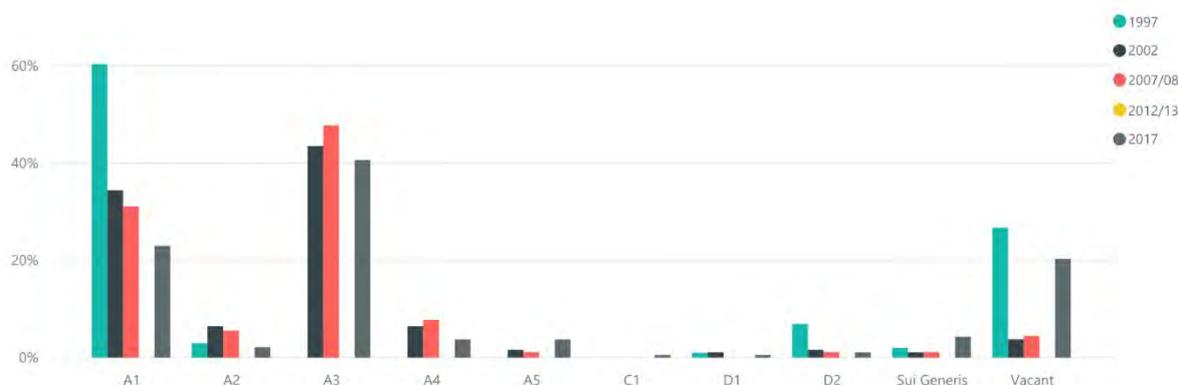
**Table 9.3: Ground floor total number of units and floorspace by land use, WERSPA – Chinatown (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	43	21.94%	2,887.65	13.94%
A2	4	2.04%	283.64	1.37%
A3	76	38.78%	8,432.37	40.69%
A4	7	3.57%	1,269.28	6.13%
A5	7	3.57%	357.46	1.73%
B1	5	2.55%	1,570.20	7.58%
B8	4	2.04%	218.38	1.05%
C1	1	0.51%	131.10	0.63%
D1	1	0.51%	297.42	1.44%
D2	2	1.02%	1,059.29	5.11%
Sui Generis	8	4.08%	1,005.18	4.85%
Vacant	38	19.39%	3,209.43	15.49%
<b>Total</b>	<b>196</b>	<b>100%</b>	<b>20,721.40</b>	<b>100%</b>

### 9.3. Comparative land use analysis

#### 9.31. Comparative range of units and floorspace analysis

**Figure 9.4: Proportion of units by land use, WERSPA – Chinatown (2017)<sup>13</sup>**



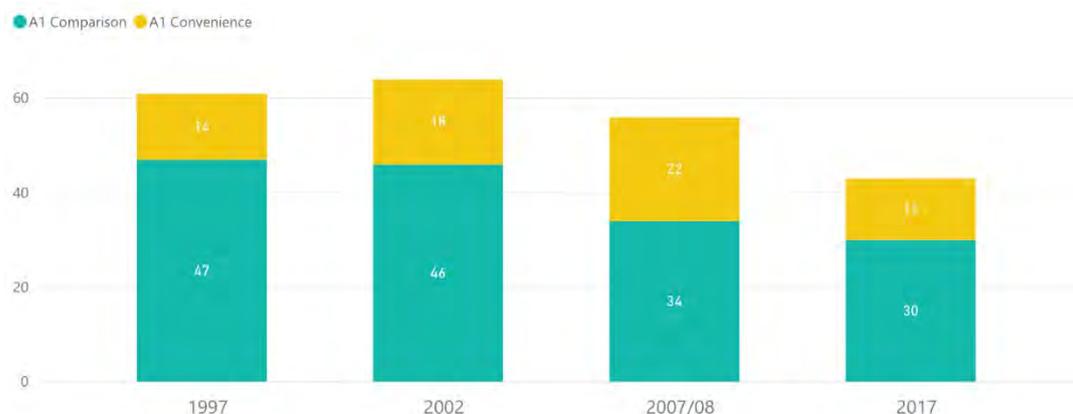
A1 was the predominant use in the area in 1997 with 61 units making 60% of the total number of units, but records show how the proportion of A1 units in Chinatown has been steadily shrinking since then. The current record is 43 units making 23% of the total units. In 2002, 81 A3 units were recorded, making 44% of the total units. Since then, A3 uses have experienced a minor relative reduction (7%) but have remained the major use in the area accounting for 41% of all units in 2017.

Other uses which have experienced growth are A5 and Sui Generis uses, each accounting for 4% of the total number of units in 2017. Conversely, A2, A4, and D2 uses have experienced a relative decline and currently account for 2%, 4% and 1% of the total units respectively.

The 2017 land use survey has found a high level of vacancies in this area with 38 units, making 20% of the total units. This record shows how vacancies have increased by 30 units since the last survey in 2007/08, which corresponds to a 16% increase.

#### 9.32. Comparative comparison/convenience split analysis

**Figure 9.5: Number of comparison and convenience A1 units by year, WERSPA – Chinatown (2017)**



<sup>13</sup> There is no data available for 2012/13 for this centre.

The area has had a consistent comparison to convenience split across the years surveyed. Records show how the number of A1 units has shrunk over the years.

## 9.4. 2018 Site Survey

### 9.41. Accessibility and pedestrian flows

Chinatown is well-connected, with a good range of transport options in the vicinity. The closest Underground stations are Piccadilly Circus (Bakerloo, Piccadilly lines) to the south west of the centre, and Leicester Square (Northern, Piccadilly lines) to the south east of the area. Both stations are roughly five-minute walk from Chinatown.

The area is also reasonably well served by buses. No bus route runs directly through the area itself, however many buses run along Shaftesbury Avenue to the north, and along Charing Cross Road to the east. Although the area is highly focused on pedestrians, all streets at the boundary of the area (Rupert Street, Shaftesbury Avenue and Charing Cross Street) are busy traffic thoroughfares. Chinatown also contains a busy public car park to the eastern end of the area.

Pedestrian flows were found to be high in Chinatown, especially on Gerrard Street, the main street. Most streets are pedestrianised, meaning that a majority of the travel in the area is done on foot. The area is also often walked through to access the neighbouring areas of Soho, Leicester Square, Piccadilly and Covent Garden.

### 9.42 Range of units and floorspace qualitative analysis

#### 9.421 Area description, land uses and retail provision

Restaurants and cafés are the predominant use in Chinatown, which works mainly as an entertainment and leisure area with a strong Asian character. Most restaurants are Chinese restaurants.

A number of shops are also present to a smaller extent. These are mainly Asian supermarkets and convenience stores such as bakeries, beauty shops and natural therapy shops.

Eight betting shops were observed, negatively contributing to the quality of the area.

Some areas have been recently upgraded (e.g. Newport Court) and feature new mid-range high quality shops, whilst there remain some portions of Chinatown where the retail quality is average.



#### 10.422 Vacant units

Vacancies are clustered to the east of the area, in the Centre Cross site which has recently undergone a complete redevelopment. Works have recently been completed and only

recently the units on Newport Court have been occupied by new A3 uses which are mainly Asian cafés selling bubble tea, ice cream and matcha tea. All the roughly 15 units of Centre Cross which look onto Charing Cross Road were still vacant at the time of visit.

### 10.43 State of the primary shopping area environmental quality assessment

#### 10.431 *Public realm*



The public realm was found to be of average quality. Most of the area is pedestrianised which makes it extremely accessible to all users and strongly contributes to the pedestrian experience. However, some streets are cluttered with bins, have uneven pavement and there is no opportunity for resting. On the eastern side of the shopping area, public realm works have been carried out in conjunction with the Central Cross redevelopment, which have upgraded the quality of public realm in this part of Chinatown.

#### 9.432 *Cleanliness, safety and security*

The area scores low in cleanliness as litter and numerous refuse bags on the street were observed, especially on Gerrard Street. Some evidence of graffiti was also found. The area was judged to have an average level of safety and security.



#### 9.433 *Identity and users*

Chinatown has a strong Chinese character, which is also reflected in some architectural elements in the area, particularly the two large portals at either end of Gerrard Street. The area is a renowned destination for tourists, visitors, Londoners and the Asian community who are also attracted by its night-time economy offer.



## 9.5. Performance summary and recommendations

- The area is considered to be 'healthy'. Chinatown is an Asian destination in the centre of London, with a number of shops complementing the main restaurants and cafés offer. The quality of the existing uses is average in some parts of the area and could be improved.
- The higher level of vacancies in 2017 is largely affected by the redevelopment of the large Centre Cross site to the east of the centre. Units in this new development are now starting to be occupied by a wider pan-Asian offer that will complement the Chinese historic core of the centre.
- The quality of the public realm has seen a major improvement on Newport Place and Newport Court, thanks to recent upgrade works. The rest of the centre would benefit from investment.
- The centre scored low in terms of cleanliness, particularly due to large supermarkets and restaurants on Gerrard Street parking deliveries and stocking refuse bags and cardboard boxes on the public highway.

## 9.6. Recommended boundary changes

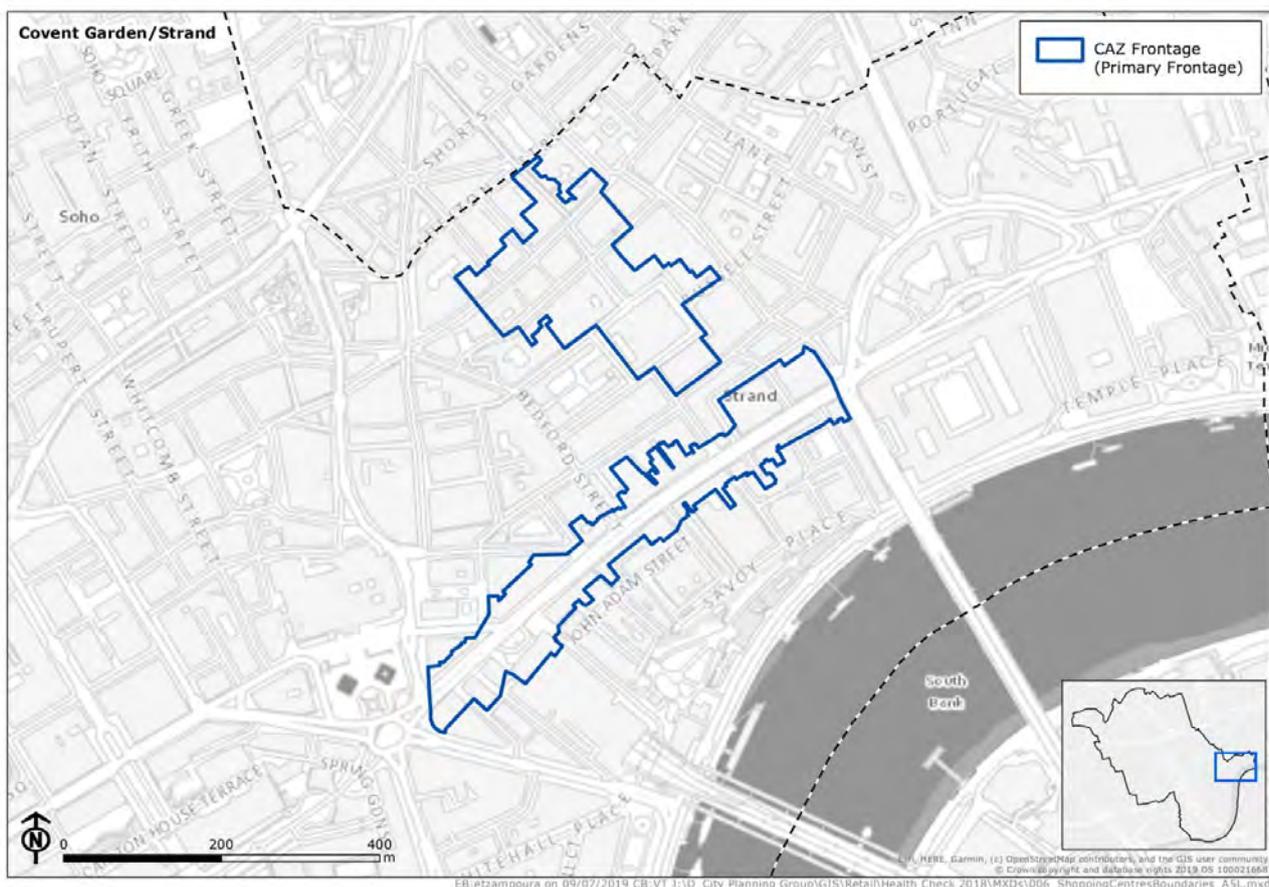
No boundary changes are recommended.

## 10.0.WERSPA – Covent Garden

The Covent Garden/Strand CAZ Frontage designation covers the two separate areas identified by the map below. For the purposes of the Town Centre Health Checks Report 2018-19, the two portions of the centre have been analysed in two separate sections: one covers Covent Garden and the other one the Strand.

This section only analyses the Covent Garden portion of the CAZ Frontage, as part of the wider Covent Garden primary shopping area. For comparative purposes, the analysis has considered the same boundary that was used for the past Town Centre Health Checks which were carried out for this area. Some separate considerations for the core portion of Covent Garden (the portion covered by the Covent Garden/Strand CAZ Frontage designation) have been made in this report. The analysis of the Strand portion of this centre can be found in the 'Covent Garden/Strand' section.

**Map 10.0: CAZ Frontage boundary, Covent Garden/Strand (2017)**



### 10.1. Introduction

Covent Garden is a primary shopping area within the designated West End Special Retail Policy Area and is within the CAZ. The central portion of the area is also part of the Covent Garden/Strand CAZ Frontage.

A small part of Covent Garden falls within the London Borough of Camden, covering the Seven Dials area north of Shelton Street. This report only considers the area that lies within Westminster.

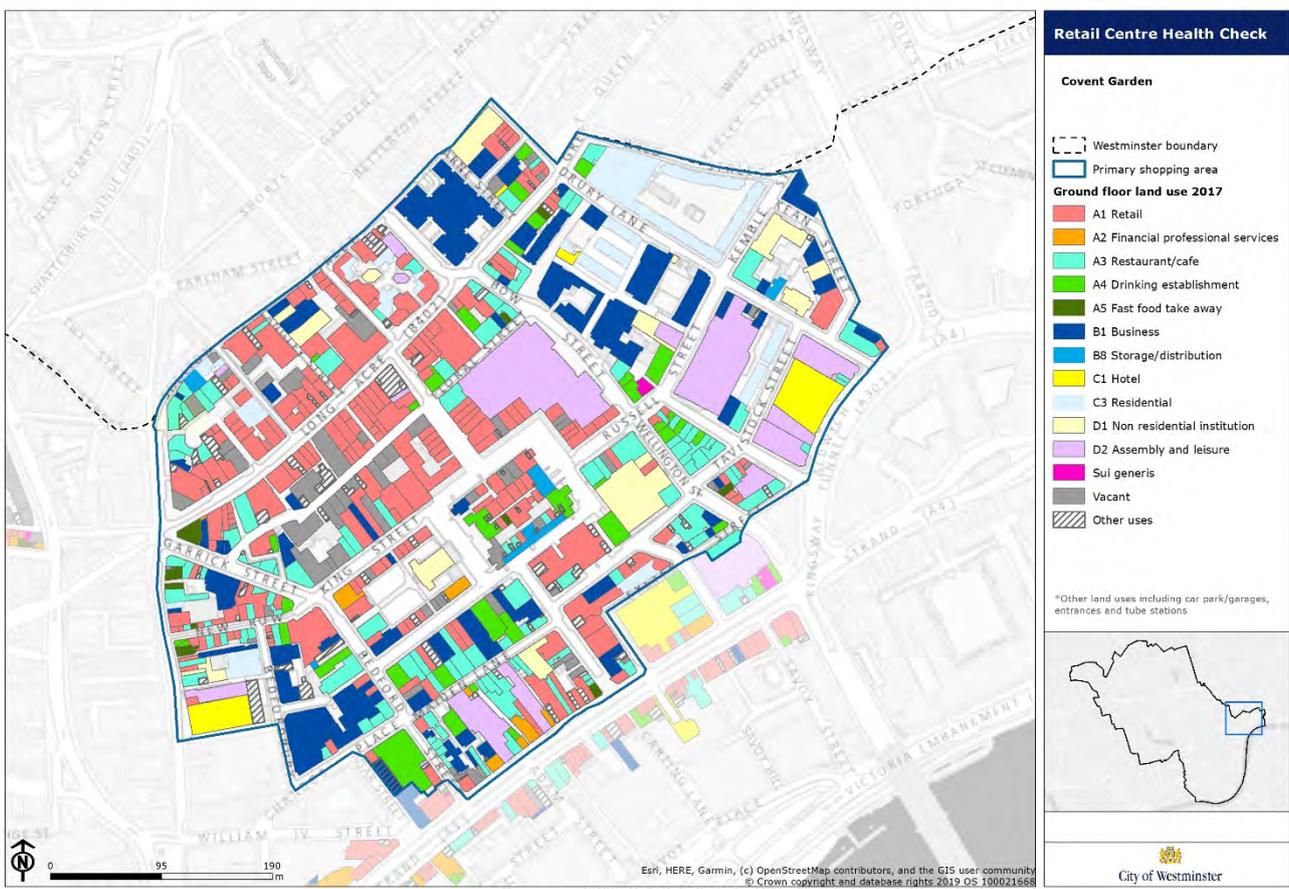
Covent Garden is a large Central London shopping and entertainment area within the West End and is a well-established tourist destination and a very historic part of Westminster. Within the area are the Royal Opera House, the London Transport Museum and the Covent Garden Market, along with many restaurants and bars, which all attract visitors to the area. The area is also known for its street performers, who entertain the large crowds of visitors.

## 10.2. 2017 Land use analysis

### 10.21. Ground floor land use map (2017)

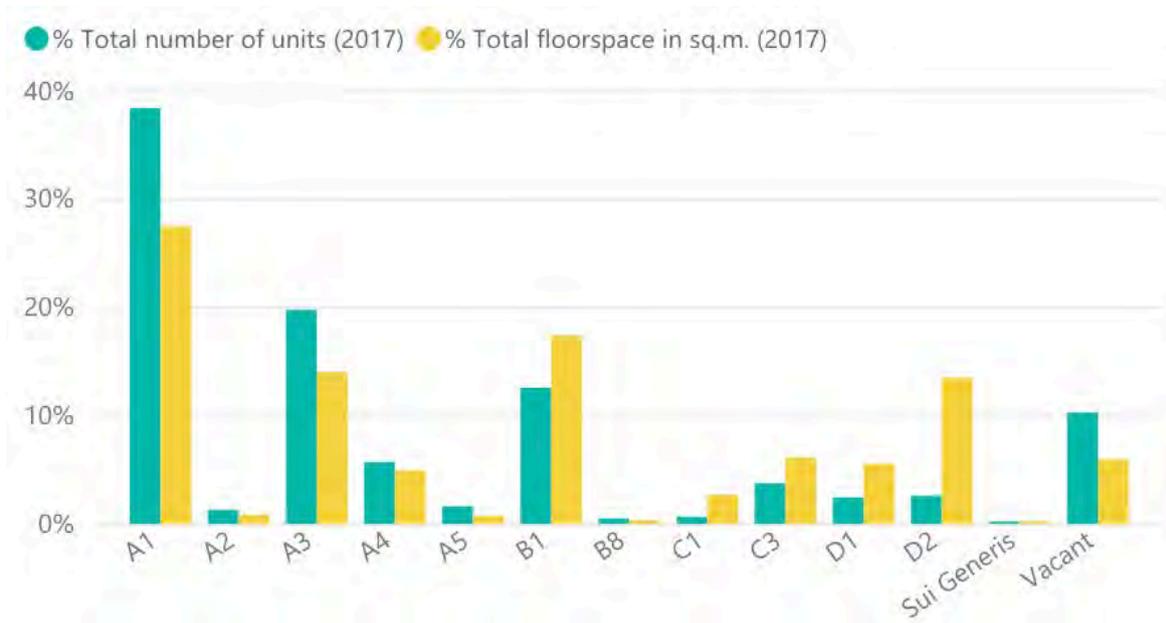
In 2017, 611 total units were identified at ground floor level. The surveyed area covered 134,521 sq m

**Map 10.1: Ground floor land use map, WERSPA – Covent Garden (2017)**



## 10.22. Range of units and floorspace analysis (2017)

**Figure 10.2: Ground floor total number of units and floorspace by land use, WERSPA – Covent Garden (2017)**



Covent Garden has a mix of uses, with majority of A1 with 235 units which account for 38% of all units and 28% of the total floorspace.

B1 is the second largest use by floorspace (17%) with 77 units. The area also has a significant A3 presence, with 121 units accounting for 20% of all units and 14% of the overall floorspace. D2 uses also make 14% of the total floorspace, but just 3% of the total number of units, which reflects the scale of these units. There are 35 A4 units in this area, making 6% of all the units and 5% of the overall floorspace.

Some C3 uses are also present at ground floor level, with 23 units recorded in 2017, making almost 4% of the total number of units and over 6% of the overall floorspace within the area.

Other uses recorded include a limited amount of A2, A5, B8, C1, D1 and Sui Generis.

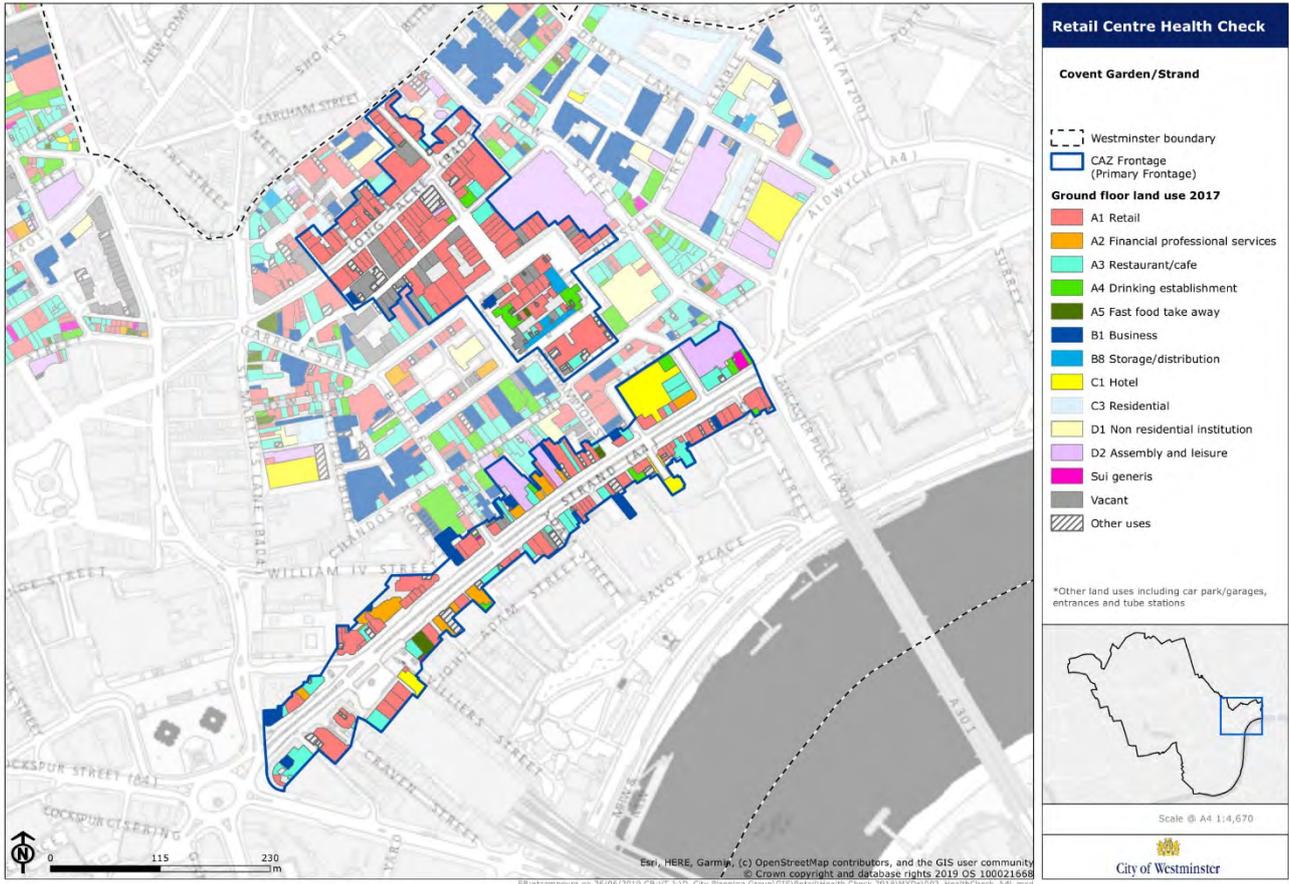
A total of 63 vacant units were recorded in 2017, making 10% of the total number of units and 6% of the overall floorspace. The 2018 land use survey has found that the majority of the vacancies around Floral Court and Floral Street are now in use.

**Table 10.3: Ground floor total number of units and floorspace by land use, WERSPA – Covent Garden (2017)**

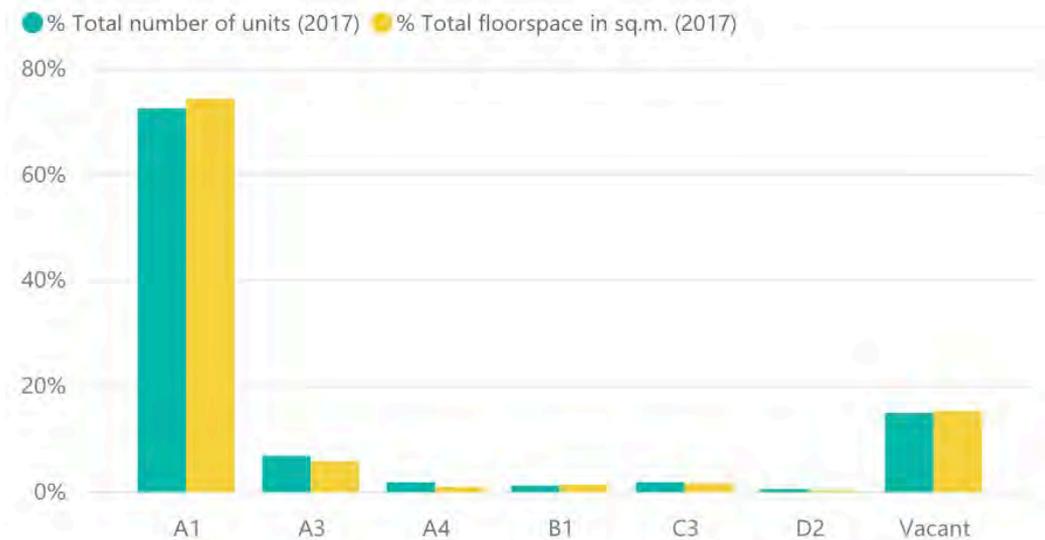
Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	235	38.46%	37,023.21	27.52%
A2	8	1.31%	1,128.22	0.84%
A3	121	19.80%	18,899.32	14.05%
A4	35	5.73%	6,682.81	4.97%
A5	10	1.64%	1,005.32	0.75%
B1	77	12.60%	23,496.27	17.47%
B8	3	0.49%	451.52	0.34%
C1	4	0.65%	3,655.36	2.72%
C3	23	3.76%	8,288.73	6.16%

D1	15	2.45%	7,478.64	5.56%
D2	16	2.62%	18,216.00	13.54%
Sui Generis	1	0.16%	133.61	0.10%
Vacant	63	10.31%	8,062.44	5.99%
<b>Total</b>	<b>611</b>	<b>100%</b>	<b>134,521.46</b>	<b>100%</b>

**Map 10.2: Ground floor land use map, Covent Garden/Strand (2017)**



**Figure 10.3: Ground floor total number of units and floorspace by land use, WERSPA – Covent Garden (Core portion covered by the CAZ Frontage designation) (2017)**



The current Covent Garden/Strand CAZ designation includes only the core portion of Covent Garden, which predominantly consists of A1 units (making 74% of all floorspace) which are complemented by a smaller proportion of A3 uses, accounting for 6% of all floorspace. Vacancies in this central part of Covent Garden account for 15% of the total floorspace, which is a higher figure compared to the whole of the centre. However, the 2018 site survey has shown that these vacancies were largely connected to redevelopment works and most units have been occupied.

**Table 10.5: Ground floor total number of units and floorspace by land use, WERSPA – Covent Garden (Core portion covered by the CAZ Frontage designation) (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq.m. (2017)	% Total floorspace in sq.m. (2017)
A1	116	72.50%	18864.12	74.34%
A3	11	6.88%	1485.42	5.85%
A4	3	1.88%	263.03	1.04%
B1	2	1.25%	360.92	1.42%
C3	3	1.88%	421.25	1.66%
D2	1	0.63%	84.35	0.33%
Vacant	24	15.00%	3896.78	15.36%
<b>Total</b>	<b>160</b>	<b>100%</b>	<b>25375.87</b>	<b>100%</b>

### 10.3. Comparative land use analysis

#### 10.31. Comparative range of units and floorspace analysis

**Figure 10.4: Proportion of units by land use, WERSPA – Covent Garden (2017)<sup>14</sup>**



While A1 units have experienced a drop between 1997 and 2007/08, the number of A1 units has remained stable since then and A1 remains the most present use in the centre. A3 uses accounted for 121 units in 2017, a 15% increase from the previous record while the proportion of A3 units has remained overall consistent.

<sup>14</sup> There is no data available for 2012/13 for this centre.

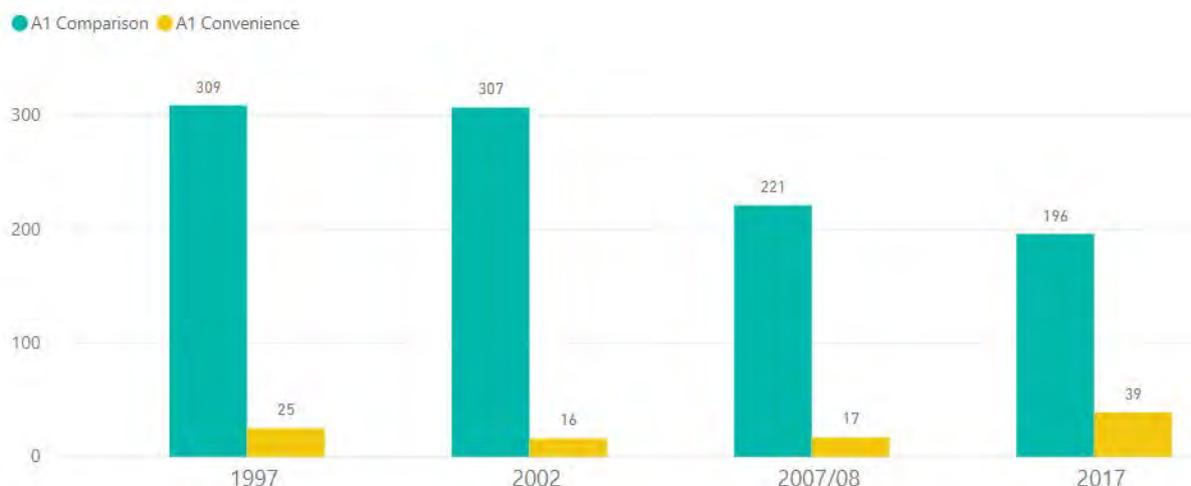
D1 uses have increased their presence growing from two to 15 units between 2007/08 and 2017. A2 units have experienced a drop between 1997 and 2002, but their proportion has remained largely stable since then. All other town centre uses have maintained a consistent proportion of units across the years surveyed.

The level of vacancies remained below 10% until 2007/08 while an increase to 12% of the total units was recorded in 2017.

There is no comparative data available for the core portion of Covent Garden that is covered by the Covent Garden/Strand CAZ Frontage designation.

### 11.32. Comparative comparison/convenience split analysis

**Figure 10.5: Number of comparison and convenience A1 units by year, WERSPA – Covent Garden (2017)**



The area has had a consistent comparison to convenience split across the years surveyed. The centre has always been comparison-led. The area has experienced a drop in the total number of A1 units in 2007/08, which could be due to a series of factors including the amalgamation of smaller units into larger ones. The figure has varied negligibly between then and 2017. Between 2007/08 and 2017, the proportion of convenience shops has experienced a marginal increase.

There is no comparative data for just the core portion of Covent Garden that is covered by the Covent Garden/Strand CAZ Frontage designation.

## 10.4. 2018 Site Survey

### 10.41. Accessibility and pedestrian flows

The centre is highly accessible via public transport. It contains the Covent Garden Underground station (Piccadilly Line) and is also located very close to Leicester Square Underground station (Northern, Piccadilly lines) to the west of Covent Garden, and Charing Cross (Bakerloo, Northern lines) to the south east of the centre. Holborn station (Central, Piccadilly lines) is also within walking distance to the north east of the centre. The proximity to Charing Cross means that Covent Garden is located close to a busy mainline train station. Although no bus routes run directly through Covent Garden, many serve the bordering roads such as the Strand to the south, Charing Cross Road to the west and Kingsway to the east. The vast majority of the centre is pedestrianised, and therefore the centre is mostly visited on foot and is very accessible. Pedestrian flows were found to be high.

Road traffic is present although at a very moderate speed due to limited road capacity and heavy pedestrian presence while through traffic is present outside the centre along main arterial routes.



## 10.42 Range of units and floorspace qualitative analysis

### 10.421 Area description, land uses and retail provision

Covent Garden is a popular retail and leisure destination. The retail offer includes mostly international renowned brands ranging from clothes and accessories, footwear, beauty shops, hairdressers, sports and outdoors goods, to bakers and confectioners. A large proportion of A1 uses consists of international brand retailers including affordable brands like Zara, H&M, sports brands like Nike, and more upmarket retailers such as Paul Smith and Burberry. Retail is predominantly focused along the western portion of Long Acre, on James Street and around the central Market Square. A portion of the old Market also features storage and distribution uses. There is a hairdresser cluster on and around Floral Street, as does a series of art galleries. Some non-clothing flagship retailers also feature in Covent Garden, the prime example being the large Apple Store on Market Square.

The area presents a number of enclosed courtyards such as the new Floral Court and St. Martin's Courtyard which have restaurant and café uses alongside a retail offer.

Restaurants, cafés and drinking establishments are present throughout Covent Garden although to a smaller extent in the central more retail-focused core area.

The portion of Covent Garden which sits to the east of Bow Street has a very different feel to the western portion. In this area, there is a concentration of office uses and a number of large D2 uses, which include the Royal Opera House, the Aldwych, Drury Lane, Dutchess, Novello and Fortune theatres. The eastern portion of the designation is more residential-focused, and comprises a number of mansion blocks and student halls linked to the London School of Economics.



#### 10.422 *Vacant units*

The site survey has not found a significant amount of vacancies in the area. The units that were found vacant by the 2017 land use survey, which were particularly concentrated around Floral Street, appear to have undergone redevelopment and are now back into use. These now host a series of clothes shops and art galleries. Floral Court has recently opened and features a Petersham Nurseries store/café alongside other cafés and restaurants. Some vacant units were observed around Singly Place. However, this courtyard has also been recently redeveloped and does not necessarily indicate an issue. Three consecutive vacant units were found on St. Martin's lane, just south from its crossing with Garrick Street.



#### 10.43 State of the primary shopping area environmental quality assessment

##### 10.431 *Public realm*

The quality of the public realm was judged to be high. Large sections of Covent Garden are pedestrianised, providing for a traffic-free environment. Pavements are well-maintained, some street furniture and planting are present and several seating opportunities can be found in the area. The several courtyards of Covent Garden are more enclosed environments that provide for resting opportunities from the buzz of the busy parts of the area. St. Paul's church also provides for an intimate courtyard which is largely used by local workers during the day and for theatre plays in the evening. Shop frontages are maintained to a high standard and contribute to the quality of the public realm.



#### 10.432 *Cleanliness, safety and security*

Cleanliness was judged to be high, although some commercial refuse awaiting collection has been identified.

The level of security and safety were judged to be high, with CCTV presence and shop security personnel. A number of newly redeveloped inner courtyards appear to function as privately-owned public spaces, which raises the level of security and the general keep of these areas.

#### 10.433 *Identity and users*



Covent Garden is a well-known London tourist destination and has a strong identity especially due to its landmark old Covent Garden market which sits at the core of the area. The open space between St. Peter's Church and the Market is used by street performers and attracts large numbers of visitors. This adds to the liveliness of the area. The area is largely used by visitors, shoppers and workers.

### 10.5. Performance summary and recommendations

- The area is considered to be 'healthy'. The area is a very popular tourist, retail and leisure destination and its uses also serve the local working population. The area has a strong retail offer which is mainly focused on clothing and accessories by well-established international brands. This is complemented by a range of A3/A4 uses which further encourage visitors to dwell in the area for longer.
- The area has a low level of vacancies, and these are usually linked with redevelopment works.
- The area scores high in terms of public realm, cleanliness, safety and security.

### 10.6. Recommended boundary changes

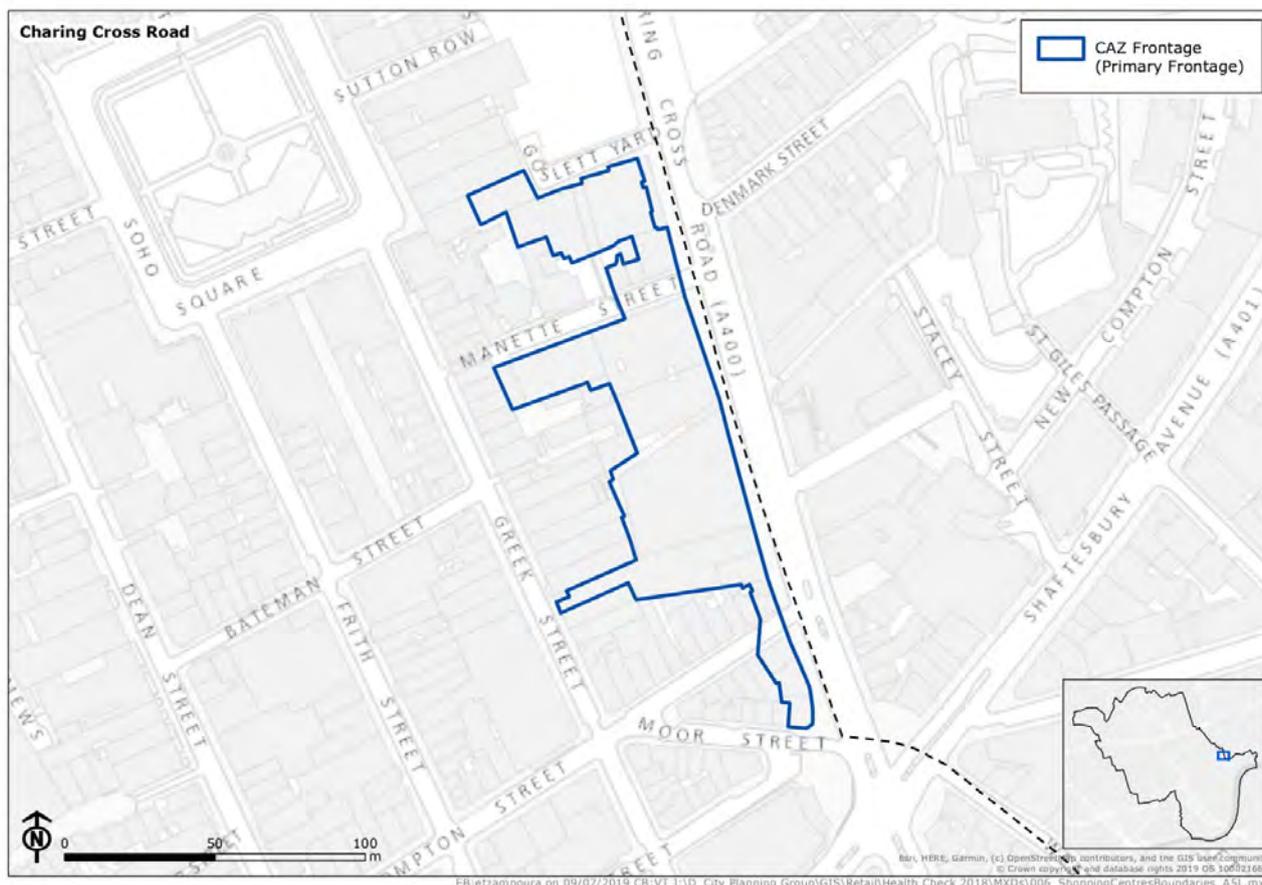
It is recommended to split the centre into two separate designations: one for the Strand, and one for the core of Covent Garden. It is considered that these two areas are distinct and operate in different ways.

It is recommended to include the units to the western end of Long Acre towards Upper St. Martin's Lane to the Covent Garden designation as they naturally complete a linear comparison-shopping parade along the Long Acre stretch.  
Further details on all boundary changes can be found in 'Appendix 3: Recommended changes to designation boundaries'.

## SECTION C: CAZ Frontages

### 11.0. Charing Cross Road

Map 12.0: CAZ Frontage boundary, Charing Cross Road (2017)



#### 11.1. Introduction

Charing Cross Road is a designated CAZ Frontage and is within the designated 'West End Retail Special Policy Area' and is within the CAZ.

It is a linear centre but only the western portion of the CAZ Frontage falls within Westminster as the western part falls within the London Borough of Camden. This report only considers the area that lies within Westminster.

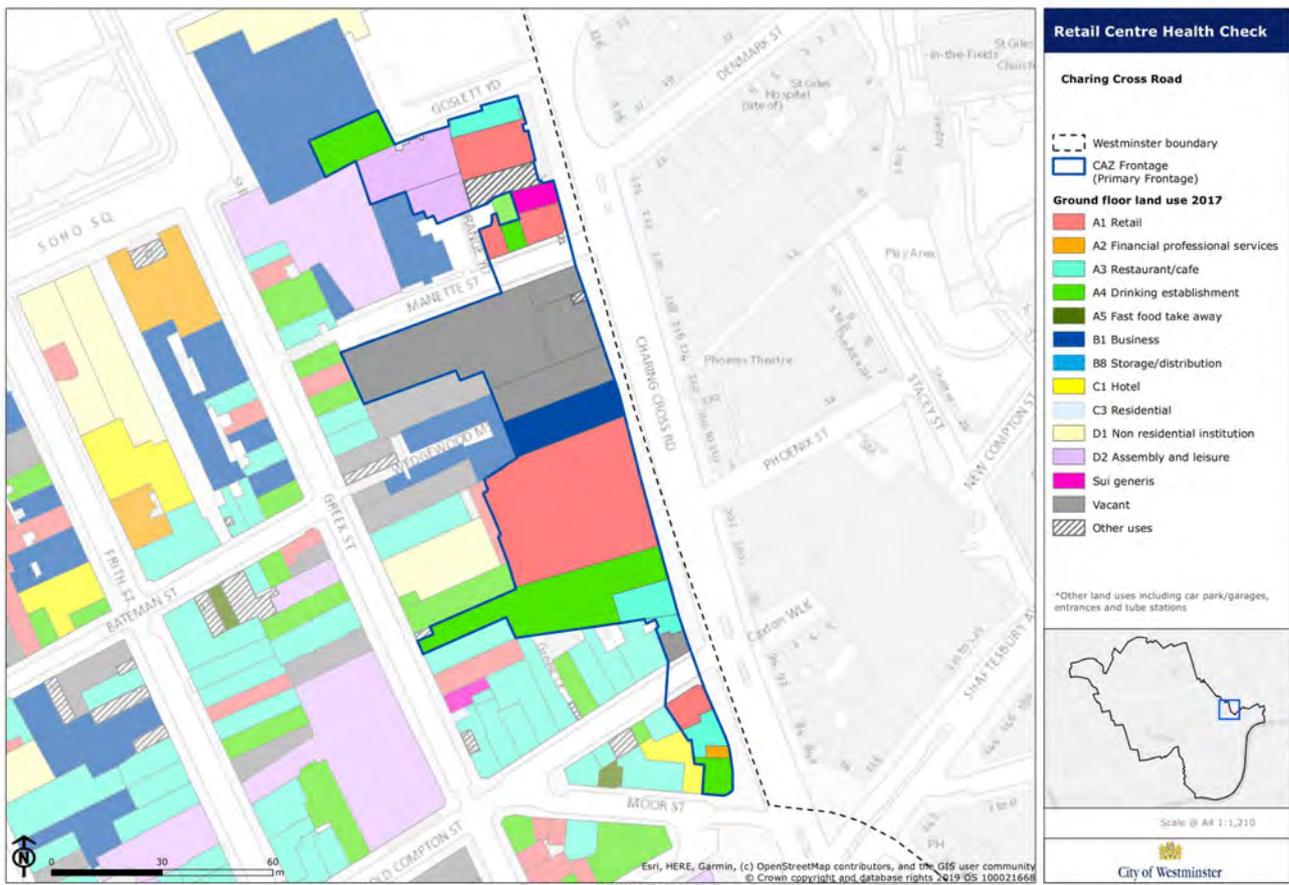
Charing Cross Road is a mixed-use centre, located in close proximity to Tottenham Court and Leicester Underground stations and to other shopping areas such as Soho, Shaftesbury, Chinatown and the wider West End. The centre is home to Foyles' flagship bookshop.

## 11.2. 2017 Land use analysis

### 11.21. Ground floor land use map (2017)

In 2017, 23 total units were identified at ground floor level. The surveyed area covered 6,324 sq m

**Map 12.1: Ground floor land use map, Charing Cross Road (2017)**



### 11.22. Range of units and floorspace analysis (2017)

Charing Cross Road is a mixed-use centre with five A1 units recorded in 2017: these account for 22% of all units within the centre and for 31% of the overall floorspace.

In terms of floorspace, A1 is followed by A4 (18%), D2 (8%), A3 (6%), B1 (5%) and Sui Generis uses (1%).

In 2017, five vacant units were recorded in the centre, accounting for 22% of the total number of units and 31% of the total floorspace. However, the 2018 site survey has identified that these vacancies are concentrated on one large site (the Ilona Rose House) which is currently under-development.

**Table 11.3: Ground floor total number of units and floorspace by land use, Charing Cross Road (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	5	21.74%	1967.44	31.11%
A2	1	4.35%	20.54	0.32%
A3	4	17.39%	371.79	5.88%
A4	4	17.39%	1110.96	17.57%
B1	1	4.35%	325.61	5.15%
D2	2	8.70%	484.14	7.66%
Sui Generis	1	4.35%	73.59	1.16%
Vacant	5	21.74%	1969.60	31.15%
<b>Total</b>	<b>23</b>	<b>100%</b>	<b>6323.68</b>	<b>100%</b>

### 11.3. Comparative land use analysis

This is the first time that Charing Cross Road is surveyed by Westminster City Council. Accordingly, there is no comparative data for this centre.

### 11.4. 2018 Site Survey

#### 11.41. Accessibility and pedestrian flows

Although there are no Underground stations within the centre, Tottenham Court Road (Central, Northern lines) and Leicester Square (Northern, Piccadilly lines) Underground stations are within a five-minute walk to the north and the south of the centre respectively. Access from the north of the centre is likely to increase once development works at Tottenham Court Road are completed and the Elizabeth Line starts operating from this station.

The area is directly served by a number of bus routes which operate along Charing Cross Road. The centre has moderate but flowing traffic from buses, cars and a few cyclists. Traffic flow was slowed down by highway works connected with the Tottenham Court redevelopment to the north of the centre.

Pedestrian flows were found to be average.

There is a lack of bike parking facilities and bikes were found to be tied illegally on railings. Pavements have dropped kerb to provide access to all users and there were two traffic light crossings at the edge of the centre to allow for safe crossing.

#### 11.42 Range of units and floorspace qualitative analysis

##### 11.421 *Area description, land uses and retail provision*

The centre presents a mix of uses which mainly comprise shops, food uses and drinking establishments.

In terms of shops, the centre has a good balance between multiples and independent retailers. The largest unit is occupied by the flagship Foyles bookstore but other flagship stores such as

Made are located in the area. Shops are in the mid-range and were found to be relatively well kept.

There are a number of restaurants and cafés which mainly belong to international and national chains (e.g. Café Nero, Starbucks) and the area is also home to a significant number of public houses (e.g. The Montagu Pyke, The Cambridge).



One LGBT night club and two specialist uses (a massage store and an adult store) were also observed, which suggests the proximity to the clusters of these uses in Soho.

#### 11.422 *Vacant units*



The site survey has found that one of the units identified by the 2017 land use survey is no longer vacant and is now a drinking establishment, the Compton Cross. The site survey also confirmed that the remaining vacant units all sit within the same block which is currently under-development. Once completed, the new development will deliver a number of shops and restaurants as well as office space.

## 11.43 State of the primary shopping area environmental quality assessment

### 11.431 *Public realm*

The quality of public realm was found to be of average quality. The site survey found the centre cluttered mainly because of construction activity within the boundary of the centre and just outside of it, to the north at Tottenham Court Road. These negatively impact on the quality of the public realm.



The centre is used mostly as a thoroughfare between more attractive areas of Central London. The moderate to sometimes high level of traffic and the absence of benches and quiet spaces are likely to discourage users to linger in this area for longer than necessary.

### 11.432 *Cleanliness, safety and security*

Cleanliness was judged to be average along the centre. Some evidence of litter and rubbish awaiting collection was found at the time of visit.

The area was found to be average in terms of safety and security although ease of passage was restricted by the ongoing redevelopment works.

### 11.433 *Identity and users*

The Foyles flagship store is a destination of its own right, and is part of a listed building which was originally home to the Central St. Martin's School of Art.

The centre is mostly used by visitors, which is likely to be due to its proximity with the areas of Oxford Street, Soho, Shaftesbury, Covent Garden and Leicester Square, however a few workers were also observed. The centre is also likely to serve Camden and Westminster's local community. The makeup of people was mixed, from young to middle-aged. A different, older, age range is likely to be drawn to this area in the evening by the nearby theatre offer.

## **11.5. Performance summary and recommendations**

- The centre is considered to have a 'neutral' performance. Charing Cross Road presents a balanced mix of uses serving visitors, workers and residents. The retail offer is considered to be average.
- Although the level of vacancies is significantly high, the site visit has found that it is due to a large site which is currently being redeveloped.
- The centre scored average on all qualitative assessment criteria. The public realm and cleanliness of the area would benefit from improvement.

## **11.6. Recommended boundary changes**

Boundary changes are recommended to include the site bounded by Tottenham Court Road station, Charing Cross Road and Goslett Yard. The site will be developed and host a mixed-use scheme containing retail, offices and a new theatre.

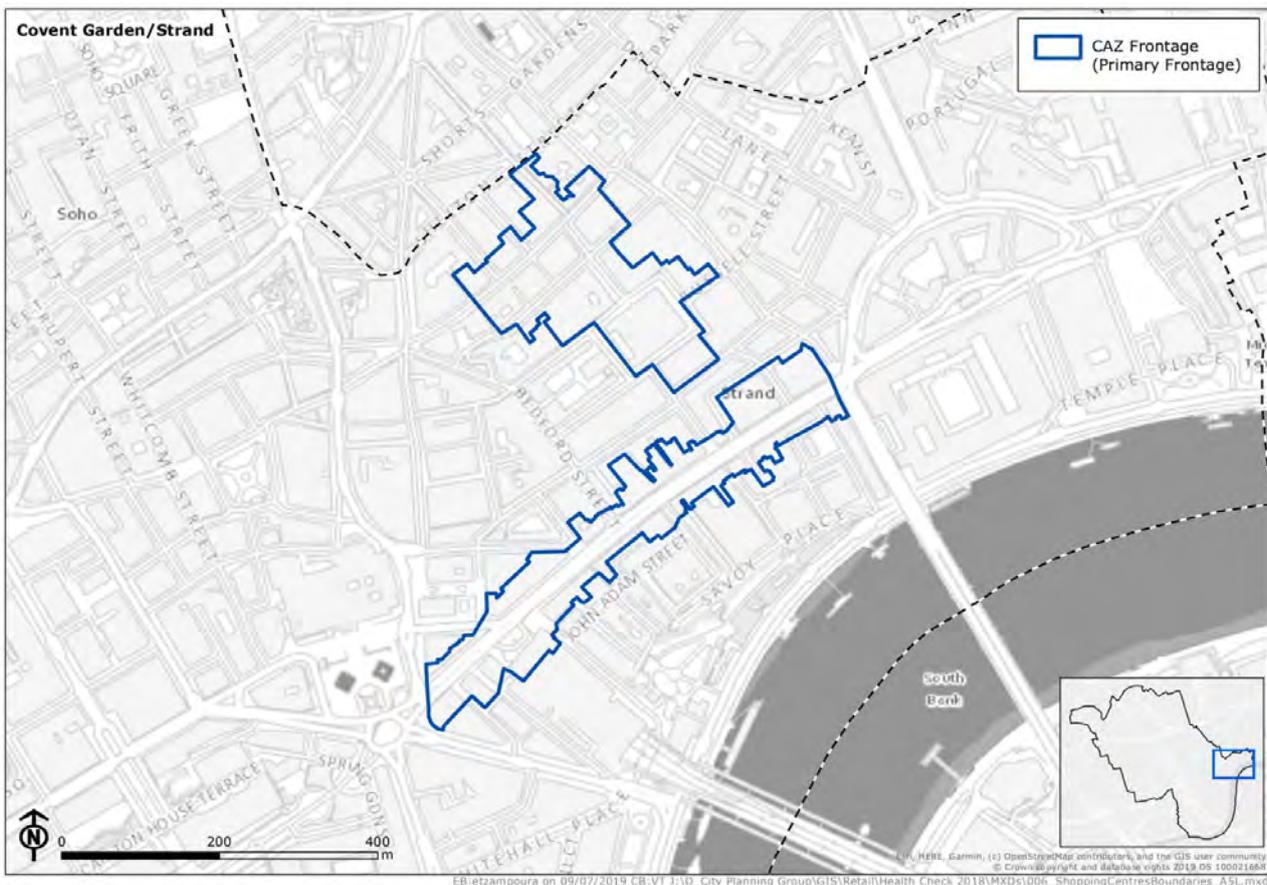
Further details on all boundary changes can be found in 'Appendix 3: Recommended changes to designation boundaries'.

## 12.0. Strand

The current Covent Garden/Strand CAZ Frontage designation covers the two separate areas identified by the map below. For the purposes of the Town Centre Health Checks Report 2018-19, the two portions of the centre have been analysed in two separate sections: one covers Covent Garden and the other one the Strand.

This section only analyses the Strand portion of the CAZ Frontage. For comparative purposes, the analysis has considered the same boundary that was used for the past Town Centre Health Checks which were carried out for this area. The analysis of the Covent Garden portion of this centre can be found in the 'WERSPA – Covent Garden'.

**Map 12.0: CAZ Frontage boundary, Covent Garden/Strand (2017)**



## 12.1. Introduction

The Strand is a shopping area within the designated 'West End Special Retail Policy Area' and is within the CAZ. It is designated as part of the Covent Garden/Strand CAZ Frontage. The Strand is a busy shopping thoroughfare located in the south of Covent Garden; a long linear shopping street extending approximately 700 metres east from Trafalgar Square at the western end, to the Aldwych in the east. Charing Cross Station is located at the western end of the street, along with The National Portrait Gallery and The National Gallery. The Strand has a range of attractions apart from the gallery, including many theatres, bars, restaurants and a range of shops.

The Strand is also an important area for student life and higher education, with King's College London and the London School of Economics both located just outside the centre boundary at the east end of the Strand.

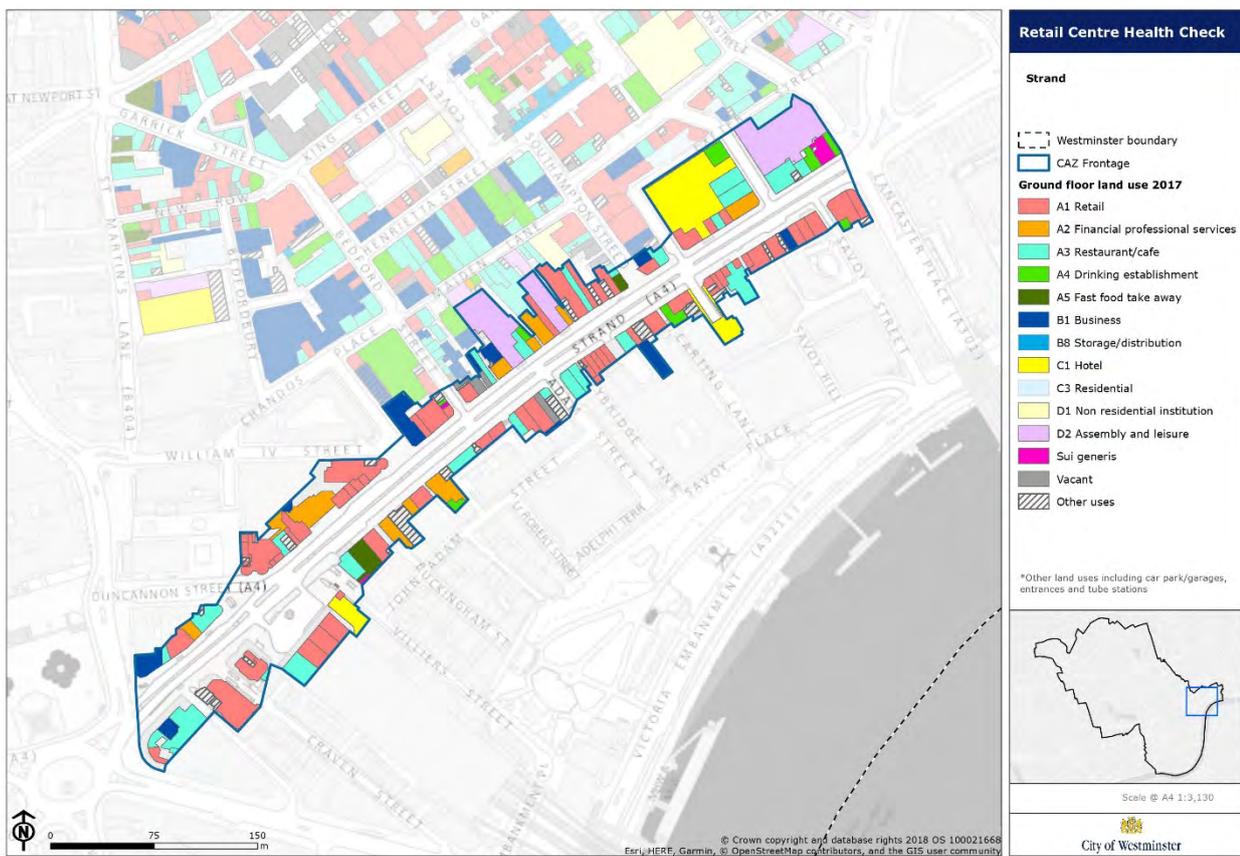
The Strand is closely connected to Covent Garden to the north, and many visitors travel on foot between the two areas and use the public transport on offer along the Strand to visit the street and surrounding areas.

## 12.2. 2017 Land use analysis

### 12.21. Ground floor land use map (2017)

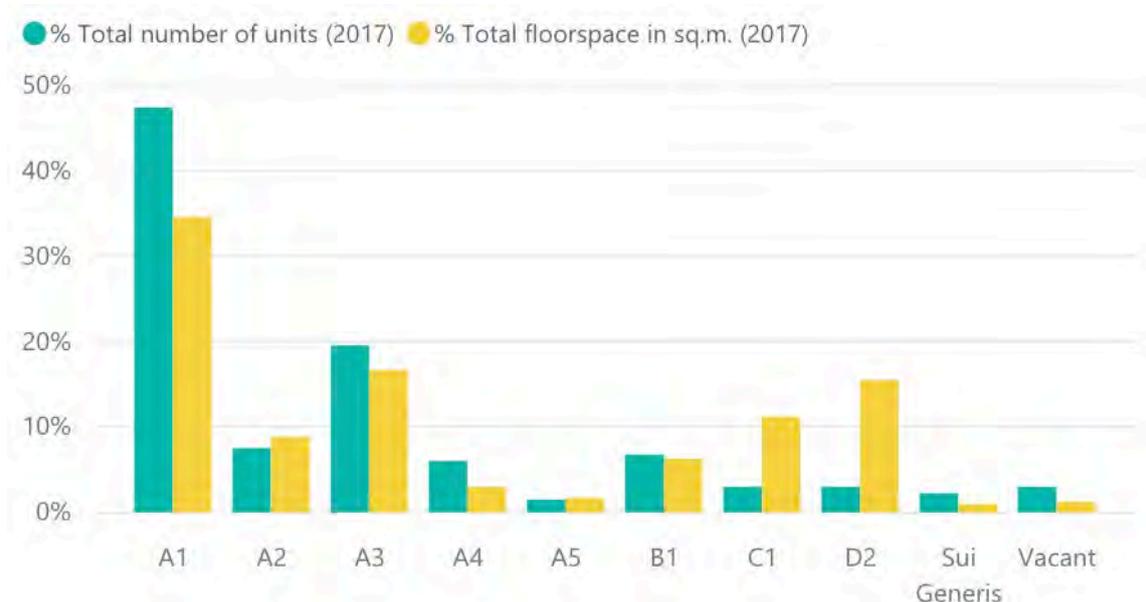
In 2017, 133 total units were identified at ground floor level. The surveyed area covered 26,338 sq m

**Map 12.1: Ground floor land use map, Strand (2017)**



## 12.22. Range of units and floorspace analysis (2017)

**Figure 12.2: Ground floor total number of units and floorspace by land use, Strand (2017)**



The most significant land use in this area is A1, with 63 units accounting for 47% of the overall floorspace and 35% of the total units in 2017.

A3 uses follow with 26 units making 17% of the floorspace and 20% of the total units. D2 and C1 uses also occupy significant portions of the total floorspace, 15 and 11 percent respectively, although either use only has four large units in this area. Other uses include a limited amount of A2, B1, A4, A5, and Sui Generis.

The 2017 survey recorded four vacant units within the area which accounted for 3% of the total units and 1% of the overall floorspace, which is considerably below the average for CAZ frontages (8% floorspace).

**Table 12.3: Ground floor total number of units and floorspace by land use, Charing Cross Road (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	63	47.37%	9102.58	34.56%
A2	10	7.52%	2329.99	8.85%
A3	26	19.55%	4390.64	16.67%
A4	8	6.02%	788.55	2.99%
A5	2	1.50%	448.84	1.70%
B1	9	6.77%	1652.38	6.27%
C1	4	3.01%	2955.20	11.22%
D2	4	3.01%	4080.29	15.49%
Sui Generis	3	2.26%	258.81	0.98%
Vacant	4	3.01%	330.77	1.26%
<b>Total</b>	<b>133</b>	<b>100%</b>	<b>26338.05</b>	<b>100%</b>

## 12.3. Comparative land use analysis

### 12.31. Comparative range of units and floorspace analysis

**Figure 12.4: Proportion of units by land use, Strand (2017)<sup>15</sup>**



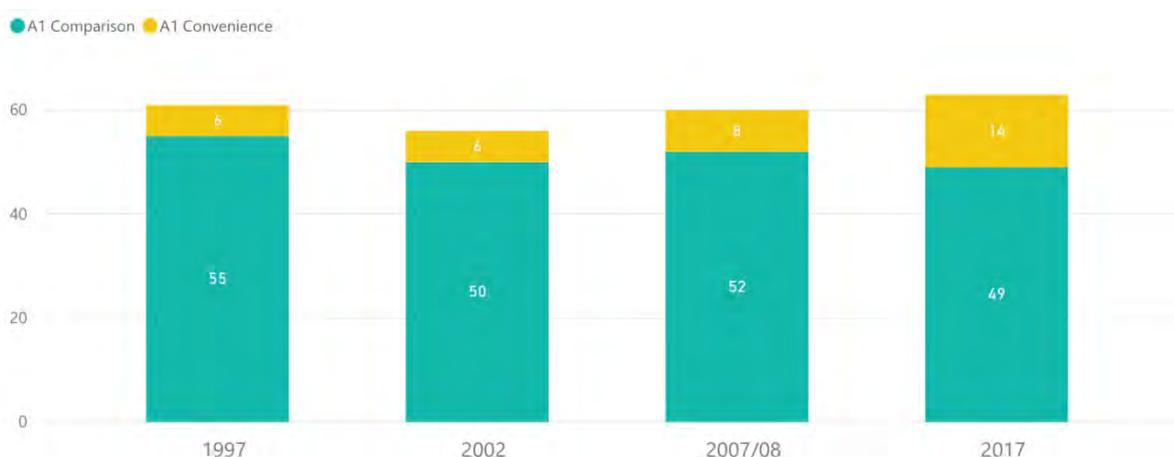
The number of A1 units has remained largely consistent across the years surveyed, while there has been a steady increase in A3 units which have more than doubled, moving from 10 units in 2002 to 26 in 2017. Proportionally, A1 units have shrunk particularly between 1997 and 2002, and have remained consistent since then, while the share of A3 units has grown from 10% in 2002 to 21% in 2017. Conversely, land use surveys have recorded a steady loss in A2 uses halving to 10 units in 2017, which account for 21 and eight percent of the total units respectively.

C1 and Sui Generis uses have also doubled their presence in units since the last survey, making three and two percent of the total units in 2017 respectively. On the other hand, the proportion of A5 and D2 units has remained constant across the years survey. There is no longer any D1 unit in the centre.

The number and share of vacancies in the centre has shrunk since the 1997 survey, moving from nine to three percent of the total units in 2017.

### 13.32. Comparative comparison/convenience split analysis

**Figure 12.5: Number of comparison and convenience A1 units by year, Strand (2017)**



<sup>15</sup> There is no data available for 2012/13 for this centre.

The centre has had a broadly consistent comparison to convenience split across the years surveyed. Between the 2007/08 and the 2017 surveys, however, the number of A1 convenience units has almost doubled in this centre while the overall number of A1 units has not changed considerably. These figures suggest how the centre's offer has changed to provide more convenience retail outlets, which are likely to cater for the local working population and visitors.

## 12.4. 2018 Site Survey

### 12.41. Accessibility and pedestrian flows

The Strand is a very well-connected area served by a wide range of transport modes. Firstly, it contains a mainline railway station, Charing Cross, which is one of the busiest interchanges in London, serving South London, Surrey and Kent. Charing Cross also contains a busy Underground station (Bakerloo, Northern lines), and is within walking distance of both Embankment station (Bakerloo, Northern, District, Circle lines) at the west end of the Strand, and Temple station (District, Circle lines) at the eastern end of the area.

It is also very well served by bus services, with many running along the Strand itself, connecting the West End to Waterloo and the wider South London area, and the City of London to the east.

Pedestrian flows were judged to be high. The street is heavily used by pedestrians, including commuters and workers as well as many tourists visiting the nearby tourist attractions in Covent Garden and Trafalgar Square. The Strand is a moderately congested area as the road is quite narrow but heavily used by buses, taxis and private motor vehicles.



### 12.42 Range of units and floorspace qualitative analysis

#### 12.421 *Area description, land uses and retail provision*

The Strand hosts a variety of uses with a majority of shops which comprises numerous high street retailers and several food and beverage chain premises such as Pret a Manger, Starbucks, Café Nero, Iitsu, Byron and Pizza Express. A few supermarkets are also present. The area has a number of high street clothing brands including Topshop, H&M, Next and T M Lewin, alongside other retailers such as Argos, Ryman Stationery, Boots, Maplin and Paperchase. These tend to be relatively small branches with a more limited offer compared to areas like Oxford Street.

The centre features a small number of souvenir shops which negatively contribute to the quality of the area's retail.

The centre also features four important theatres: the Adelphi, the Savoy, the Vaudeville and the Lyceum. There are also three large hotels within the boundary of the centre: the Savoy, the Strand Palace Hotel and the Amba Hotel. Several banks are also present along the Strand.



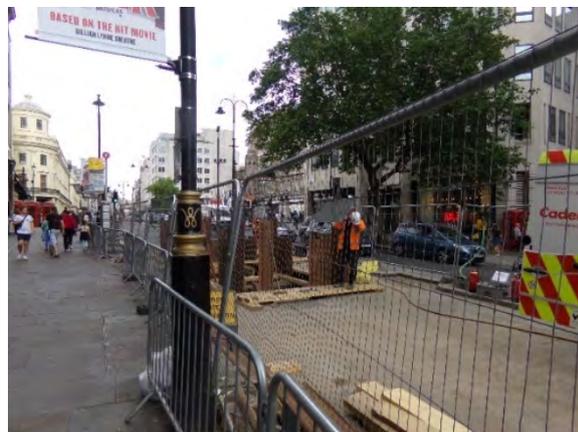
#### 12.422 *Vacant units*

No vacant units were observed at the time of visit.

### 12.43 State of the shopping area environmental quality assessment

#### 12.431 *Public realm*

The quality of the public realm was found to be average. As the area consists mostly of the linear corridor of the Strand stretching along a busy two-way two-lanes road, the public realm ends up being mostly relegated to the side pavement which is generally busy with pedestrians and exposed to the distress, noise and air pollution from vehicular traffic. The site survey also found that a portion of the Strand was closed to eastbound traffic due to highway works. While this reduced the number of vehicles on the street, on the other hand it contributed to clutter and pavement congestion. There are no public benches and the pedestrian areas just off the Strand tend to operate as residual spaces with limited public realm value.



#### 12.432 *Cleanliness, safety and security*

Cleanliness was judged to be average along the Strand as the pavements are generally well maintained and there is limited presence of litter.

As the area is particularly populated with rough sleepers, this has an impact on the perceived level of security although the area feels generally safe. The site visit has found evidence of CCTV and security guards for a number of premises. Overall, the area was judged to have an average level of safety and security.

#### 12.433 *Identity and users*

The area is mostly used by workers and visitors, due to the large number of employment space on the Strand and its proximity to Trafalgar Square and Covent Garden which attract a large number of tourists.

A large number of rough sleepers are present on the Strand and on neighbouring streets.

### **12.5. Performance summary and recommendations**

- The area is considered to be 'healthy'. The Strand is a busy shopping street mostly focused on A1 retail, which mainly cater for workers and visitors. The street also hosts a range of other uses that complement the retail offer.
- The area has a very low level of vacancies.
- Public realm and the pedestrian experience could be improved in the area.
- There is a concentration of rough sleepers on the Strand and nearby streets.

### **12.6. Recommended boundary changes**

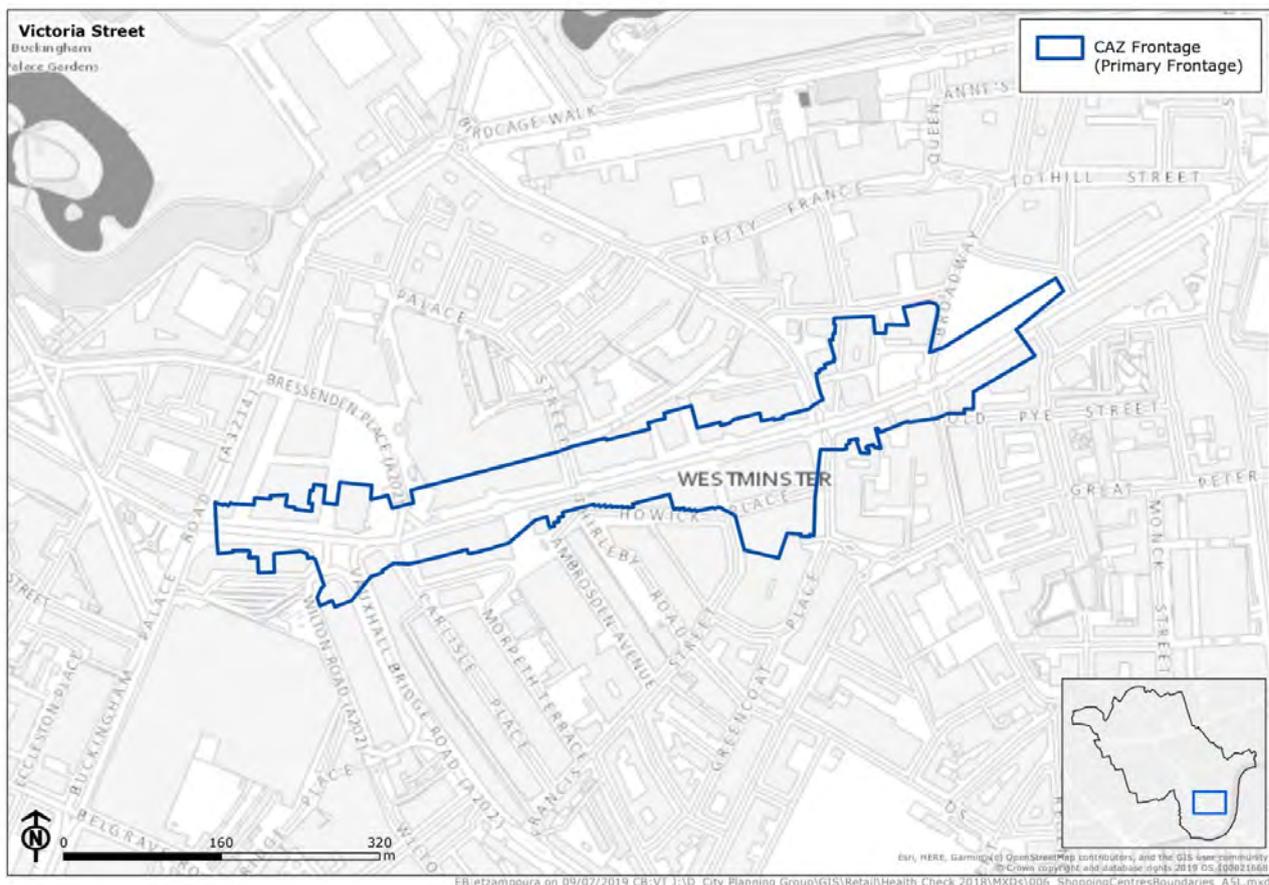
It is recommended to split the centre into two separate designations: one for the Strand, and one for the core of Covent Garden. It is considered that these two areas are distinct and operate in different ways.

It is recommended to include the Savoy Hotel to the Strand designation as this is a prominent use within the centre.

Further details on all boundary changes can be found in 'Appendix 3: Recommended changes to designation boundaries'.

## 13.0. Victoria Street

Map 13.0: CAZ Frontage boundary, Victoria Street (2017)



### 13.1. Introduction

Victoria Street is a designated CAZ Frontage and is within the CAZ.

Victoria Street is a linear shopping centre within close proximity to Victoria station to the west, Parliament Square to the east and Buckingham Palace and St James's park to the north. The centre is relatively isolated in the southern part of the CAZ, but there are nearby shopping facilities in Victoria Plaza (in Victoria Station), the new Cardinal Place and Nova developments, and in the Strutton Ground/Artillery Row and Warwick Way/Tachbrook Street designated shopping centres.

It is a mixed-use centre that mainly serves workers and visitors attracted to the area by the proximity of Victoria station, the area's high office stock and numerous tourist attractions. The centre also serves residents that live in the surrounding areas.

The area is undergoing considerable change, with the recent Nova Victoria redevelopments taking centre stage, to be followed in the near future by further redevelopments around Victoria Station and along other parts of Victoria Station and along other parts of Victoria Street.

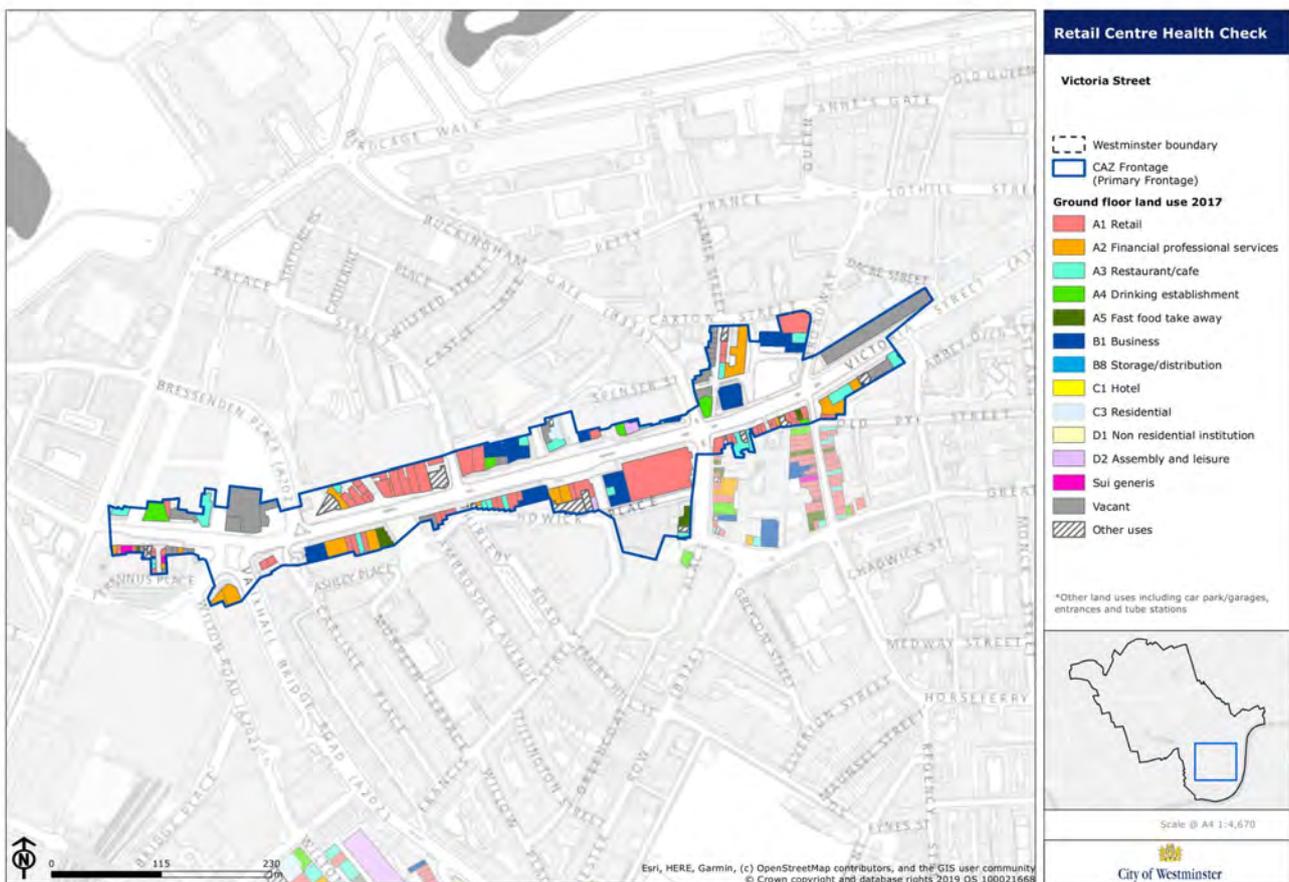


## 13.2. 2017 Land use analysis

### 13.21. Ground floor land use map (2017)

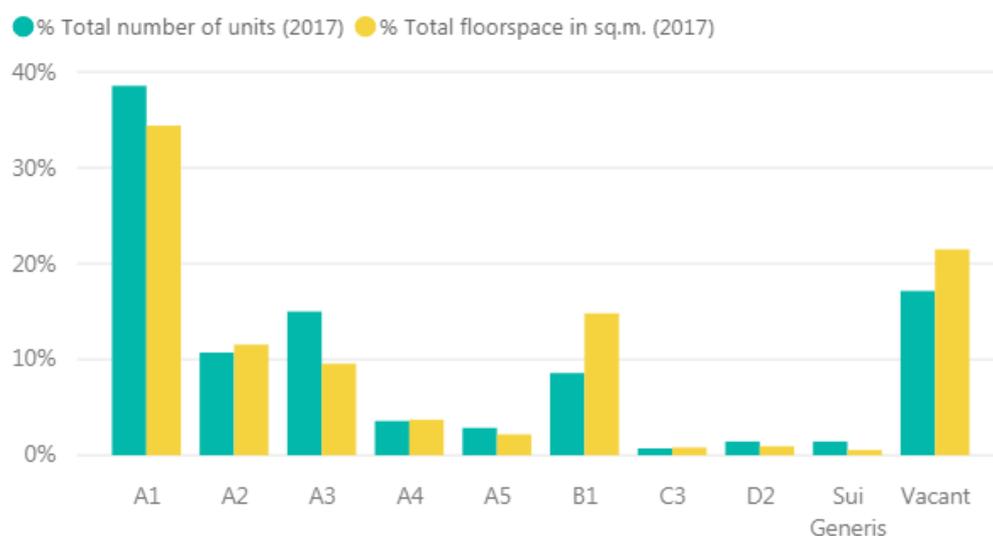
In 2017, 140 total units were identified at ground floor level. The surveyed area covered 26,152 sq m

**Map 13.1: Ground floor land use map, Victoria Street (2017)**



### 13.22. Range of units and floorspace analysis (2017)

**Figure 13.2: Ground floor total number of units and floorspace by land use, Victoria Street (2017)**



The predominant use in the area is A1, accounting for 39% of the total number of units and 34% of the total floorspace in 2017.

A1 uses are followed by A3 uses, with 21 units making up 15% of the total number of units and 10% of the total floorspace. A2 units make up 11% of the total number of units and 12% of the total floorspace. B1 uses also occupy a large number of units making 9% of the total number of units and 15% of the total floorspace.

The 2017 survey recorded 24 vacant units in the centre, accounting for 17% of all units and 21% of the overall floorspace. However, the 2018 site survey has found that a number of these units are under alteration. There is a significant amount of redevelopment and construction happening in the area meaning the units are likely to only be vacant temporarily.

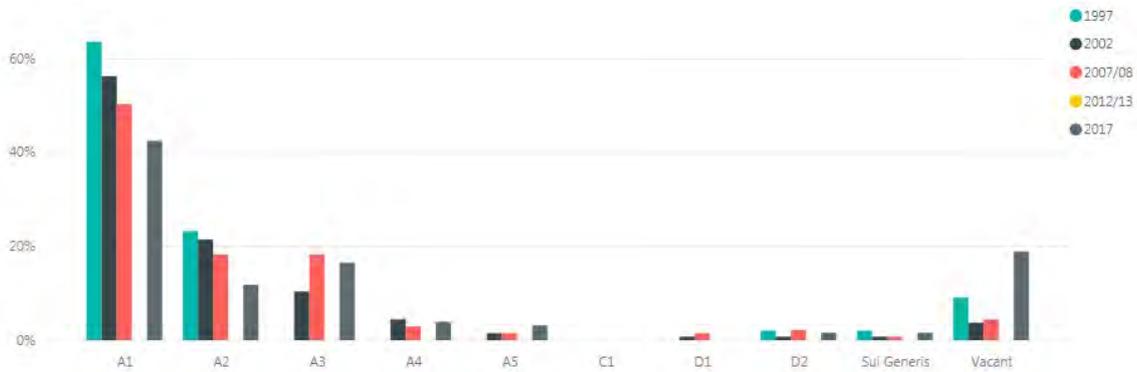
**Table 13.3: Ground floor total number of units and floorspace by land use, Victoria Street (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	54	38.57%	8999.84	34.41%
A2	15	10.71%	3019.88	11.55%
A3	21	15.00%	2501.24	9.56%
A4	5	3.57%	968.54	3.70%
A5	4	2.86%	568.97	2.18%
B1	12	8.57%	3872.72	14.81%
C3	1	0.71%	210.96	0.81%
D2	2	1.43%	243.67	0.93%
Sui Generis	2	1.43%	145.47	0.56%
Vacant	24	17.14%	5621.13	21.49%
<b>Total</b>	<b>140</b>	<b>100%</b>	<b>26152.42</b>	<b>100%</b>

### 13.3 Comparative land use analysis

#### 13.31. Comparative range of units and floorspace analysis

Figure 13.4: Proportion of units by land use, Victoria Street (2017)<sup>16</sup>



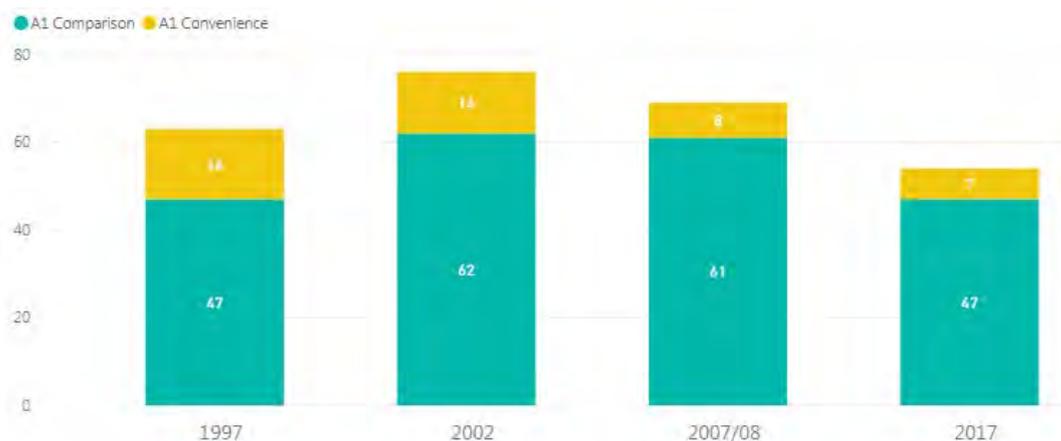
The proportion of A1 units has decreased across the years surveyed: they represented 64% of the total number of units in 1997, 56% in 2002, 50% in 2007/08 and 43% in 2017. The overall decrease over the survey period is of 63 units to 54 units.

A2 uses have also experienced a large decrease in the proportion of total units from 18% in 2007/08 to 12% in 2017. The proportion of other uses has remained broadly stable.

Vacancies recorded a continuous increase across the years surveyed, moving from 4% to 19% between 2007/08 and 2017 and increasing from 6 to 24 units.

#### 13.32. Comparative comparison/convenience split analysis

Figure 13.5: Number of comparison and convenience A1 units by year, Victoria Street (2017)



<sup>16</sup> There is no data available for 2012/13 for this centre.

The centre has had a broadly consistent comparison to convenience split across the years surveyed. Victoria Street has been A1 comparison-led since 1997. A1 convenience has experienced a marginal decrease over the years surveyed.

### **13.3. 2018 Site Survey**

#### **13.41. Accessibility and pedestrian flows**

The centre is very well connected by public transport, predominantly due to the location of Victoria train station at the west end of the centre. Victoria Station is one of the busiest mainline interchanges in London, serving south London and the wider southern England region. The station is also home to a Underground station (Circle, District and Victoria lines) and other Underground options in the area include St James's Underground station (Circle, District lines) which is located a five-minute walk from the eastern end of Victoria street. Victoria Underground station is often closed due to the congestion caused by the sheer volume of users.

The centre is also close to Victoria Coach station, which serves destinations all over the United Kingdom and abroad. The terminus also contains a bus station serving many parts of London, with several of the bus routes running down Victoria Street itself towards Parliament Square to the east.

Transport links around Victoria are extremely busy, as are road crossings – especially due to construction works funnelling pedestrians. Victoria Street is also heavily used by cars and other vehicles. This can make the area hard to use for pedestrians and has a detrimental effect on the air quality and general environment. The area has a number of safe pedestrian crossings, however the high number of users often renders these insufficient and crossings become hazardous.

Pedestrian flows were judged to be high. The street is heavily used by pedestrians, including commuters and workers as well as many tourists using the station and visiting the nearby tourist attractions such as Westminster Abbey, Buckingham Palace and Westminster Cathedral. Local attractors are also the Curzon cinema, Victoria Palace Theatre and the Apollo theatre – the latter just beyond the centre's boundary.

Car parking in the area is limited and is mostly found on streets behind the main shopping frontage.

#### **13.42 Range of units and floorspace qualitative analysis**

##### *13.421 Area description, land uses and retail provision*

Victoria Street is a mixed use, modern and evolving centre combining several ground floor land uses – large floorplate offices, small independent shops and larger chain stores along the length of the street as well as a number of food and drink premises and entertainment uses including theatres and cinemas. The area has a significant office stock above ground floor level.

The area contains a high number of shops of varying quality: close to Victoria Station and at the eastern end, units are smaller and cater for commuters and tourists with low quality shop

fronts and some with external displays. Elsewhere in the centre, the quality of shopping is much higher featuring brands such as Hugo Boss, Zara, Clarks or Nespresso. These types of shops along the main body of Victoria Street have large glass frontages which are well maintained and attractive. These are mostly chain retailers whereas at the edges of the centre more independent stores exist. The smaller units at the eastern end tend to have more traditional shop fronts. Victoria Street also accommodates a House of Fraser department store. In terms of food shops, a small Waitrose is on Victoria Street and just outside of the centre boundary a M&S Food Hall and a large Waitrose exist (in Cardinal Place/on Bressenden Place). There is a fruit seller's market pitch at Howick Place/Vic Street junction.

There are a mixture of cafés and restaurants: these predominantly belong to chains and cater for a range of budgets. The new Nova development has injected more variety in the western end of the centre in terms of eating and drinking establishments.

The centre has been characterised for some time by large scale development and new retail outlets, bars, cafés and restaurants have started to appear in the area. These are particularly concentrated between Cardinal Place/Bressenden Place and the new Nova development and appear to be particularly upmarket in the latter.



#### 13.422 Vacant units

A number of units recorded as vacant in 2017 are now occupied and a number of vacant units are due to redevelopment rather than being un-let. Overall, the 2018 site survey has found no evidence of any cluster of vacancies within the centre's boundary.



### 13.43 State of the primary shopping area environmental quality assessment

#### 13.431 *Public realm*

The area's public realm was found to be of average quality. The area has undergone considerable redevelopment work in recent years, which have also contributed to improved pavements, especially along Victoria Street, where they have been widened to accommodate the high numbers of pedestrians and are well maintained and generally free of clutter. Where tables and chairs encroach on the public realm this is limited and does not cause obstruction. The large-scale redevelopment of Nova has brought about new high quality privately-owned public space which is receded from the main road and provides opportunities for seating. Elsewhere in the centre, the public realm is poorer owing to large scale construction works taking place – pedestrians are funnelled tightly at the western end. Christchurch Gardens are underutilised and in need of improvements to add to the centre.



The level of bus traffic along Victoria Street and at the junction with Buckingham Palace Road contributes to the sense of clutter and negatively affects the pedestrian experience because of the level of noise and pollution.



#### 13.432 *Cleanliness, safety and security*

Cleanliness was judged to be high along Victoria Street.

The level of security and safety was judged to be high, with some CCTV observed. The private land developments of Nova and Cardinal Place have their own security staff. McDonald's has its own security guard on the door which is indicative of possible past issues with security.

### 13.433 *Identity and users*

The area's identity is that of an office district characterised by large floorplate offices, although this is evolving – new restaurants and bars are making it more of a destination for leisure. The presence of House of Fraser is significant, but it does not dominate. The centre mostly serves workers in the local area and commuters; however, a growing local residential population may increase the demand for new food stores and facilities. Rough sleeping is evident across the centre, with some tents and beggars. Rough sleepers and street beggars appear to concentrate mainly along the stretch between the Cathedral's square and Victoria Train Station.

## **13.4. Performance summary and recommendations**

- The centre is considered to be 'healthy'. Victoria Street is a commuters and workers destination but also attracts visitors due to its proximity to a number of tourist attractions and to Victoria Station. The area offers a mix of uses that serve the transient population such as shops, banks, restaurants and theatres.
- The level of vacancies appears to be largely affected by several large sites that are undergoing redevelopment.
- The public realm was found to be of average quality. While recent works have improved the pedestrian experience, parts of the centre would benefit from investment. Traffic congestion and pollution from buses and taxis negatively contributes to the quality of the area.
- The area scored high on cleanliness, safety and security.
- There is a concentration of rough sleepers and beggars on Victoria Street.

## **13.5. Recommended boundary changes**

A number of units currently fall both within Victoria Street (CAZ Frontage) and Strutton Ground/Artillery Row (Other Shopping Centre Within the CAZ). It is recommended that the units on Artillery Row become all part of Victoria Street (CAZ Frontage) and the units on Strutton Ground become only part of Strutton Ground/Artillery Row (Other Shopping Centre Within the CAZ). It is considered that the type and function of the units on Artillery Row is more consistent to the offer on Victoria Street.

It is also recommended to incorporate the Nova development, Cardinal Place and the large Waitrose site on Bressenden to Victoria Street (CAZ Frontage). These new developments have virtually extended the extent of Victoria Street and provide a key retail and leisure function to the area.

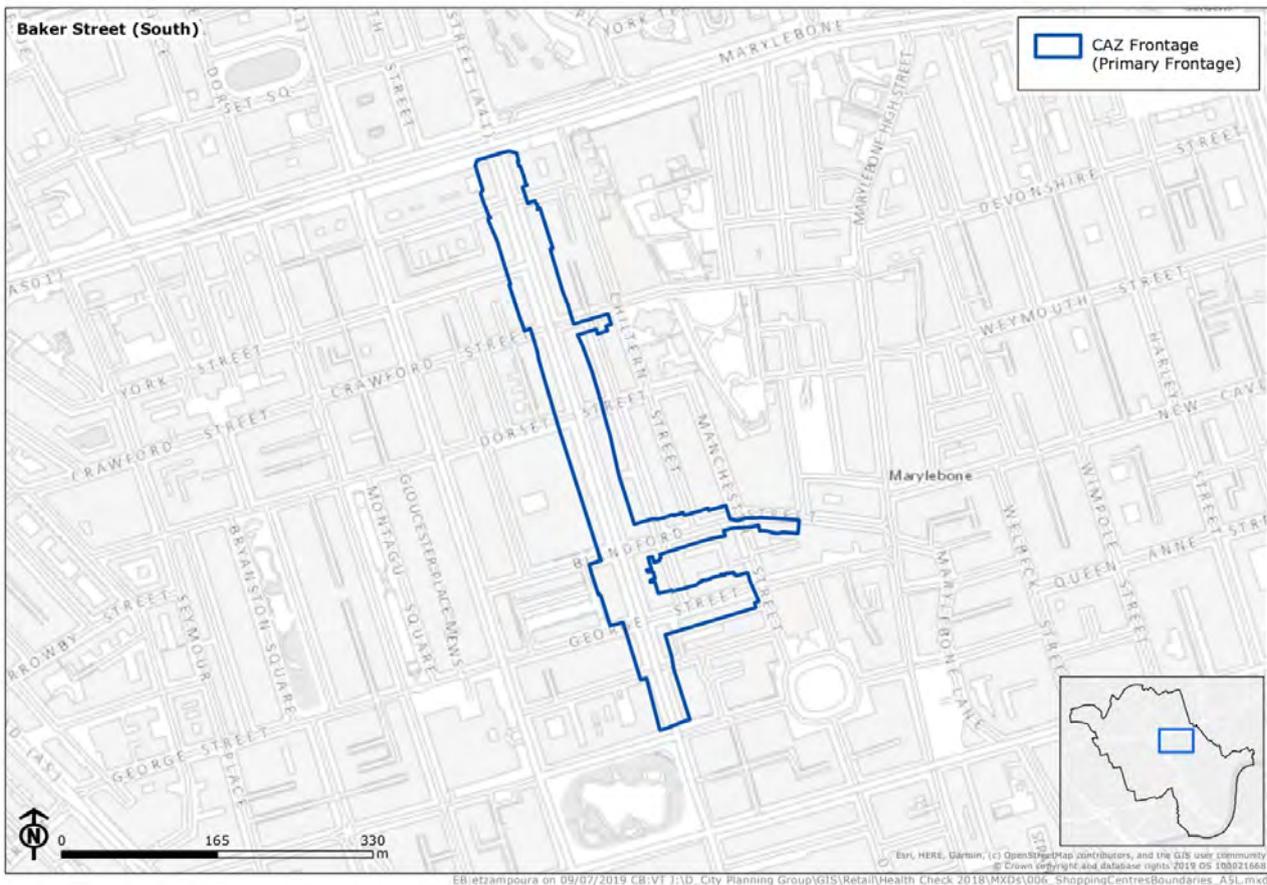
A number of units on Terminus Place have recently been redeveloped and include a new Market Hall which provides for an extended leisure function. It is recommended that it is incorporated to Victoria Street (CAZ Frontage).

Finally, the New Scotland Yard site will host a mix-use scheme and it is recommended that it is incorporated to Victoria Street (CAZ Frontage).

Further details on all boundary changes can be found in 'Appendix 3: Recommended changes to designation boundaries'.

## 14.0. Baker Street (South) ♦

Map 14.0: CAZ Frontage boundary, Baker Street (South) (2017)



### 14.1. Introduction

Baker Street (South) is a designated CAZ Frontage and is within the CAZ.

The centre is a long linear centre located at the heart of Westminister close to a series of London attractions including Madame Tussaud's Museum, Regent's Park and other designated town centres including Marylebone Road, Marylebone High Street, Chiltern Street/George Street/Blandford Street and Crawford Street/Seymour Place/York Street.

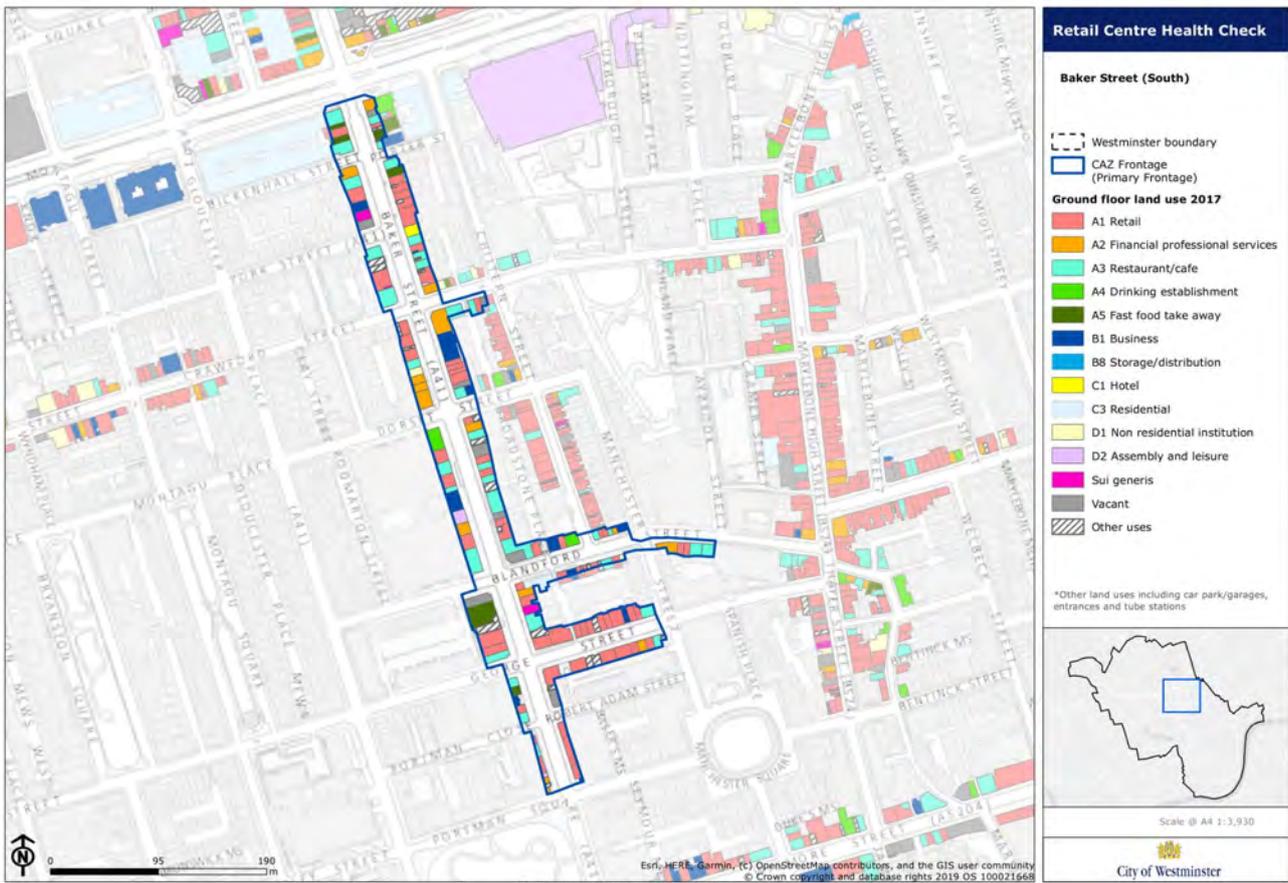
It is a mixed-use centre that serves the local community but also workers and visitors to the area. New developments have been completed and street works are being carried out as part of the 'Baker Street Two Way Project'.

## 14.2. 2017 Land use analysis

### 14.21. Ground floor land use map (2017)

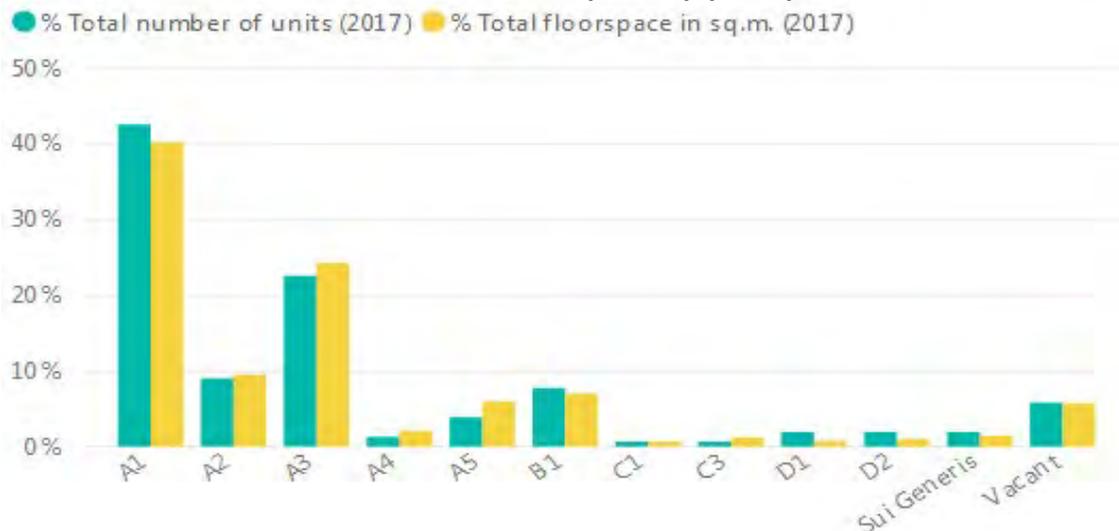
In 2017, 155 total units were identified at ground floor level. The surveyed area covered 16,977 sq m

**Map 14.1: Ground floor land use map, Baker Street (South) (2017)**



### 14.22. Range of units and floorspace analysis (2017)

**Figure 14.2: Ground floor total number of units and floorspace by land use, Baker Street (South) (2017)**



The centre is a mixed-use centre with 66 A1 units recorded in 2017. A1 is the prevalent use accounting for 43% of all units within the centre and for 40% of the overall floorspace. The second dominant land use is A3 (23% of all units) and third use is A2 (9% of the units). Other uses in the centre include a limited amount of A4, A5, C1, C3, D1, D2 and Sui Generis. The area is also home to a number of offices at ground floor level (12 units). There are nine vacant units in the centre, taking up 6% of the total number of units and 6% of the overall floorspace. However, the 2018 site survey has identified a number of additional vacant units.

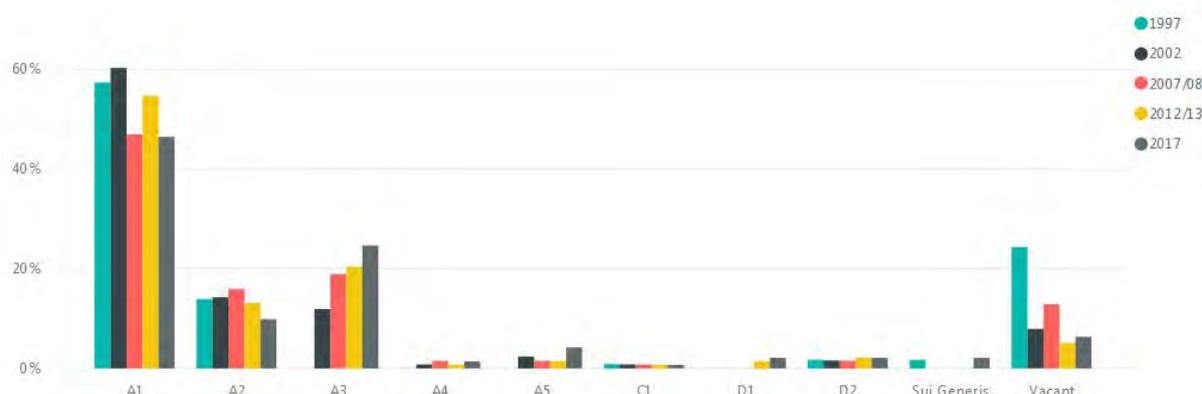
**Table 14.3: Ground floor total number of units and floorspace by land use, Baker Street (South) (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	66	42.58%	6834.17	40.25%
A2	14	9.03%	1617.51	9.53%
A3	35	22.58%	4121.86	24.28%
A4	2	1.29%	352.72	2.08%
A5	6	3.87%	1018.69	6.00%
B1	12	7.74%	1196.79	7.05%
C1	1	0.65%	116.49	0.69%
C3	1	0.65%	206.93	1.22%
D1	3	1.94%	130.35	0.77%
D2	3	1.94%	169.99	1.00%
Sui Generis	3	1.94%	240.83	1.42%
Vacant	9	5.81%	971.44	5.72%
<b>Total</b>	<b>155</b>	<b>100%</b>	<b>16977.76</b>	<b>100%</b>

### 14.3. Comparative land use analysis

#### 14.31. Comparative range of units and floorspace analysis

**Figure 14.4: Proportion of units by land use, Baker Street (South) (2017)**

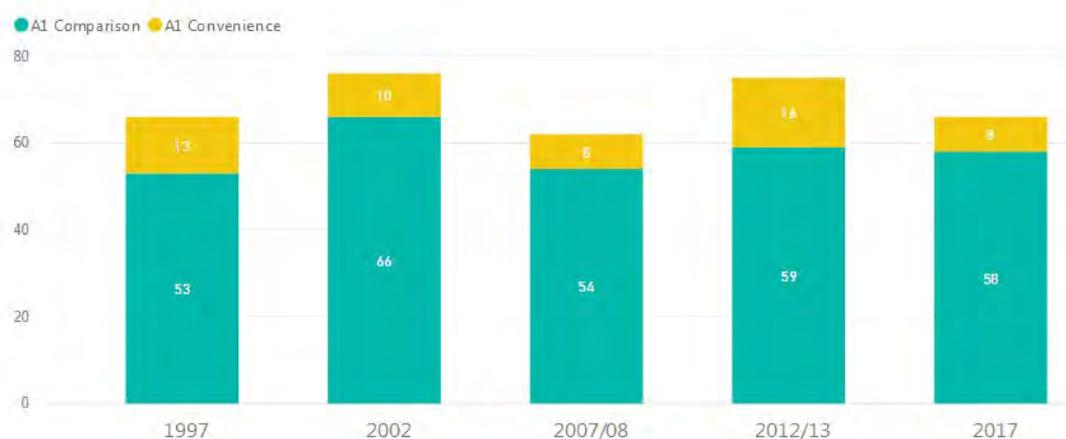


The proportion of A1 units has decreased between 1997 and 2017 and is at its lowest: in 2017 A1 accounted for 47% of all the centre's units.

Across the years surveyed the proportion of A2 units has decreased and reached its minimum in 2017. However, the proportion of A3 units has increased between 2002 and 2017: in 2017, A3 uses represented 25% of all units with 35 units. Since the last survey period in 2012/2013, there has been a negligible change in the number of A4, C1, D1 and D2 units. The number of A5 units has slightly increased from 2 to 6 and the centre has now three Sui Generis units. Overall, the level of vacancy has decreased across the years surveyed, as it was at its maximum in 1997 (24% of all units). The vacancy level has increased from 5% to 6% between 2012/2013 and 2017, representing a marginal change and affecting nine units.

### 14.32. Comparative comparison/convenience split analysis

**Figure 14.5: Number of comparison and convenience A1 units by year, Baker Street (South) (2017)**



The centre has had a broadly consistent comparison to convenience split across the years surveyed. Baker Street (South) has been A1 comparison-led since 1997. Between 2012/13 and 2017, the centre has lost half of its A1 convenience units.

## 14.4. 2018 Site Survey

### 14.41. Accessibility and pedestrian flows

Although there are no Underground stations within the boundary of the centre, the area is close to Marble Arch (Central line), Bond Street (Central, Jubilee lines), Baker Street (Bakerloo, Circle, Hammersmith and City, Jubilee, Metropolitan lines) and Marylebone train station.

A significant number of buses directly serve Baker Street. Vehicular traffic is dense along the street as Baker Street is one of Westminster’s strategic roads.

Pedestrian flows were judged to be average all along Baker Street. The area has safe crossings and is highly accessible. However, as there are many junctions controlled by traffic lights it is difficult to have a continuity while walking.



## 14.42 Range of units and floorspace qualitative analysis

### 14.421 Area description, land uses and retail provision

The Baker Street (South) area is home to a significant number of business and office buildings. At ground floor level it accommodates a wide range of uses and units. In terms of land uses, three different areas can be identified: Baker Street, Blandford Street and George Street.

Baker Street itself presents a mixed balance of uses at ground floor level that mainly attract visitors and workers but also local residents.

In terms of shops, there is a good offer of food shops (e.g. Tesco Express, Eat, Sainsbury's Local, Holland and Barrett) that are mainly multiples. There are a series of comparison type shops (e.g. pharmacies, opticians) and a small cluster of interior design, furniture and household products shops (e.g. The Creative Centre, Fired Earth).

A significant number of food premises can be found in the area. The majority of the cafés in the northern and southern edges of the street belong to chains (e.g. Iitsu, Pizza Express, Nando's) but the area also hosts a small number of independent cafés and restaurants. A number of hot-food takeaway premises complement the food offer.

A number of banks and estate agents can be found along the street. The area also accommodates a small number of betting offices, a gym and a dancing academy.

Blandford Street and George Street are perpendicular to Baker Street. Both streets have active and well-maintained shop fronts.

George Street hosts comparison type shops including hairdressers, clothing shops and florists. Two small cafés located in the eastern road of George Street have tables and chairs in the pavement.



Blandford Street presents a more mixed balance of uses than George Street as it not only accommodates a number of comparison type shops but also a number of cafés and restaurants that have tables and chairs outside.

#### 14.422 *Vacant units*



The 2017 land use survey identified nine vacant units in the centre. During the site visit, it was observed that a small number of new vacant units had appeared in the middle part of Baker street and on Blandford and George Street. However, the area is undergoing change with a number of new developments and street works underway.

### 14.43 State of the primary shopping area environmental quality assessment

#### 14.431 *Public realm*

The centre's public realm was found to be of average quality. Works related to the 'Baker Street Two Way Project' are being carried out on Baker Street and Gloucester Place to reduce the dominance of traffic, improve the environment for pedestrians, improve crossings and ensure adequate kerbside capacity<sup>17</sup>. During the site visit, evidence of the ongoing works was observed but the atmosphere did not feel very cluttered. Dense traffic however contributes to pollution and noise and affect the pedestrian experience.

Pavements are wide and the shop fronts well-maintained. However, the area is slightly cluttered due to A boards and tables and chairs on the pavements which adds to the existing street clutter (e.g. bins, lampposts, bus stops and phone boxes). There was little evidence of landscaping, the environment is highly urbanised, and a lack of amenity space was observed.



<sup>17</sup> More information can be found here: <http://www.bakerstreetwoway.co.uk>

#### 14.432 *Cleanliness, safety and security*

Cleanliness was judged to be average throughout the centre. The level of safety and security was judged to be average. This scoring reflects the impacts of works that were ongoing during the site visit.

#### 14.433 *Identity and users*

The area does not have a strong identity itself and is not home to any flagship stores or buildings. However, it is one of Westminster's arterial roads and therefore attracts a large number of commuters and residents from the neighbouring areas. Visitors also use the area due to its proximity to Madame Tussaud's Museum and Regent's Park.

### **14.5. Performance summary and recommendations**

- The centre is considered to be 'healthy'. Baker Street (South) is a centre that serves local residents, workers and visitors attracted by nearby stations, office buildings and tourist attractions. The centre offers a mix of uses including shops, restaurants and cafés.
- The level of vacancies remains low despite a number of ongoing developments in the area.
- Traffic congestion and pollution from vehicular traffic negatively impacts on the quality of the area. Once completed, ongoing "Baker Street two way" and public realm works will improve the pedestrian experience throughout the centre.

### **14.6. Recommended boundary changes**

A number of units currently fall both within Baker Street (South) (CAZ Frontage) and Marylebone Road (CAZ Frontage). It is recommended that the units that face Baker Street remain part of Baker Street (South) (CAZ Frontage) and that the units at the junction with Marylebone Road become part of Marylebone Road (CAZ Frontage). It is considered that the type and function of the units on Baker Street is more consistent to the offer on Baker Street (South).

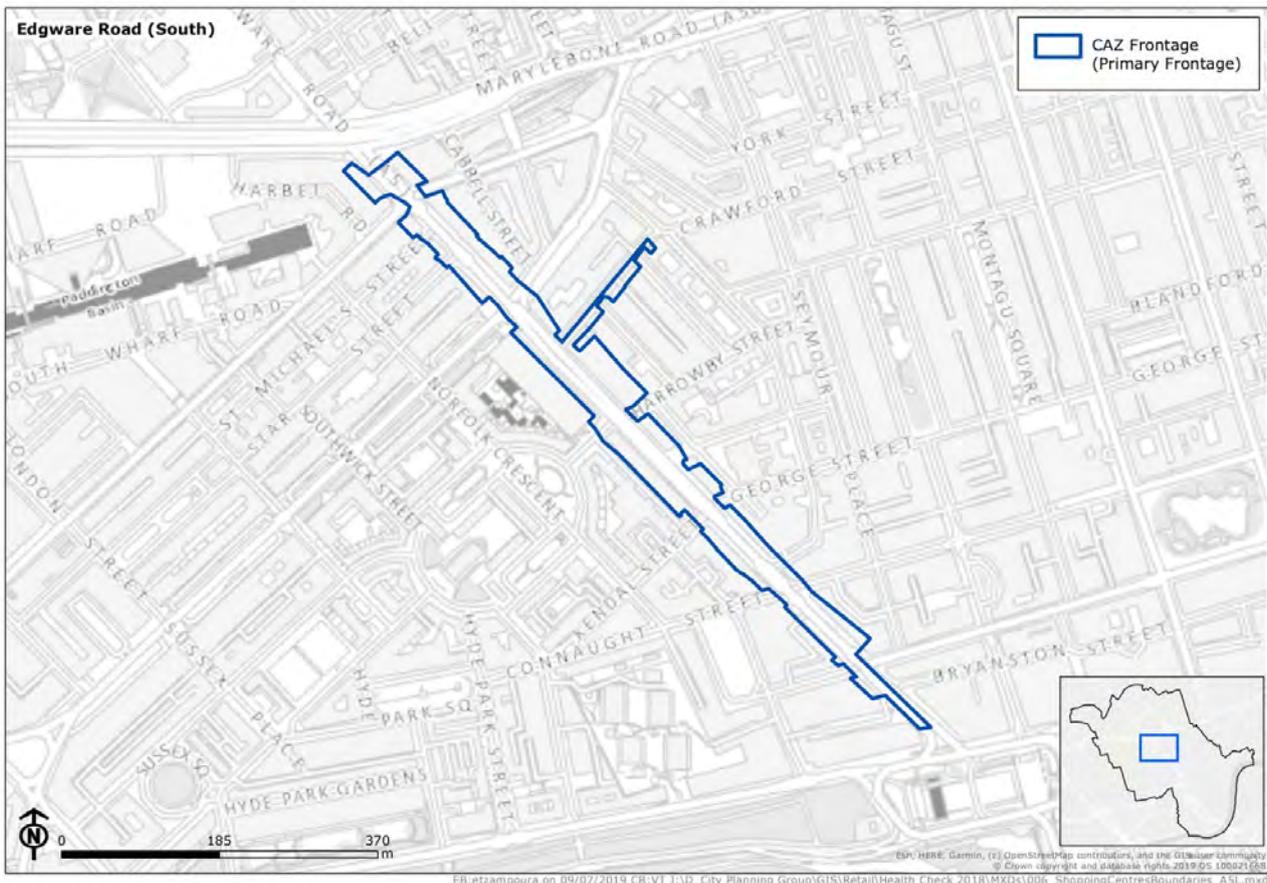
Another number of units currently fall both within Baker Street (South)(CAZ Frontage) and Chiltern Street/George Street/Blandford Street (Other Shopping Centre within the CAZ). It is recommended that the units on both George Street and Blandford Street become all part of Baker Street (South)(CAZ Frontage). It is considered that the type and function of the units on both streets is more consistent to the offer on Baker Street (South).

It is also recommended to include a number of units on George Street (west of Baker Street) and to extend the centre boundary so the southern part of Baker Street becomes part of the centre to recognise that these areas contribute to the centre's function.

Further details on all boundary changes can be found in 'Appendix 3: Recommended changes to designation boundaries'.

## 15.0. Edgware Road (South) ♦

Map 15.0: CAZ Frontage boundary, Edgware Road (South) (2017)



### 15.1. Introduction

Edgware Road (South) is a designated CAZ Frontage and is within the CAZ.

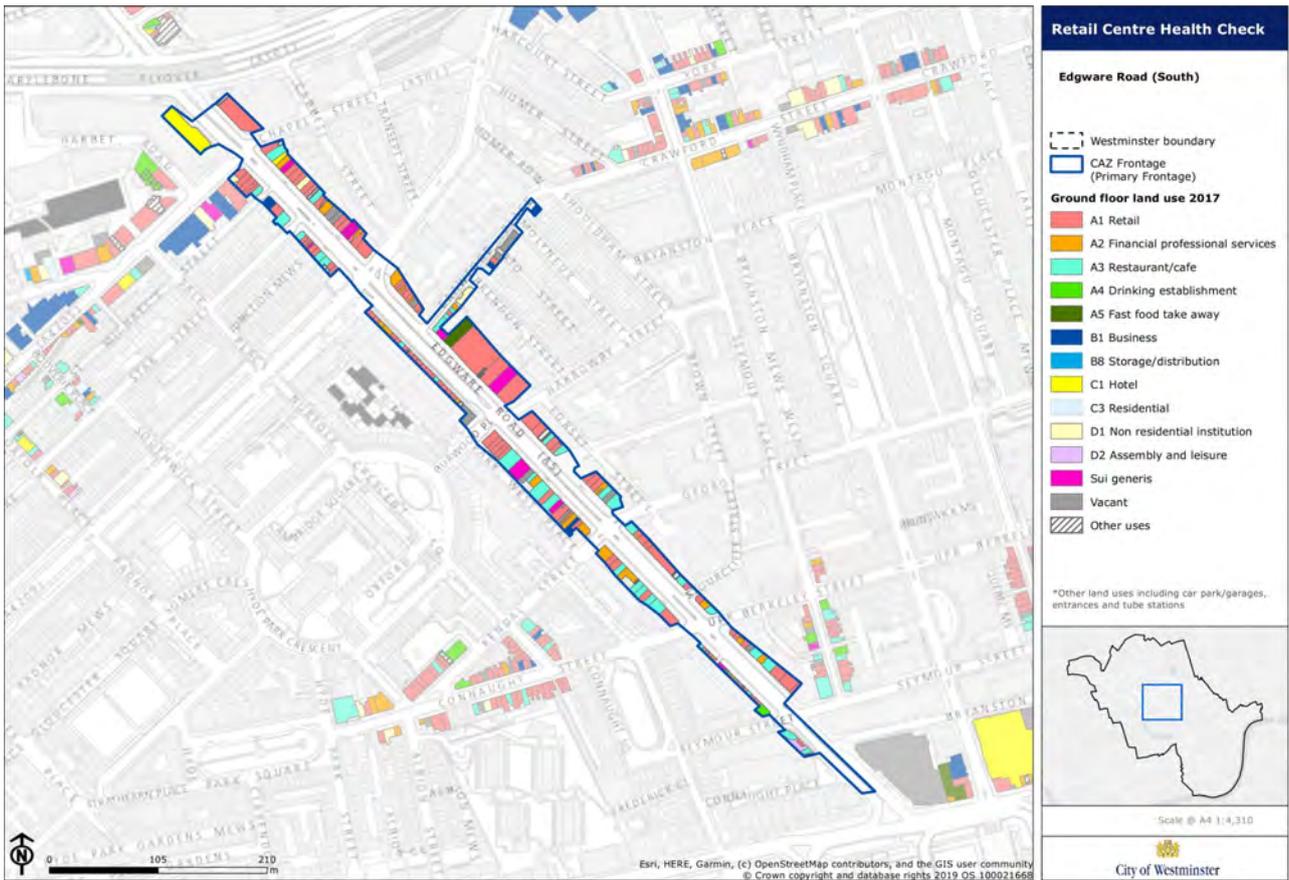
Edgware Road (South) is a linear centre located in the north part of Westminster and is in close proximity to Edgware Road and Marble Arch Underground stations and Marylebone and Paddington train stations. The centre is close to several tourist attractions such as Hyde Park, Marble Arch and Oxford Street and also attracts visitors itself. The centre is close to other designated town centres including the West End, Praed Street, Church Street/Edgware Road, Connaught Square, Seymour Place and Crawford Street/Seymour Place/York Street. It is a mixed-use centre that hosts a large number of shops, financial and professional services units and restaurants and cafés which have a strong international identity. The centre serves the local community but also workers and visitors to the area.

### 15.2. 2017 Land use analysis

#### 15.2.1. Ground floor land use map (2017)

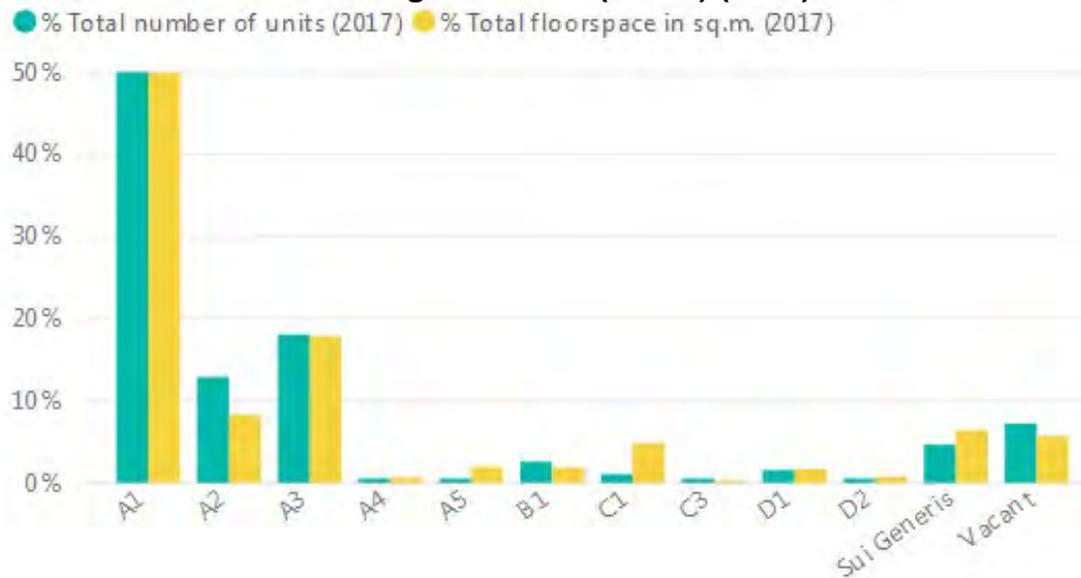
In 2017, 194 total units were identified at ground floor level. The surveyed area covered 16,635 sq m

**Map 15.1: Ground floor land use map, Edgware Road (South) (2017)**



**15.22. Range of units and floorspace analysis (2017)**

**Figure 15.2: Ground floor total number of units and floorspace by land use, Edgware Road (South) (2017)**



Edgware Road (South) is a mixed-use centre with 97 A1 units recorded in 2017. These account for 50% of all units within the centre and for 50% of the overall floorspace. A1 uses are followed by A3 (18% of the units) and A2 uses (13% of the units).

A residential unit was recorded within the boundary of the centre (on Crawford Place) and five office units (three in Crawford Place and two on Edgware Road). There are 14 vacant units within the centre, accounting for 7% of all units and 6% of the overall floorspace. The 2018 site survey has not revealed any significant changes although some units appeared to be under alteration.

**Table 15.3: Ground floor total number of units and floorspace by land use, Edgware Road (South) (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	97	50.00%	8295.98	49.87%
A2	25	12.89%	1379.71	8.29%
A3	35	18.04%	2965.74	17.83%
A4	1	0.52%	99.23	0.60%
A5	1	0.52%	325.46	1.96%
B1	5	2.58%	309.86	1.86%
C1	2	1.03%	806.10	4.85%
C3	1	0.52%	46.67	0.28%
D1	3	1.55%	277.58	1.67%
D2	1	0.52%	117.84	0.71%
Sui Generis	9	4.64%	1066.65	6.41%
Vacant	14	7.22%	944.63	5.68%
<b>Total</b>	<b>194</b>	<b>100%</b>	<b>16635.45</b>	<b>100%</b>

### 15.3. Comparative land use analysis

#### 15.3.1. Comparative range of units and floorspace analysis

**Figure 15.4: Proportion of units by land use, Edgware Road (South) (2017)**



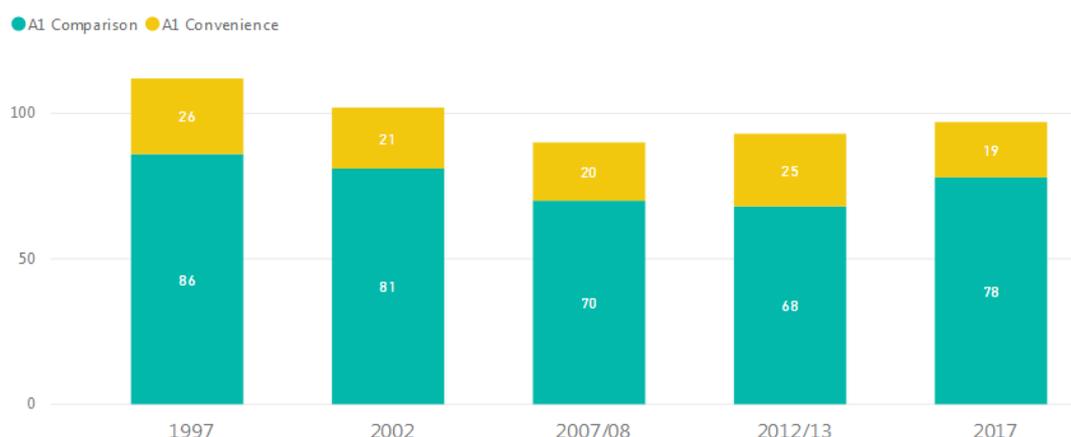
Across the years surveyed, the proportion of A1 units has decreased: in 2017, A1 accounted for 50% of all the centre's units. The actual number of shops has also dropped down: the number of units was of 112 in 1997 and of 97 in 2017.

A2 units have reached its minimum in 2017 (13% of all units). The proportion of A3 units has increased across the years surveyed although it slightly decreased in 2012/2013: in 2017 it represents 19% of all units.

The proportion of A4, A5, C1, D1 and D2 uses has always been marginal. However, the proportion of Sui Generis uses increased importantly in 2012/2013 from 2% in 2007/2008 to 10% in 2012/2013. In 2017, they only represented 5% of the total number of units and most of them hosted betting offices. The level of vacancy was at its maximum in 2007/2008 (11% of all units), decreased to 1% in 2012/2013 and increased to 7% in 2017, when 14 vacant units were recorded.

### 15.32. Comparative comparison/convenience split analysis

**Figure 15.5: Number of comparison and convenience A1 units by year, Edgware Road (South) (2017)**



The centre has had a broadly consistent comparison to convenience split across the years surveyed. Edgware Road (South) has been A1 comparison-led since 1997.

## 15.4. 2018 Site Survey

### 15.41. Accessibility and pedestrian flows

The area is well served by transport links. There are two Underground stations in close proximity to the centre: Marble Arch station (Central line) and Edgware Road station (Circle, District, Hammersmith and City lines). Paddington and Marylebone train stations are also at a walking distance.

The centre is served by several bus routes that run along Edgware Road and is one of Westminster's arterial roads. The traffic is dense along Edgware Road with a high number of buses, taxis and cars. Edgware Road is at the edge of the Congestion Charge and Ultra Low Emissions Zone area.

Pedestrian flows were judged to be high all along Edgware Road but lower in the side streets. The pavements are wide, and a significant amount of people walk. The area has moderately unsafe crossings as the traffic is dense and not all the crossings are controlled by traffic lights.

### 15.42 Range of units and floorspace qualitative analysis

#### 15.421 Area description, land uses and retail provision

The Edgware Road (South) centre is a mixed-use centre as it combines shops, financial and professional service units and a good offer of restaurants and cafés. The Edgware Road and the Crawford Place areas are different and attract a different amount of people.

Edgware Road itself accommodates a significant number of shops that have an international character and that are mainly independent stores (e.g. pharmacies, barbers, opticians, technology shops). Along the street, a significant number of small food shops that have an international character can be found but also large supermarkets (e.g. Tesco, Waitrose). Many of the small grocery shops have stalls outside with vegetables and fruits, resembling an outdoor market. The area also hosts a number of souvenir/tourist shops that not always have very well-maintained shop fronts. A number of shops are very mixed retail units as offer different types of goods such as food, jewellery or phones.

In the southern edge of Edgware Road and closer to Oxford Street, a small number of shops belonging to national multiples can be identified (e.g. Paperchase, As Nature Intended). New mixed-used developments are under-construction in the southern edge of the street creating sometimes noise and a sense of clutter.

The centre also hosts a very significant number of units that offer financial and professional services such as estate agencies, banks and a large number of Bureaux de Change that very often target the international population that lives or visits the area: signs are very often both in Arabic and English.

The area is also home to a considerable number of food and drink premises and some have tables and chairs outside. Several food premises are independent businesses with an international food offer including Middle Eastern, North African, and Eastern Mediterranean food but there are also a number of premises that belong to multiples (e.g. Starbucks, Nero). The area also accommodates a 4-stars Hilton Hotel in the northern edge and another small hotel in the vicinity; the area attracts an important number of visitors.

The southern part of Crawford Place is part of the centre and accommodates a number of food premises but also an estate agent and a small number of offices. There is a public house (Crawford Street and Molyneux Street junction) in the area that attracts people and that was found to be very busy during the site visit (however, the public house does not fall within the centre boundary) as it has tables and chairs outside.

Edgware Road (South) concentrates a large number of premises that have shisha smoking terraces. A significant number of betting shops was also observed along the centre (e.g. William Hill, Ladbrokes, Coral).



15.422 *Vacant units*

The 2017 land use survey identified 14 vacant units in the centre. During the site visit, no significant changes were noted although it was noted that some units were under alteration. A cluster of vacancies was found on Crawford Street.

## 15.43 State of the primary shopping area environmental quality assessment

### 15.431 *Public realm*

The centre's public realm was found to be of low quality as the area could be decluttered, improved and would benefit from landscaping.

The pavements are wide and well designed, encouraging walking. However, shop fronts are not well maintained and do not look attractive. There area is cluttered as shops install signs, stools and different boards and products outside occupying an important part of the pavement width very often already occupied by bus stops, a large number of phone boxes and containers.

Several buildings in the area are under alteration, making some areas unpleasant and widening the pavements.

There are very few traffic lights for pedestrians which make crossings dangerous.

The area also scores poorly on amenity and rest space and there is little evidence of landscaping.

Traffic congestion along Edgware Road also contributes to the sense of clutter and to air pollution.



### 15.432 *Cleanliness, safety and security*

Cleanliness was judged to be low throughout the centre. During the site visit, litter and refuse bags were observed on the street. A number of graffiti was also observed.

The level of safety and security was judged to be average, especially due to the amount of traffic and hazardous crossings.



### 15.433 *Identity and users*

The area has a strong international identity and comprises a number of businesses selling Middle Eastern, North African, and Eastern Mediterranean goods. Shops, financial units, restaurants and cafés and fascia names constantly remind the visitor of the area's identity. The area mainly serves local residents but also workers and visitors.

There are no major flagship stores or monuments but the area itself attracts people as it has a unique character and offer.

A few beggars were spotted during the site visit, but no rough sleepers were observed.



## 15.5. Performance summary and recommendations

- The centre is considered to be 'healthy'. Edgware Road (South) is a mixed-use area with three predominant uses: shops, financial and property services units, and restaurants and cafés. The area has a diverse international character as it has historically attracted people from the Middle East, North Africa and the Eastern Mediterranean who either live in or visit the area. The proportion of food and drink uses has increased, suggesting a trend towards a more leisure and entertainment-focused offer especially around the evening and night-time.
- The level of vacancies is low and is not considered of concern.
- The area would benefit from improved landscaping, de-clutter and cleanliness.
- The safety and security in the area could improve as traffic is dense and crossings are hazardous.
- A number of betting shops and shisha-smoking premises can be found throughout the centre.

## 15.6. Recommended boundary changes

It is recommended to include a number of units on Edgware Road, between Seymour and Bryanston Street to recognise that the new retail units contribute to the centre's function.

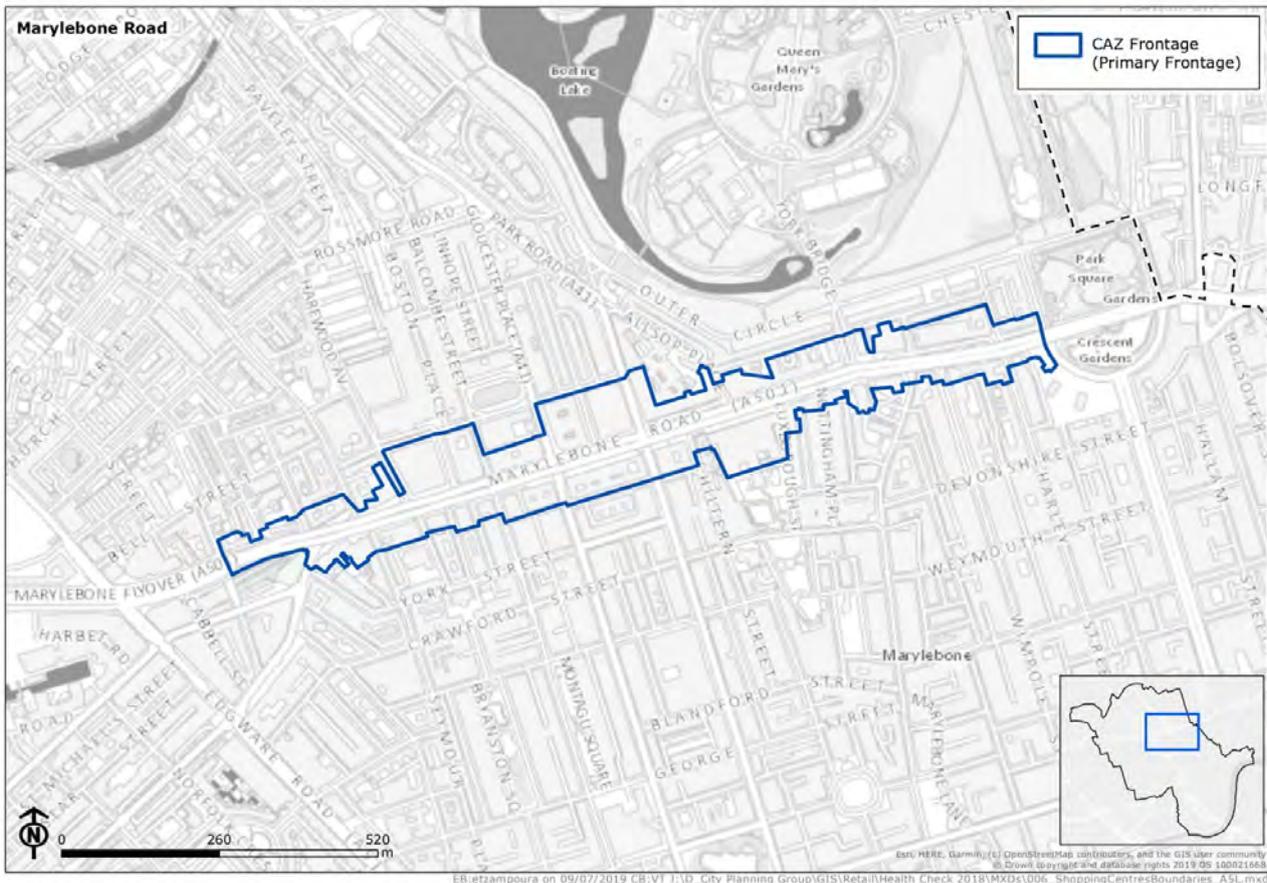
It is also recommended to include the first block on the north-eastern corner between Edgware Road and Upper Berkeley Street to recognise the function of these units is consistent with the centre's function.

Finally, it is considered that the units on Crawford Street should be removed from the designation. These units do not make up a continuous frontage, present a significant level of vacancy and the development pipeline for the area suggests the function of this frontage will shrink further.

Further details on all boundary changes can be found in 'Appendix 3: Recommended changes to designation boundaries'.

## 16.0. Marylebone Road

Map 16.0: CAZ Frontage boundary, Marylebone Road (2017)



### 16.1. Introduction

The Marylebone Road centre is a designated CAZ Frontage and is within the CAZ. Marylebone Road is a linear centre located in the north part of Westminster. The centre accommodates tourist attractions such as Madame Tussaud's Museum and is in close proximity to Regent's Park. The centre is in close proximity to other town centres including Edgware Road, Baker Street (South), Marylebone High Street, Baker Street/Melcombe Street and Lisson Grove.

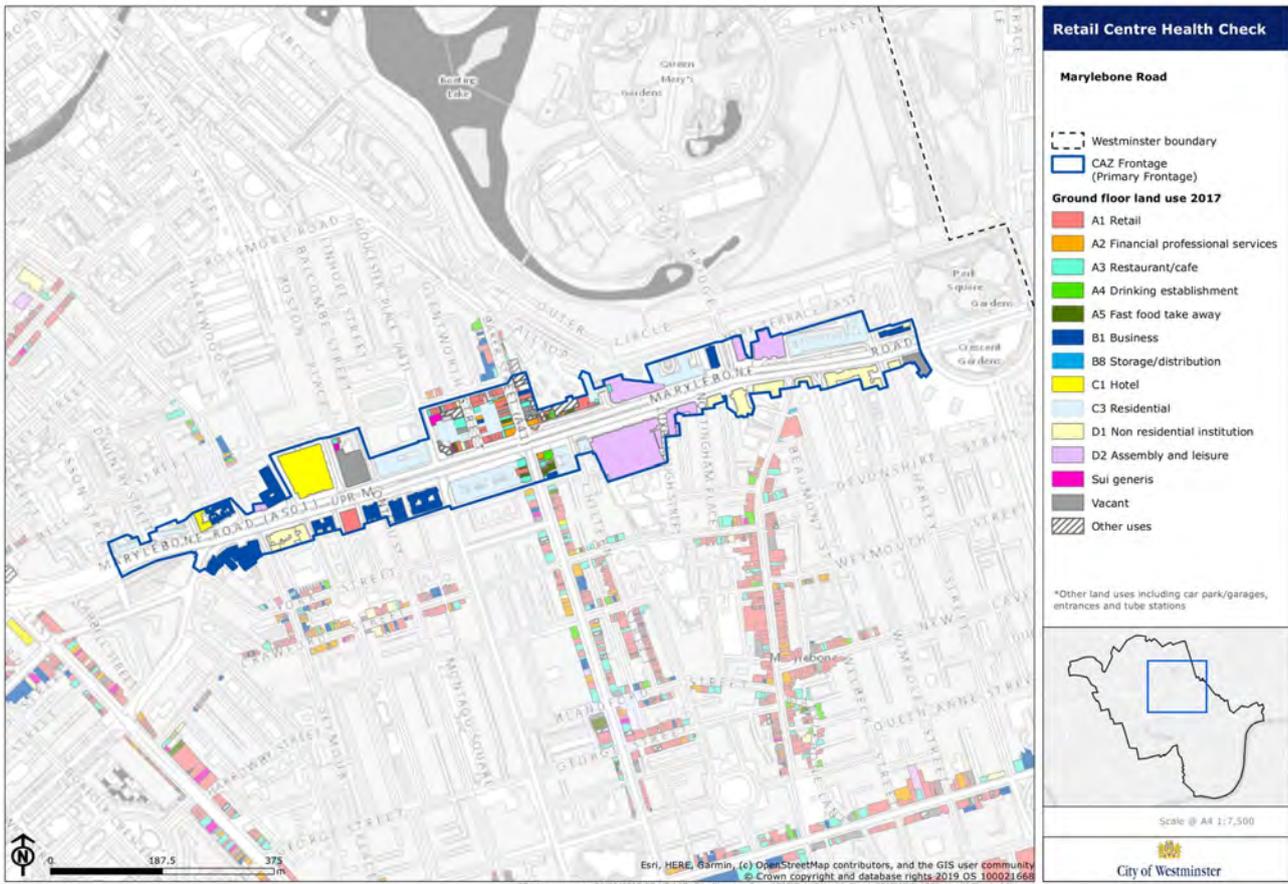
The centre presents a range of commercial uses including a significant office stock, a hotel and civic buildings, interspersed with residential buildings. Retail activity is focused around the intersection with Baker Street.

### 16.2. 2017 Land use analysis

In 2017, 145 total units were identified at ground floor level. The surveyed area covered 68,714 sq m

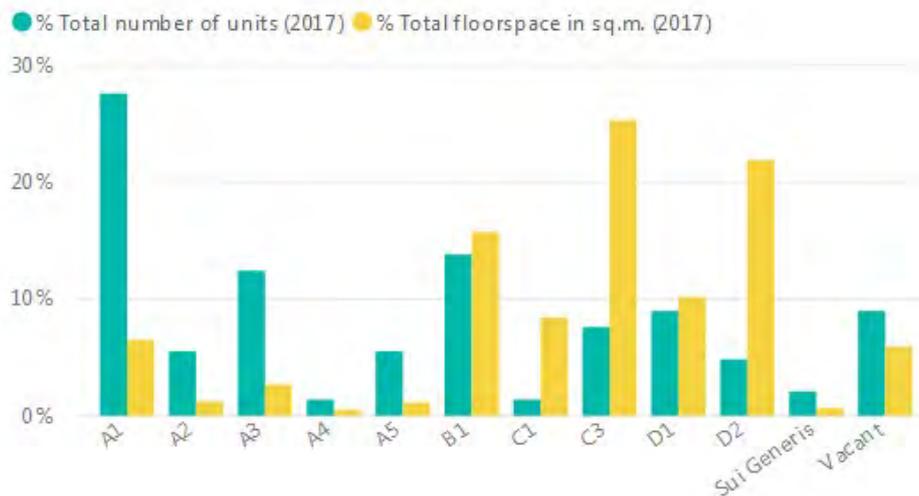
#### 16.21. Ground floor land use map (2017)

## Map 16.1: Ground floor land use map, Marylebone Road (2017)



### 16.22. Range of units and floorspace analysis (2017)

**Figure 16.2: Ground floor total number of units and floorspace by land use, Edgware Road (South) (2017)**



The centre is very mixed in terms of land uses. A1 units account for 28% of all units within the centre but only 6% of the overall floorspace at ground floor level indicating they occupy small units.

The most significant use in terms of floorspace (25%) is residential although it only represents 8% of the total number of units. B1 land uses are also significant, representing 14% of the units and 16% of the total ground floor floorspace.

D1 and D2 uses also make a significant contribution to the mixed nature of the centre: they represent 10% and 22% of the total ground floor floorspace respectively. D2 uses operate from large floorplates. A2, A4, A5 and Sui Generis uses were marginal in 2017.

In 2017, 13 vacant units were recorded, accounting for 9% of all units and 6% of the overall floorspace. The building at 206-216 Marylebone was recorded vacant as well as some other vacant units located in close proximity to Baker Street Underground station. The 2018 site survey recorded little evidence of vacancy and a number of units were under alteration.

**Table 16.3: Ground floor total number of units and floorspace by land use, Marylebone Road (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	40	27.59%	4461.61	6.49%
A2	8	5.52%	831.45	1.21%
A3	18	12.41%	1830.85	2.66%
A4	2	1.38%	354.27	0.52%
A5	8	5.52%	770.57	1.12%
B1	20	13.79%	10805.86	15.73%
C1	2	1.38%	5760.16	8.38%
C3	11	7.59%	17361.12	25.27%
D1	13	8.97%	6977.10	10.15%
D2	7	4.83%	15043.75	21.89%
Sui Generis	3	2.07%	449.92	0.65%
Vacant	13	8.97%	4067.08	5.92%
<b>Total</b>	<b>145</b>	<b>100%</b>	<b>68713.73</b>	<b>100%</b>

### 16.3. Comparative land use analysis

This is the first time that Marylebone Road has been surveyed by Westminster City Council. Accordingly, there is no comparative data for this centre.

### 16.4. 2018 Site Survey

#### 16.4.1. Accessibility and pedestrian flows

The area is very well served by public transport as Baker Street Underground station falls within the centre boundary. The Marylebone Underground and train station is just outside of the centre and within walking distance.

Several bus routes run along Marylebone Road. Marylebone Road itself links to the A40 to the west and as such provides a major through-route for vehicular traffic. At the time of visit, Marylebone Road was found to be very heavily trafficked with a six-lane highway including bus lanes running through the centre. Marylebone Road is at the edge of the Congestion Charge and Ultra Low Emissions Zone areas.

Pedestrian flows were judged to be average. Footfall is predominantly from tourists, students and workers. It was noted that the footfall was much lower at the far East and West ends of the centre and busier close to the station and Baker Street.



## 16.42 Range of units and floorspace qualitative analysis

### 16.421 *Area description, land uses and retail provision*

The retail activity is largely clustered around the Baker Street/Marylebone Road junction and along Melcombe Street. The shops are mainly small units and are a mix of independent and chain businesses (e.g. pharmacies, opticians, off licenses). Many units target visitors, selling souvenirs and luggage or providing money exchange services. The area also hosts several banks and food premises that mainly belong to multiples.

The centre's use changes away from shopping to the east of Baker Street. The units are much bigger floorplates that accommodate different uses such as the Madame Tussaud's Museum, a campus of the University of Westminster and the Academy of Music. The area also has a significant residential stock and accommodates several health-related uses. Towards the west of the centre, the predominant uses are office and residential. This area is also home to the Landmark Hotel.

Two public houses, a betting office, a petrol station and some street traders were also observed during the site visit.



### 16.422 *Vacant units*

The 2017 land use survey identified a number of vacant units and some were observed to be under alteration or occupied by new businesses at the time of visit. The site survey also revealed that almost half of Eye Hospital (by Seymour Place) is now vacant.

## 17.43 State of the primary shopping area environmental quality assessment



### 16.431 *Public realm*

The public realm was found to be of a low quality.

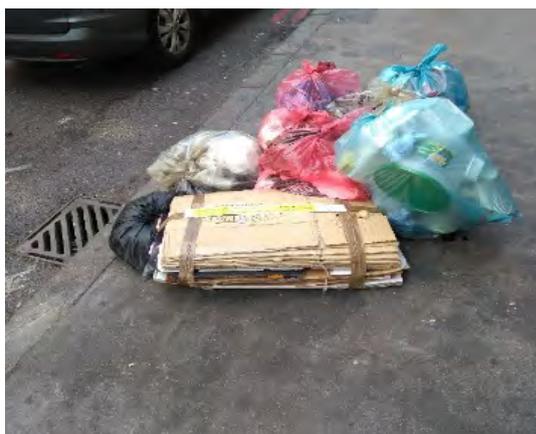
The area has wide pavements to the western side of the centre. There are trees lining either side of the highway. However, the area is slightly cluttered with lampposts, phone boxes and general street furniture.

Traffic congestion along Marylebone Road contributes to the sense of clutter and to noise and air pollution making Marylebone Road an unpleasant street to walk along. The area has pelican crossings however traffic can make crossing to the other side of the street difficult.

### 16.432 *Cleanliness, safety and security*

Cleanliness was judged to be average along Marylebone Road. However, some commercial waste was noted on the pavements awaiting collection. Some graffiti was observed on vacant units.

The level of safety and security was judged to be average.



### 16.433 *Identity and users*

Marylebone Road caters for tourists, workers and residents from the nearby areas. Footfall from the mainline rail station nearby was also evident.

Flagship (largely institutional rather than retail) buildings in the area include Madame Tussaud's Museum, the Landmark Hotel, a campus of the University of Westminster, the Academy of Music, and the Old Marylebone Town Hall.

However, the area does not have a strong identify itself as it is a main arterial road traffic-dominated.



## 16.5. Performance summary and recommendations

- The centre is considered to have a 'neutral' performance. Marylebone Road offers a mix of town centre uses around the junction with Baker Street that serve workers, commuters and visitors to the area. The rest of the centre mainly attracts workers and residents as it accommodates a good stock of office, residential, educational and health-related uses.
- The vacancy level is low.
- The centre would benefit from improved cleanliness, public realm and landscaping as the six-lane road does not contribute to a pleasant pedestrian experience.

## 16.6. Recommended boundary changes

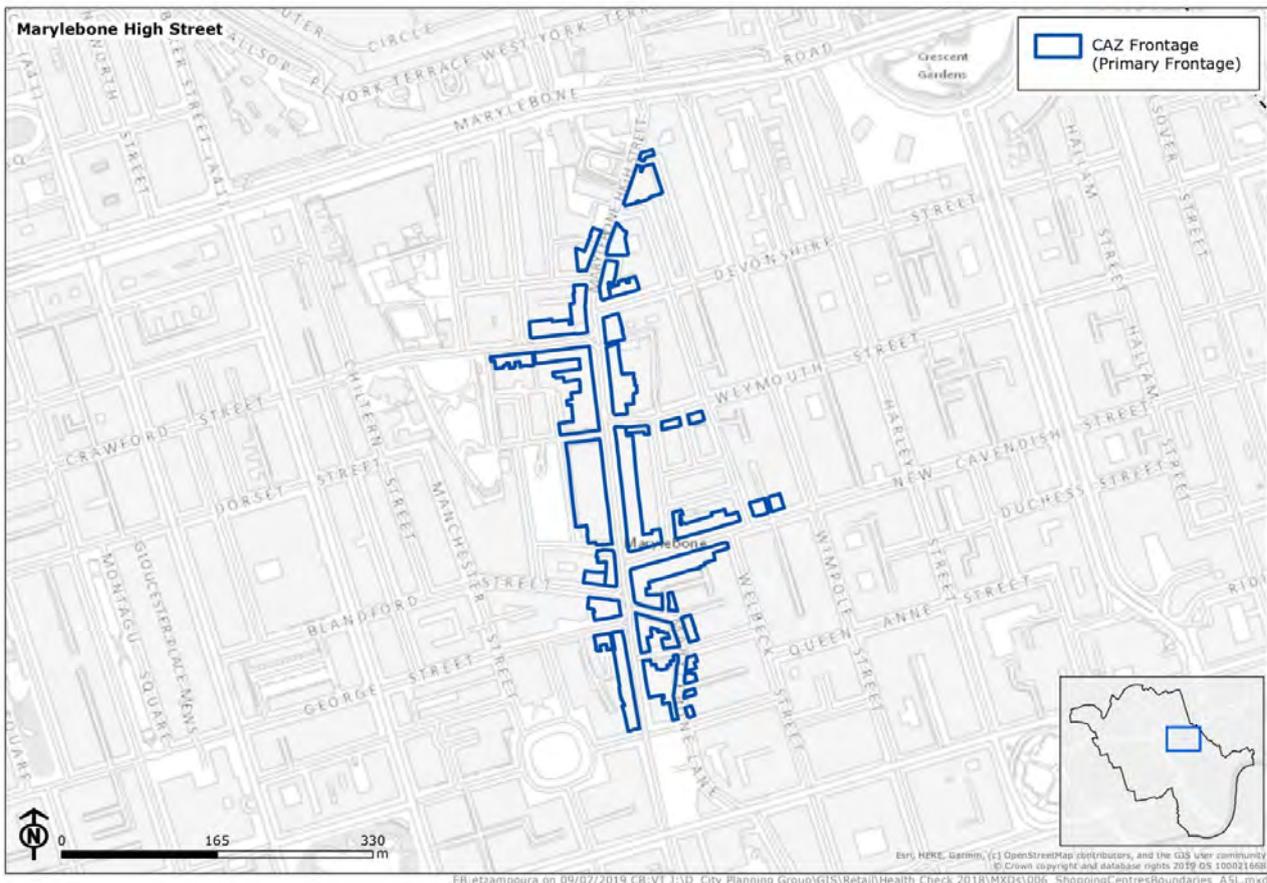
A number of units currently fall both within Baker Street (South) (CAZ Frontage) and Marylebone Road (CAZ Frontage). It is recommended that the units that face Baker Street remain part of Baker Street (South) (CAZ Frontage) and that the units at the junction with Marylebone Road become part of Marylebone Road (CAZ Frontage). It is considered that the type and function of the units on Baker Street is more consistent to the offer on Baker Street (South).

A number of units currently fall both within Marylebone Road (CAZ Frontage) and Baker Street/Melcombe Street (Local Shopping Centre). It is recommended that the units on Baker Street between Marylebone Road and Melcombe Street remain part of Baker Street (South)(CAZ Frontage) and that the units on Melcombe Street and Baker Street between Melcombe Street and Park Road remain part of Baker Street/Melcombe Street (Local Shopping Centre). It is considered that the type and function of the units on both streets is better reflected by the revised designation.

Further details on all boundary changes can be found in 'Appendix 3: Recommended changes to designation boundaries'.

## 17.0. Marylebone High Street

Map 17.0: CAZ Frontage boundary, Marylebone High Street (2017)



### 17.1. Introduction

Marylebone High Street is a designated CAZ Frontage and is within the CAZ.

Marylebone High Street is a linear centre located in the centre of Westminster, linking Oxford Street to the A40 Euston/Marylebone Road. The area is close to other town centres including Marylebone Road and Baker Street (South).

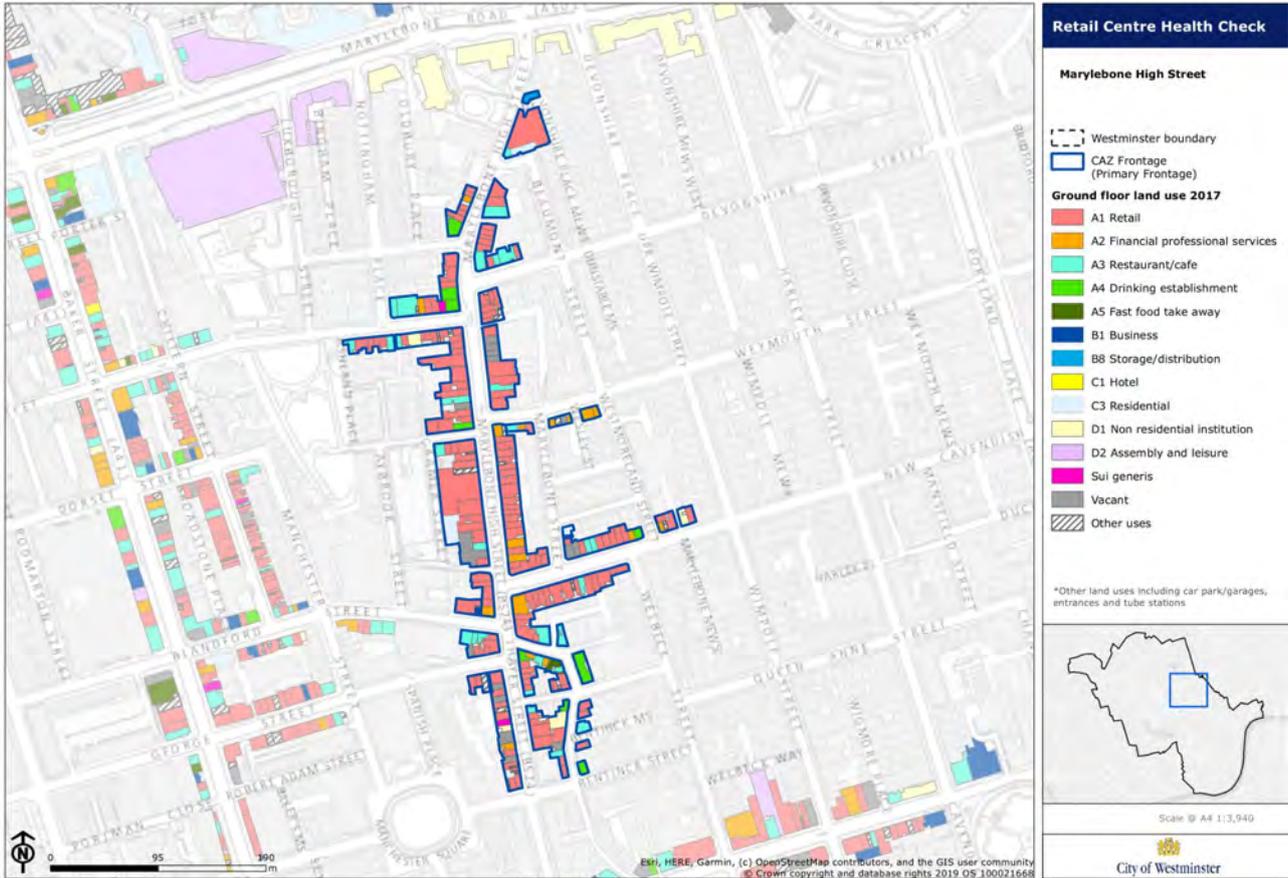
Marylebone High Street accommodates a high number of shops and other town centre uses. The area has seen extensive upgrading and improvement in recent years and is well-maintained.

## 17.2. 2017 Land use analysis

In 2017, 239 total units were identified at ground floor level. The surveyed area covered 24,649 sq m

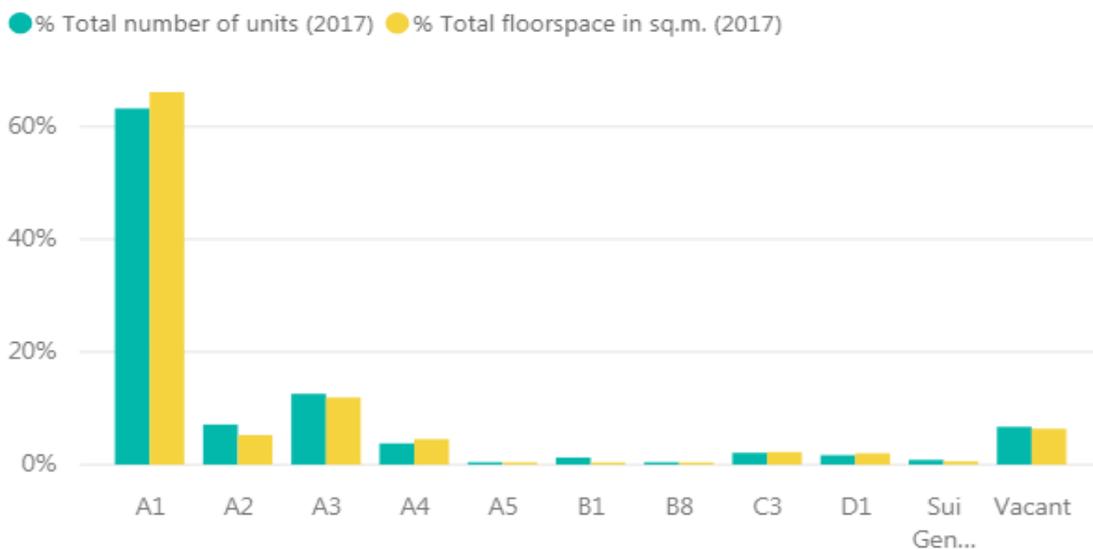
### 17.21. Ground floor land use map (2017)

Map 17.1: Ground floor land use map, Marylebone High Street (2017)



### 17.22. Range of units and floorspace analysis (2017)

Figure 17.2: Ground floor total number of units and floorspace by land use, Marylebone High Street (2017)



The town centre is very retail focused with 151 A1 units. These account for 63% of all units within the centre and for 66 % of the overall floorspace at ground floor level.

The second most significant land use is A3 which accounts for 13% of the total number of units and 12% of the floorspace.

Other uses in the centre include a limited amount of A5, B1, B8, C3, D1 and Sui Generis.

In 2017, 16 vacant units were recorded in the centre, accounting for 7% of all units and 6% of the overall floorspace. The 2018 site survey has found that a number of these units have been occupied and are no longer vacant.

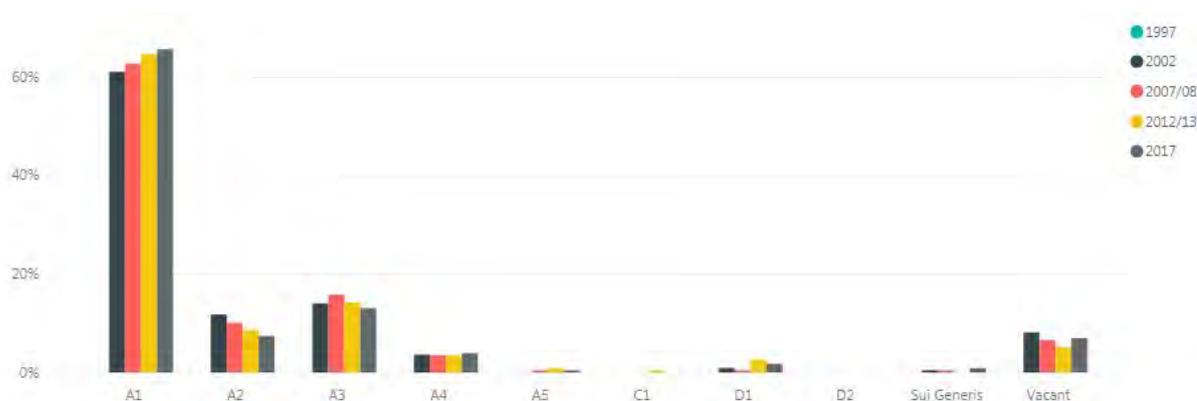
**Table 17.3: Ground floor total number of units and floorspace by land use, Marylebone High Street (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	151	63.18%	16289.77	66.09%
A2	17	7.11%	1295.92	5.26%
A3	30	12.55%	2933.95	11.90%
A4	9	3.77%	1112.03	4.51%
A5	1	0.42%	99.54	0.40%
B1	3	1.26%	77.43	0.31%
B8	1	0.42%	92.21	0.37%
C3	5	2.09%	546.55	2.22%
D1	4	1.67%	492.74	2.00%
Sui Generis	2	0.84%	138.74	0.56%
Vacant	16	6.69%	1570.39	6.37%
<b>Total</b>	<b>239</b>	<b>100%</b>	<b>24649.26</b>	<b>100%</b>

### 17.3. Comparative land use analysis

#### 17.3.1. Comparative range of units and floorspace analysis

**Figure 17.4: Proportion of units by land use, Marylebone High Street (2017)<sup>18</sup>**



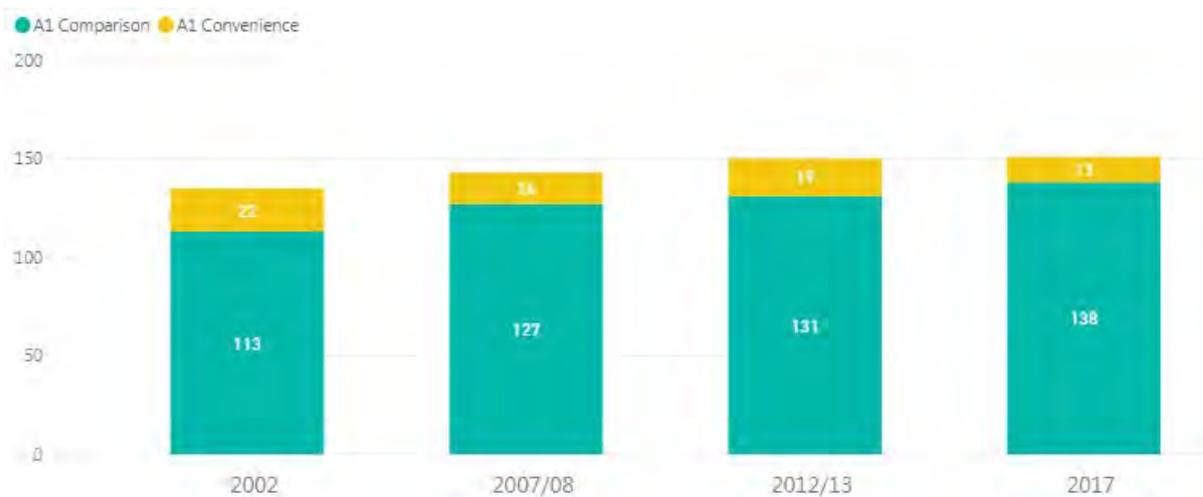
In 2002, there were 221 total units in the centre compared to 228 in 2007/08, 232 in 2012/13 and 230 in 2017 (239 if we include B1, B8 and C3). When we include these land uses we can see that the centre has seen an increase in units across every year surveyed.

<sup>18</sup> There is no data available for 1997 for this centre.

The proportion of A1 units in the centre has increased in every survey. In 2002, 61% of all units in the centre were A1 units compared to 66% in 2017. A2 and A3 uses have both experienced marginal declines in the 2017 survey. The proportion of vacant units in the centre has increased from 5% in 2012/13 to 7% in 2017 but is still very low.

### 17.32. Comparative comparison/convenience split analysis

**Figure 17.5: Number of comparison and convenience A1 units by year, Marylebone High Street (2017)**



The centre has had a broadly consistent comparison to convenience split across the years surveyed. Marylebone High Street has been A1 comparison-led since 1997.

## 17.4. 2018 Site Survey

### 17.41. Accessibility and pedestrian flows

The centre does not host any Underground or train stations. The closest stations are Baker Street and Regent’s Park station to the north of the centre and Bond Street to the south of the centre.

No buses run along Marylebone High Street and the traffic was not very heavy at the time of visit. Pedestrian flows were judged to be high all along Marylebone High Street. The area was heavily used by workers and shoppers.

Pedestrian flows were also high as it was drop off/pick up time at the Marylebone Church of England School. The area has safe crossings and is highly accessible.



## 17.42 Range of units and floorspace qualitative analysis

### 17.421 *Area description, land uses and retail provision*

Marylebone High Street centre is a shop-led centre, but a wide range of other town centre uses also contribute to its vibrancy.

In terms of shops, the area hosts a mixture of high-quality stores including some well-established international and national brands (e.g. Paul Smith, Emma Bridgewater) but also a number of independent stores. The street accommodates a significant number of clothing shops, but the area also hosts a wide range of comparison-type shops (e.g. bookshop, pharmacy, jeweller). There are several sandwich shops and a number of supermarkets (e.g. Waitrose). A market stall on Marylebone High Street selling flowers was also observed. Several banks and estate agents can also be found along the street.

The area accommodates a significant number of restaurants, cafés and drinking establishments which were very busy during the site visit.

The premises in the northern part of the street are better maintained. The centre becomes more geared towards residents rather than visitors with units such as dry cleaners and hardware stores towards the south of the centre.

There is a betting shop on Paddington Street, just off Marylebone High Street.

Thayer Street has a very different feel to Marylebone High Street and was not as affluent during the site visit. Marylebone Church and gardens are just off the site and provide an area for people to eat food and rest.

### 17.422 *Vacant units*

The 2017 land use survey recorded 12 vacant properties in the centre. At the time of visit, it was observed that some of these units had been occupied and now host new uses including clothing shops, a restaurant and a library. However, another site at 34 New Cavendish Street was found to be vacant.



## **17.43 State of the primary shopping area environmental quality assessment**

### *17.431 Public realm*

The public realm was found to be of a high quality. The pavements are wide and adequate. While several shops have tables and chairs outside and some shops display A boards, they do not make it difficult to navigate the pedestrian environment. Well-maintained shop fronts contribute to the pedestrian experience.

### *17.432 Cleanliness, safety and security*

Cleanliness was judged to be high along Marylebone High Street. The safety and security were judged to be high along Marylebone High Street.

### *17.433 Identity and users*

Marylebone High Street has a strong local identity as it very well-maintained, and its mixed offer attracts both workers and residents to the area. The centre's food and drink offer also attracts visitors. A number of schools and markets that can be found in the vicinity also attract people to the area.

## **17.5. Performance summary and recommendations**

- The centre is considered to be 'healthy'. Marylebone High Street comprises a number of high-quality shops and a wide range of other town centre uses. The centre serves local residents, workers and visitors.
- The level of vacancies is low.
- The public realm was found to be of high quality and the shop fronts are generally well maintained contributing to the pedestrian experience.

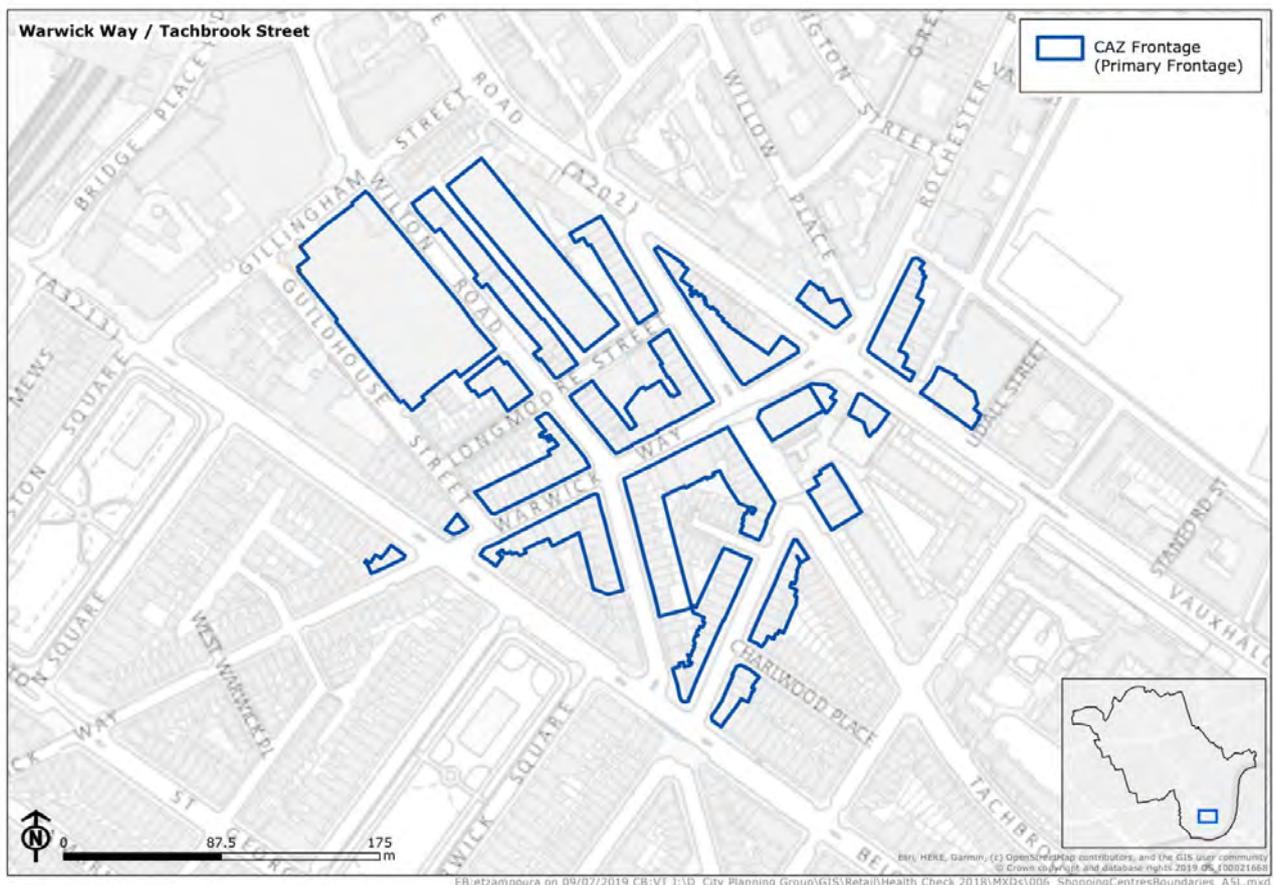
## **17.6. Recommended boundary changes**

It is recommended to extend the centre's boundary to include the southern end of Marylebone Lane between Wigmore Street and Marylebone High Street. It is considered that the function of this area is largely made up of restaurants and cafés and is consistent to the adjoining portion of the centre.

Further details on all boundary changes can be found in 'Appendix 3: Recommended changes to designation boundaries'.

## 18.0. Warwick Way/Tachbrook Street

Map 18.0: CAZ Frontage boundary, Warwick Way/Tachbrook Street (2017)



### 18.1. Introduction

Warwick Way/Tachbrook Street is a designated CAZ Frontage and is within the CAZ. The area is located in the southern part of Westminister and is in close proximity to Victoria and Pimlico Underground stations. The area is close to other designated town centres including Victoria Street, Pimlico, Moreton Street and Lupus Street. The centre covers a number of irregular streets and junctions. It is a mixed-use centre that serves local residents but also workers and visitors. The area is home to the council-run Tachbrook Street Market and the Queen Mother Sports Centre.

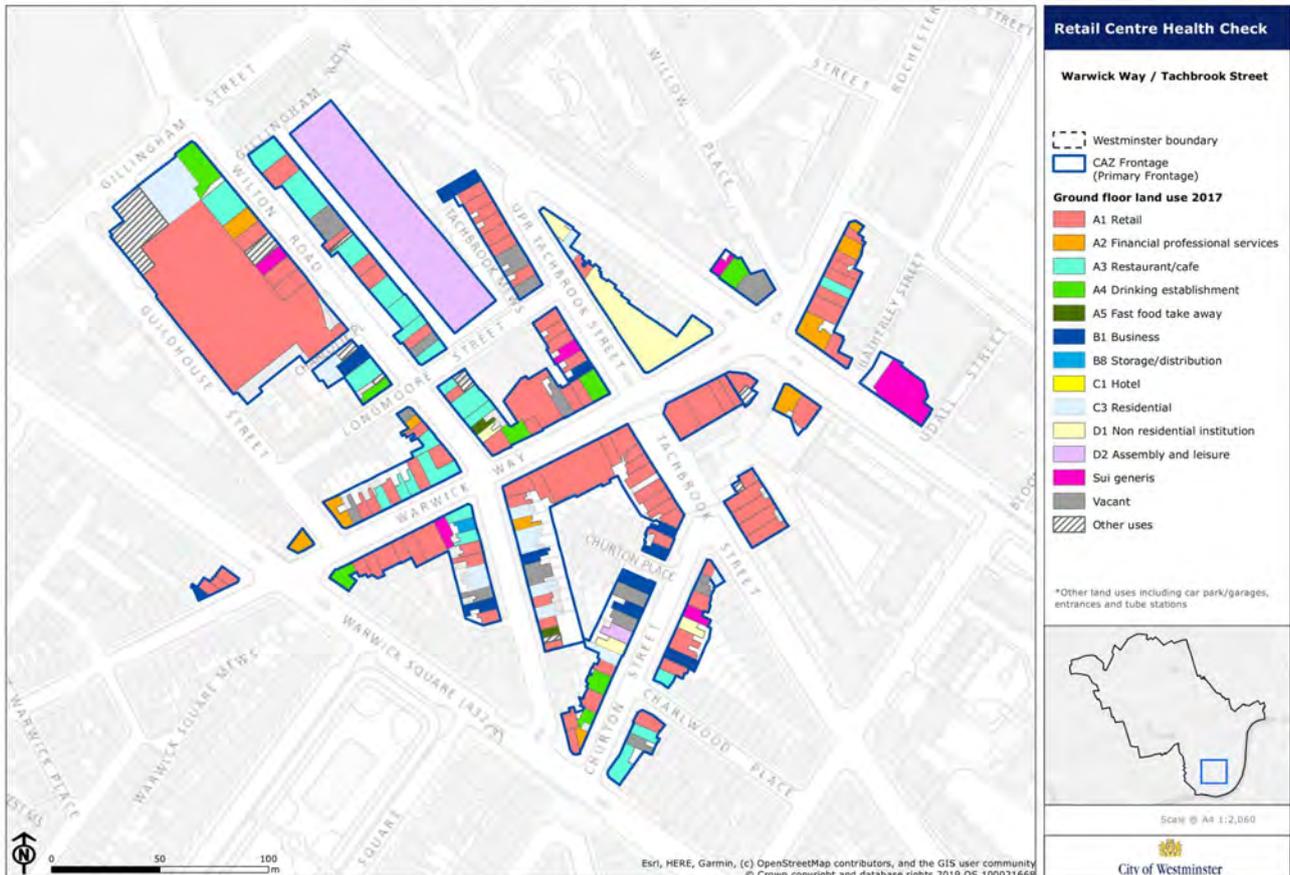


## 18.2. 2017 Land use analysis

### 18.21. Ground floor land use map (2017)

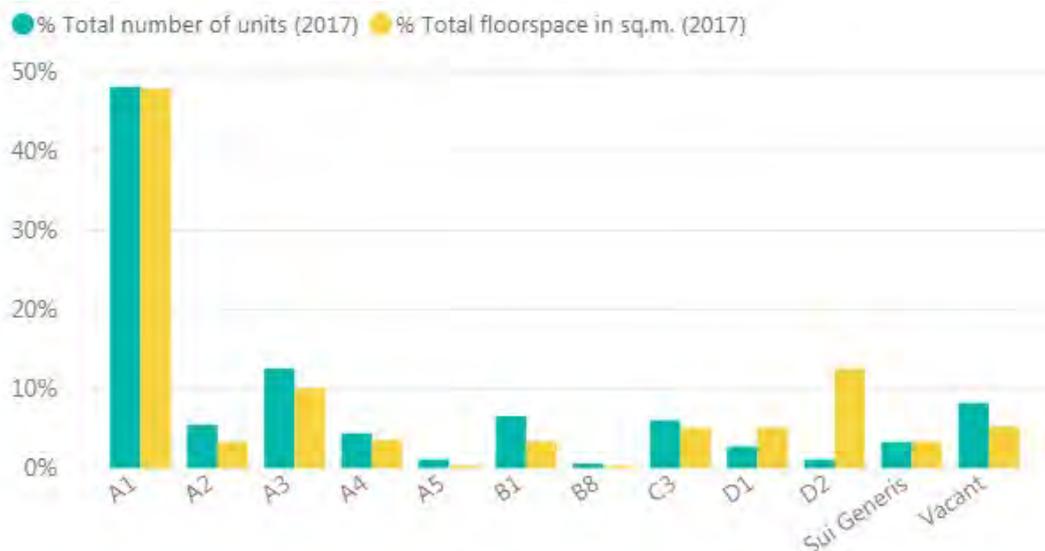
In 2017, 183 total units were identified at ground floor level. The surveyed area covered 23,669 sq m

**Map 18.1: Ground floor land use map, Warwick Way/Tachbrook Street (2017)**



### 18.22. Range of units and floorspace analysis (2017)

**Figure 18.2: Ground floor total number of units and floorspace by land use, Warwick Way/Tachbrook Street (2017)**



The centre is A1-led with 88 A1 units: these account for 48% of all units within the centre and for 48% of the overall floorspace at ground floor level.

A3 uses are the second most prevalent land use with 23 units, making up 13% of the total number of units and 10% of the overall floorspace.

Other uses in the centre include a limited amount of A2, A4, A5, B1, B8, D1, D2 and Sui Generis uses. The centre also hosts 11 residential units.

In 2017, 15 vacant units were recorded in the centre, accounting for 8% of all units and 5% of the overall floorspace. The 2018 site survey has identified that a number of these units are still vacant.

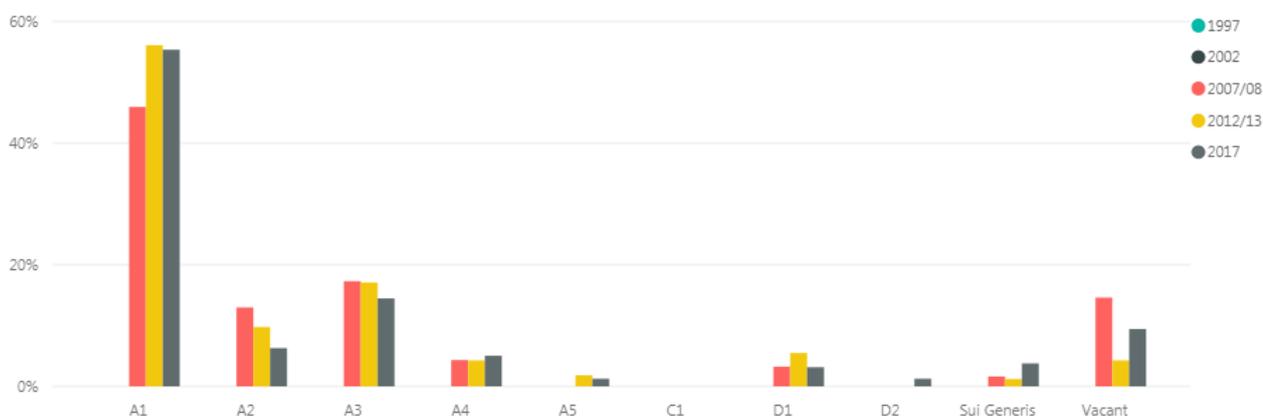
**Table 18.3: Ground floor total number of units and floorspace by land use, Warwick Way/Tachbrook Street (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	88	48.09%	11328.58	47.86%
A2	10	5.46%	785.34	3.32%
A3	23	12.57%	2386.65	10.08%
A4	8	4.37%	845.34	3.57%
A5	2	1.09%	74.54	0.31%
B1	12	6.56%	803.52	3.39%
B8	1	0.55%	49.97	0.21%
C3	11	6.01%	1194.26	5.05%
D1	5	2.73%	1200.90	5.07%
D2	2	1.09%	2969.22	12.54%
Sui Generis	6	3.28%	786.72	3.32%
Vacant	15	8.20%	1244.30	5.26%
<b>Total</b>	<b>183</b>	<b>100%</b>	<b>23669.35</b>	<b>100%</b>

### 18.3. Comparative land use analysis

#### 19.31. Comparative range of units and floorspace analysis

**Figure 18.4: Proportion of units by land use, Warwick Way/Tachbrook Street (2017)<sup>19</sup>**



<sup>19</sup> There is no data available for 1997 and 2002 for this centre.

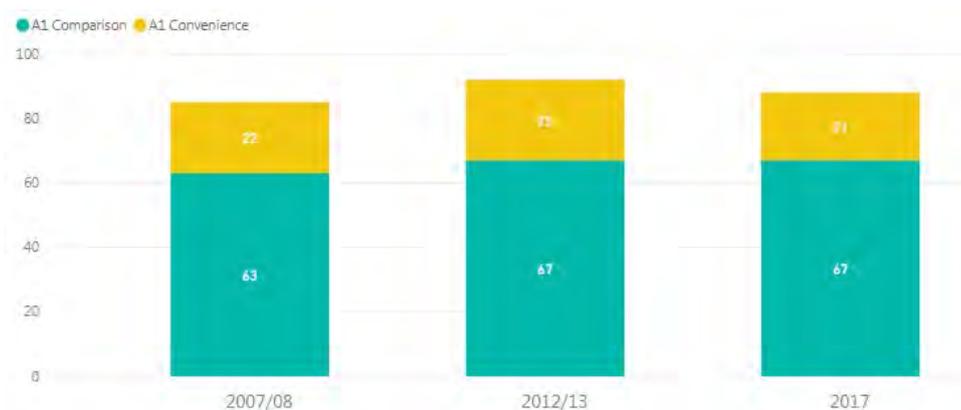
The proportion of A1 units has remained stable between the 2012/13 (56%) and 2017 (55%) surveys after seeing a big increase between 2007/08 and 2012/13. In terms of the number of units, it has barely changed.

A2, A3 and D1 units have all experienced a decline in land use split in the 2017 survey, with A2 seeing the biggest decrease from 10% in 2012/13 to 6% in 2017.

The proportion of vacant units in the centre has increased from 4% in 2012/13 to 9% in 2017, with an actual unit increase of 8 units from 7 to 15 over this period.

### 18.32. Comparative comparison/convenience split analysis

**Figure 18.5: Number of comparison and convenience A1 units by year, Warwick Way/Tachbrook Street (2017)**



The centre has had a broadly consistent comparison to convenience split across the years surveyed. The centre has been A1 comparison-led since 1997 but has a strong A1 Convenience offer.

## 18.4. 2018 Site Survey

### 18.41. Accessibility and pedestrian flows

Although there are no Underground stations within the boundary of the centre, the area is within a five-minute walk to Pimlico Underground station (Victoria line) and a ten-minute walk to Victoria Underground (Circle, District and Victoria lines) and train station.

A number of buses also serve the centre. A significant amount of traffic was however evident at the time of visit, especially along Vauxhall Bridge Road and the Warwick Way/Tachbrook Street junction.

Pedestrian flows were judged to be high as the centre was found to be busy and used by residents, workers and visitors to the area. The area has several pelican and dedicated crossings. However, the Vauxhall Bridge Road/Warwick Way junction and the Warwick Way/Tachbrook junction can be hazardous.

There is a reasonable amount of bike and motorbike parking spaces throughout the centre although unauthorised use of railings for additional cycle parking was also observed. There are on-site car parking spaces and on street loading bays for commercial purposes.

## 18.42 Range of units and floorspace qualitative analysis

### 18.421 *Area description, land uses and retail provision*

The Warwick Way/Tachbrook centre covers a number of junctions and streets that accommodate a wide range of units and uses. However, the centre is shop-led with a significant number of shops located along Tachbrook Street, Warwick Way and Wilton Street. The centre accommodates a significant number of convenience and food shops. Some of the shops are small businesses but the area also hosts a number of larger supermarkets (e.g. Sainsbury's, Tesco, Little Waitrose); one of them has a large car park that attracts a significant amount of people from the southern part of the city. There is a good offer of other food shops including bakeries, a cheese shop or a wine shop.

The council-run Tachbrook market contributes to the vibrancy of the area and to the convenience offer; it is installed from Monday to Saturday. The market has fruit and vegetable and hot food stalls. It is also possible to buy other goods including clothes and a range of household products. Public toilets are available.

The centre also accommodates a number of comparison type shops (e.g. hairdresser, beauty salon) and specialist shops including a bridal shop. A number of charity shops have appeared in the centre.



The centre accommodates a number of food and drink premises that shape the town centre, contribute to its vibrancy and attract a high number of people. There is a concentration of food premises in the Wilton Street area, but other units can also be found throughout the centre. A number of cafés and restaurants belong to well-known multiples (e.g. Café Nero, Costa, Nando's) but the area also accommodates a range of independent restaurants. Some restaurants and cafés have tables and chairs outside and these were found to be busy at the time of visit. A couple of hot-food takeaway premises were identified during the site visit and the area is also home to a large number of public houses (e.g. The Queens Arms, the Warwick, the Jugged Hare) and bars.



A number of estate agents and a range of offices can be found in the centre, but these are generally located towards the edges of the centre.

The Queen Mother Sports Centre run by Westminster City Council falls within the centre's boundary. The centre's main entrance is on Vauxhall Bridge Road and it attracts a large amount of people as it's one of the few council-run sports centres in this area of the city.

#### 18.422 *Vacant units*

The 2017 land use survey identified fifteen vacant units within the centre. At the time of visit, no significant changes were observed but these were not clustered around a specific area.



### 18.43 State of the primary shopping area environmental quality assessment

#### 18.431 *Public realm*

The quality of the public realm was judged to be low. The pavements are average width but sometimes feel cluttered with lampposts, bins, telephone boxes and tables and chairs outside the restaurants cafés and drinking establishments. Some shop fronts are also not very well-maintained.

Dense traffic contributes to a sense of clutter and pollution, especially around the Vauxhall Bridge Road junction. Although there are some dedicated pedestrian crossings, crossings can be hazardous.

There was little evidence of landscaping and amenity space, reflecting the highly urbanised environment.

#### 18.432 *Cleanliness, safety and security*

Cleanliness was judged to be average throughout the centre. During the site visit, no street litter was observed and only a small number of commercial refuse bags awaiting collection were seen.

The level of safety and security was judged to be average. Dense traffic and hazardous junctions affect the perception of safety.

#### 18.433 *Identity and users*

The Warwick Way/Tachbrook Street centre is a busy and vibrant centre that has a strong local identity. The centre attracts visitors staying in hotels in the neighbouring areas, commuters travelling from or to Victoria Station and workers from the surrounding areas. However, it is also a strategic place for Pimlico's residents that come to the centre to shop, eat or use its community and social facilities. Although some secondary streets and shops feel more isolated such as Rochester Row, the centre is well used.

A small number of rough sleepers and beggars were identified on Tachbrook Street.

### **18.5. Performance summary and recommendations**

- The centre is considered to have a 'neutral' performance. Warwick Way/Tachbrook is a centre that attracts visitors, workers and local residents. The centre accommodates a wide range of town uses, a council-run market and a sports centre that are especially important to the local community.
- The level of vacancies has slightly increased since the last survey.
- The area scored low on public realm and average on cleanliness and would benefit from improved landscaping, provision of amenity space, street cleansing and better maintained shop fronts.
- Traffic congestion especially around the Warwick Way/Tachbrook Street/Vauxhall Bridge Road junction negatively impacts on the quality of the area and the pedestrian experience.

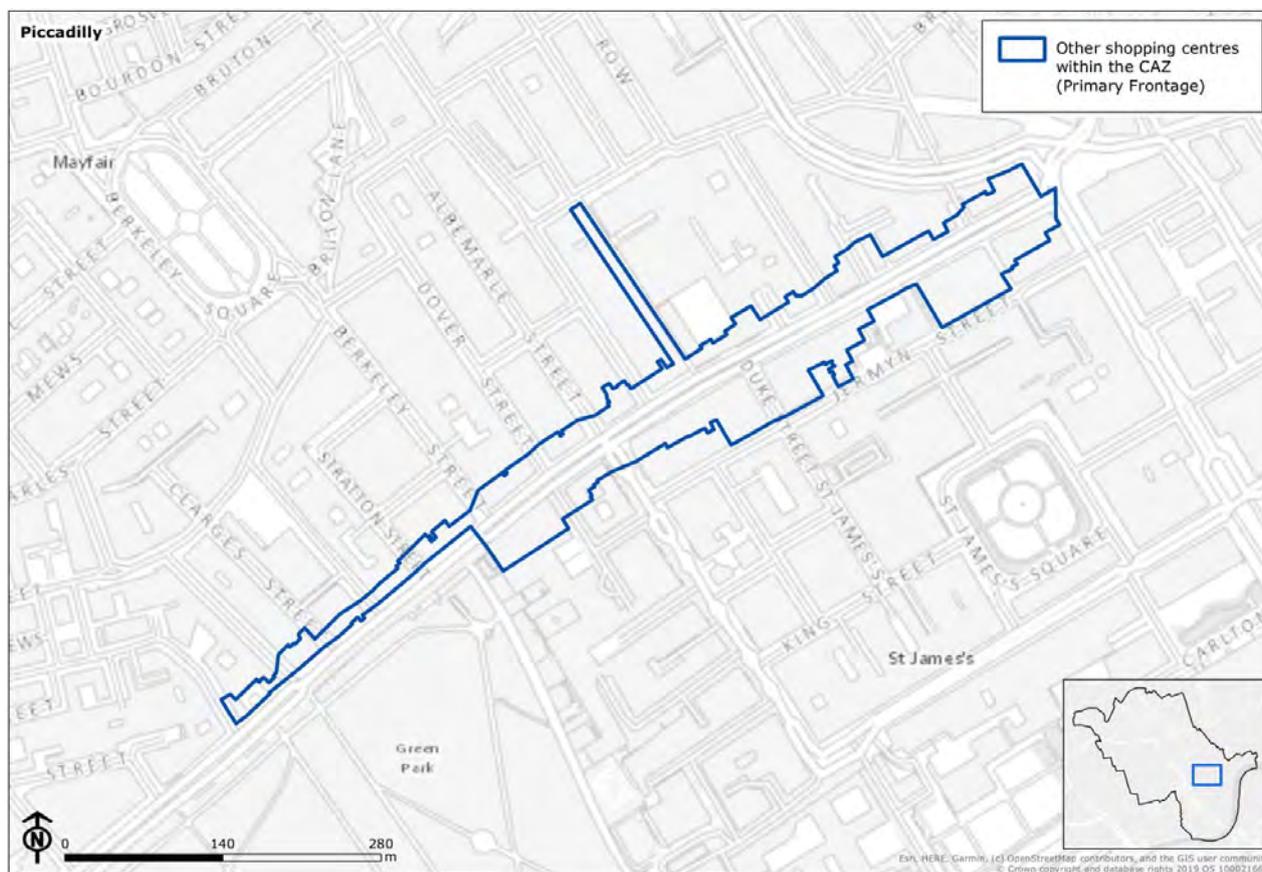
### **18.6. Recommended boundary changes**

No boundary changes are recommended.

## SECTION D: Other Shopping Centres within the CAZ

### 19.0. Piccadilly

Map 19.0: Other Shopping Centre within the CAZ boundary, Piccadilly (2017)



### 19.1. Introduction

Piccadilly is a designated Other Shopping Centre within the CAZ and is within the CAZ. Piccadilly is a linear centre as it covers Piccadilly Street but also includes the Burlington Arcade. The centre is close to Piccadilly Circus, Green Park and a number of tourist attractions. The area is close to other designated shopping centres such as Jermyn Street, the wider West End and the Shepherd Market. Piccadilly Street is a destination by itself and accommodates a significant number of shops, restaurants and cafés and a series of tourist attractions that shape the town centre.

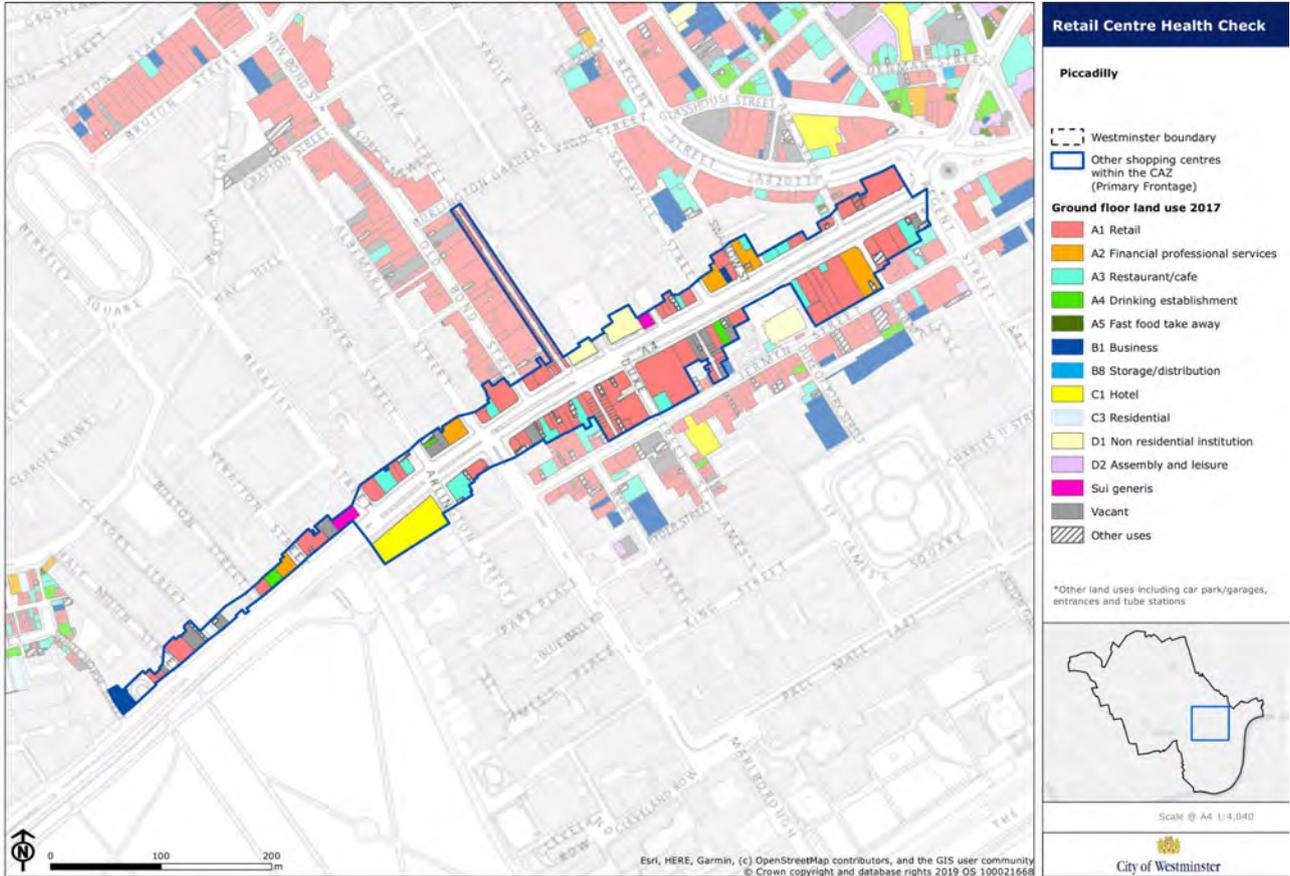


## 19.2. 2017 Land use analysis

### 19.21. Ground floor land use map (2017)

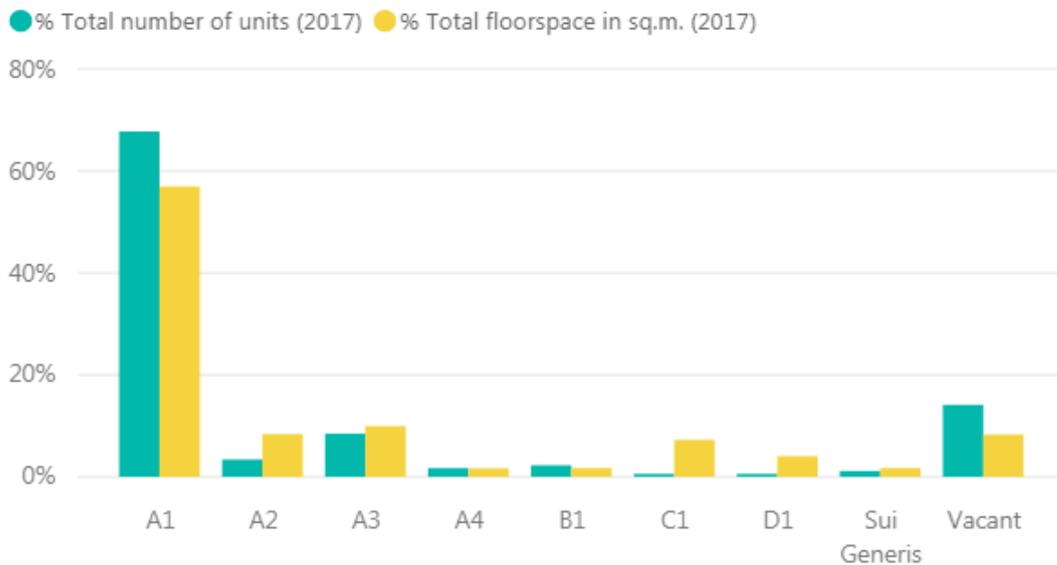
In 2017, 177 total units were identified at ground floor level. The surveyed area covered 24,984 sq m

**Map 19.1: Ground floor land use map, Piccadilly (2017)**



### 19.22. Range of units and floorspace analysis (2017)

**Figure 20.2: Ground floor total number of units and floorspace by land use, Piccadilly (2017)**



The town centre is shop-led with 120 A1 units recorded in 2017. These account for 68% of all units within the town centre and for 57% of the overall floorspace at ground floor level. A3 uses are the second most prevalent use in the centre with 15 units, making 8% of the total number of units and 10% of the overall floorspace in the centre. Other recorded uses in the town centre include a limited amount of A2, A4, B1, C1, D1 and Sui Generis. There are 25 vacant units in the centre, accounting for 14% of all units and 8% of the overall floorspace. However, the 2018 site survey has identified that a number of these units are under redevelopment.

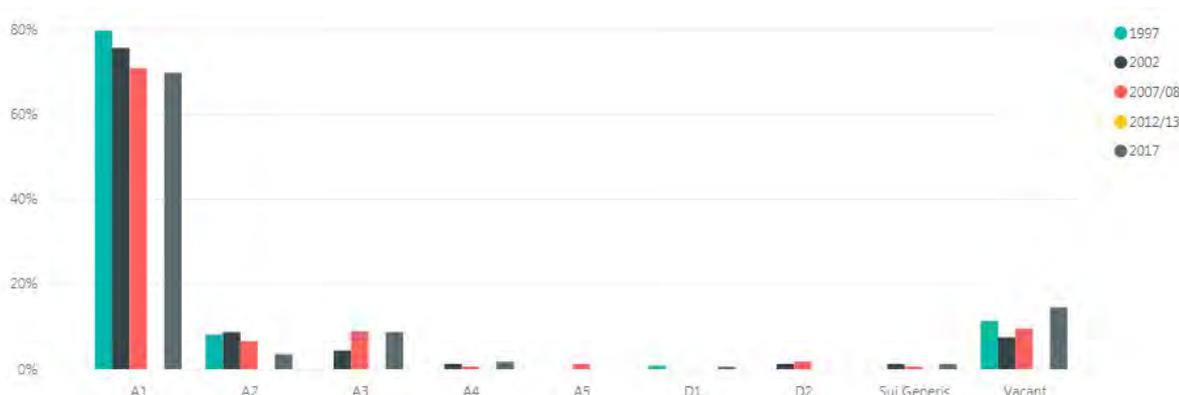
**Table 19.3: Ground floor total number of units and floorspace by land use, Piccadilly (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	120	67.80%	14241.60	57.00%
A2	6	3.39%	2091.39	8.37%
A3	15	8.47%	2490.72	9.97%
A4	3	1.69%	414.03	1.66%
B1	4	2.26%	428.42	1.71%
C1	1	0.56%	1810.64	7.25%
D1	1	0.56%	1012.73	4.05%
Sui Generis	2	1.13%	425.07	1.70%
Vacant	25	14.12%	2069.42	8.28%
<b>Total</b>	<b>177</b>	<b>100%</b>	<b>24984.01</b>	<b>100%</b>

### 19.3. Comparative land use analysis

#### 19.31. Comparative range of units and floorspace analysis

**Figure 19.4: Proportion of units by land use, Piccadilly (2017)<sup>20</sup>**



The total number of units has increased across the years surveyed and reached its maximum in 2017 with 173 total units.

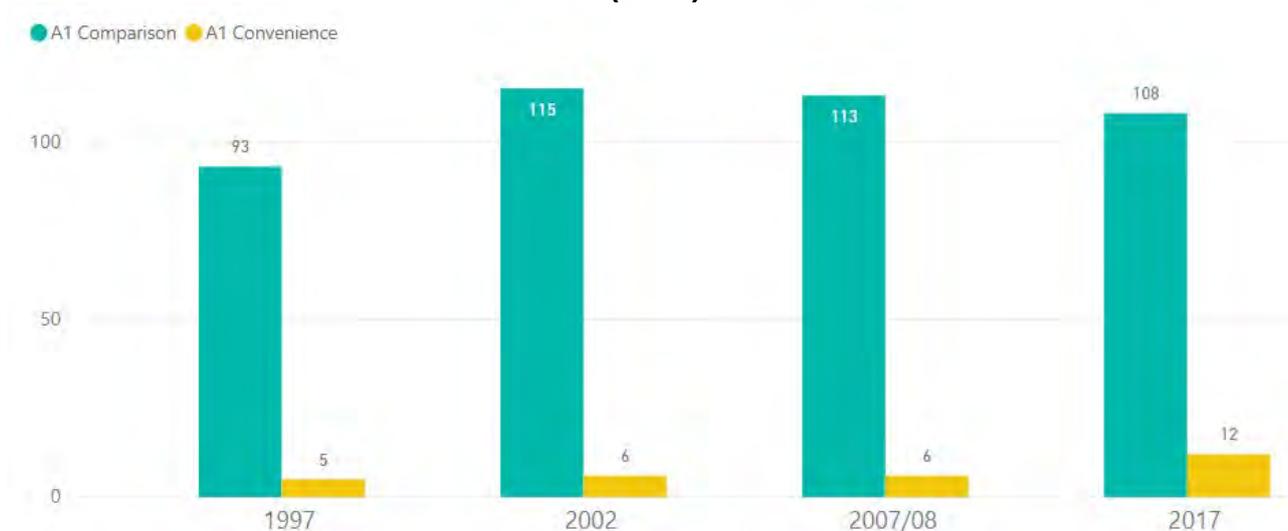
<sup>20</sup> There is no data available for 2012/13 for this centre.

The proportion of A1 units has steadily decreased over the years surveyed. In 1997, A1 units took up 79% of total units compared to 68% of total units (57% of total floorspace) in 2017. However, in terms of units, the number of A1 units has increased over the years surveyed. A2 units have seen a decrease in proportion from 9% in 2002 to 3% in 2017. However, the number of A3 units has increased: the 2017 survey identified the highest number of A3 units across the years surveyed with 15 A3 units recorded.

The proportion of vacant units in the centre has increased from 7% in 2002 to 14% in 2017, with 25 vacant units recorded in 2017.

### 19.32. Comparative comparison/convenience split analysis

**Figure 19.5: Number of comparison and convenience A1 units by year, Piccadilly (2017)**



The centre has had a broadly consistent comparison to convenience split across the years surveyed. Piccadilly has been A1 comparison-led since 1997. However, across the years surveyed, the number of convenience type shops has increased: there were 5 convenience units in 1997 and 12 units in 2017.

## 19.4. 2018 Site Survey

### 19.41. Accessibility and pedestrian flows

The overall area is well served by transport links. There are two Underground stations within the centre: Piccadilly Circus station (Bakerloo, Piccadilly lines) towards the east edge (east edge) and Green Park station (Jubilee, Piccadilly, Victoria lines) to the west edge of the centre (west edge).

A number of buses run along Piccadilly Street which is a main arterial road. The street is also on the circular tourist bus routes and has heavy traffic.

Pedestrian flow is average all along Piccadilly although higher in the Piccadilly Circus area than in the rest of the centre. The Arcades appeared to be busier than the main street at the time of visit. Crossings are controlled by red lights that facilitate crossings from one side to the other of the street as the street is busy and traffic is dense.



## 19.42 Range of units and floorspace qualitative analysis

### 19.421 *Area description, land uses and retail provision*

Piccadilly is a shop-led centre that mainly attracts workers and visitors.

In terms of shops, the centre contains a mixture of shops belonging to international and national multiples (e.g. Tiger, Cotswold) and high-end independent specialist retailers (e.g. Hatchard, De Beers Jewellers). There are several Arcades such as the Burlington Arcade leading off Piccadilly Street which contain high-end jewelleries, clothing shops and art galleries. On the east side of the street, there is a daily market in the grounds of St James's Piccadilly Church (just outside the boundary of the centre) that attracts visitors and workers. Close to Green Park there is a small cluster of souvenirs shops that have a few market-style stalls.

Restaurants and cafés can be found throughout the centre: some of them belong to well-known chains (e.g. Eat, Pret a Manger, Wasabi) but there is also a good offer of cafés that target visitors and offer afternoon tea menus (e.g. The Wolseley, Café Concerto, Richoux). Although almost all the units at ground floor level are shops and restaurant or cafés, the street is home to a large number of offices and well-known hotels such as The Ritz Hotel or Le Meridien.

Not only is Piccadilly Circus located on the east edge of the centre and Green Park on the west edge of it, but the centre is also home to the Royal Academy of Arts: accordingly, the centre attracts a very significant number of visitors.

### 19.422 *Vacant units*

The 2017 land use survey identified a number of vacant units and a number of them were found to still be vacant at the time of visit. However, some of them have been occupied and twelve of the units located in the Princes Arcade are being redeveloped which suggests they will be occupied in the near future.



### **19.43 State of the primary shopping area environmental quality assessment**

#### *19.431 Public realm*

The quality of the public realm was judged to be of average quality and slightly inadequate for the number of people using the area every day. However, the quality of the Burlington and Princes Arcades was judged to be higher as the arcades are pedestrianised and have very unique and well-maintained historical shop fronts and interiors.

Pavements are well-maintained, and the area is not very cluttered. However, there are a number of lampposts, phone boxes, bins and other signs that considered together contribute to create a sense of clutter. The Piccadilly Circus area is busier and feels more cluttered than the rest of the centre due to the high number of visitors.

Traffic is heavy along Piccadilly Street. Crossings can be hazardous and traffic contributes to a taste of pollution.

Although the area lacks in amenity space for its visitors, it is close to Green Park and calmer streets.

#### *19.432 Cleanliness, safety and security*

Cleanliness was judged to be average along Piccadilly Street.

The level of safety and security was judged to be average.

#### *19.433 Identity and users*

The area has a strong identity as it is home to well-known attractions such as Piccadilly Circus, The Royal Academy of Arts and Green Park but also to well-known shops and restaurants. The area is one of London's most important tourist destinations.

The centre is also home to a significant number of offices and businesses that attract workers to the area.

A small number of rough sleepers were observed at the time of visit.



## 19.5. Performance summary and recommendations

- The area is considered to be 'healthy'. Piccadilly is a shop-led centre that hosts a significant number of shops and food premises that target visitors and workers. The centre is a visitor destination but also has a strong office stock.
- The level of vacancies is not considered of concern as a number of the identified vacant units are currently undergoing development.
- The area would benefit from improved public realm, cleanliness and landscaping.
- Crossings can be hazardous and traffic contributes to a taste of pollution.
- Due to its scale and function, it is recommended to reclassify the centre as a CAZ Retail Cluster. Further details on the reclassification recommendation can be found in 'Appendix 4: Evidence for the reclassification of existing 'Other Shopping Centres within the CAZ''.

## 19.6. Recommended boundary changes

A number of units currently fall both within Jermyn Street (Other Shopping Centre within the CAZ) and Piccadilly (Other Shopping Centre within the CAZ). It is recommended that all the units between Regent's Street and Haymarket Street become part of Piccadilly (Other Shopping Centre within the CAZ) as well as 203-209 and 207-209 Piccadilly Street (currently occupied by Waterstones and Natwest). It is recommended that 18-27 Jermyn Street and 34 Jermyn Street (currently occupied by Hawes&Curtis) become part of Jermyn Street (Other Shopping Centre within the CAZ). It is considered that the type and function of the units on both streets is better reflected by the revised designation.

It is also recommended to include the site comprising the Piccadilly Market and St James's Piccadilly church to recognise that the function of these units is consistent with the offer on Piccadilly.

Further details on all boundary changes can be found in 'Appendix 3: Recommended changes to designation boundaries'.

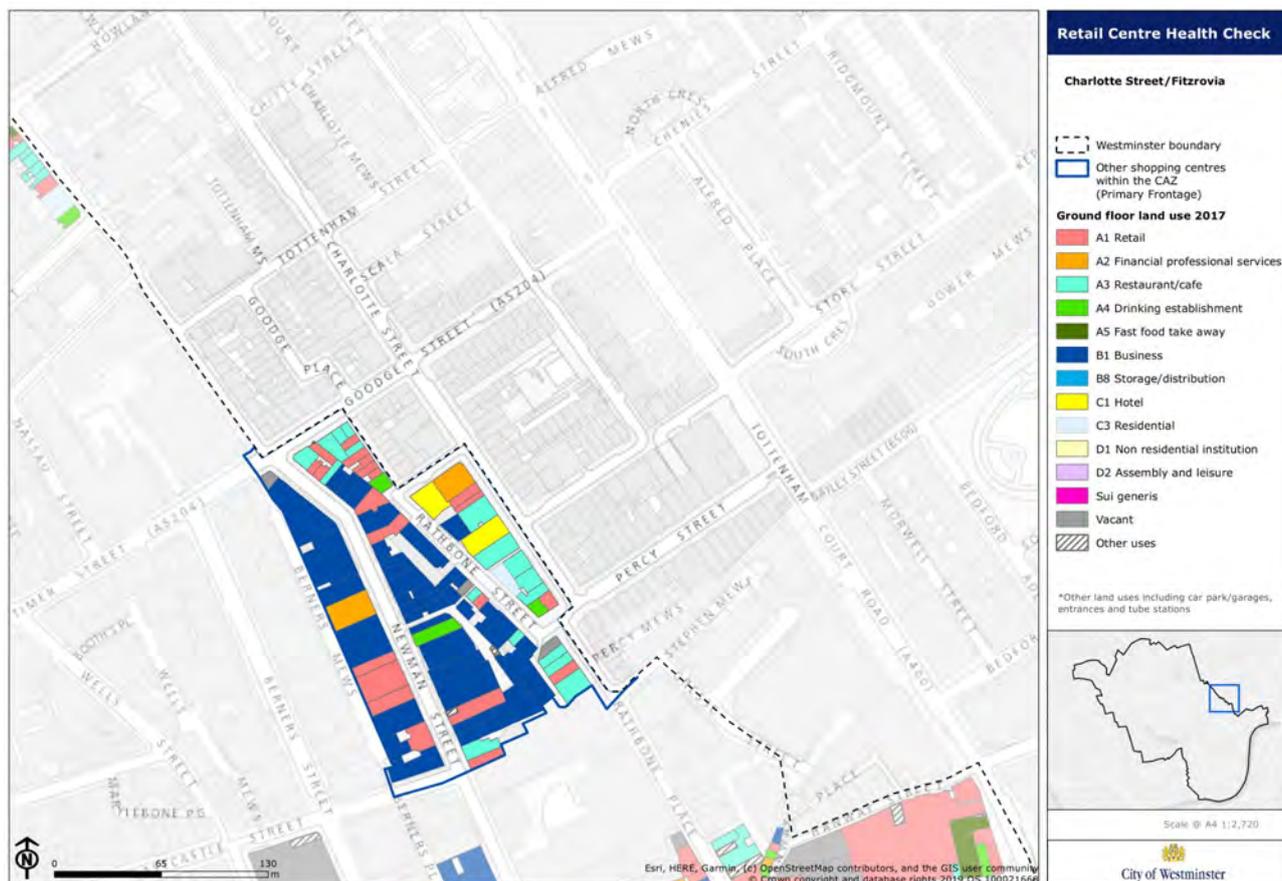


## 20.2. 2017 Land use analysis

### 20.21. Ground floor land use map (2017)

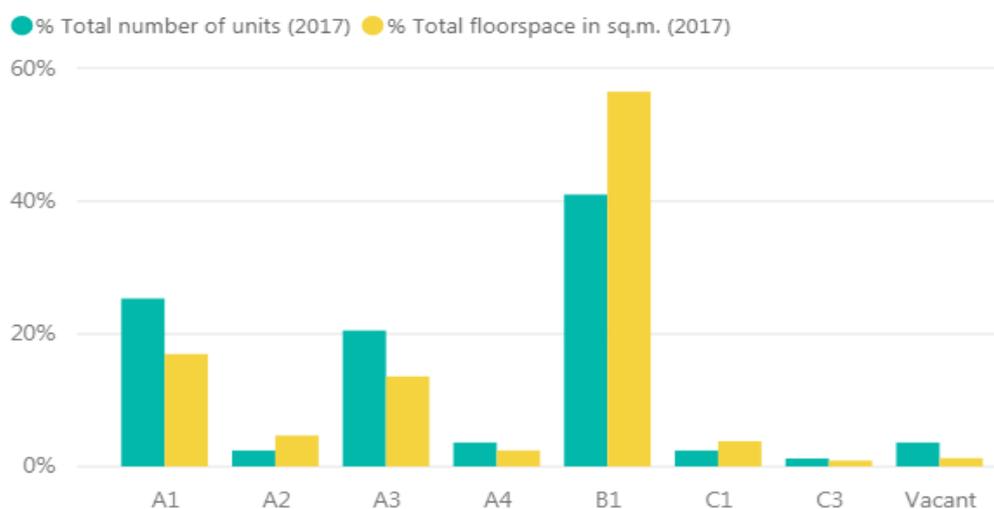
In 2017, 83 total units were identified at ground floor level. The surveyed area covered 16,731 sq m

**Map 20.1: Ground floor land use map, Charlotte Street/Fitzrovia (2017)**



### 20.22. Range of units and floorspace analysis (2017)

**Figure 20.2: Ground floor total number of units and floorspace by land use, Charlotte Street/Fitzrovia (2017)**



The centre is B1 focused with 34 units. These account for 41% of all units within the town centre and for 56% of the overall floorspace at ground floor level.

A1 uses represent the second most numerous use in the centre with 21 units making 25% of the total number of units and 17% of the floorspace. There is a broadly even split of A1 and A3 uses as A3 uses are also strong with 17 units, making 20% of the total number of units and 14% of the overall floorspace at ground floor level.

In 2017, three vacant units were recorded in the centre, accounting for 4% of all units and 1% of the overall floorspace. The 2018 site survey has found that some of the units are now occupied although a small number of new vacant units have appeared in the Newman Street area.

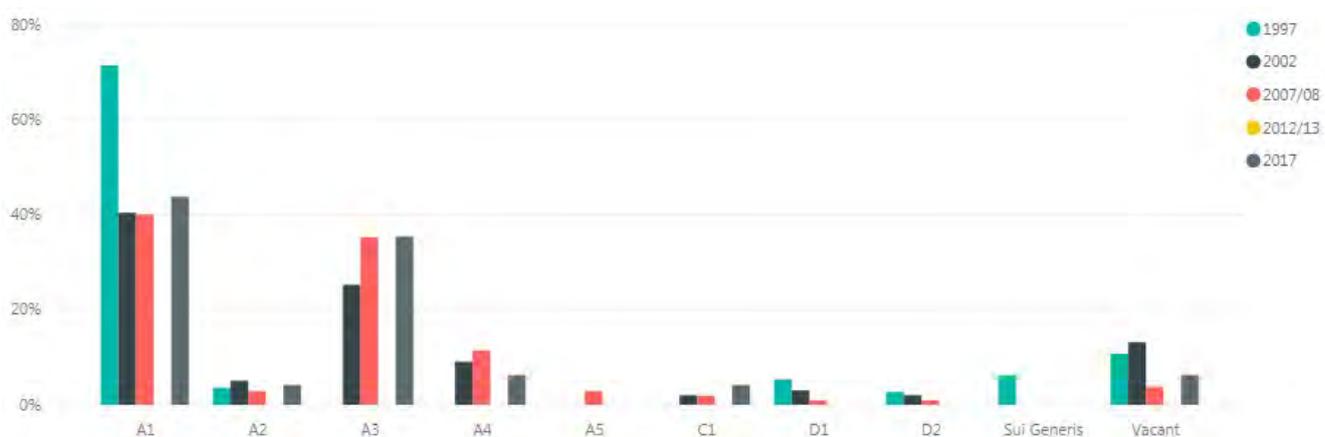
**Table 20.3: Ground floor total number of units and floorspace by land use, Charlotte Street/Fitzrovia (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	21	25.30%	2833.08	16.93%
A2	2	2.41%	780.71	4.67%
A3	17	20.48%	2269.80	13.57%
A4	3	3.61%	405.14	2.42%
B1	34	40.96%	9448.28	56.47%
C1	2	2.41%	636.29	3.80%
C3	1	1.20%	147.41	0.88%
Vacant	3	3.61%	210.79	1.26%
<b>Total</b>	<b>83</b>	<b>100%</b>	<b>16731.49</b>	<b>100%</b>

## 20.3. Comparative land use analysis

### 20.31. Comparative range of units and floorspace analysis

**Figure 20.4: Proportion of units by land use, Charlotte Street/Fitzrovia (2017)<sup>21</sup>**



<sup>21</sup> There is no data available for 2012/13 for this centre.

The number of units has decreased across the years surveyed: there were 105 units in 2007/2008 and 48 in 2017. This shows that the centre has recently experienced a large drop in the total number of units: this could have been caused by a number of reasons including smaller units forming into larger units and redevelopment of sites.

The proportion of A1 units has increased to 44% in the 2017 survey compared to 40% in 2007/08 but, in terms of units, the survey has revealed an actual unit drop from 42 to 21 indicating again a potential amalgamation of units.

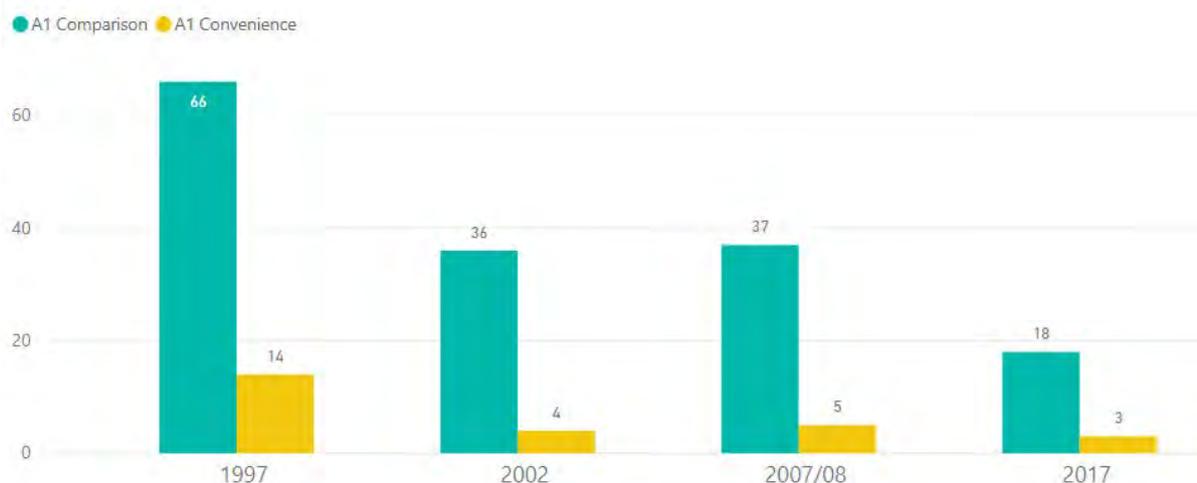
A2 units have experienced a minor but almost negligible change over all survey periods. However, the proportion of A3 units has increased between 2002 and 2007/2008 and has remained proportionally similar since the last survey period in 2007/08. In terms of number of units, we can observe a sharp drop of 20 units between 2007/2008 and 2017.

The centre has never accommodated a significant amount of A5, C1, D1, D2 and Sui Generis uses.

The proportion of vacant units has slightly increased between 2007/2008 and 2017 but in terms of units there has been a drop from 4 to 3 units.

## 20.32. Comparative comparison/convenience split analysis

**Figure 20.5: Number of comparison and convenience A1 units by year, Charlotte Street/Fitzrovia (2017)**



The centre has had a broadly consistent comparison to convenience split across the years surveyed. Charlotte Street/Fitzrovia has been A1 comparison-led since 1997. Figures show that the proportion of comparison retail has experienced a marginal reduction in recent surveys.

## 20.4. 2018 Site Survey

### 20.41. Accessibility and pedestrian flows

The overall area is well served by transport links although there are no direct links serving the centre. There are two Underground stations within a five-minute walk: Tottenham Court Road station (Central, Northern lines) and Goodge Street station (Northern line).

The centre's neighbouring areas are also served by several bus routes and are main arterial roads.

Pedestrian flows were judged to be average throughout the centre. Charlotte Street was found to be slightly busier than the rest of the centre as it accommodates a significant number of

restaurants, cafés and drinking establishments that attracted people who were either having a afternoon tea, a drink or dinner. Newman Street was quieter as it mainly accommodates offices and there are not as many active frontages.

The area has safe crossings, a number of pedestrianised streets and is moderately accessible.

## 20.42 Range of units and floorspace qualitative analysis

### 20.421 *Area description, land uses and retail provision*

Charlotte Street/Fitzrovia is a mixed-use centre that accommodates a large proportion of office floorspace. The centre also presents a good offer of restaurants, cafés and drinking establishments and a small number of independent stores. In terms of land uses, two main areas can be identified.

The Charlotte Street/Rathbone Place area accommodates a significant number of restaurants and cafés that mainly belong to chains (e.g. Pizza Express, Wahaca, Costa) and a number of drinking establishments.

A small number of independent stores can be found on Charlotte Place and Newman Street, close to Eastcastle Street. The shops are mostly independent shops (e.g., hairdressers, beauty salons, optician) and art galleries.

The area is also home to two hotels including the iconic five-star Charlotte Street Hotel.



The Rathbone Street/Newman Street area accommodates a very significant number of offices at ground floor level. The businesses belong to a wide range of sectors, from engineering to design and cinema suggesting the area accommodates a powerful creative and cultural industry cluster. Although the area has limited shops, a small number of art galleries can be found in the area.



It was observed that a significant number of restaurants and cafés sell take-away food and operate deliveries. It was also observed that there are no convenience stores in the centre. The new and recently finished Rathbone development is in the vicinity of the centre. A number of retail units are still vacant but ready to be let.

#### 20.422 *Vacant units*

The 2017 land use survey identified three vacant units within the centre. The 2018 site survey revealed that one of the units is still vacant. Another vacant unit was found to have a Notice of possession affixed dated May 2018 and a new public house called 'Newman Arms' has opened in Rathbone Street.

During the visit, a series of other units were found to be vacant or being developed. This includes a whole building on Rathbone Street that was found to be under-development<sup>22</sup>. The new development will accommodate office floorspace and has planning permission to provide a gym (D2) in the basement and a restaurant (A3) on the ground floor. In the northern part of Newman Street, a number of units were found to be vacant and advertised to be let as retail, art gallery or café.



### 20.43 State of the primary shopping area environmental quality assessment

#### 20.431 *Public realm*

The quality of the public realm was judged to be of average quality. The pavements are well-maintained and encourage walking. However, the area was found to be slightly cluttered with signals, A boards, trees and lampposts occupying the pavement. A significant number of cafés



<sup>22</sup> See planning application 16/02884/FULL for 29-35 Rathbone Street London W1T 1NJ.

and restaurants also have tables and chairs on the pavement; this contributes to the vibrancy of the area but increases the feeling of clutter.

#### 20.432 *Cleanliness, safety and security*

Cleanliness was judged to be average. At the time of the visit, commercial refuse bags awaiting collection were seen on the street.

The level of safety and security was judged to be high. As traffic is low and a number of streets are pedestrianised, it feels safe to walk around the centre.

#### 20.433 *Identity and users*

The centre's food and drink offer contributes to the evening and night-time economy of the area which mainly serves workers and visitors. No flagship stores, monuments or buildings were identified apart from the iconic Charlotte Street Hotel.

### **20.5. Performance summary and recommendations**

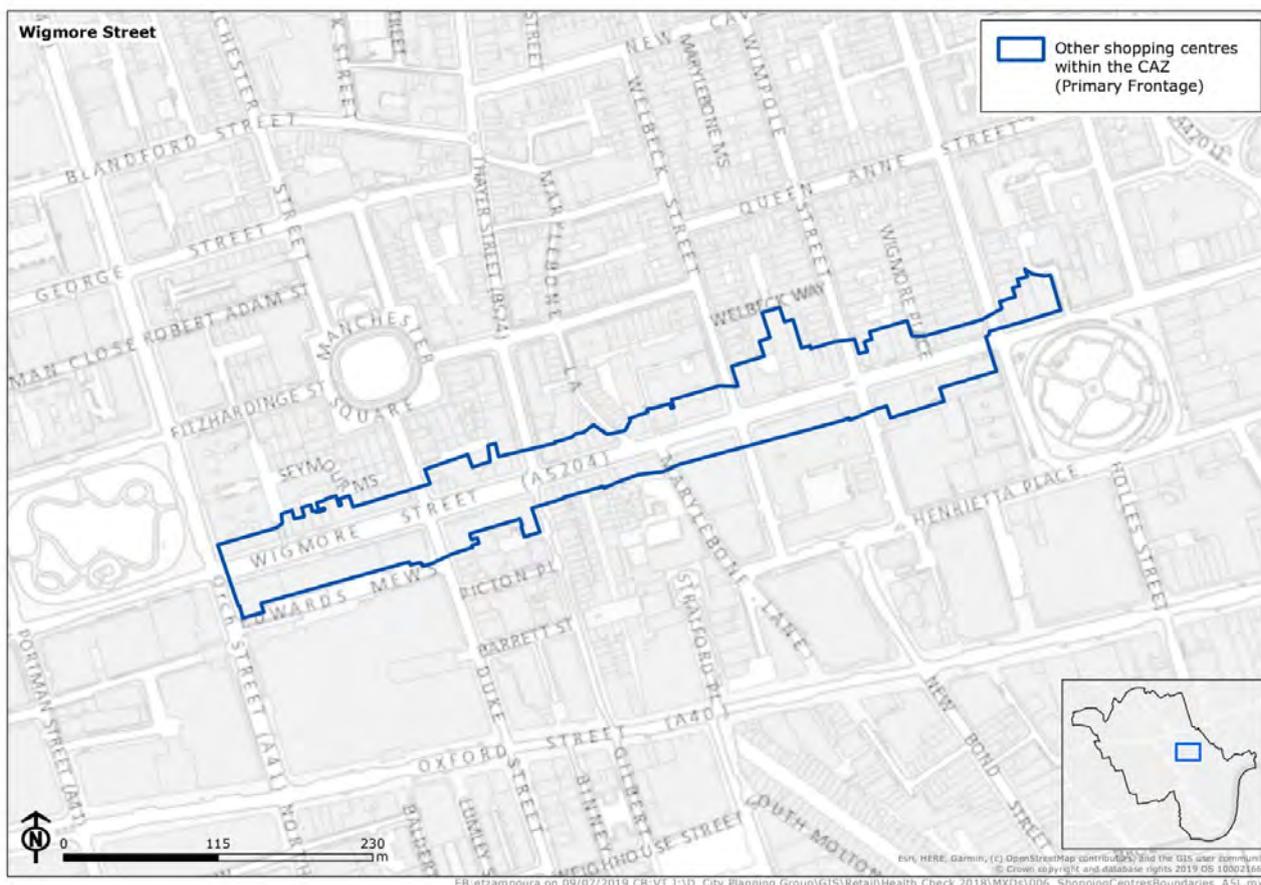
- The area is considered to be 'healthy'. The centre accommodates a significant number of offices that mainly belong to the creative industry as well as a number of art galleries. These uses are supported by a mix of restaurants, cafés and drinking establishments that provide an evening and night-time economy.
- The level of vacancies is not considered of concern although a number of vacant units have appeared on Newman Street.
- The centre would benefit from improved public realm although the low amount of vehicular traffic and pedestrianised streets contribute to a sense of place.

### **20.6. Recommended boundary changes**

It is recommended to remove the Charlotte Street/Fitzrovia designation. The centre contains limited A1 retail provision and is rather focused on offices along Newman Street and on restaurants and cafés around Rathbone Street. These functions are more compatible with the function of the WERLSPA designation which already covers the area. It is considered that a town centre designation is not required to support the function and vitality of the area, Further details on all boundary changes can be found in 'Appendix 3: Recommended changes to designation boundaries'.

## 21.0. Wigmore Street

Map 21.0: Other Shopping Centre within the CAZ boundary, Wigmore Street (2017)



### 21.1. Introduction

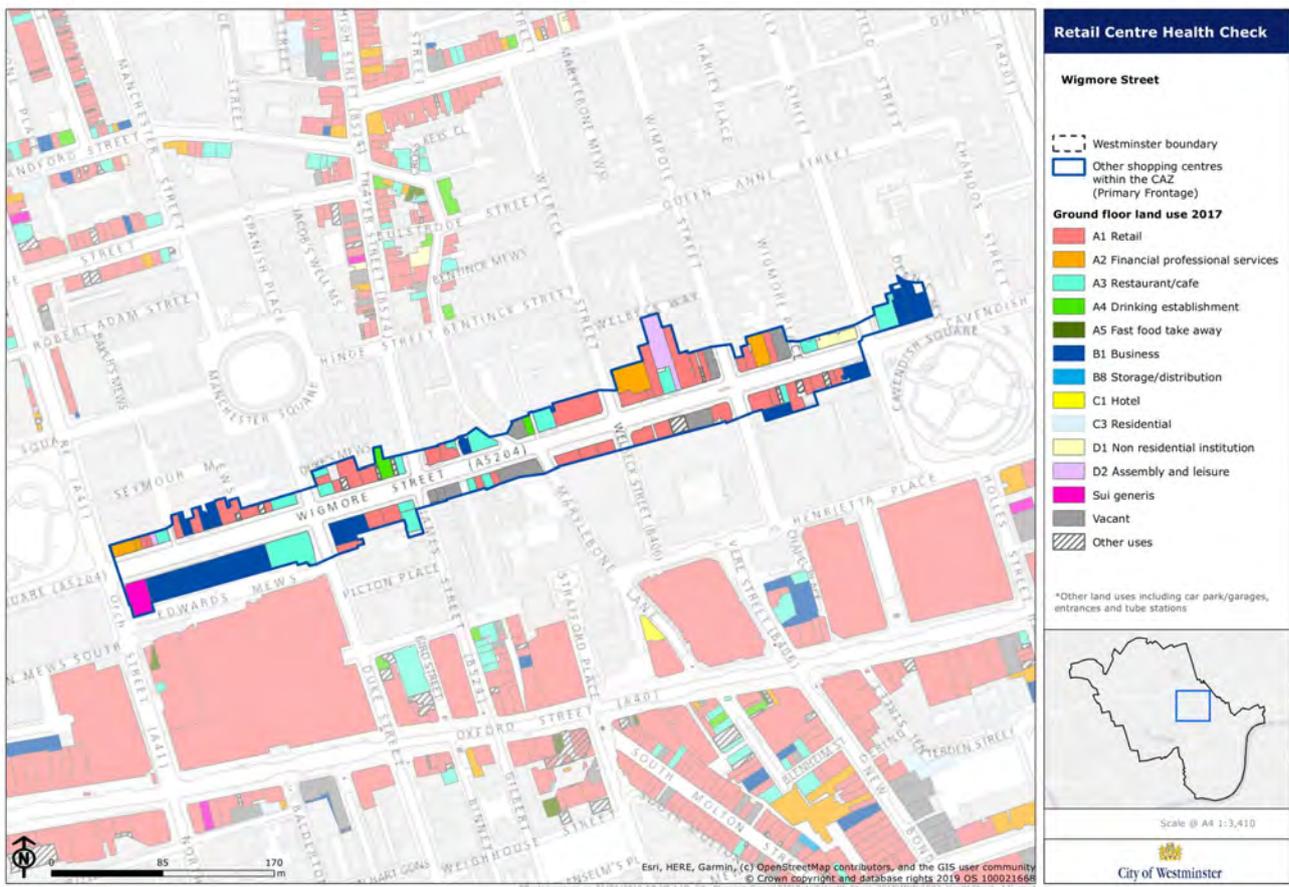
Wigmore Street is a designated Other Shopping Centre within the CAZ and is within the CAZ. Wigmore Street is a linear and moderately contained centre, running parallel to Oxford Street, which is located about 200 metres south of Wigmore Street. The centre is close to Marble Arch and Bond Street stations. Wigmore Street is close to other designated shopping centres including the West End, Baker Street South and Marylebone High Street. The centre contains a variety of shops with predominant specialist interior design and health and medical retailers, as well as offices and restaurants and cafés serving local workers, visitors and residents. The centre also contains attractions such as Wigmore Hall, a concert hall specialising in chamber music.

### 21.2. 2017 Land use analysis

#### 21.21. Ground floor land use map (2017)

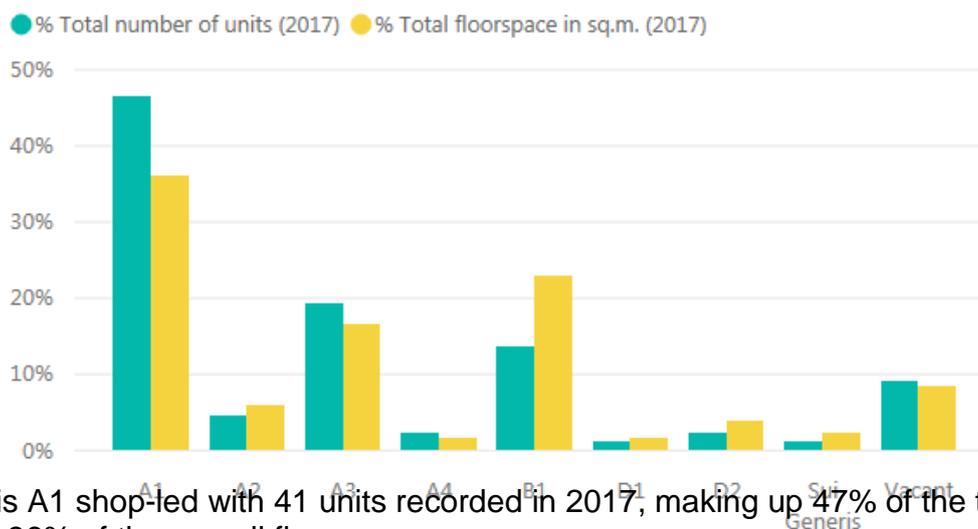
In 2017, 88 total units were identified at ground floor level. The surveyed area covered 17,142 sq m

## Map 21.1: Ground floor land use map, Wigmore Street (2017)



### 21.22. Range of units and floorspace analysis (2017)

Figure 21.2: Ground floor total number of units and floorspace by land use, Wigmore Street (2017)



The centre is A1 shop-led with 41 units recorded in 2017, making up 47% of the total number of units and 36% of the overall floorspace.

A3 uses are also strong within the centre with 17 recorded units in 2017 making up 19% of the total number of units and 17% of the overall floorspace.

Also of note are B1 uses with 12 recorded units in 2017, making 14% of the total number of units and 23% of the overall floorspace within the centre. Other recorded uses within the centre include a limited amount of A2, A4, D1, D2 and Sui generis.

There are eight vacancies recorded in this centre, making 9% of the total number of units and 8% of the overall floorspace. However, the 2018 site survey has found that many of the units were being developed.

**Table 21.3: Ground floor total number of units and floorspace by land use, Wigmore Street (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	41	46.59%	6190.51	36.11%
A2	4	4.55%	1038.44	6.06%
A3	17	19.32%	2860.86	16.69%
A4	2	2.27%	299.83	1.75%
B1	12	13.64%	3951.22	23.05%
D1	1	1.14%	273.32	1.59%
D2	2	2.27%	686.94	4.01%
Sui Generis	1	1.14%	409.24	2.39%
Vacant	8	9.09%	1431.77	8.35%
<b>Total</b>	<b>88</b>	<b>100%</b>	<b>17142.13</b>	<b>100%</b>

## 21.3. Comparative land use analysis

### 21.31. Comparative range of units and floorspace analysis

**Figure 21.4: Proportion of units by land use, Wigmore Street (2017)<sup>23</sup>**



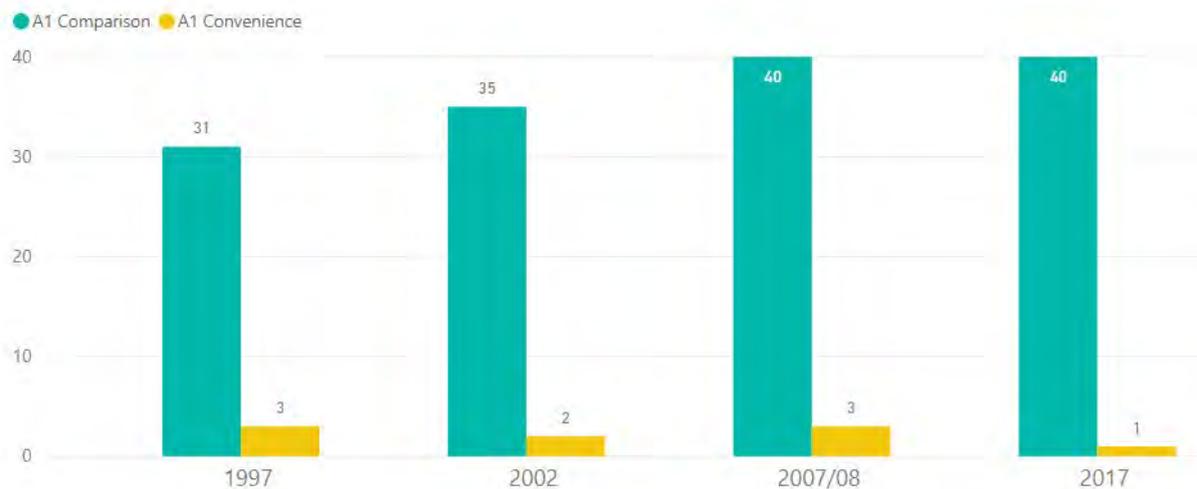
The total number of units within the boundary of this centre peaked in 2017 with 76 units. The proportion of A1 units has remained stable across the years surveyed. However, A3 uses have risen proportionally by 7% since the last survey in 2007/08, with an increase of five units. A2 uses have shown a steady decline since the 2002 survey period, a 6% relative decline and a loss of five units since the last survey in 2007/08.

Vacancies peaked in 1997 with 24 units and have dropped proportionally by 25% between 1997 and 2017, indicating a trend of recovery.

### 21.32. Comparative comparison/convenience split analysis

**Figure 21.5: Number of comparison and convenience A1 units by year, Wigmore Street (2017)**

<sup>23</sup> There is no data available for 2012/13 for this centre.



The centre has had a broadly consistent comparison to convenience split across the years surveyed. Wigmore Street has been A1 comparison-led since 1997. The number of A1 convenience shops was at its lowest in 2017.

## 21.4. 2018 Site Survey

### 21.41. Accessibility and pedestrian flows

Although there are no Underground stations within the centre, the area is within a five-minute walk to Bond Street station (Jubilee, Central lines) on Oxford Street, to the South of Wigmore Street.

No buses run directly along Wigmore Street itself, however many routes run along Oxford Street to the south of the centre, and along Baker Street and Gloucester Place at the western end of Wigmore Street. However, the street is heavily used by cars and other motor vehicles. Pedestrian flows were judged to be low throughout the centre although the Charlotte Street area was found to be slightly busier.



### 21.42 Range of units and floorspace qualitative analysis

#### 21.421 Area description, land uses and retail provision

Wigmore Street is a mixed-use centre. It is home to two main strands of specialist shops: home furnishing and interior design shops (kitchens and bathroom showrooms in particular) and health-related shops. These specialist uses are present throughout the stretch of the centre but are more prevalent on the eastern portion of the centre.

A number of cafés and restaurants can also be found along the street as well as a number of public houses. Food and drinks uses are more concentrated in the middle section of the centre. These appear to cater mostly to office workers in the area as well as to tourist spill-overs from the nearby Oxford Street.

The western portion of the centre mainly accommodates offices and several financial and professional units such as banks.



### 21.422 *Vacant units*

Although the 2017 land use survey identified eight vacant units within the centre, at the time of the visit it was observed that the majority of the identified units were being redeveloped. A number of units appeared to have been completely refurbished and ready to be occupied.



## 21.43 State of the primary shopping area environmental quality assessment

### 21.431 *Public realm*

The quality of the public realm was judged to be of average quality. The centre is currently affected by considerable roadworks involving the kerb space and the pavement which affect the pedestrian experience. The environment is car-dominated with a three to four lane street crossing the centre. Ease of passage seems to be predominantly affected by the ongoing roadworks.

The pavement presents minor clutter due to some A boards and some tables and chairs from restaurants and cafés that are also present (especially in the middle section and side streets that are joining up with Oxford Street and Marylebone Lane).

The quality of the public realm is higher near the side streets which host more food and drink units and provide a more tranquil environment.

The area lacks in amenity for its visitors, particularly in terms of limited resting space and there is little evidence of landscaping.



#### 21.432 *Cleanliness, safety and security*

Cleanliness was judged to be high throughout the centre, with very few used cardboard boxes left on the pavement.

The level of safety and security was judged to be high.

#### 21.433 *Identity and users*

The area is home to a number of historic building alongside more modern developments, the latter being more prevalent especially to the western end of the centre.

There is a good presence of well-known international design brands, particularly in terms of specialist design and furniture retailers. Wigmore Hall, a renowned leisure destination, is also located on Wigmore Street.

The area appears to be used mainly by workers, as well as by some visitors that are likely to be coming or going to the nearby Oxford Street. Specialist shops and medical uses also attract a number of customers and patients.

### **21.5. Performance summary and recommendations**

- The area is considered to be 'healthy'. Wigmore Street accommodates a significant number of specialist shops including kitchen showrooms and other interior design and furniture shops. However, the number of restaurants and cafés has recently increased. A number of secondary streets (James Street, St Christopher's Place and Marylebone Lane) are focussed on food and drink uses and link the centre to similar uses on Marylebone High Street.
- The number of vacancies in the centre has declined across the years surveyed and most of the current vacant units are so due to ongoing development works.

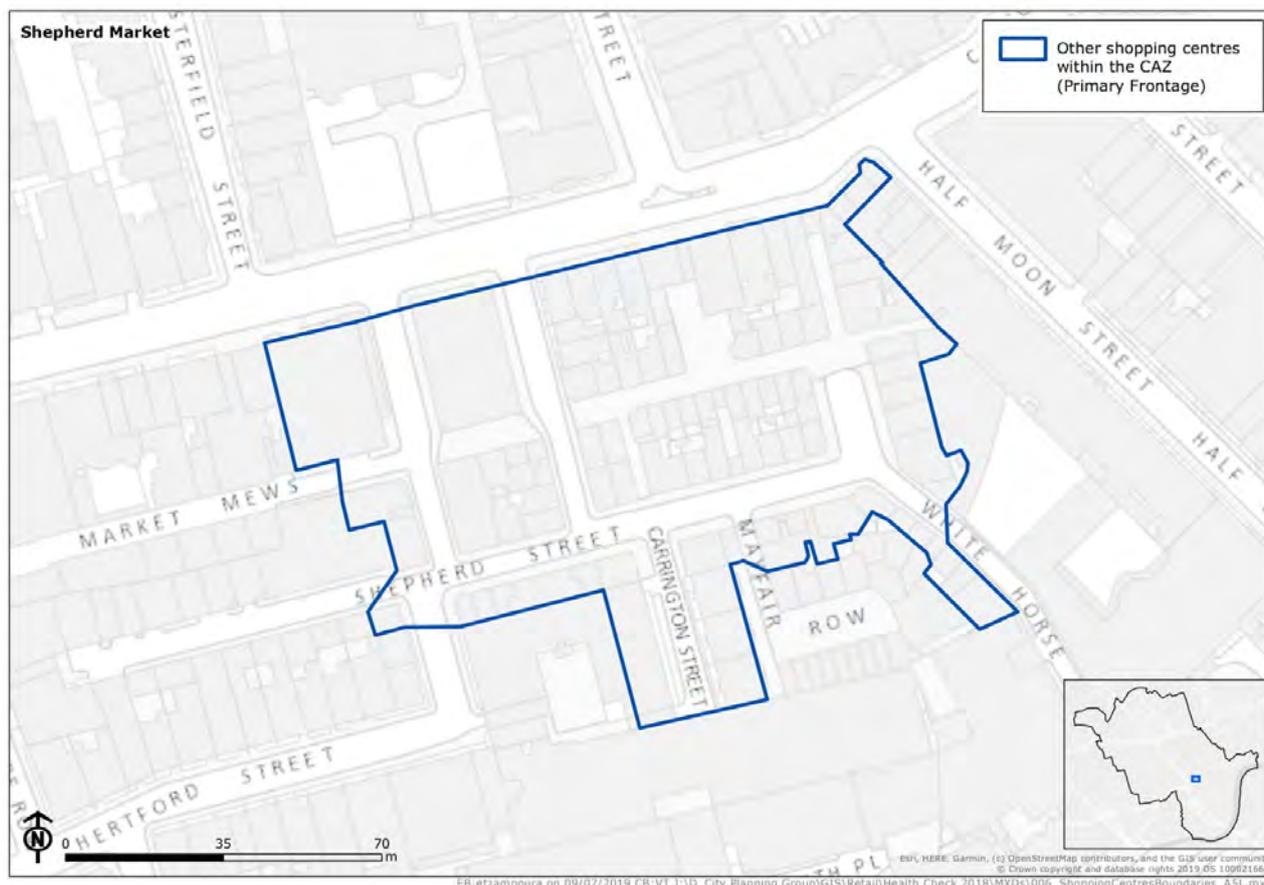
- The area feels naturally safe and well maintained, although the overall quality of the public realm is affected by a number of sites undergoing redevelopment and by substantial highway works taking place throughout the centre.
- Due to its scale and function, it is recommended to reclassify the centre as a CAZ Retail Cluster. Further details on the reclassification recommendation can be found in 'Appendix 4: Evidence for the reclassification of existing 'Other Shopping Centres within the CAZ''.

## **21.6. Recommended boundary changes**

No boundary changes are recommended.

## 22.0. Shepherd Market

Map 22.0: Other Shopping Centre within the CAZ boundary, Shepherd Market (2017)



### 22.1. Introduction

Shepherd Market is a designated Other Shopping Centre within the CAZ and is within the CAZ. The centre is located in Mayfair and in close proximity to Green Park Underground station. The area is close to other designated town centres including Piccadilly and North Audley Street/Mount Street.

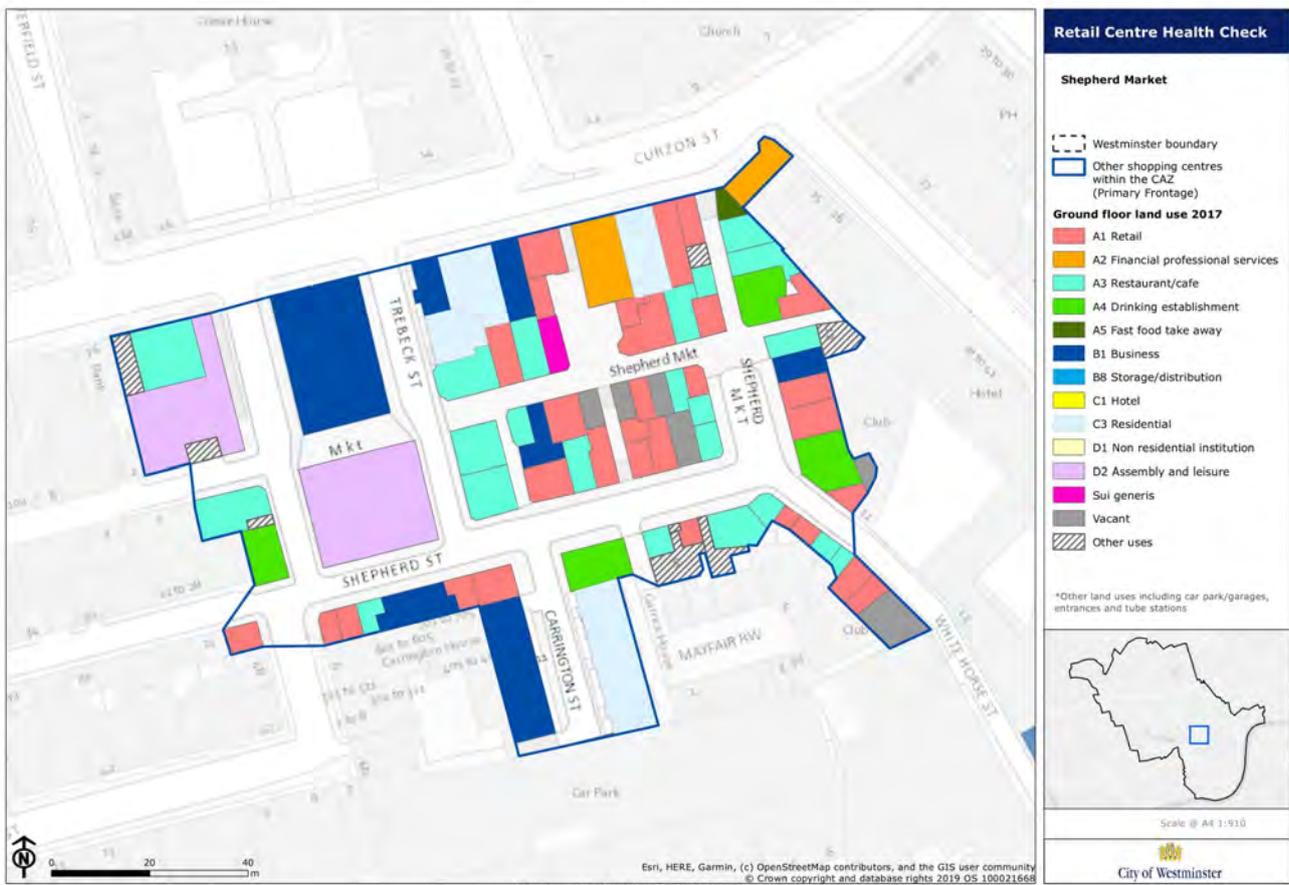
It is a village-like centre that covers a number of streets (Hertford Street, Trebeck Street, Shepherd Street and the Shepherd Market), some of them pedestrianised. It is a small mixed-use area that accommodates a significant amount of shops, restaurants and cafés and drinking establishments.

### 22.2. 2017 Land use analysis

#### 22.21. Ground floor land use map (2017)

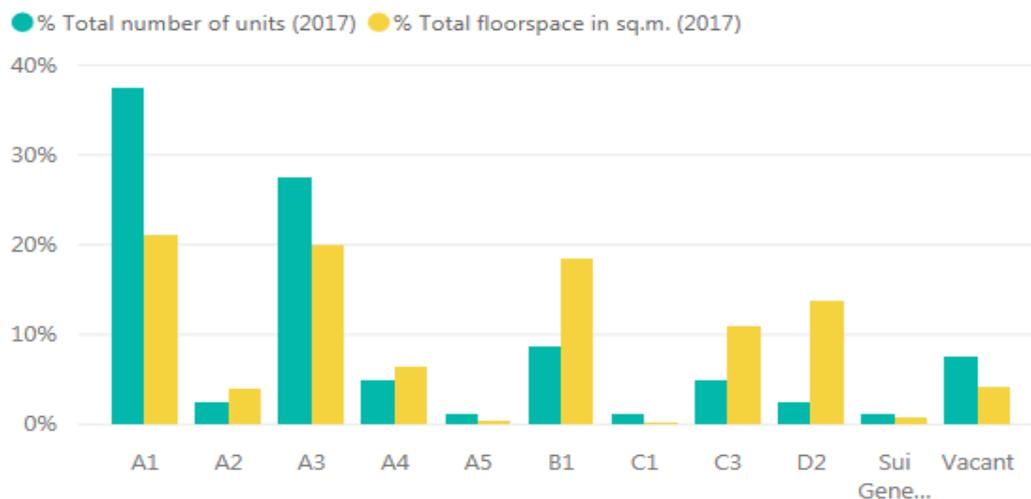
In 2017, 80 total units were identified at ground floor level. The surveyed area covered 6,307 sq m.

## Map 22.1: Ground floor land use map, Shepherd Market (2017)



### 22.22. Range of units and floorspace analysis (2017)

**Figure 22.2: Ground floor total number of units and floorspace by land use, Shepherd Market (2017)**



The centre is largely balanced between a predominance of A1 (30 units in 2017) and A3 units (22 units in 2017). A1 accounts for 38% of the total number of units and 21% of the total floorspace and A3 accounts for 28% of the total number of units and 20% of the total

floorspace. There are a number of service-type shops such as hairdressers and beauty salons. The area also hosts several art galleries. The food and drink offer is diverse and the area has a strong evening and night-time economy.

There is a smaller proportion of B1 units accounting for 9% of the total units but a considerable percentage of floorspace at 18%, consisting of units larger than their surroundings.

The centre also accommodates a limited amount of D2, C3, A4, A2, A5 and C1 uses.

The 2017 survey recorded 6 vacant units but these only account for 4% of the floorspace. The vacant units appear to be clustered around Shepherd Market, with 2 units on the periphery of the town centre on White Horse Street. The 2018 site survey has found that some of these units are being developed.

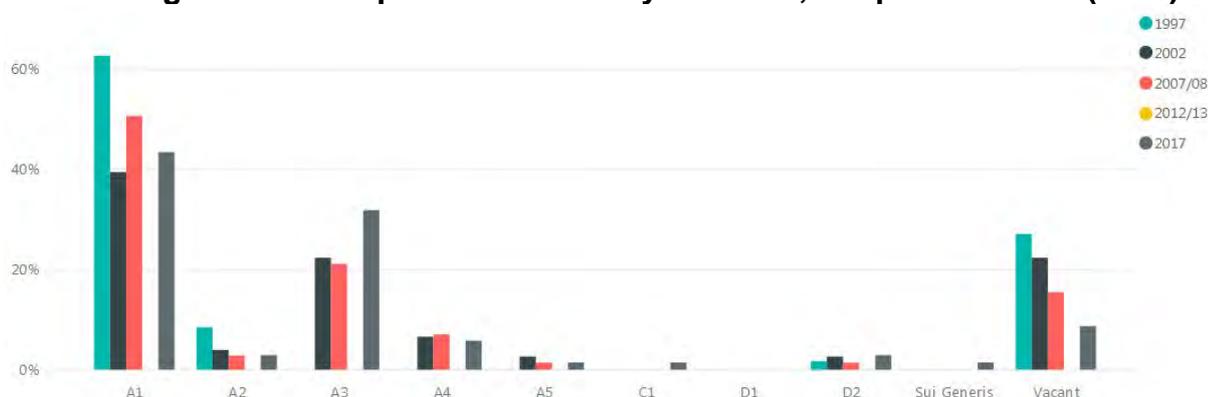
**Table 22.3: Ground floor total number of units and floorspace by land use, Shepherd Market (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	30	37.50%	1331.37	21.11%
A2	2	2.50%	245.59	3.89%
A3	22	27.50%	1264.39	20.05%
A4	4	5.00%	402.78	6.39%
A5	1	1.25%	25.75	0.41%
B1	7	8.75%	1165.13	18.47%
C1	1	1.25%	2.26	0.04%
C3	4	5.00%	687.70	10.90%
D2	2	2.50%	873.66	13.85%
Sui Generis	1	1.25%	48.32	0.77%
Vacant	6	7.50%	260.16	4.12%
<b>Total</b>	<b>80</b>	<b>100%</b>	<b>6307.11</b>	<b>100%</b>

## 22.3. Comparative land use analysis

### 22.31. Comparative range of units and floorspace analysis

**Figure 22.4: Proportion of units by land use, Shepherd Market (2017)<sup>24</sup>**



The total number of units within the boundary of this centre experienced a peak in 2002 with 76 units. However, the following surveys have shown a steady marginal decrease in the number of units. The total number of units recorded in 2017 was 69.

<sup>24</sup> There is no data available for 2012/13 for this centre.

The proportion of A1 units has experienced a relatively small drop decreasing by six units between 2007/2008 and 2017.

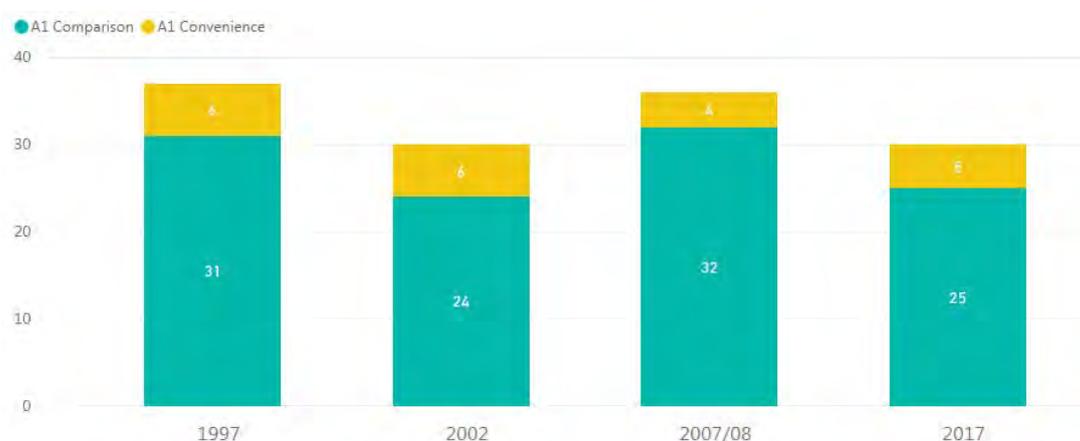
However, the proportion of A3 units has experienced a rise in number between 2007/08 and 2017. In 2017, there were 7 more units.

There are a limited amount of A2, A4, A5, C1, D2 and Sui Generis units.

Surveys have recorded a significant reduction of vacant units since 1997. The 2002 survey recorded a peak in vacancies at 17 units (22% of the units), though the highest percentage of vacant units sat at 27% in 1997. In 2017, the survey recorded 6 vacant units accounting for 9% of the units.

## 22.32. Comparative comparison/convenience split analysis

**Figure 22.5: Number of comparison and convenience A1 units by year, Shepherd Market (2017)**



The centre has had a broadly consistent comparison to convenience split across the years surveyed. Shepherd Market has been A1 comparison-led since 1997.

## 22.4. 2018 Site Survey

### 22.41. Accessibility and pedestrian flows

The overall area is well served by transport links, although there are no direct links serving the centre. There is a Underground station within a five-minute walk: Green Park (Jubilee, Piccadilly, Victoria lines).

The centre's neighbouring areas are also served by several bus routes and host main arterial roads. At the time of the visit, some unauthorised use of streets by delivery drivers was observed.

Pedestrian flows were judged to be low throughout the centre. However, the site survey was carried out during a quiet morning and the centre's mix of uses indicates that the area is more used during the afternoon and evening time rather than early in the morning. Some streets are pedestrianised, and the area has moderately safe crossings and is accessible.

### 22.42 Range of units and floorspace qualitative analysis

#### 22.421 Area description, land uses and retail provision

Shepherd Market is a small mixed-use town centre.

There are a significant number of independent and boutique-style shops. The area accommodates both a number of specialist shops (e.g. hairdressers, beauty salons, jewellers), art galleries and convenience shops. Almost none of the shops belong to multiples.

The area accommodates a number of independent food and drink premises and some restaurants and cafés have tables and chairs outside, contributing to a feeling of clutter but also to the vibrancy of the area. Restaurants offer a wide range of different cuisines (e.g. African, British, French).

The area also hosts a number of public houses and drinking establishments such as The Shepherds Tavern, the Ye Grapes, the Kings Arms and the Market Tavern.

There is a cinema, a social club and a betting office.



#### 22.422 *Vacant units*

The 2017 land use survey identified six vacant units within the centre; the 2018 site survey did not reveal major changes in terms of occupancy. However, some of the units seemed to be under-development and new vacant units may have appeared.



#### 22.43 State of the primary shopping area environmental quality assessment

##### 22.431 *Public realm*

The quality of the public realm was judged to be of average quality. The pavements are very narrow, and the area was found to be slightly cluttered with signals, A boards and street furniture occupying the pavement. A significant number of cafés and restaurants have tables

and chairs on the pavement which contributes to the local feeling of the area but also increases the feeling of clutter.

There is a low amount of green infrastructure and amenity space.

A number of delivery vehicles were observed to be illegally parked at the time of the visit.



#### 22.432 *Cleanliness, safety and security*

Cleanliness was judged to be average throughout the centre. Commercial refuse bags awaiting collection were observed on the street as well as some litter left close to bins. The level of safety and security was judged to be average.



#### 22.433 *Identity and users*

The area serves local residents and workers as the neighbouring areas host a number of offices. The area may also attract visitors staying in the Park Lane area. The strong presence of restaurants and drinking establishments suggests that the town centre is mainly used in the evening and night time.

Rough sleepers were observed during the site visit.

### 22.5. Performance summary and recommendations

- The area is considered to be 'healthy'. Shepherd Market is a small mixed-use centre at the heart of Mayfair that accommodates a range of independent shops, art galleries, restaurants and drinking establishments. The centre attracts local workers, residents and visitors towards the evening and night time.

- The number of vacancies in the centre has declined across the years surveyed.
- Although some streets within the centre are pedestrianised, the pavements in the rest of the centre are sometimes cluttered. The centre would benefit from improved landscaping, amenity space and decluttering.
- Due to its scale and function, it is recommended to reclassify the centre as a Local Centre. Further details on the reclassification recommendation can be found in the main report.

## **22.6. Recommended boundary changes**

It is recommended to remove the residential block on Carrington Street as the building does not have an active frontage nor does its design suggest the ground floor units could be converted into commercial use.

Further details on all boundary changes can be found in 'Appendix 3: Recommended changes to designation boundaries'.

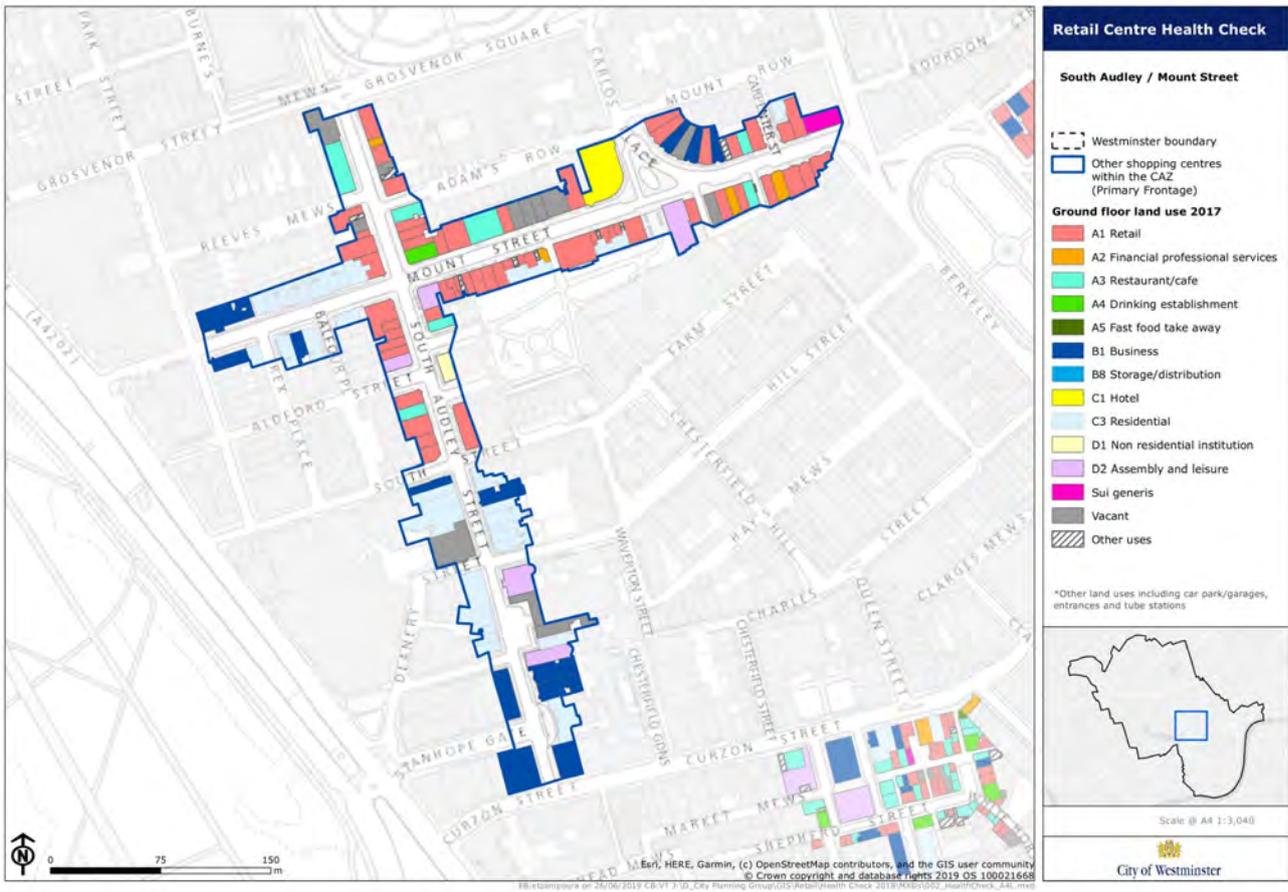


## 23.2. 2017 Land use analysis

### 23.21. Ground floor land use map (2017)

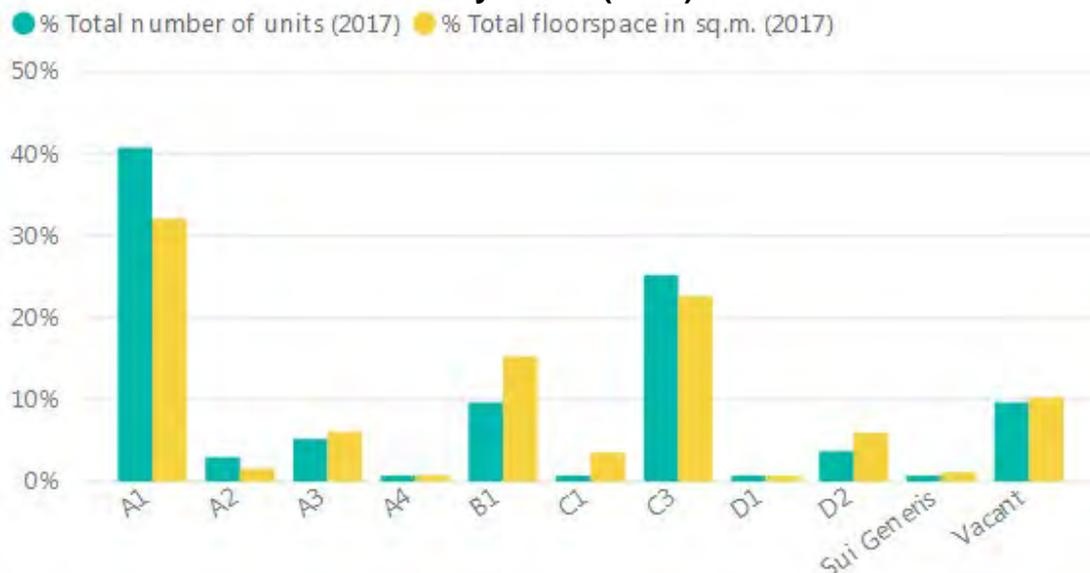
In 2017, 135 total units were identified at ground floor level. The surveyed area covered 36,399 sq m

**Map 23.1: Ground floor land use map, South Audley Street (2017)**



### 23.22. Range of units and floorspace analysis (2017)

**Figure 23.2: Ground floor total number of units and floorspace by land use, South Audley Street (2017)**



The town centre is strongly A1-led, with 55 units recorded in 2017 making up 41% of the total number of units and 32% of the overall floorspace.

The second most prevalent ground floor land use within the centre is C3 with 34 residential units, taking up 25% of the total number of units and 23% of the total floorspace. Most of the residential units are located in the western part of Mount Street and southern edge of South Audley Street.

B1 floorspace is also strong with 13 units representing 10% of the total number of units and 15% of the floorspace.

Other uses in the centre include a limited amount of A2, A3, A4, C1, D1 and D2. Together, these represent less than 10% of the units.

In terms of vacancy, 13 vacant units were recorded in 2017 accounting for 10% of the total number of units and 10% of the floorspace. A small concentration of vacant units can be observed towards the north of the centre. However, the 2018 site survey has identified that a number of vacant units are undergoing development.

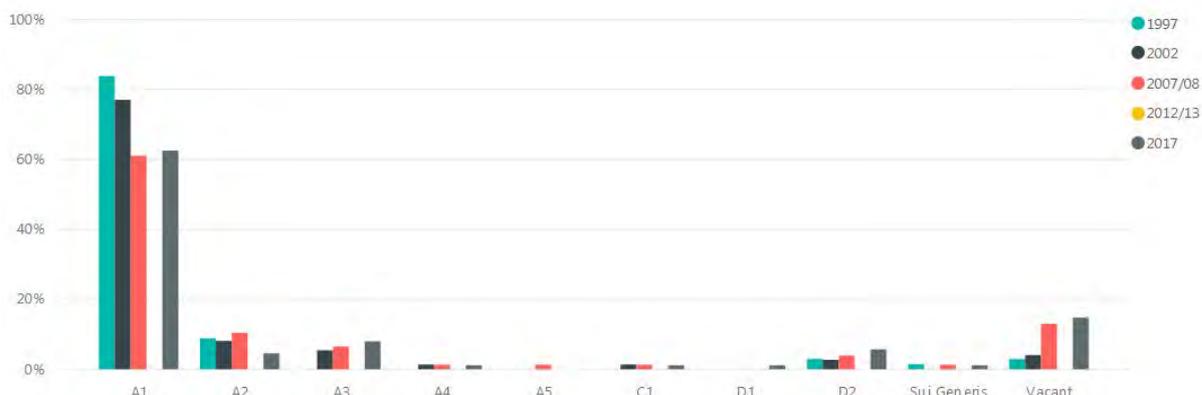
**Table 23.3: Ground floor total number of units and floorspace by land use, South Audley Street (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	55	40.74%	8473.95	32.10%
A2	4	2.96%	414.12	1.57%
A3	7	5.19%	1600.03	6.06%
A4	1	0.74%	209.15	0.79%
B1	13	9.63%	4032.93	15.28%
C1	1	0.74%	925.51	3.51%
C3	34	25.19%	5980.03	22.65%
D1	1	0.74%	181.54	0.69%
D2	5	3.70%	1565.22	5.93%
Sui Generis	1	0.74%	298.29	1.13%
Vacant	13	9.63%	2717.94	10.30%
<b>Total</b>	<b>135</b>	<b>100%</b>	<b>26398.72</b>	<b>100%</b>

## 23.3. Comparative land use analysis

### 23.31. Comparative range of units and floorspace analysis

**Figure 23.4: Proportion of units by land use, South Audley Street (2017)<sup>25</sup>**



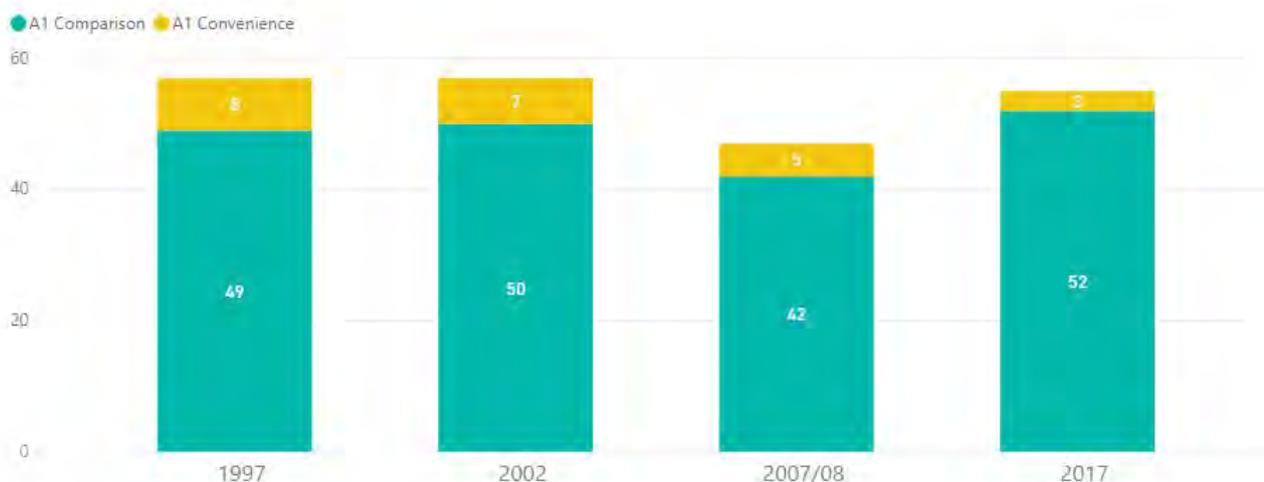
The total number of units within the boundary of the centre in 2017 represented an increase on previous years.

A1 has been the predominant land use but its proportion has experienced a minor increase from the last survey in 2007/08. A1 has gained 8 units between 2007/2008 and 2017.

The mix of land uses across the centre has remained broadly consistent across the years surveyed and the centre includes a very limited amount of A2, A3, A4, C1, D1, D2 and Sui Generis uses.

### 23.32. Comparative comparison/convenience split analysis

**Figure 23.5: Number of comparison and convenience A1 units by year, South Audley Street (2017)**



<sup>25</sup> There is no data available for 2012/13 for this centre.

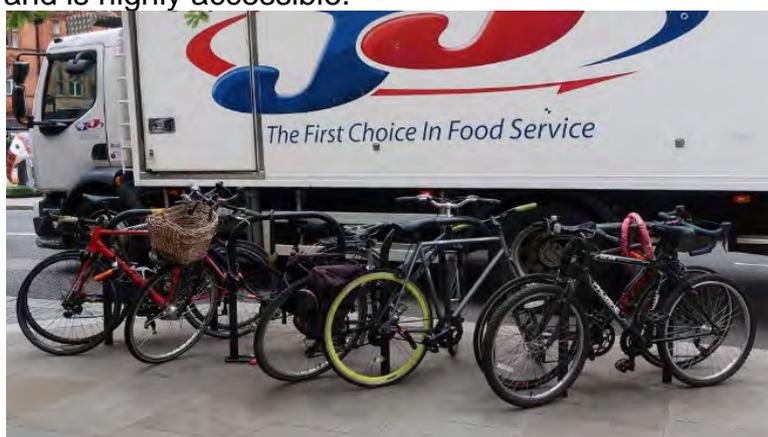
The centre has had a broadly consistent comparison to convenience split across the years surveyed. South Audley Street has been A1 comparison-led since 1997. This reflects the centre's unique and well-established role as a destination for high end clothing and accessories shopping.

## 23.4. 2018 Site Survey

### 23.41. Accessibility and pedestrian flows

Although there are no Underground stations within the boundary of the centre, the area is within a ten-minute walk to four Underground stations: Green Park (Jubilee, Piccadilly, Victoria lines), Hyde Park Corner (Piccadilly line), Marble Arch (Central line) and Bond Street (Central, Jubilee line).

No buses directly serve the centre but many routes run along Piccadilly Street to the south of the centre, Park Lane to the west of the centre and Oxford Street to the north of the centre. Pedestrian flows were judged to be low throughout the centre. However, the site survey took place on a quiet morning and the area is likely to be more used later in the day. If compared to other surrounding centres such as Oxford Street which attract a greater number of visitors and shoppers not looking for a specific single purchase, South Audley Street is quieter. The area has safe crossings and is highly accessible.



### 23.42 Range of units and floorspace qualitative analysis

#### 23.421 *Area description, land uses and retail provision*

The South Audley/Mount Street centre is a specialised centre as it mainly accommodates high-end comparison type shops, offices and residential units. In terms of land uses, four different areas can be identified.

South Audley Street (between Curzon Street and South Street) mainly accommodates office and residential buildings with not very active frontages. The area is also home to the Embassy of Qatar and the Nehru Centre. On the eastern side of the street, demolition works have taken place: the Audley Square Garage has been demolished and the site is now under alteration. When completed, it will host a new residential apartment building.<sup>26</sup>

South Audley Street (between South Street and Grosvenor Square) accommodates a significant number of shops including antiques shops, art galleries and high-end clothes shops. Some of the outlets are the only United Kingdom outlet for the brands. A number of food premises, a social club, a private spa, a public house and a church also contribute to the character of the area. All units have very well-maintained and active frontages, sometimes

<sup>26</sup> See planning application 15/02197/FULL for Audley Square Garage 5 Audley Square London W1K 1DS.

decorated with flowers, plants and flags. In the northern part of the centre, a couple of vacant units have appeared.

The western part of Mount Street (between South Audley Street and Park Street) mainly accommodates offices and residential buildings. However, the eastern part of Mount Street (between South Audley Street and Berkeley Square) is shop-led: there is a mixture of high-end clothing stores, accessories shops and delicatessen food stores. Some of the shops are independent stores and some of them belong to high-end international and national multiples (e.g. Dior, Mark Jacobs). The area also accommodates restaurants and the well-known five-star hotel The Connaught. There is a new square in front of The Connaught hotel with public art contributing to the pedestrian experience.



### 23.422 *Vacant units*

The 2017 land use survey identified 13 vacant units within the centre. The site survey did not reveal any changes in terms of occupancy but some of the units seem to be under-development.



## 23.43 State of the primary shopping area environmental quality assessment

### 23.431 *Public realm*

The public realm was found to be of high quality and there was evidence of recent investment. Minimal vehicular movements and high quality and wide pavements encourage walking. Although there are no dedicated pedestrian crossings, crossings are safe.

The town centre is not cluttered and there is evidence of landscaping, with trees and a new square with public art and a fountain shaping the centre. Well-maintained and decorated shop fronts also contribute to the appeal of the area.



#### 23.432 *Cleanliness, safety and security*

Cleanliness was judged to be high throughout the centre. The level of safety and security was judged to be high and a number of shops have security guards.

#### 23.433 *Identity and users*

The area has a strong identity and offers a specialised shopping experience. South Audley Street and the wider Mayfair neighbourhood is a well-known destination for high-end shopping and hosts world famous shops and restaurants. This shopping centre complements the offer of the nearby New Bond Street.

The centre is also home to a number of businesses and has a strong residential stock.

### **23.5. Performance summary and recommendations**

- The area is considered to be 'healthy'. South Audley Street is a well-known destination for high-end shopping. The area is also home to a number of businesses and has a strong residential stock.
- The level of vacancies is not considered of concern as a number of units are undergoing development.
- The area scores high on public realm, cleanliness and safety and security. Recent public realm works have taken place, which include a new piazza with public art.
- Due to its scale and function, it is recommended to reclassify the centre as a CAZ Retail Cluster. Further details on the reclassification recommendation can be found in 'Appendix 4: Evidence for the reclassification of existing 'Other Shopping Centres within the CAZ''.

## **23.6. Recommended boundary changes**

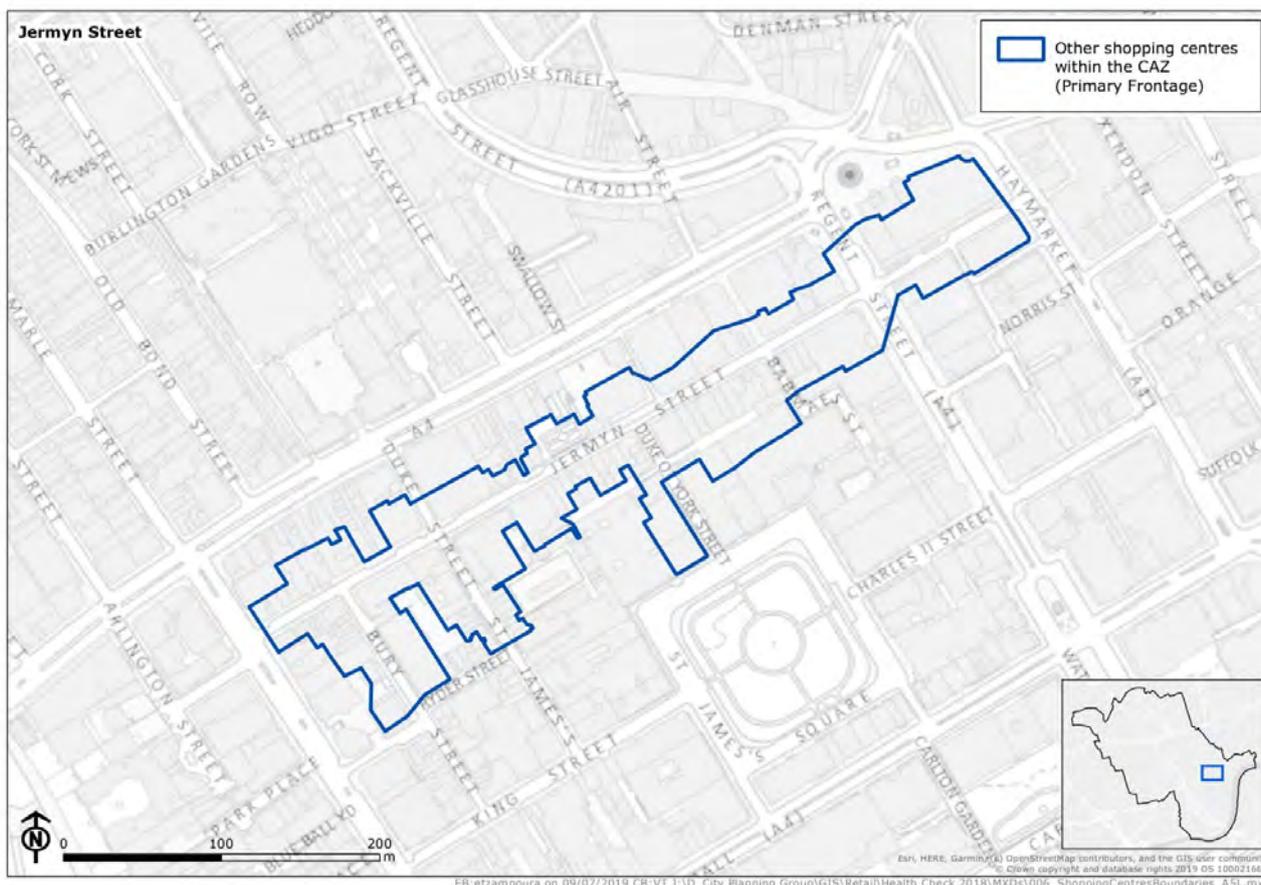
It is recommended to remove the residential units to the west and south of the centre as these buildings do not have active frontages nor does their design suggest the ground floor units could be converted into commercial use.

It is also recommended to include two art galleries and a hairdresser on Carlos Place, to the north east of the boundary, as these uses are consistent with adjoining units already covered by the designation.

Further details on all boundary changes can be found in 'Appendix 3: Recommended changes to designation boundaries'.

## 24.0. Jermyn Street

Map 24.0: Other Shopping Centre within the CAZ boundary, Jermyn Street (2017)



### 24.1. Introduction

Jermyn Street Centre is a designated Other Shopping Centre within the CAZ and is within the CAZ.

The centre is located in close proximity to Piccadilly and Green Park Underground stations. The area is close to other designated town centres, particularly Piccadilly and the wider West End.

The centre is a linear centre that is a well-known destination for men's clothes and apparel shopping and also accommodates a number of art galleries, restaurants and cafés and office



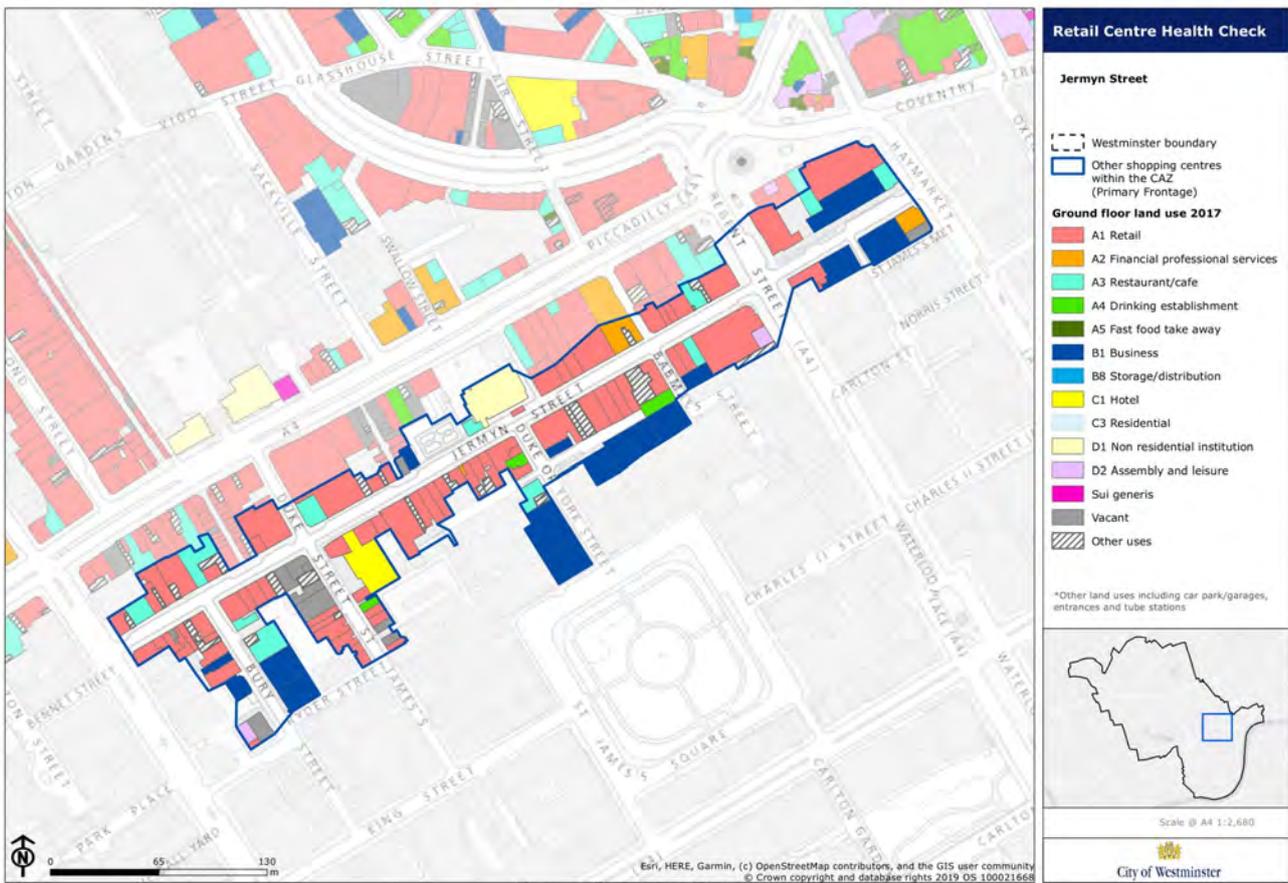
stock above ground floor level. A Fortnum & Manson department store and the Piccadilly Waterstones shop can be accessed from Jermyn Street and Piccadilly Street.

## 24.2. 2017 Land use analysis

### 24.21. Ground floor land use map (2017)

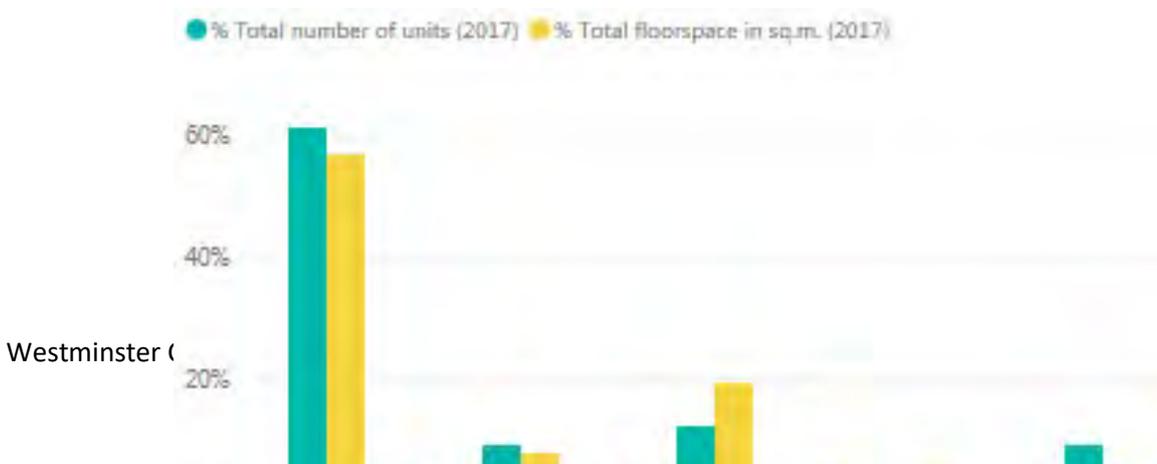
In 2017, 122 total units were identified at ground floor level. The surveyed area covered 26,263 sq m

**Map 24.1: Ground floor land use map, Jermyn Street (2017)**



### 24.22. Range of units and floorspace analysis (2017)

**Figure 24.2: Ground floor total number of units and floorspace by land use, Jermyn Street (2017)**



The centre is strongly A1-led, with 75 units recorded in 2017 making up 61% of the total number of units and 57% of the overall floorspace in the centre.

The second most prevalent ground floor land use is B1 floorspace with 15 units, making up 12% of the total number of units and 20% of the total floorspace. Most of the office stock is on side streets to Jermyn Street, which is itself more retail focussed.

Third most numerous use is A3 with 11 units taking up 9% of the total number of units and 8% of the overall floorspace.

Other uses in the centre include a limited amount of A2, A4, C1, D1 and D2. Together these represent less than 10% of units.

In 2017, there were 11 vacant units in the centre, taking up 9% of the total number of units and 4% of the overall floorspace. However, the 2018 site survey has found that most of these units are undergoing development.

**Table 24.3: Ground floor total number of units and floorspace by land use, Jermyn Street (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	75	61.48%	14970.87	57.00%
A2	3	2.46%	997.92	3.80%
A3	11	9.02%	2019.41	7.69%
A4	3	2.46%	307.83	1.17%
B1	15	12.30%	5173.60	19.70%
C1	1	0.82%	675.73	2.57%
D1	1	0.82%	805.03	3.07%
D2	2	1.64%	191.35	0.73%
Vacant	11	9.02%	1121.36	4.27%
<b>Total</b>	<b>122</b>	<b>100%</b>	<b>26263.10</b>	<b>100%</b>

## 24.3. Comparative land use analysis

### 24.31. Comparative range of units and floorspace analysis

**Figure 24.4: Proportion of units by land use, Jermyn Street (2017)<sup>27</sup>**

<sup>27</sup> There is no data available for 2012/13 for this centre.



The total number of units within the centre increased in 2017, from 99 units in 2002 to 107 units in 2017.

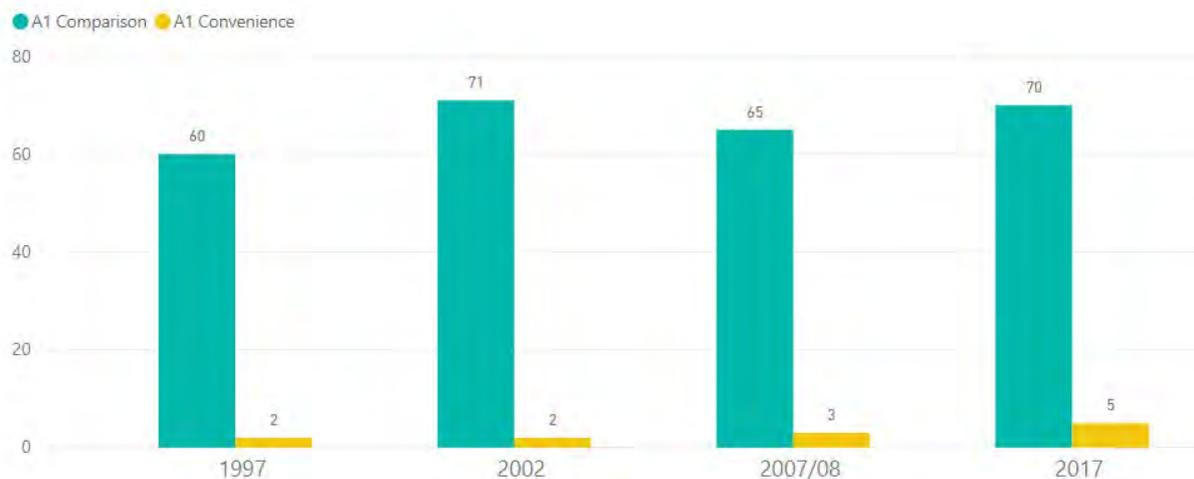
The mix of land uses across the centre has remained broadly consistent since 2002. The centre is A1-led with shops making up 50% of the units.

The centre also accommodates a limited amount of A2, A3, A4, C1, D1 and D2 uses.

The vacancy level was slightly higher in 2017 if compared to the previous years but the increase was marginal.

#### 24.32. Comparative comparison/convenience split analysis

**Figure 24.5: Number of comparison and convenience A1 units by year, Jermyn Street (2017)**



The centre has had a broadly consistent comparison to convenience split across the years surveyed. Jermyn Street has been A1 comparison-led since 1997. This reflects the centre's unique and well-established role as a destination for high-end clothing and accessories shopping. The number of convenience type shops has recently increased.

## **24.4. 2018 Site Survey**

### **24.41. Accessibility and pedestrian flows**

Although there are no Underground stations within the boundary of the centre, the area is within a five-minute walk to Piccadilly Circus Underground station (Bakerloo, Piccadilly lines) and a ten-minute walk to Green Park station (Jubilee, Piccadilly, Victoria lines).

No buses directly serve Jermyn Street but many routes run along Piccadilly Street to the north of the centre and along Regent's Street to the eastern end of the centre. A small amount of through traffic was however evident at the time of the visit.

Pedestrian flows were judged to be average and lower than in the surrounding shopping centres and areas such as Piccadilly which attract a greater number of visitors not looking for a specific single purchase. The area has safe crossings and is highly accessible with shared pavement in some areas. A number of Arcades and small streets are also pedestrianised and connect the centre to Piccadilly Street.

There is a cycle lane in the eastern part of the street and a reasonable amount of cycle and motorbike parking spaces throughout the centre although some unauthorised use of railings off Jermyn Street for additional cycle parking were observed.

### **24.42 Range of units and floorspace qualitative analysis**

#### *24.421 Area description, land uses and retail provision*

Jermyn Street is a specialised centre as it mainly accommodates a specialised clothing and accessories offer. In terms of land uses, different areas can be identified.

To the east of Regent Street, the area mainly accommodates office buildings and a number of servicing entrances to shops facing Piccadilly Circus and Haymarket Street.

To the west of Regent Street, the area is retail dominated and accommodates a mixture of high-street clothing stores (e.g. TM Lewin, Hawes and Curtis) and specialist independent shops that predominantly sell suits, shirts and shoes. There are a number of cafés and restaurants (e.g. Getti, The Gallery, Café Nero) and several public houses around the junctions (e.g. the Three Crowns, the Red Lion). Above ground floor level (and off main frontage), a number of office buildings attract workers to the area which is also home to the well-known four-star hotel The Cavendish.

The western part of Jermyn Street and Duke Street, accommodates not only a number of men's clothes and apparel shops but also a significant number of art galleries (e.g. The Weiss, Sladmore). Several shops throughout the centre also display art works. This area also hosts a range of food and drink premises (e.g. Wiltons, Franco's) and a public house, The Chequers Tavern.

A small number of food stores can be found throughout the centre, including a Tesco Metro and several delicatessen shops.

A Fortnum & Mason department store and a Waterstones book shop that have their main entrance on Piccadilly Street also have entrances on Jermyn Street. Jermyn Street is also connected to Piccadilly Street with arcades that are home to a large number of boutiques.



#### 24.422 *Vacant units*

The 2017 land use survey identified eleven vacant units on Jermyn Street. The 2018 site survey has not identified significant changes to the level of vacancy. However, it was observed that a whole new building located in the Duke Street/Jermyn Street junction is under-construction. The new development will accommodate office floorspace along with retail (A1) and café and restaurant (A3) floorspace



### 24.43 State of the primary shopping area environmental quality assessment

#### 24.431 *Public realm*

The public realm was found to be of high quality, with evidence of recent investment. Minimal vehicular movements and high quality and wide pavements encourage walking. Although there is only one dedicated pedestrian crossing at Regent Street (given higher traffic levels), crossings are safe. Single-level streets encourage pedestrian movement. The centre does not feel very cluttered with street furniture. However, street furniture, tables and chairs from some cafés and restaurants and sculptures are found throughout the centre. There was little evidence of landscaping, reflecting the highly urbanised environment. In general, the shops have very attractive heritage shop fronts and interiors and are well maintained. Some buildings have flags. A significant number of buildings on Jermyn Street are listed buildings.

#### 24.432 *Cleanliness, safety and security*

Cleanliness was judged to be high along Jermyn Street. During the site visit, no street litter was observed and only a small number of commercial refuse bags awaiting collection were seen.

The level of safety and security was judged to be high.



#### 24.433 *Identity and users*

The area has a strong identity and offers a specialised shopping experience. Jermyn Street is a well-known destination for high-end clothing and tailoring. It also hosts a number of art galleries, high quality restaurants and a hotel and is well-connected to Piccadilly with covered arcades containing boutiques.

The area mainly serves workers, shoppers and visitors.

### **24.5. Performance summary and recommendations**

- The area is considered to be 'healthy'. Jermyn Street has a strong retail role focused on high-end fashion, tailoring and accessories. The area is also home to a number of art galleries, restaurants and drinking establishments that provide for an evening and night-time economy. The centre has a strong identity and attracts workers, shoppers and visitors to the area.
- Whilst vacancies have risen, development is undergoing to provide new commercial units including retail and office floorspace.
- The public realm is of high quality and the street has a limited amount of traffic and wide pavements. A number of buildings along the street have attractive shop fronts and facades.
- The area feels naturally safe, is clean and well maintained.
- Due to its scale and function, it is recommended to reclassify the centre as a CAZ Retail Cluster. Further details on the reclassification recommendation can be found in 'Appendix 4: Evidence for the reclassification of existing 'Other Shopping Centres within the CAZ''.

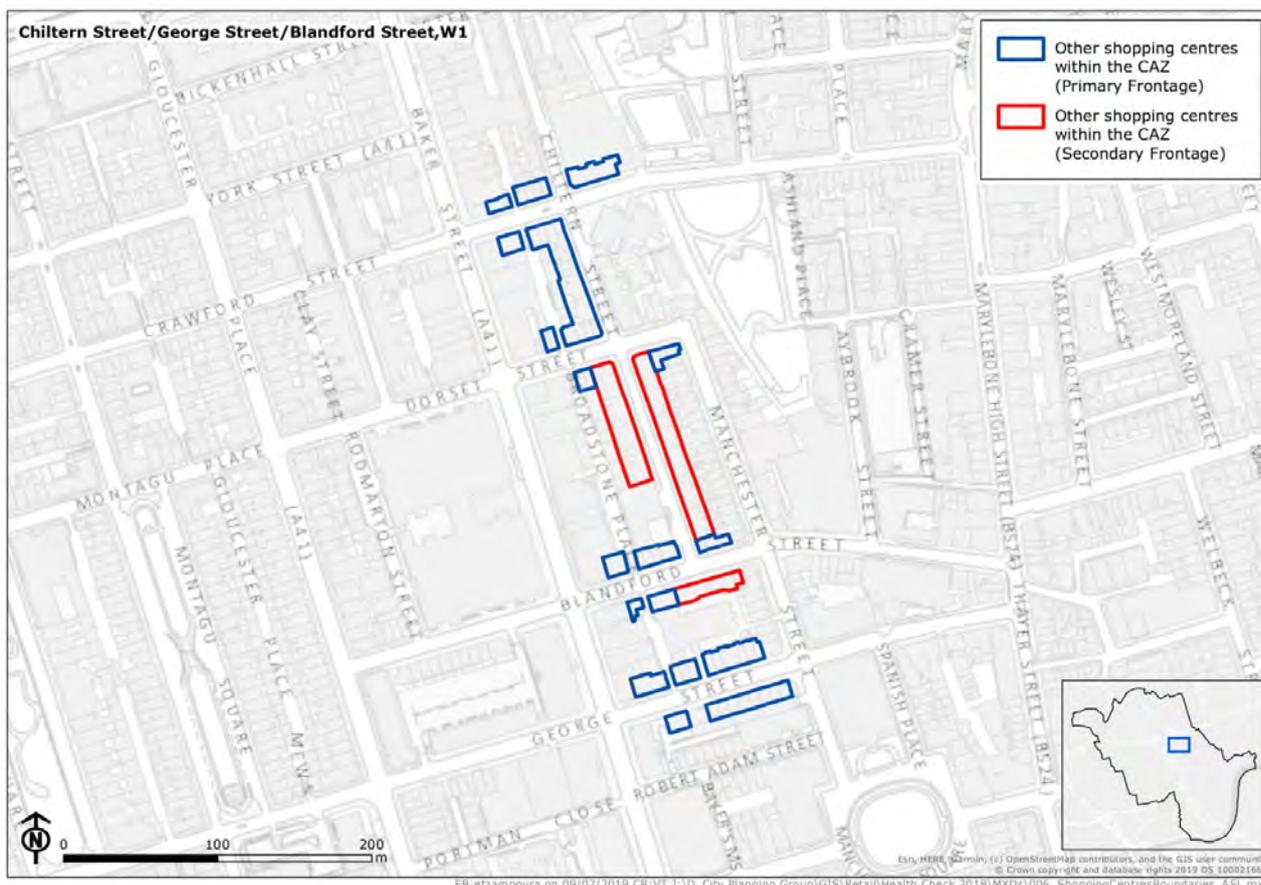
## **24.6. Recommended boundary changes**

A number of units currently fall both within Jermyn Street (Other Shopping Centre within the CAZ) and Piccadilly (Other Shopping Centre within the CAZ). It is recommended that the units between Regent's Street and Haymarket Street as well as 203 to 207 and 207 to 209 Piccadilly Street (currently occupied by Waterstones and Natwest), remain part of Piccadilly (Other Shopping Centre within the CAZ). It is also recommended that 18-27 and 34 Jermyn Street (currently occupied by Hawes&Curtis) remain part of Jermyn Street (Other Shopping Centre within the CAZ). It is considered that the type and function of the units on both streets is better reflected by the revised designation.

Further details on all boundary changes can be found in 'Appendix 3: Recommended changes to designation boundaries'.

## 25.0. Chiltern Street/George Street/Blandford Street

Map 25.0: Other Shopping Centre within the CAZ boundary, Chiltern Street/George Street/Blandford Street (2017)



### 25.1. Introduction

Chiltern Street/George Street/Blandford Street is a designated Other Shopping Centre within the CAZ and is within the CAZ. The centre currently has a primary and a secondary frontage. The centre is located at the heart of Westminster and close to a series of London attractions including Madame Tussaud's Museum and Regent's Park. Although it is not served by public transport a number of Underground stations are at a walking distance and some bus routes serve nearby streets. The centre is close to other designated town centres including Baker Street (South) and Marylebone High Street.

The centre covers a number of units along Chiltern Street but also includes some units on George Street and Blandford Street. The centre is shop-led but also hosts a wide range of other town centre uses.

A number of large development schemes have been recently completed or are under construction in the area.

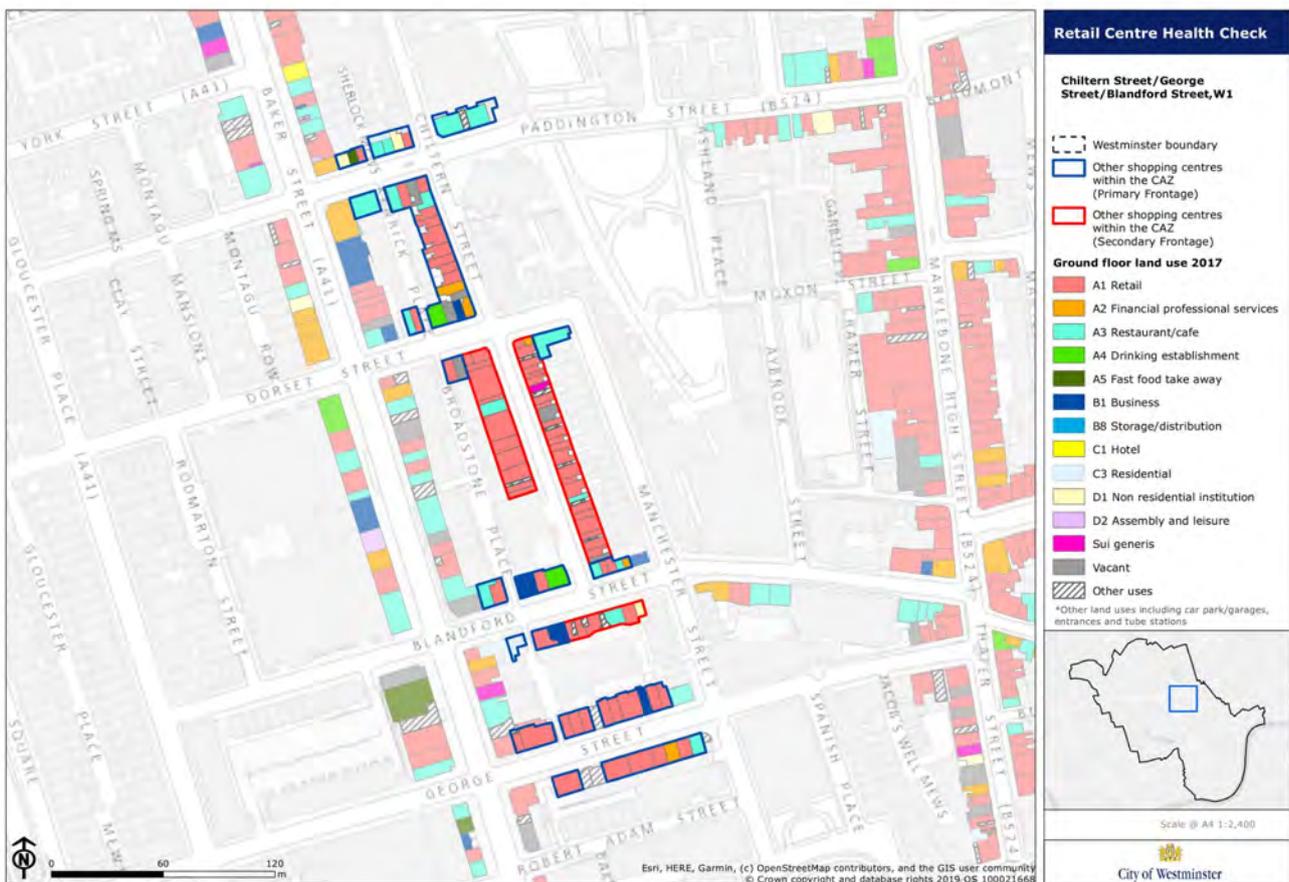


## 25.2. 2017 Land use analysis

### 25.21. Ground floor land use map (2017)

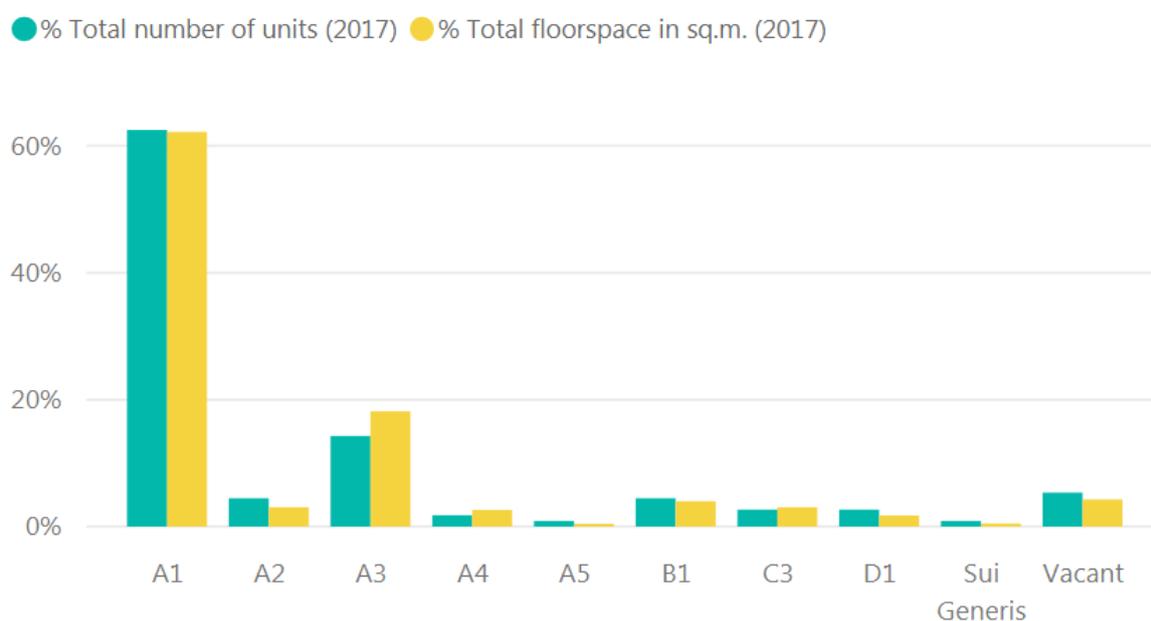
In 2017, 112 total units were identified at ground floor level. The surveyed area covered 8,572 sq m

**Map 25.1: Ground floor land use map, Chiltern Street/George Street/Blandford Street (2017)**



## 25.22. Range of units and floorspace analysis (2017)

**Figure 25.2: Ground floor total number of units and floorspace by land use, Chiltern Street/George Street/Blandford Street (2017)**



The centre is A1-led with 70 units accounting for 63% of the total number of units within the centre and 62% of the total floorspace. The second most prevalent land use in the centre is A3 with 14% of the total number units in the centre and 18% of the total floorspace.

Other uses in the centre include a limited amount of A2, A4, A5, B1, C3, D1 and Sui Generis. In 2017, six vacant units were recorded accounting for 5% of the total units and 4% of the total floorspace. However, the 2018 site survey has found that some of these units have been developed and are now occupied.

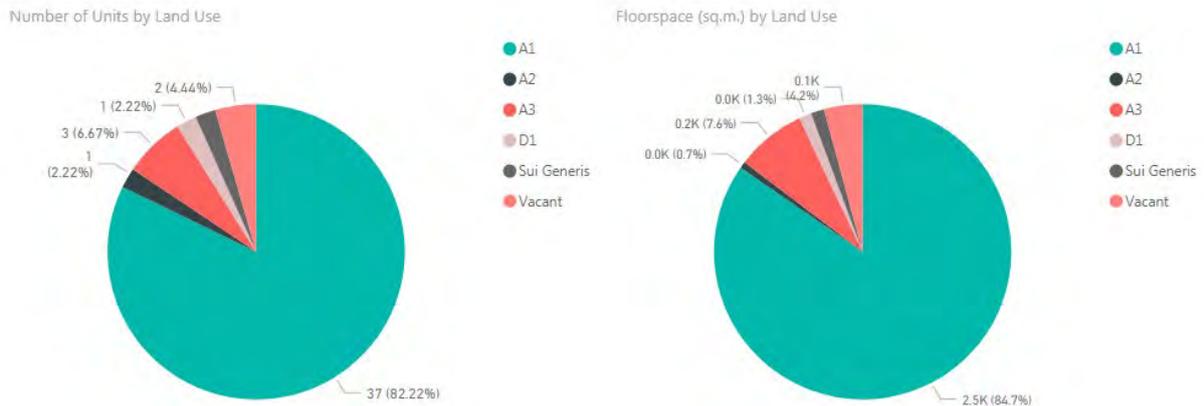
**Table 25.3: Ground floor total number of units and floorspace by land use, Chiltern Street/George Street/Blandford Street (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	70	62.50%	5329.35	62.17%
A2	5	4.46%	260.67	3.04%
A3	16	14.29%	1556.87	18.16%
A4	2	1.79%	226.07	2.64%
A5	1	0.89%	38.83	0.45%
B1	5	4.46%	341.88	3.99%
C3	3	2.68%	260.62	3.04%
D1	3	2.68%	148.66	1.73%
Sui Generis	1	0.89%	42.25	0.49%
Vacant	6	5.36%	366.79	4.28%
<b>Total</b>	<b>112</b>	<b>100%</b>	<b>8572.00</b>	<b>100%</b>

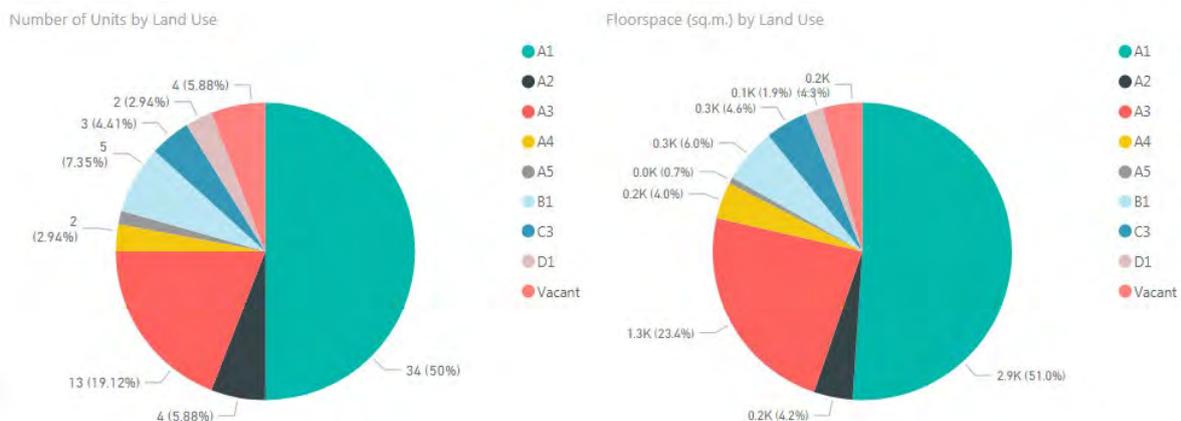
### 25.23. Frontages analysis (2017)

The primary frontage is A1-led with 82% of the units. The primary frontage hosts two vacant units accounting for 4% of all units. The secondary frontage is more varied in terms of land use with A1 accounting for 50% of all units (51% of its floorspace), complemented by A2, A3, A4, A5, B1, C3 and D1 uses. The secondary frontage hosts four vacant units accounting for 6% of all units.

**Figure 25.4: Primary Frontage - Number of units by land use and floorspace by land use (2017)**



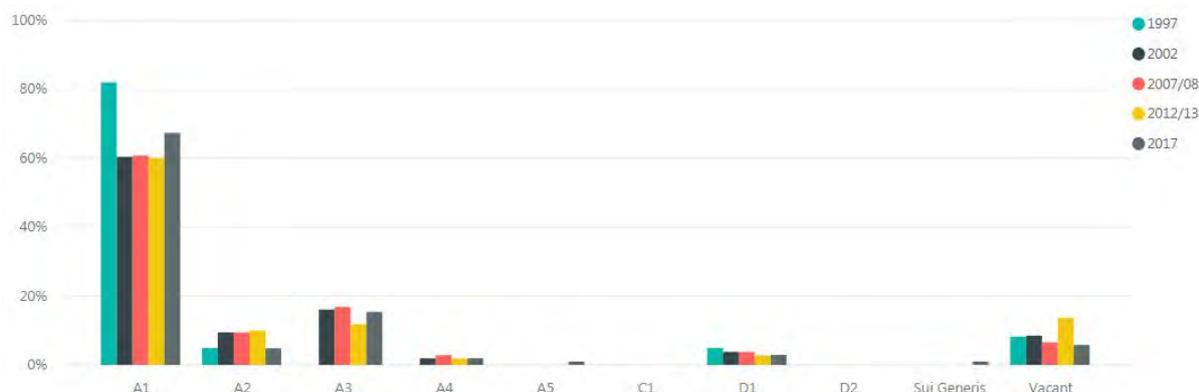
**Figure 25.5: Secondary Frontage - Number of units by land use and floorspace by land use (2017)**



## 25.3. Comparative land use analysis

### 25.31. Comparative range of units and floorspace analysis

**Figure 25.4: Proportion of units by land use, Chiltern Street/George Street/Blandford Street (2017)**



In 2017, the centre was made up of 104 units, six less units than in 2012/13. The figure suggests a possible amalgamation of units.

The proportion of A1 units has increased from 60% in 2012/13 to 67% in 2017.

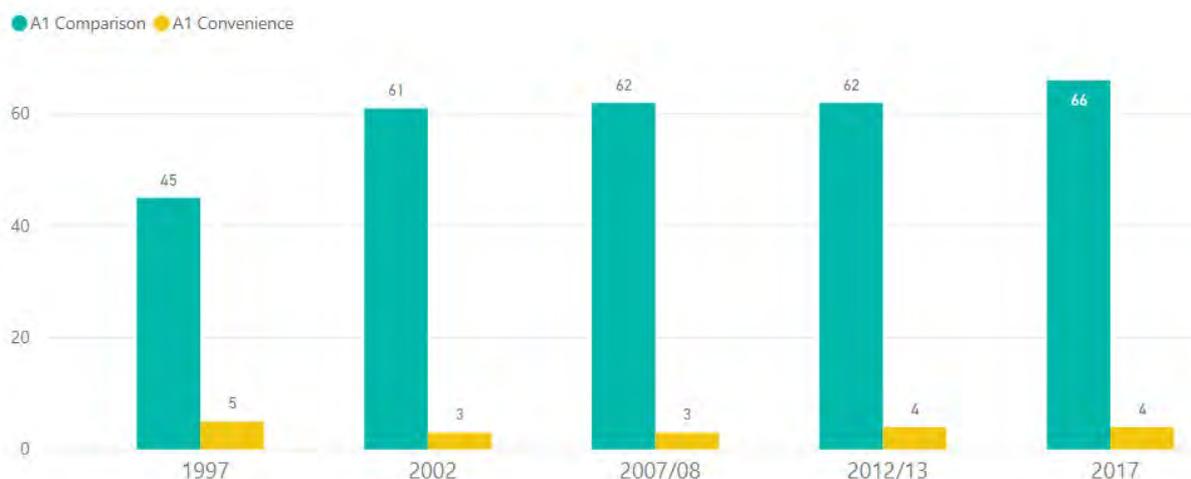
A2 uses have recorded a significant decrease from 10% in 2012/13 to 5% in 2017 whereas A3 uses have increased from 12% in 2012/13 to 15% in 2017.

A hot-food takeaway and a Sui Generis unit have been recorded in the 2017 survey; this is the first time these land uses have been recorded in Chiltern Street/George Street/Blandford Street.

The proportion of vacant units has decreased significantly from 14% in 2012/13 to 6% in 2017. The 2017 vacancy level is the lowest ever recorded since surveys began in 1997.

### 25.32. Comparative comparison/convenience split analysis

**Figure 25.5: Number of comparison and convenience A1 units by year, Chiltern Street/George Street/Blandford Street (2017)**



The centre has had a broadly consistent comparison to convenience split across the years surveyed. Chiltern Street/George Street/Blandford Street has been A1 comparison-led since 1997. In both the 2012/13 and 2017 surveys four convenience type units were recorded.

## 25.4. 2018 Site Survey

### 25.41. Accessibility and pedestrian flows



Although there are no Underground stations within the boundary of the centre, Baker Street (Bakerloo, Circle, Hammersmith & City, Jubilee, Metropolitan lines) to the north of the centre and Bond Street (Central, Jubilee lines) to the south of the centre are within a five-minute walk. A number of buses run along Marylebone Road to the north of the centre and along Baker Street to the west of the centre. Traffic was found to be heavier in the secondary streets rather than on Chiltern Street itself which was very quiet.

Pedestrian flows were judged to be low throughout the centre. The secondary streets host a number of food and drink premises that were found to be slightly busier than Chiltern Street itself. The area has safe crossings and is highly accessible.



### 25.42 Range of units and floorspace qualitative analysis

#### 25.421 *Area description, land uses and retail provision*

The Chiltern Street/George Street/Blandford Street centre is a shop-led centre and the different streets it covers present a different balance of land uses. Chiltern Street is home to a significant number of high-quality shops: these are mainly clothing shops, home design shops and art galleries. The area also hosts a number of other comparison type shops (e.g. hairdresser, recordings). The shop fronts are very well-maintained, and many shops have plants outside. Many shops are independent. The area also accommodates a significant number of food and drink premises. The restaurants, cafés and drinking establishments are well decorated and maintained which

makes the centre look very attractive. Some of them have a small number of tables and chairs outside. There is a public house, the Bok Bar.

The former Chiltern Street Fire station has been converted to a luxury five-star hotel and also has a restaurant at ground floor level. However, the hotel does not fall within the centre boundary.

The secondary streets (Paddington Street, Dorset Street, Blandford Street and George Street) are through routes between Baker Street and Marylebone High Street and were found to be busier in terms of vehicle traffic and footfall.

Blandford Street presents a balanced mix of land uses as it also accommodates a number of comparison type shops as well as estate agents, restaurants and cafés, bars and small offices among other uses. Shop fronts are well-maintained.

Almost all the units on George Street are comparison-type shops including clothing shops, hairdressers and a furniture shop.

Throughout the centre and above ground floor, units are primarily residential apartment blocks.

#### 25.422 *Vacant units*



The 2017 land use survey identified four vacant units within the centre. The 2018 site survey has found that three of the vacant units are being decorated and that two of them have new retailers opening in August 2018.

#### 25.43 **State of the primary shopping area environmental quality assessment**

##### 25.431 *Public realm*

The quality of the public realm was judged to be high in Chiltern Street/George Street/Blandford Street.

Throughout the centre, pavements are well-maintained and make the street attractive. The street scores low on street clutter and although some shops and food premises have plants or tables and chairs outside, they do not make pedestrian movement difficult.

The shop fronts are well-maintained and decorated and have retained their original look. The area would benefit from improved landscaping and amenity space.

##### 25.432 *Cleanliness, safety and security*

Cleanliness was judged to be high in Chiltern Street/George Street/Blandford Street.

Safety and security were judged to be average in Chiltern Street/George Street/Blandford Street as there are not many dedicated crossings and these can be hazardous.

#### 25.433 *Identity and users*

Although the centre is close to two larger centres that attract a higher number of people (Marylebone High Street and Baker Street), Chiltern Street/George Street/Blandford Street complements their offer. This is an affluent area with well-established mansion blocks above the ground floor parades of shops. The independent clothes shops serve the local community but also draw some shoppers from outside of the area. Cafés, restaurants and bars serve workers as well as locals.

### **25.5. Performance summary and recommendations**

- The area is considered to be 'healthy'. The centre offers a high-quality retail experience with a focus on clothing and art which attracts affluent visitors and shoppers.
- The vacancy level has decreased and is of 5% in 2017.
- The area scores high on public realm, cleanliness, safety and security. Pavements and shop fronts are attractive and well-maintained. However, the area would benefit from improved landscaping and amenity space.
- Due to its scale and function, it is recommended to reclassify the centre as a CAZ Retail Cluster. Further details on the reclassification recommendation can be found in 'Appendix 4: Evidence for the reclassification of existing 'Other Shopping Centres within the CAZ''.

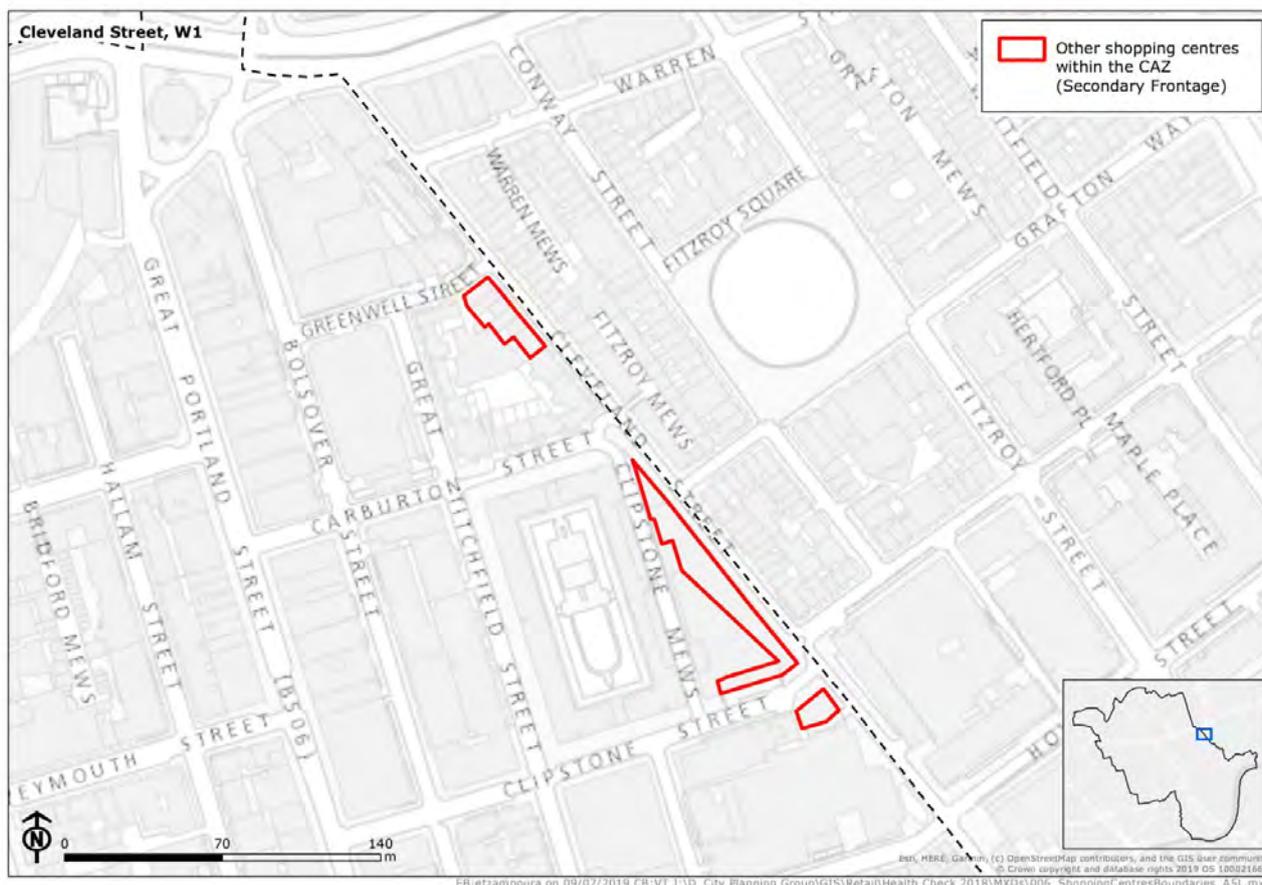
### **25.6. Recommended boundary changes**

A number of units currently fall both within Baker Street (South)(CAZ Frontage) and Chiltern Street/George Street/Blandford Street (Other Shopping Centre within the CAZ). It is recommended that the units on both George Street and Blandford Street become all part of Baker Street (South)(CAZ Frontage). It is considered that the type and function of the units on both streets is more consistent to the offer on Baker Street (South). Due to these boundary changes, it is recommended that the centre's name is changed to 'Chiltern Street'. It is recommended to include 1 Chiltern Street (the Chiltern Firehouse Hotel) as it is a town centre use which complements the existing offer.

Further details on all boundary changes can be found in 'Appendix 3: Recommended changes to designation boundaries'.

## 26.0. Cleveland Street

Map 26.0: Other Shopping Centre within the CAZ boundary, Cleveland Street (2017)



### 26.1. Introduction

Cleveland Street is a designated Other Shopping Centre within the CAZ and is within the CAZ. It currently has a secondary frontage. Only the western portion of the centre falls within the Westminster as most of it falls within the London Borough of Camden. This report only considers the area that lies within Westminster. Cleveland Street is a linear centre located in the eastern part of the city, in close proximity to Great Portland Street Underground station (Circle, Hammersmith & City, Metropolitan lines). Half of the Westminster portion of the centre is undergoing development and therefore vacant. The rest of the centre accommodates a very small number of town centre uses and a few residential units.

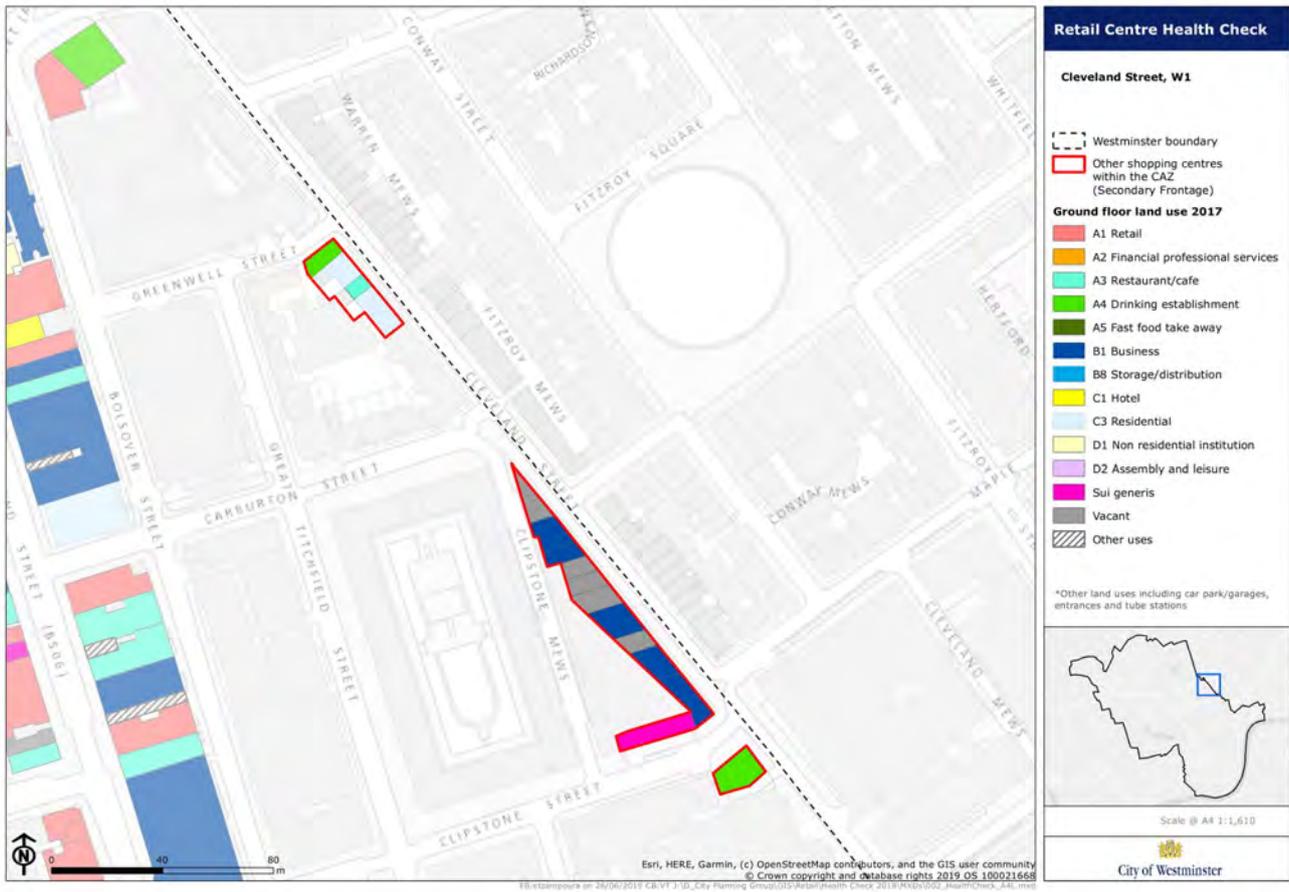


## 26.2. 2017 Land use analysis

### 26.21. Ground floor land use map (2017)

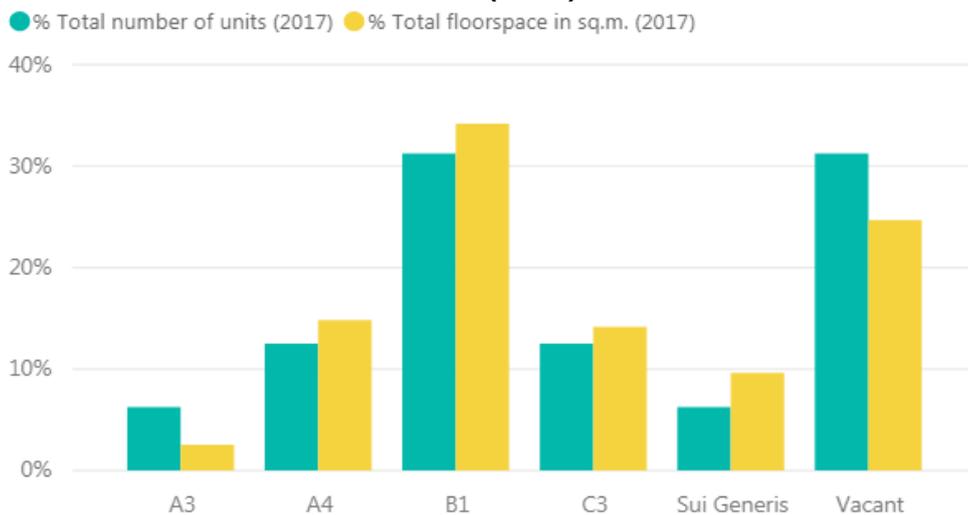
In 2017, 16 total units were identified at ground floor level. The surveyed area covered 1,813 sq m

**Map 26.1: Ground floor land use map, Cleveland Street (2017)**



### 26.22. Range of units and floorspace analysis (2017)

**Figure 26.2: Ground floor total number of units and floorspace by land use, Cleveland Street (2017)**



Cleveland Street is B1-led with five units accounting for 31% of the total number of units within the centre and 34% of the total floorspace.

In 2017, the survey also recorded one A3 unit, two A4 units, two C3 units and one Sui Generis unit. No A1 units were recorded in this centre in 2017.

There were five vacant units in the centre in 2017, accounting for 31% of all units and 25% of the overall floorspace. As the 2018 site survey has revealed, a major factor causing the high vacancy level appears to be the ongoing redevelopment of a large section of the centre consisting of a number of units all located in the same block, between Carbuton and Clipstone Street. There is an approved planning application<sup>28</sup> awaiting construction to demolish and rebuild this block to provide a mixed-use development with A1, A3, A4, B1, C1, D1, D2 and Sui Generis uses).

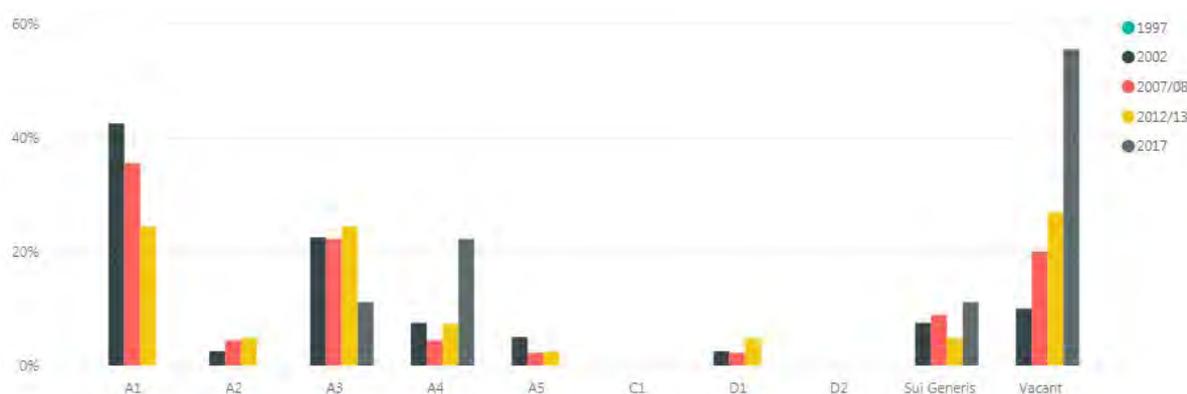
**Table 26.3: Ground floor total number of units and floorspace by land use, Cleveland Street (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A3	1	6.25%	46.00	2.54%
A4	2	12.50%	268.71	14.82%
B1	5	31.25%	619.96	34.20%
C3	2	12.50%	256.65	14.16%
Sui Generis	1	6.25%	174.21	9.61%
Vacant	5	31.25%	447.33	24.68%
<b>Total</b>	<b>16</b>	<b>100%</b>	<b>1812.85</b>	<b>100%</b>

## 26.3. Comparative land use analysis

### 26.31. Comparative range of units and floorspace analysis

**Figure 26.4: Proportion of units by land use, Cleveland Street (2017)<sup>29</sup>**



The total number of units within the centre has decreased significantly between 2012/13 and 2017 from 41 to 9, a decrease of 78%.

The proportion of A1 units within the centre has decreased across the years surveyed.

Although shops represented around 40% of the total number of units in 2002 and around 20% in 2012/13, no A1 units were recorded in 2017 in the centre.

<sup>28</sup> See 14/11837/FULL

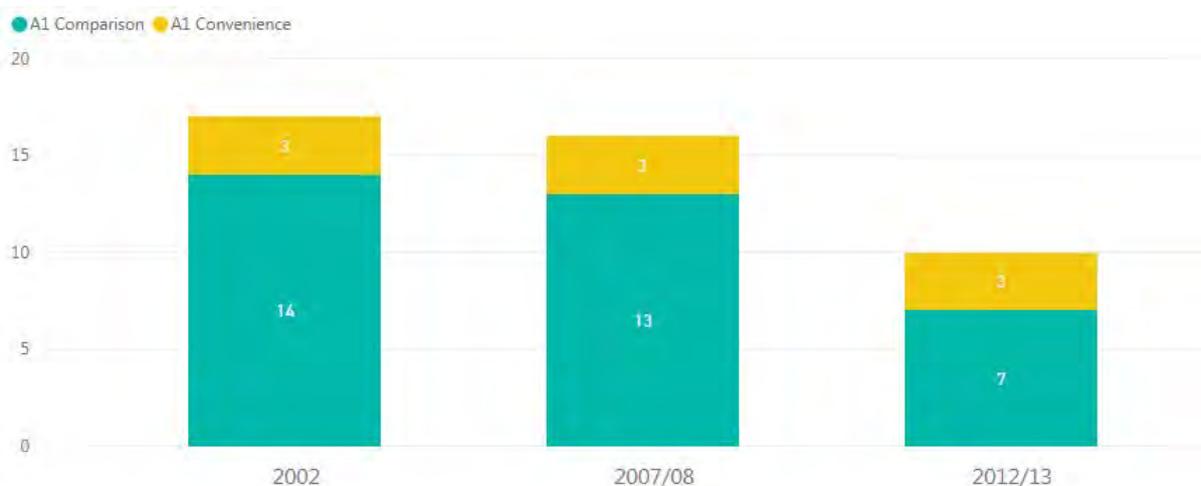
<sup>29</sup> There is no data available for 1997 for this centre.

Most numerous use in 2017 was A4 with 22% of the total number of units. However, the total number of A4 units has decreased between 2012/13 and 2017 from three to two units. A3 uses have also shown a relative decrease by 13% but this reflects a large drop in the actual number of units from 10 to 1 since the last survey period. The proportion of Sui Generis units has seen a marginal increase between 2012/13 and 2017. The centre also has lost all A2, A5 and D1 units between 2012/13 and 2017. The proportion of vacant units has increased significantly in 2017 due to a number of factors. However, the number of vacant units itself has substantially decreased from 11 to five units.

## 26.32. Comparative comparison/convenience split analysis

**Figure 4.5: Number of comparison and convenience A1 units by year, Cleveland Street (2017)**

The centre has had a broadly consistent comparison to convenience split across the years



surveyed. Cleveland Street has been A1 comparison-led since 2002. Across the years surveyed, the centre has always had three convenience type shops. However, the number of shops has gradually decreased suggesting that the centre has lost comparison type shops.

## 26.4. 2018 Site Survey

### 26.41. Accessibility and pedestrian flows

Although there are no Underground stations within the centre, Cleveland Street is well served by public transport as Great Portland Street (Circle, Hammersmith & City, Metropolitan lines) Underground station is within a five-minute walk and Warren Street (Northern, Victoria lines), Regent's Park (Bakerloo line) and Goodge Street (Northern line) Underground stations are also within a walking distance.

Although no buses serve the centre, a number of bus routes serve neighbouring areas. At the time of visit, vehicle traffic was however high with many delivery vans and taxis in the street. Pedestrian flows were judged to be average although higher in some area due to some local protests and rally's taking place on the day of the site visit. The Camden portion of the centre had a noticeably higher footfall.



## 26.42 Range of units and floorspace qualitative analysis

### 26.421 *Area description, land uses and retail provision*

The block between Clipstone Mews, Clipstone Street and Cleveland Street was completely vacant and boarded up when visited. However, the north of the centre was of higher quality with an attractive public house, the George and Dragon pub, on the corner of Greenwell street and Cleveland Street. This means that the dominant land use in the centre is vacant. At the time of visit, no shops were observed within the centre. The two main uses observed were hot food takeaways and residential units and blocks.

The opposite side of Cleveland Street (Camden) is visibly livelier with a mix of uses and almost no vacancies at all.



### 26.422 *Vacant units*

The 2018 site survey identified that 11 vacant units out of 16 total units in the centre were vacant. Many of the vacancies are new.

A whole block surrounded by Clipstone Mews, Clipstone Street and Cleveland Street is completely vacant.



## **26.43 State of the primary shopping area environmental quality assessment**

### **26.431 *Public realm***

The quality of the public realm was judged to be low. The area around the vacant block is not pleasant and does not provide for an attractive pedestrian experience as seems abandoned. However, the northern portion of the centre is nicer and both the public house and the restaurant have attractive and well-maintained facades. Only a dedicated pedestrian crossing was noted in the centre. Pavements are not cluttered and some street greening with trees lining the road was observed.



### **26.432 *Cleanliness, safety and security***

Cleanliness was judged to be low. Pavements were somewhat dirty, especially around the vacant block, and litter was found around the centre. Safety and security were judged to be average. Many of the vacant units had security cameras and alarms installed.



### 26.433 *Identity and users*

The many vacancies in this centre make the street an unattractive place to visit. A number of rough sleepers were observed in the centre.

## 26.5. Performance summary and recommendations

- The centre is considered to have a 'neutral' performance. Cleveland Street is a very small centre that falls both within Camden and Westminster. At the moment, half of the centre is vacant as development works are ongoing. There is no A1 retail in the centre.
- The vacancy level is high as a large portion of the centre is awaiting development. The centre is expected to recover once development is completed.
- The centre would benefit from improved public realm, landscaping and cleanliness specially around the vacant block area.
- Due to its scale and function, it is recommended to reclassify the centre as a Local Centre. Further details on the reclassification recommendation can be found in the main report.

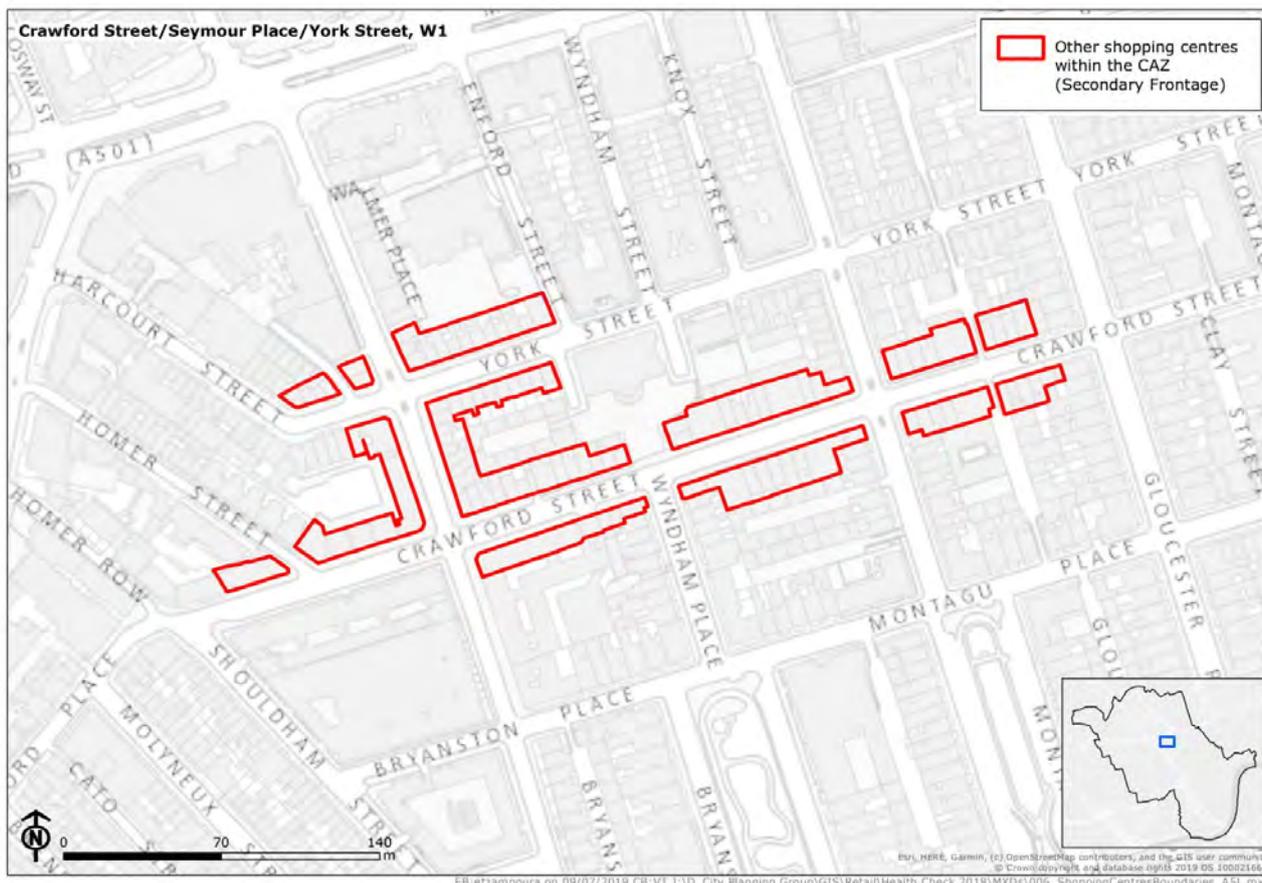
## 26.6. Recommended boundary changes

It is recommended to include the site bound by Clipstone Street, Clipstone Mews and Cleveland Street as the site is being redeveloped with a mixed-use scheme containing retail, office, leisure and community floorspace.

Further details on all boundary changes can be found in 'Appendix 3: Recommended changes to designation boundaries'.

## 27.0.Crawford Street/Seymour Place/York Street

Map 27.0: Other Shopping Centre within the CAZ boundary, Crawford Street/Seymour Place/York Street (2017)



### 27.1. Introduction

Crawford Street/Seymour Place/York Street is a designated an Other Shopping Centre within the CAZ and is within the CAZ. It currently has a secondary frontage.

The centre is close to other designated town centres including Marylebone Road (CAZ Frontage) to the north, Edgware Road (South)(CAZ Frontage) to the west and Baker Street (South)(CAZ Frontage) to the east.

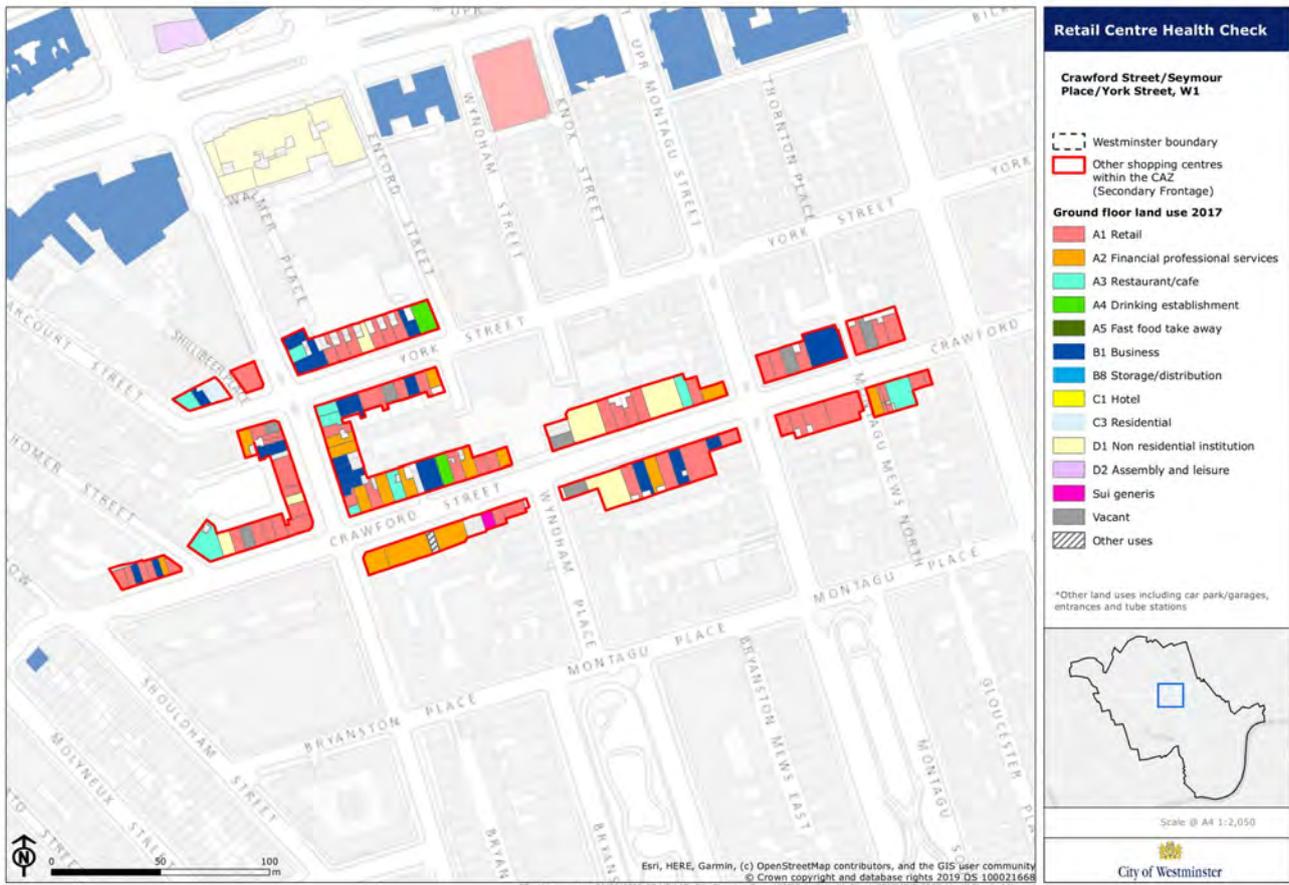
Crawford Street/Seymour Place/York street is a medium-sized centre, offering a mix of comparison and convenience shops alongside food and drink uses catering for local workers, students and residents.

### 27.2. 2017 Land use analysis

#### 27.21. Ground floor land use map (2017)

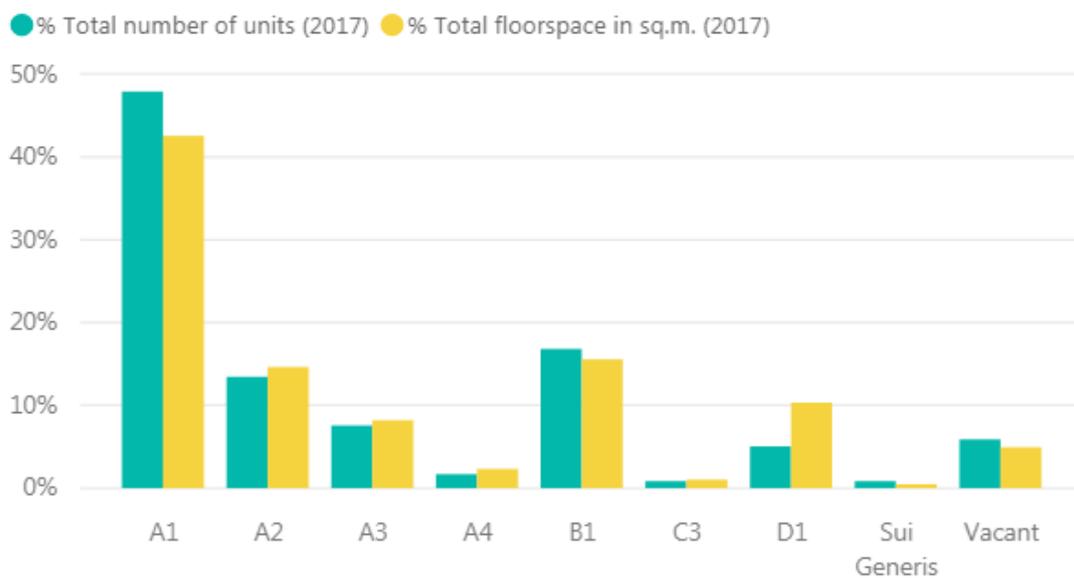
In 2017, 119 total units were identified at ground floor level. The surveyed area covered 8,690 sq m

**Map 27.1: Ground floor land use map, Crawford Street/Seymour Place/York Street (2017)**



**27.22. Range of units and floorspace analysis (2017)**

**Figure 27.2: Ground floor total number of units and floorspace by land use, Crawford Street/Seymour Place/York Street (2017)**



The centre is A1-led with 57 A1 units. These account for 48% of all units within the centre and for 43% of the overall floorspace.

B1 is the second most numerous use with 20 units, making 17% of the total number of units and 16% of the total floorspace.

In 2017, seven vacant units were recorded in the centre, accounting for 6% of all units and 5% of the overall floorspace. The 2018 site survey has found that some of these units have been occupied although a small number of other vacant units have appeared in the centre.

**Table 27.3: Ground floor total number of units and floorspace by land use, Crawford Street/Seymour Place/York Street (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	57	47.90%	3697.89	42.55%
A2	16	13.45%	1270.34	14.62%
A3	9	7.56%	712.11	8.19%
A4	2	1.68%	201.67	2.32%
B1	20	16.81%	1351.64	15.55%
C3	1	0.84%	89.32	1.03%
D1	6	5.04%	897.54	10.33%
Sui Generis	1	0.84%	41.36	0.48%
Vacant	7	5.88%	428.57	4.93%
<b>Total</b>	<b>119</b>	<b>100%</b>	<b>8690.45</b>	<b>100%</b>

## 27.3. Comparative land use analysis

### 27.31. Comparative range of units and floorspace analysis

**Figure 27.4: Proportion of units by land use, Crawford Street/Seymour Place/York Street (2017)**



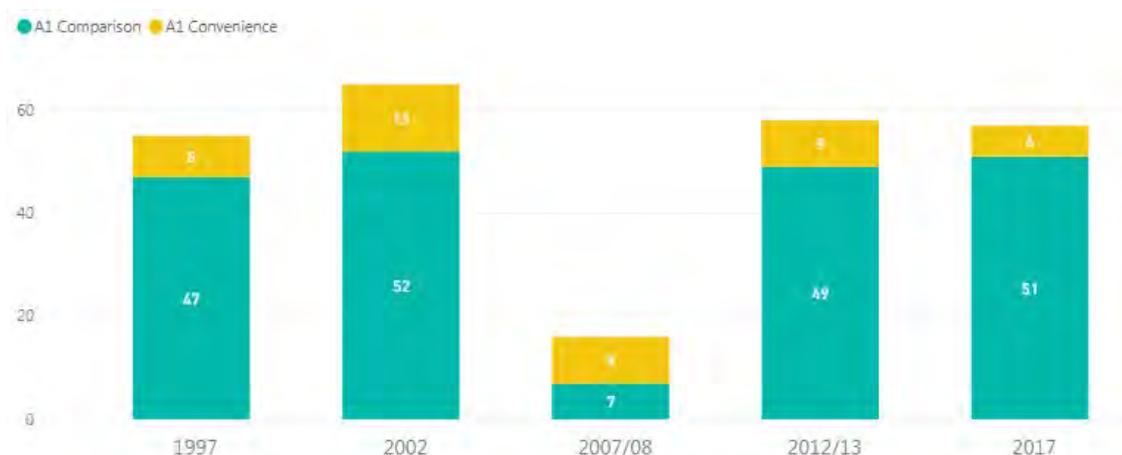
The proportion of A1 units in the centre has increased between 2012/13 and 2017 from 52% to 58% despite a marginal decrease in the actual number of units. This indicates the centre has recovered from 2007/08 where A1 only made up 23% of total units.

The proportion of A2, A3 and A4 uses has remained stable in the 2017 survey. D1 has seen a marginal increase from 4% to 6% while Sui Generis uses have decreased from 4% to 1%.

The proportion of vacant units in the centre has decreased significantly from 28% of the total number of units in 2007/08 to 7% of the total number of units in 2017.

### 27.32. Comparative comparison/convenience split analysis

**Figure 27.5: Number of comparison and convenience A1 units by year, Crawford Street/Seymour Place/York Street (2017)**



Crawford Street/Seymour Place/York Street has been A1 comparison-led since 1997 and the comparison to convenience split has been broadly consistent across the years surveyed. A dramatic shift in data in the 2007/08 survey records the only period in which convenience was stronger than comparison.

## 27.4. 2018 Site Survey

### 27.41. Accessibility and pedestrian flows

Although the centre does not host any Underground station, Edgware Road Underground station (Circle, District, Hammersmith & City lines) and Marylebone Underground (Bakerloo line) and train station are in the vicinity of the centre.

There are no bus routes through the centre itself but buses run along Edgware Road, Marylebone Road and Gloucester Place. Crawford Street and Seymour Place have higher vehicle traffic than York Street. A car park is located on Crawford Street.

Pedestrian flows are considered 'low' throughout the centre. Accessibility in the area is good thanks to safe pedestrian crossings around major junctions and dropped kerbs allowing easier wheelchair access.



## 27.42 Range of units and floorspace qualitative analysis

### 27.421 *Area description, land uses and retail provision*

The centre is shop-led but also hosts a range of town centres uses such as cafés, restaurants and small offices. The retail offer is diverse as there are a number of clothing stores, homeware and interior design stores, florists, beauty salons, hairdressers and convenience shops.

York Street is home to a number of high-end furniture and clothing shops and the area appear to be more affluent than the surrounding streets.

Crawford Street features a number of dry cleaners and hardware shops and the shop fronts are not as well maintained as on York Street. Along the west side of the street, the area accommodates some professional services (e.g. estate agents, solicitors). The central area hosts a number of dental clinics, therapy rooms and an international school. It is on Crawford Street area were a higher number of vacant units are located.

Throughout the centre, the food offer is of high quality and is mostly comprised of independent businesses.



### 27.422 *Vacant units*

The 2017 land use survey identified seven vacant units within the centre, most of which are located on Crawford Street. At the time of visit, two of the vacant units identified by the 2017 land use survey had been occupied while a small number of new units were recorded as vacant.



## 27.43 State of the primary shopping area environmental quality assessment

### 27.431 *Public realm*

The public realm was found to be of 'average' quality. Uneven pavements, street furniture, A boards, illegally parked cars, motorcycles and vans contribute to a sense of clutter. Some shop fronts, particularly on Crawford Street and Seymour Street, would benefit from better upkeep. However, Wyndham Place is pedestrianised and has benches providing some resting and amenity space in a highly urbanised area.



### 27.432 *Cleanliness, safety and security*

Cleanliness was judged to be average throughout the centre. The level of safety and security was judged to be average.

### 27.433 *Identity and users*

The centre offers a range of uses that cater for local residents and workers. The specialist and upmarket homeware and interior design offer on York Street suggests that its customer base is mostly made of people on a specialist shopping trip.



## **27.5. Performance summary and recommendations**

- The area is considered to be 'healthy'. Crawford Street/Seymour Place/York Street is a medium-sized centre that serves workers, local residents and occasional shoppers. The centre offers a wide range of town centre uses, including a good food and beverage offer and it also contains a specialist homeware and interior design cluster.
- The level of vacancies is in line with the average for this type of centre in Westminster.
- The centre scores average on all qualitative assessment criteria. The area would benefit from decluttering, improved pavements and better maintained shop fronts.
- Due to its scale and function, it is recommended to reclassify the centre as a Local Centre. Further details on the reclassification recommendation can be found in the main report.

## **27.6. Recommended boundary changes**

No boundary changes are recommended.

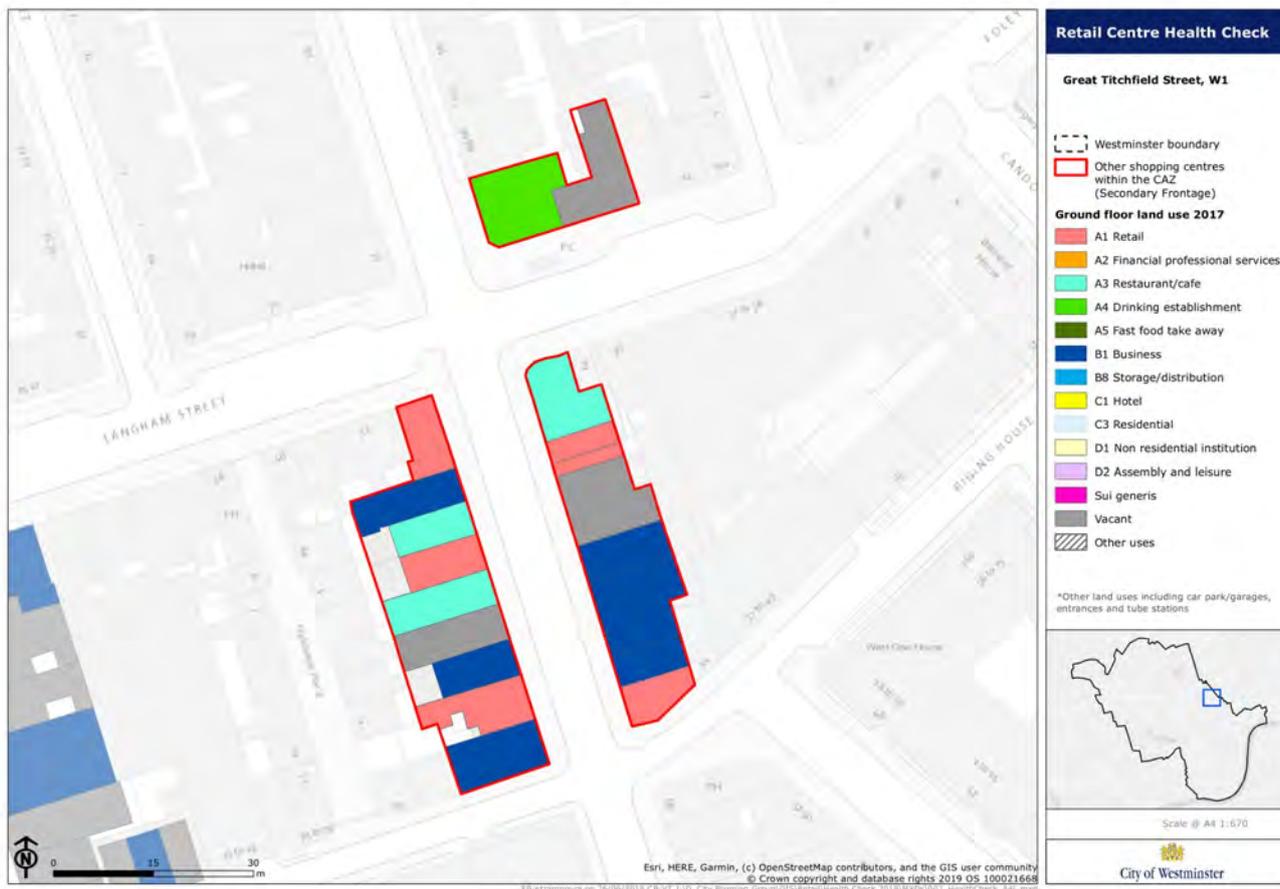


## 28.2. 2017 Land use analysis

### 28.21. Ground floor land use map (2017)

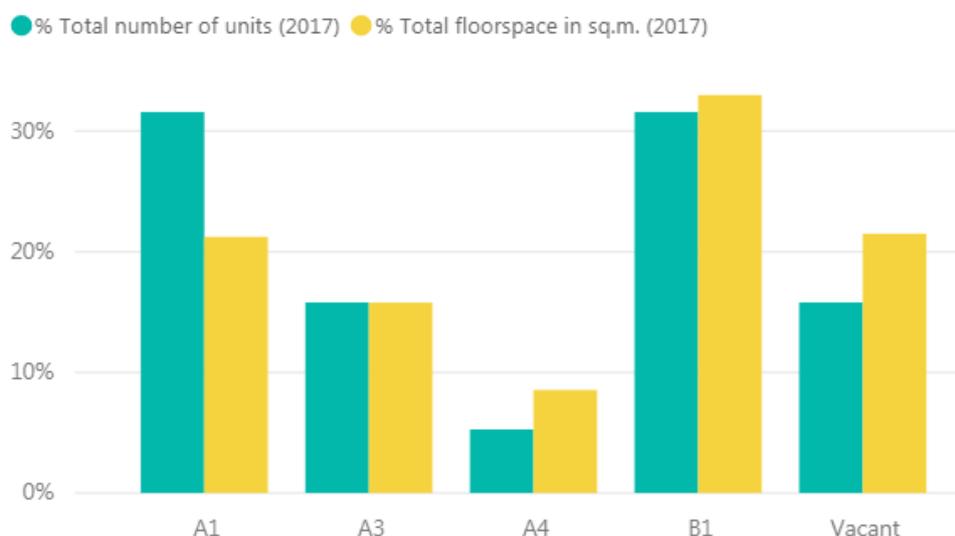
In 2017, 19 total units were identified at ground floor level. The surveyed area covered 1,612 sq m

**Map 28.1: Ground floor land use map, Great Titchfield Street (2017)**



## 28.22. Range of units and floorspace analysis (2017)

**Figure 28.2: Ground floor total number of units and floorspace by land use, Great Titchfield Street (2017)**



The shopping centre provides a balance of A1 and B1 uses with each taking up 32% of the total number of units in the centre. In terms of floorspace, B1 takes up the largest area with 33% compared with A1 with 21% of the total floorspace. Three A3 units were also recorded in 2017, making up 16% of the total floorspace.

The 2017 land use data survey has identified three vacant units taking up 21% of the total floorspace and 16% of all units. The 2018 site survey has found a total of four vacancies in this centre.

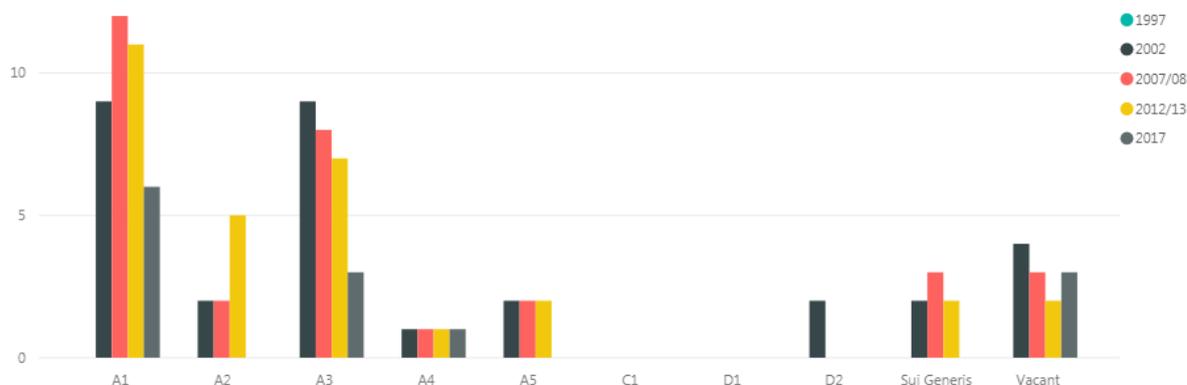
**Table 28.3: Ground floor total number of units and floorspace by land use, Great Titchfield Street (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	6	31.58%	342.06	21.22%
A3	3	15.79%	254.26	15.78%
A4	1	5.26%	137.48	8.53%
B1	6	31.58%	531.53	32.98%
Vacant	3	15.79%	346.28	21.49%
<b>Total</b>	<b>19</b>	<b>100%</b>	<b>1611.60</b>	<b>100%</b>

## 28.3. Comparative land use analysis

### 28.31. Comparative range of units and floorspace analysis

Figure 28.4: Proportion of units by land use, Great Titchfield Street (2017)<sup>30</sup>



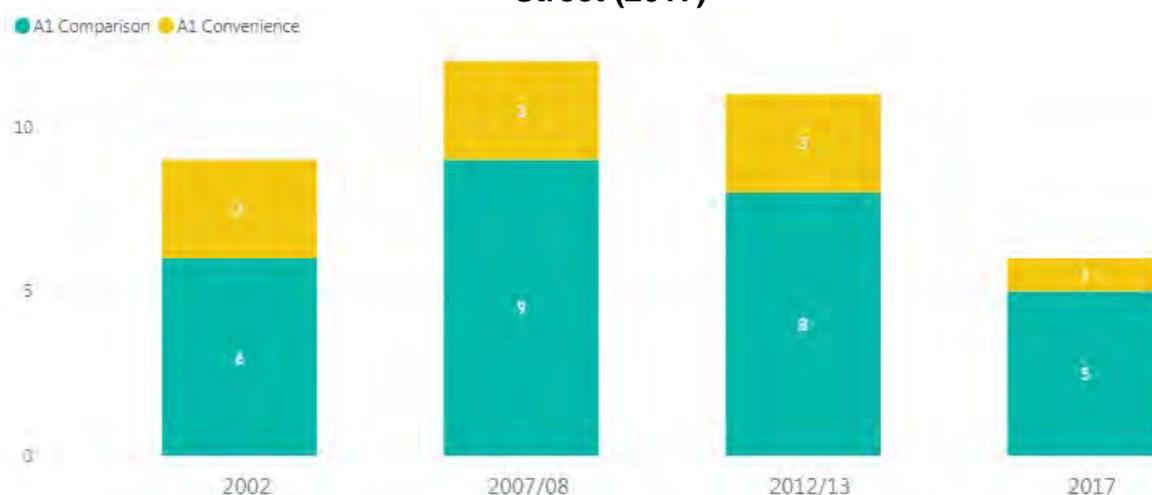
The total number of units in the centre has decreased from 30 in 2012/13 to 13 in 2017, a sharp decline from an overall stable trend. This is likely to indicate a trend towards larger units in this centre.

The number of A1 units has decreased significantly to six units in 2017 from 11 units in 2012/13, representing a 45% decrease.

A3 uses have more than halved moving from seven units in 2012/13 to three units in 2017. The 2017 survey found that there are no longer any A2, A5 or Sui Generis units in the centre. The number of vacant units in the centre has increased from two units in 2012/13 to three units in the 2017 survey. An additional vacant unit was identified by the 2018 land use survey.

### 28.32. Comparative comparison/convenience split analysis

Figure 28.5: Number of comparison and convenience A1 units by year, Great Titchfield Street (2017)



The area has had a broadly consistent comparison to convenience split across the years surveyed. Great Titchfield Street has been A1 comparison-led since 1997. The surveys have

<sup>30</sup> There is no data available for 1997 for this centre.

shown that the number of units within the centre has decreased since the last survey, as has the number of convenience type shops.

## 28.4. 2018 Site Survey

### 28.41. Accessibility and pedestrian flows

The street does not have direct public transport links. The nearest Underground stations are Goodge Street (Northern line) and Oxford Circus (Bakerloo, Central, Victoria lines), which are both within a seven-minute walk. The nearest bus routes can be found on Regent Street and Portland Place. The main way to access the centre is by foot, car or bike.

Good provision of cycle parking was observed towards the north of the centre.

Some on street parking is available in the centre. The vehicle traffic is high with many taxis picking up and dropping off in the area.

Pedestrian flows were considered average in this centre.

### 28.42 Range of units and floorspace qualitative analysis

#### 28.421 *Area description, land uses and retail provision*

The centre accommodates a large number of restaurants and one public house, which provide for a strong evening and night-time economy function. Some independent comparison type stores including a musical instrument store and a bag shop complement this offer. A photography studio and an event space are also present in the centre.

#### 28.422 *Vacant units*

24-25 Foley Street is no longer vacant and is now used as an Italian restaurant. Some previously identified vacant office units were found to be still vacant. In total, four vacant units remain in the centre however, a number of these units appear to have been undergoing refurbishment at the time of the visit.

### 28.43 State of the primary shopping area environmental quality assessment

#### 28.431 *Public realm*

Overall, the quality of the public realm was judged to be 'average'. While dropped kerbs provide wheelchair access to the centre, pavements have uneven surfaces and some encroachment due to the outdoor seating of many restaurant units was observed.



### 28.432 *Cleanliness, safety and security*

The cleanliness of the centre was judged to be 'average'. Pavements were mostly clean, with little evidence of litter.

The security of the centre was judged to be 'average'. A number of CCTV cameras and burglar alarms were noted.



### 28.433 *Identity and users*

The centre has a strong food and drink offer that cater to local workers, residents and visitors.



## 28.5. Performance summary and recommendations

- The area is considered to have a 'neutral' performance. Great Titchfield Street is a relatively small centre with a good food and drink offer complemented by a number of comparison shops. It serves workers, local residents and visitors.
- The level of vacancies is above the average for this type of centre in Westminster, however the site survey has found that most units identified as vacant by the 2017

land use survey were undergoing refurbishment works. Therefore, the level of vacancy in this centre is not considered of concern.

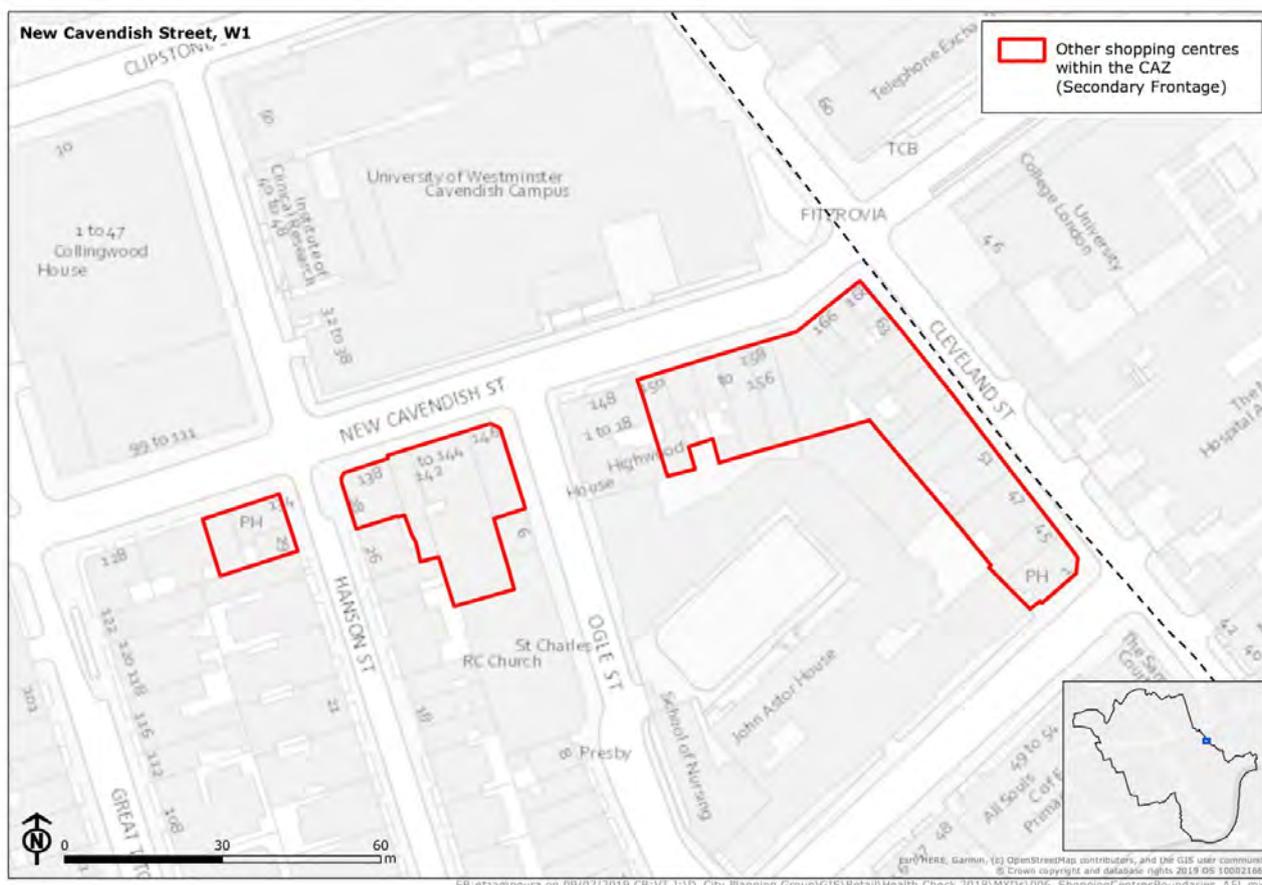
- The centre scores average on all qualitative assessment criteria. The area would benefit from decluttering and improved pavements.
- Due to its scale and function, it is recommended to reclassify the centre as a Local Centre. Further details on the reclassification recommendation can be found in the main report.

## **28.6. Recommended boundary changes**

No boundary changes are recommended.

## 29.0. New Cavendish Street

Map 29.0: Other Shopping Centre within the CAZ boundary, New Cavendish Street (2017)



### 29.1. Introduction

New Cavendish Street is a designated Other Shopping Centre within the CAZ and is within the CAZ. It currently has a secondary frontage.

Only a portion of the centre falls within the Westminster as the rest falls within the London Borough of Camden. This report only considers the area that lies within Westminster.

The centre is set along the eastern portion of New Cavendish Street and at the junction with Cleveland Street, in the east of Westminster.

New Cavendish Street is a small centre close to the University of Westminster, Great Portland Street and Tottenham Court Road, offering a mix of comparison retail and food and drink uses catering for local workers, students and residents.

The catchment area of the centre is limited by its proximity to other designated Shopping Centres such as Charlotte Street/Fitzrovia, the undesignated area of Great Portland Street and two other local centres that sandwich New Cavendish Street: Cleveland Street to the north and Great Titchfield Street to the south.

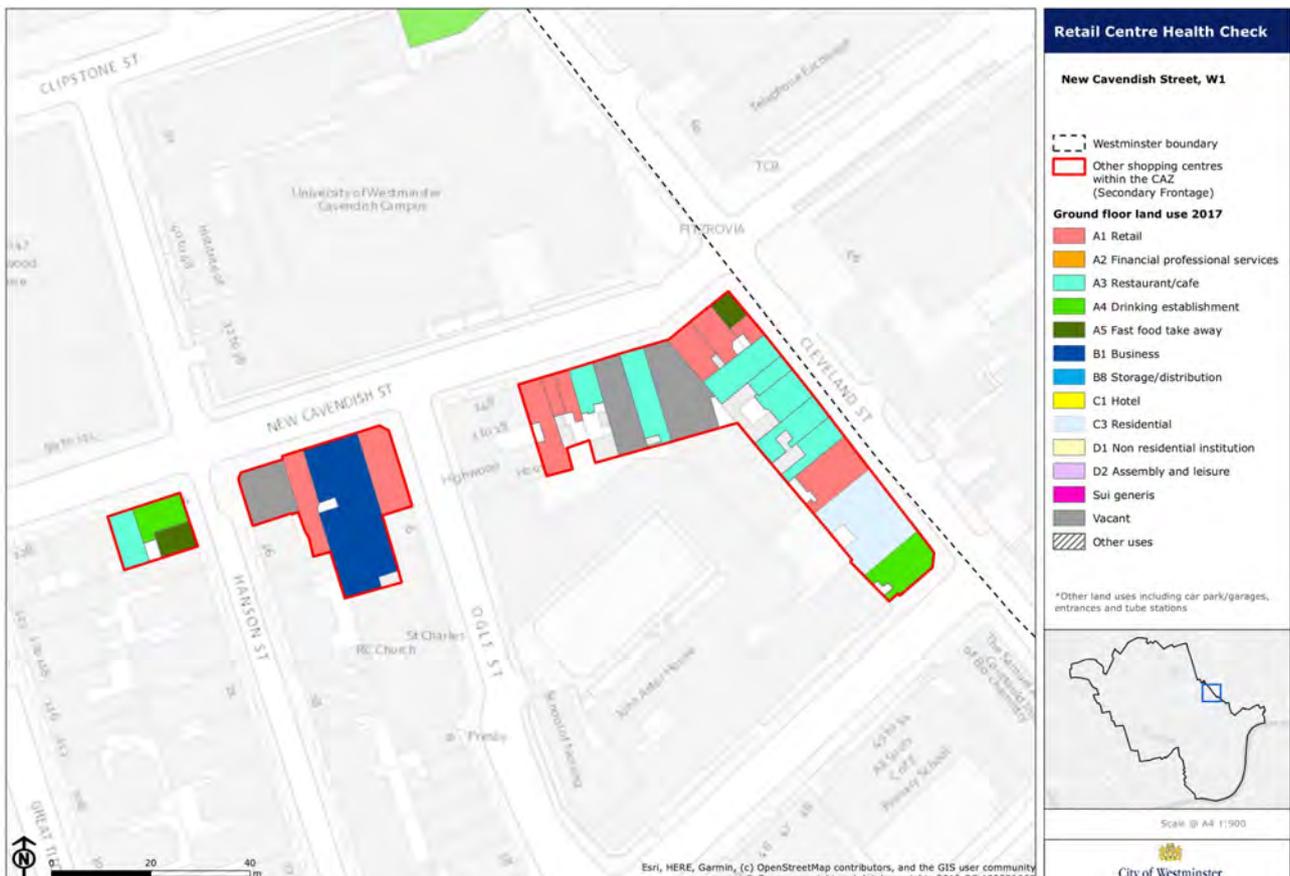


## 29.2. 2017 Land use analysis

### 29.21. Ground floor land use map (2017)

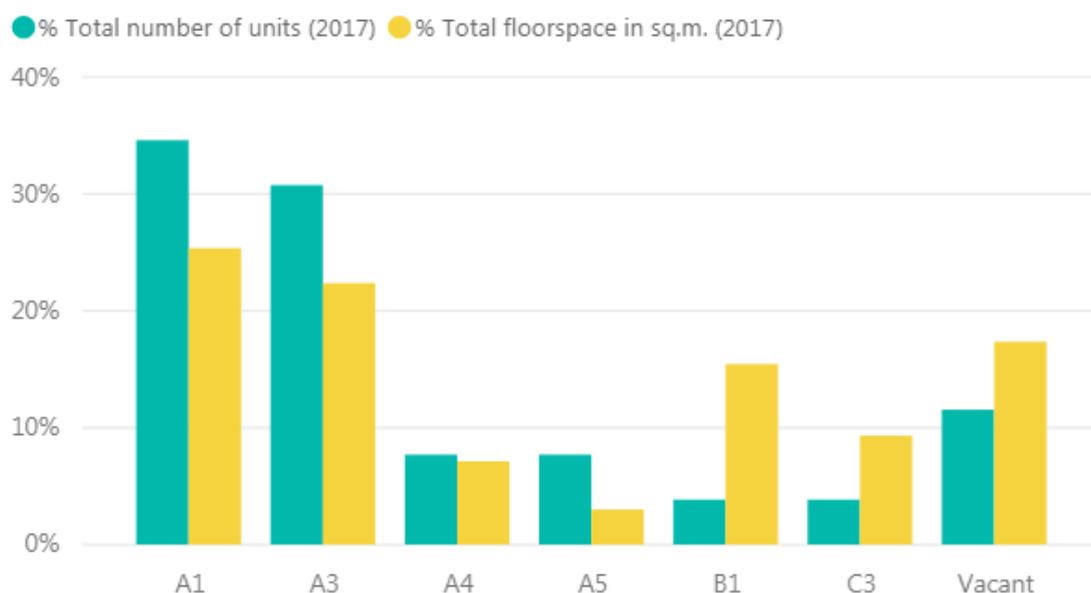
In 2017, 26 total units were identified at ground floor level. The surveyed area covered 2,274 sq m

**Map 29.1: Ground floor land use map, New Cavendish Street (2017)**



## 29.22. Range of units and floorspace analysis (2017)

**Figure 29.2: Ground floor total number of units and floorspace by land use, New Cavendish Street (2017)**



The centre has a balanced mix of A1 and A3 uses. A1 represents 35% of the total number of units and 25% of the total floorspace. A3 uses represent 31% of the total number of units and 22% of the total floorspace. The one B1 unit in this centre covers a considerable portion of the floorspace (15%). Two A4 and two A5 units, and one C3 unit have also been recorded in the centre.

The 2017 survey recorded three vacant units within the centre, accounting for 12% of all units and 17% of floorspace, a relatively high proportion of the overall floorspace in the centre. However, the 2018 site survey has revealed that one of the units is now occupied, bringing the figure in line with the average for this type of centre.

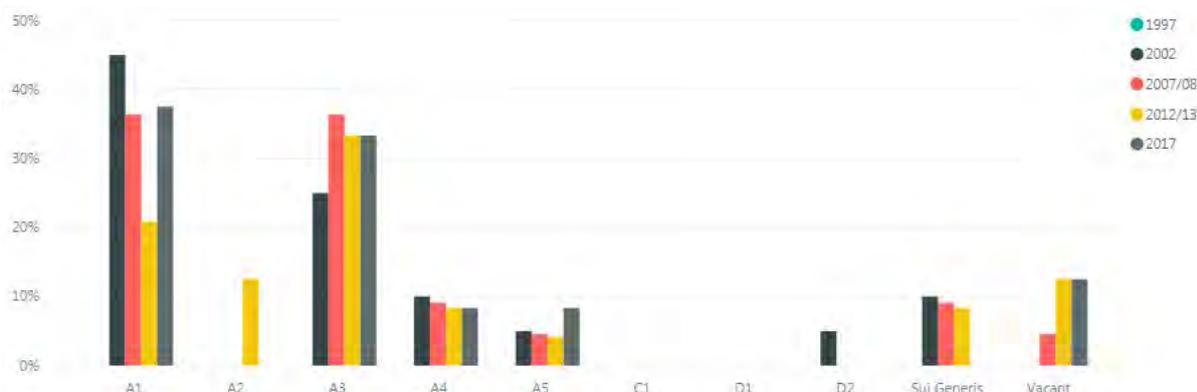
**Table 29.3: Ground floor total number of units and floorspace by land use, New Cavendish Street (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	9	34.62%	577.07	25.37%
A3	8	30.77%	508.98	22.38%
A4	2	7.69%	162.10	7.13%
A5	2	7.69%	68.12	3.00%
B1	1	3.85%	351.37	15.45%
C3	1	3.85%	211.92	9.32%
Vacant	3	11.54%	394.75	17.36%
<b>Total</b>	<b>26</b>	<b>100%</b>	<b>2274.30</b>	<b>100%</b>

## 29.3. Comparative land use analysis

### 29.31. Comparative range of units and floorspace analysis

**Figure 29.4: Proportion of units by land use, New Cavendish Street (2017)<sup>31</sup>**



The total number of units in the centre have increased over the years surveyed with a record of 24 units recorded in 2017 compared to 20 in 2002, 22 in 2007/08 and 24 in 2012/13. This is a 20% increase overall across the survey periods, possibly indicating a slow trend towards smaller units in this centre.

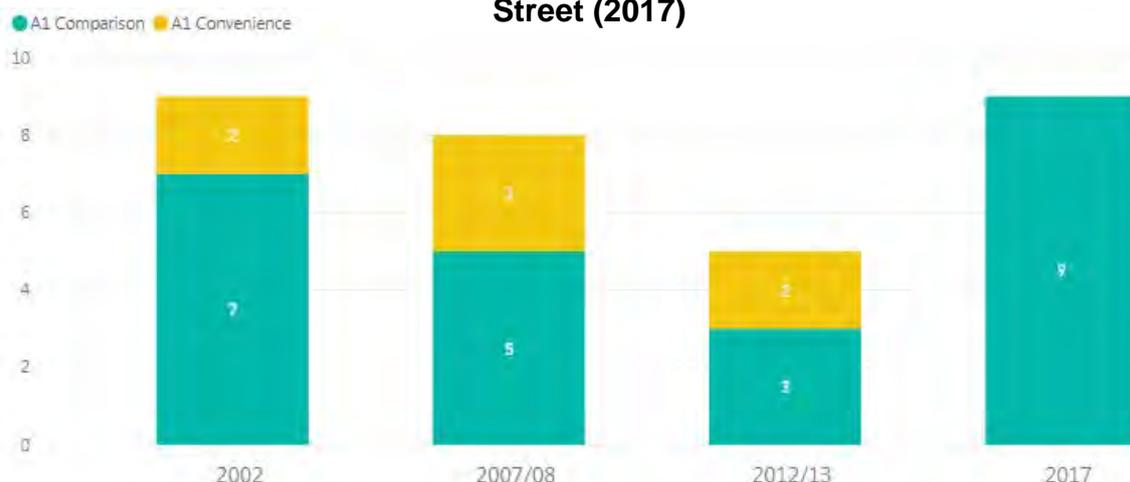
The proportion of A1 units has increased from 21% in 2012/13 to 37% in 2017, moving from five to nine units. The 16% increase of A1 uses shows that retail in the area is performing well after experiencing a decline between the 2002 and 2012/13 surveys.

The proportion of A3 and A4 uses has remained stable since the last survey in 2012/13 and A5 uses have seen a relative increase by 4% since the last survey in 2012/13.

The proportion of vacant units in the centre has remained stable between the 2012/13 and 2017 survey periods and remains at three units.

### 29.32. Comparative comparison/convenience split analysis

**Figure 29.5: Number of comparison and convenience A1 units by year, New Cavendish Street (2017)**



The centre has had a broadly consistent comparison to convenience split between 2002 and 2012/2013. New Cavendish Street has been A1 comparison-led since 1997 and in 2017 all the A1 surveyed have been found to be comparison type, leaving no convenience use in the centre.

<sup>31</sup> There is no data available for 1997 for this centre.

## 29.4. 2018 Site Survey

### 29.41. Accessibility and pedestrian flows

Although there are no Underground stations within the centre, New Cavendish Street is easily accessed via public transport. The nearest Underground station is Goodge Street (Northern line) which is within a six-minute walk while Great Portland Street (Circle, Hammersmith & City, Metropolitan lines) is seven minutes away and Warren Street (Northern, Victoria lines) eight minutes.

There are no bus routes through the centre however Tottenham Court Road is within close proximity and is served by several bus routes.

Pedestrian flows were judged to be average throughout New Cavendish Street. The main ways to access the centre are by foot or car. The site survey has found a very high level of vehicle traffic in this centre.

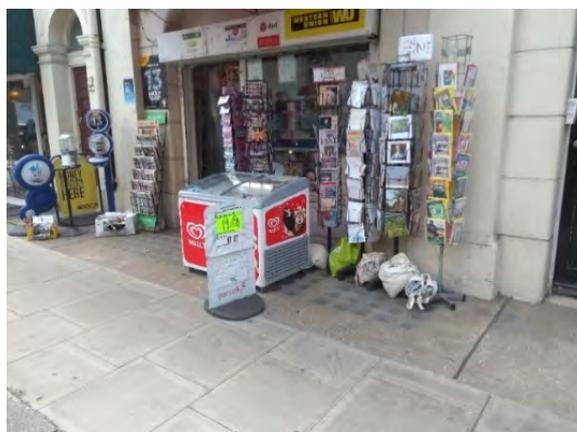
Some on street car parking is provided whilst there is no cycle parking provision in the centre.



### 29.42 Range of units and floorspace qualitative analysis

#### 29.421 *Area description, land uses and retail provision*

The centre's retail offer is entirely comparison and comprises a number of hairdressers and beauty salons, a clothing shop and a clothing hire shop, a travel agent and a dog grooming saloon. Most of these appear to be independent stores. The survey found a newsagent which also provides a convenience function.



The centre is also quite A3/A4 heavy with several cafés, restaurants and pubs, offering a social use. The site survey also identified one hot food takeaway unit.

#### 29.422 *Vacant units*

Since the 2017 survey one vacant unit has become occupied by an A3 restaurant and one residential unit is now under renovation. There are now two vacant units in the centre.

### 29.43 State of the primary shopping area environmental quality assessment

#### 29.431 *Public realm*

The quality of the public realm was judged to be average. The pavements in the centre are quite narrow with uneven surfaces and some street clutter. On street parking on New Cavendish Street creates further visual clutter.

Some safe pedestrian crossing with dropped kerbs were also noted in the centre.

While most frontages are well-maintained, the hot food takeaway and newsagent have a lower level of upkeep which detracts from the character of the area.



#### 29.432 *Cleanliness, safety and security*

Cleanliness was judged to be average throughout the centre. The site survey noted stained pavements, some litter and a number of rubbish bags awaiting collection.

Safety and security were judged to be average throughout the centre. Most units appear to be fitted with burglar alarms and overall security measures felt average. One example of graffiti was noted.

#### 29.433 *Identity and users*

Several cafés, restaurants, pubs and drinking establishments are present in this area, making this a small cluster that mainly caters for local workers, students and residents. Few shoppers and tourists were noted at the time of the visit.

## **29.5. Performance summary and recommendations**

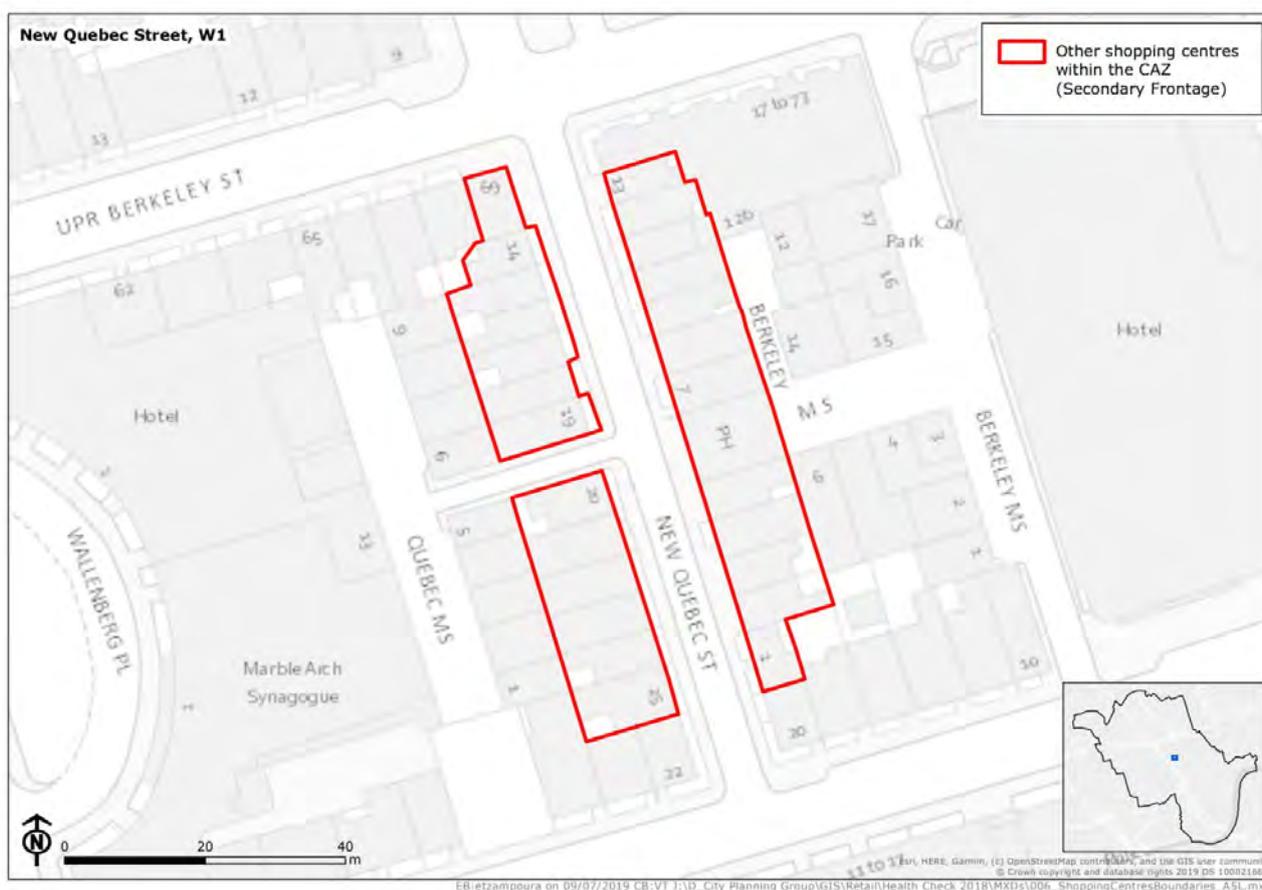
- The area is considered to have a 'neutral' performance. New Cavendish Street is a small cluster of comparison retail and food and drink uses that mostly cater for local workers, students and residents.
- Two vacant units remain in the centre. The level of vacancy is in line with the average for this type of centre in Westminster.
- The centre scores average on public realm and low on cleanliness. Improvements to the public realm including pavement works, decluttering, better frontage upkeep and improved cleanliness would be beneficial.
- Due to its scale and function, it is recommended to reclassify the centre as a Local Centre. Further details on the reclassification recommendation can be found in the main report.

## **29.6. Recommended boundary changes**

No boundary changes are recommended.

## 30.0. New Quebec Street

Map 30.0: Other Shopping Centre within the CAZ boundary, New Quebec Street (2017)



### 30.1. Introduction

New Quebec Street is a designated Other Shopping Centre within the CAZ and is within the CAZ. It currently has a secondary frontage.

It is a very small linear local centre located in the centre of Westminster, to the north west of Oxford Street, the north of Marble Arch and the east of Edgware Road. Marble Arch (Central line) Underground station is at a walking distance.

New Quebec Street is close to other designated Shopping Centres including Seymour Place, Connaught Street and Crawford Street/York Street/Seymour Street.

The centre is shop-led and also hosts a number of food and drink premises. However, its catchment is restricted by its proximity to Oxford Street, Edgware Road and Baker Street CAZ Frontages.



## 30.2. 2017 Land use analysis

### 30.2.1. Ground floor land use map (2017)

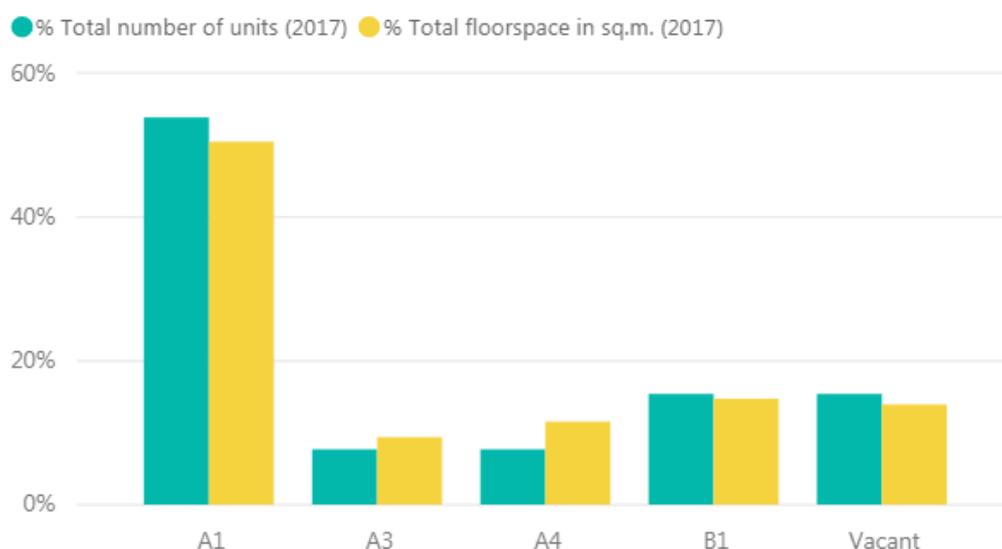
In 2017, 26 total units were identified at ground floor level. The surveyed area covered 1,779 sq m

**Map 30.1: Ground floor land use map, New Quebec Street (2017)**



### 30.22. Range of units and floorspace analysis (2017)

**Figure 30.2: Ground floor total number of units and floorspace by land use New Quebec Street (2017)**



The centre is A1 led with 14 A1 units. These account for 54% of all units within the centre and for 50% of the overall floorspace at ground floor level.

B1 floorspace is the second most significant land use making up 15% of total units and 15% of total floorspace with four units.

Other recorded uses include a limited amount of A3 and A4.

In 2017, four vacant units were recorded within the centre, accounting for 15% of all units and 14% of the overall floorspace, a relatively high vacancy level considering the size of the centre. However, the 2018 site survey has revealed that a number of these units have been occupied.

**Table 30.3: Ground floor total number of units and floorspace by land use, New Quebec Street (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	14	53.85%	897.58	50.46%
A3	2	7.69%	166.77	9.38%
A4	2	7.69%	205.13	11.53%
B1	4	15.38%	261.69	14.71%
Vacant	4	15.38%	247.55	13.92%
<b>Total</b>	<b>26</b>	<b>100%</b>	<b>1778.71</b>	<b>100%</b>

### 30.3. Comparative land use analysis

#### 30.31. Comparative range of units and floorspace analysis

**Figure 30.4: Proportion of units by land use, New Quebec Street (2017)<sup>32</sup>**



The proportion of A1 units within the centre has increased between 2012/13 and 2017 from 48% to 64%, with a three-unit increase from 11 to 14.

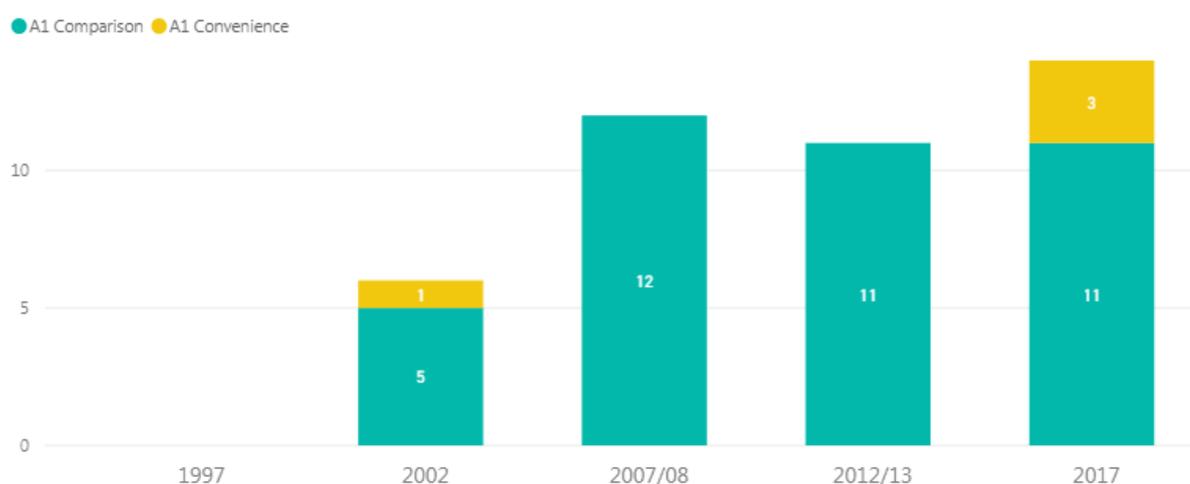
The 2017 land use survey found that there were no longer any A2 units in the centre.

A loss of two A3 units was recorded in 2017, meaning that its proportion of total units has fallen to 9% from 22% in 2012/13. In 2017, one more A4 unit was recorded taking the proportion of total units to 9% from 4%. The centre has also lost a Sui Generis unit meaning that this land use is no longer present in the centre.

The proportion of vacant units in the centre has increased from 13% to 18% between 2012/13 and 2017 after a period of stability since 2007/08 survey period.

#### 30.32. Comparative comparison/convenience split analysis

**Figure 30.5: Number of comparison and convenience A1 units by year, New Quebec Street (2017)<sup>33</sup>**



<sup>32</sup> There is no data available for 1997 for this centre.

<sup>33</sup> There is no data available for 1997 for this centre.

Across the years surveyed, the centre has been A1 comparison-led. New Quebec Street had never had as many shops as in 2017. Figures for 2017 show that that 79% of the total number of shops in the centre are comparison type.

No convenience shops were recorded in 2007/2008 and 2012/2013. However, the 2017 survey revealed three new convenience shops within the centre.

### **30.4. 2018 Site Survey**

#### **30.41. Accessibility and pedestrian flows**

Although there are no Underground stations within the centre and no buses run along New Quebec Street, the centre has good public transport links as Marble Arch (Central line)



Underground station is within a three-minute walk.

A number of buses also run along nearby roads such as Oxford Street, Edgware Road, Portman Street and Gloucester Place. Traffic on New Quebec Street is low, most of the vehicles are delivery trucks and vans.

Pedestrian flows were judged to be low. The people using the centre were mainly residents and local workers dining and getting breakfast. There were very few tourists or shoppers. The area has safe crossings and is highly accessible.

#### **30.42 Range of units and floorspace qualitative analysis**

##### *30.421 Area description, land uses and retail provision*

New Quebec Street is a small mixed-use centre. The area hosts a significant number of shops. The shops are high quality shops, mainly comparison type and host uses such as clothes shops, bridal shops and beauty salons. The area also hosts a small number of convenience shops such as a fishmonger and a delicatessen.

A small number of cafés and restaurants contribute to the vibrancy of the town centre as they have tables and chairs outside. At the time of the visit, most people were using the centre for dining and eating rather than shopping.

A number of office units can also be found at ground floor level. A number of bars also add to the vibrancy of the centre.

The shop fronts are clean and modern, and shop fronts and overhead signs match and create a consistency along the street.



### 30.422 *Vacant units*

The 2017 land use survey identified four vacant units in the centre. During the site visit, it was observed that some of these units were still vacant but that some of them had been occupied and now host, for instance, a new restaurant/café. However, new vacant units were also observed.



## 30.43 State of the primary shopping area environmental quality assessment

### 30.431 *Public realm*

The quality of public realm was judged as high.

A large section of the street is raised up to pavement level removing the kerb and with evidence of recent investment.

There was little pavement clutter despite the tables and chairs outside many restaurants and cafés: the pedestrian movements were not affected.

Shop fronts are attractive and well-maintained throughout the centre.

### 30.432 *Cleanliness, safety and security*

Cleanliness was judged to be high throughout the centre.

Safety and security were judged to be high throughout the centre. Many units had security notices to deter criminals.



### 30.433 *Identity and users*



Although the centre has no flagship stores, the consistency between many of the units appearance adds to the local character and identity of the centre. Moreover, there was some street decoration in the form of bunting overhead along the street adding to the character and attractiveness of the street. The area mainly serves local residents and workers.

## 30.5. Performance summary and recommendations

- The centre is considered to be 'healthy'. New Quebec Street offers a mix of high-end independent comparison retail and cafés, restaurants and drinking establishments that attract local residents and workers.
- The vacancy level was at 18% but is not considered of concern.
- The quality of the public realm was judged to be high. The centre benefits from very well-maintained shop fronts.
- The catchment of the area is restricted by the wider offer on neighbouring centres such as Edgware Road and Oxford Street.

- Due to its scale and function, it is recommended to reclassify the centre as a Local Centre. Further details on the reclassification recommendation can be found in the main report.

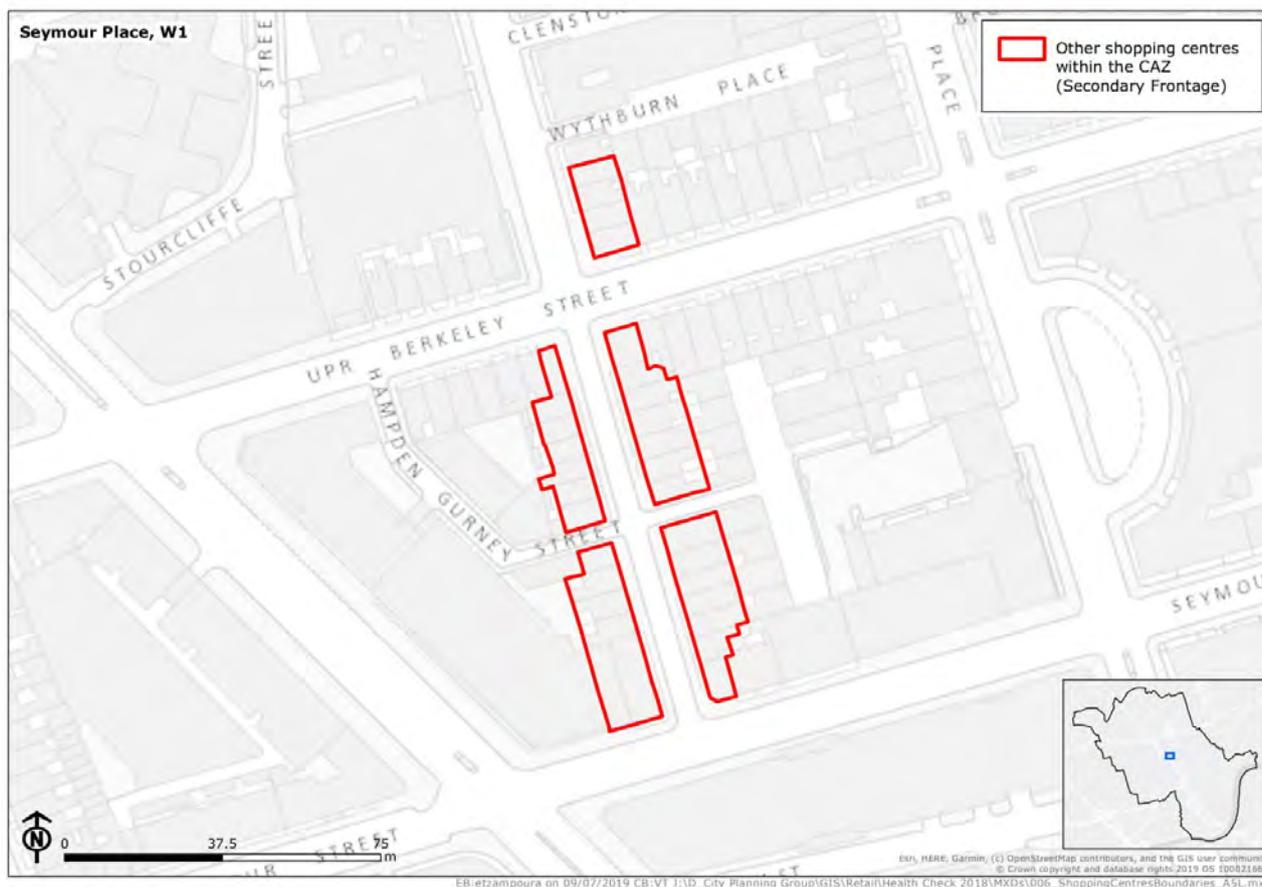
### **30.6. Recommended boundary changes**

It is recommended to include 20-22 New Quebec Street as they are currently occupied by a dentist and a café which are a functional part of the centre.

Further details on all boundary changes can be found in 'Appendix 3: Recommended changes to designation boundaries'.

## 31.0. Seymour Place

Map 31.0: Other Shopping Centre within the CAZ boundary, Seymour Place (2017)



### 31.1. Introduction

Seymour Place is a designated 'Other Shopping Centre within the CAZ'. The centre is comprised of a secondary frontage.

Seymour Place is a small linear centre located in the centre of Westminster, close to Marble Arch and Edgware Road. It is therefore easily accessible due to its proximity to Edgware Road (Circle, District, Hammersmith & City, Bakerloo lines) Underground station to the north and Marble Arch (Central line) station to the south. It is close to other designated Shopping Centres including New Quebec Street, Edgware Road (South) and Oxford Street.

The centre offers a mix of town centre uses that mainly serve workers, local residents and visitors to the area, however the centre's catchment area is limited by its proximity to larger centres. It is also in the vicinity (and almost an extension of) the larger Crawford Street/Seymour Street/York Street Local Shopping Centre in this part of Marylebone.

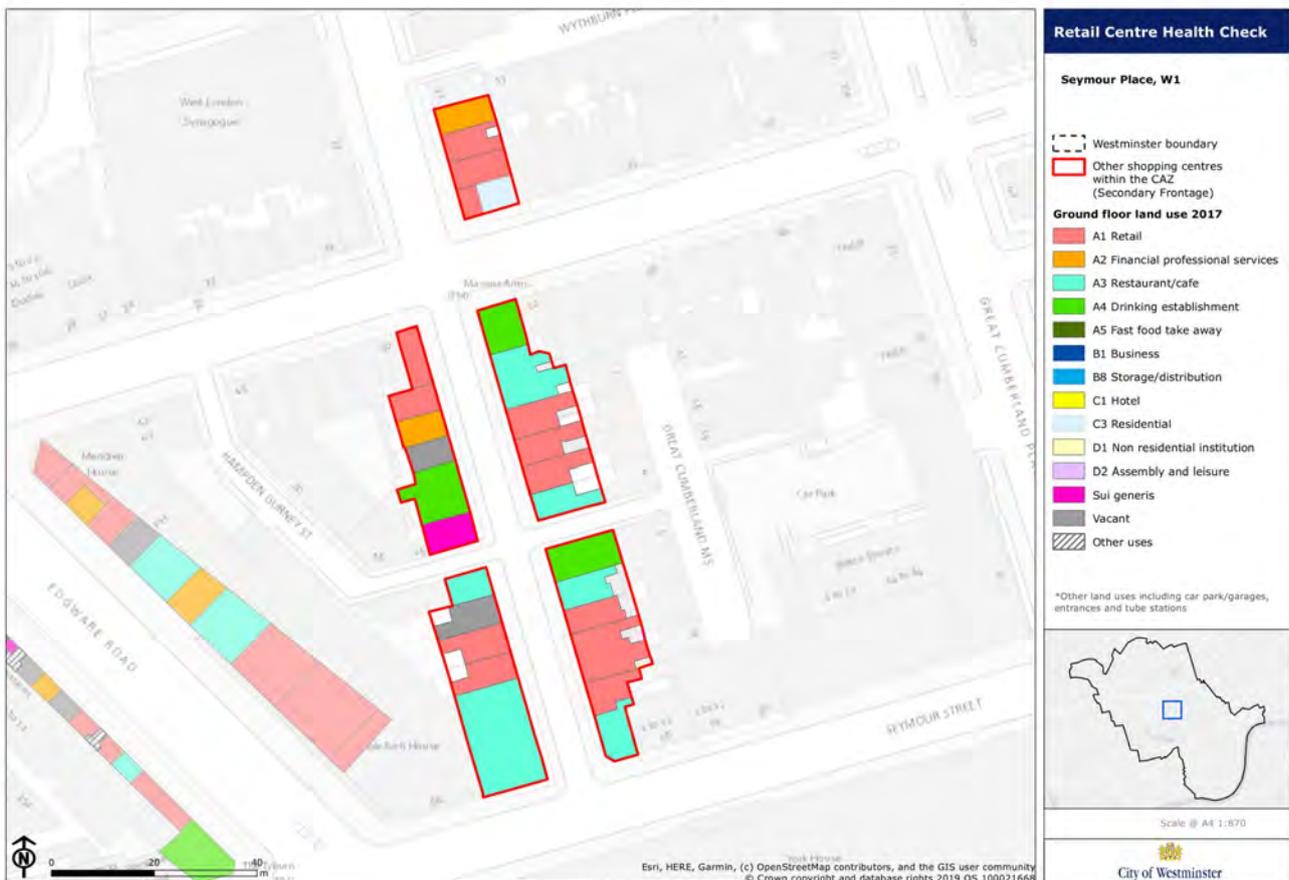


## 31.2. 2017 Land use analysis

### 31.2.1. Ground floor land use map (2017)

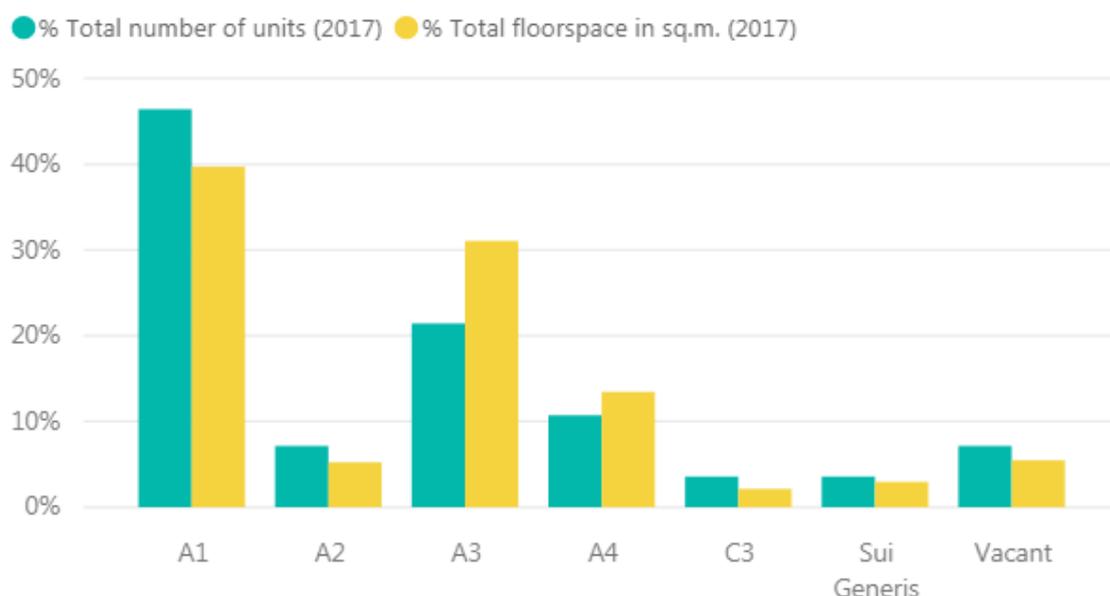
In 2017, 28 total units were identified at ground floor level. The surveyed area covered 1,981 sq m

**Map 31.1: Ground floor land use map, Seymour Place (2017)**



## 31.22. Range of units and floorspace analysis (2017)

**Figure 31.2: Ground floor total number of units and floorspace by land use, Seymour Place (2017)**



The centre has a large proportion of A1 units with 13 A1 units recorded in 2017. These account for 46% of all units within the centre and for 40% of the overall floorspace at ground floor level.

A3 is the second most significant land use with six units recorded in 2017 accounting for 21% of total units and 31% of the overall floorspace. There are also three drinking establishments of which two are pubs. A4 uses account for 11% of the total number of units and for 13% of the centre's floorspace. Overall, the food and drink offer in this centre (A3 and A4 uses) covers 44% of the total floorspace, suggesting that the centre's offer of restaurants, cafés and drinking establishments also provides for an evening and night time economy.

One ground floor residential unit was also recorded.

In 2017, two vacant units were recorded in the centre, accounting for 7% of all units and 5% of the overall floorspace. However, the 2018 site survey has revealed that these units were under alteration.

**Table 31.3: Ground floor total number of units and floorspace by land use, Seymour Place (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	13	46.43%	786.71	39.71%
A2	2	7.14%	103.60	5.23%
A3	6	21.43%	615.33	31.06%
A4	3	10.71%	266.49	13.45%
C3	1	3.57%	42.17	2.13%
Sui Generis	1	3.57%	58.48	2.95%
Vacant	2	7.14%	108.24	5.46%
<b>Total</b>	<b>28</b>	<b>100%</b>	<b>1,981.01</b>	<b>100%</b>

### 31.3. Comparative land use analysis

#### 31.31. Comparative range of units and floorspace analysis

**Figure 31.4: Proportion of units by land use, Seymour Place (2017)<sup>34</sup>**



The total number of units within the centre peaked at 30 units in 2012/13 after a trend of steady increase since 2002. The number of units has subsequently fallen by three, representing a 10% drop since the last survey period.

The proportion of A1 units has experienced an increase of three units between 2007/08 and 2017 and represents a 15% increase since the last survey period. Previous to the 2017 survey, the number of A1 units had remained stable between 2007/08 and 2012/13.

The proportion of A2 units has decreased in 2017 by 6% and has fallen from four to two units since the last survey period.

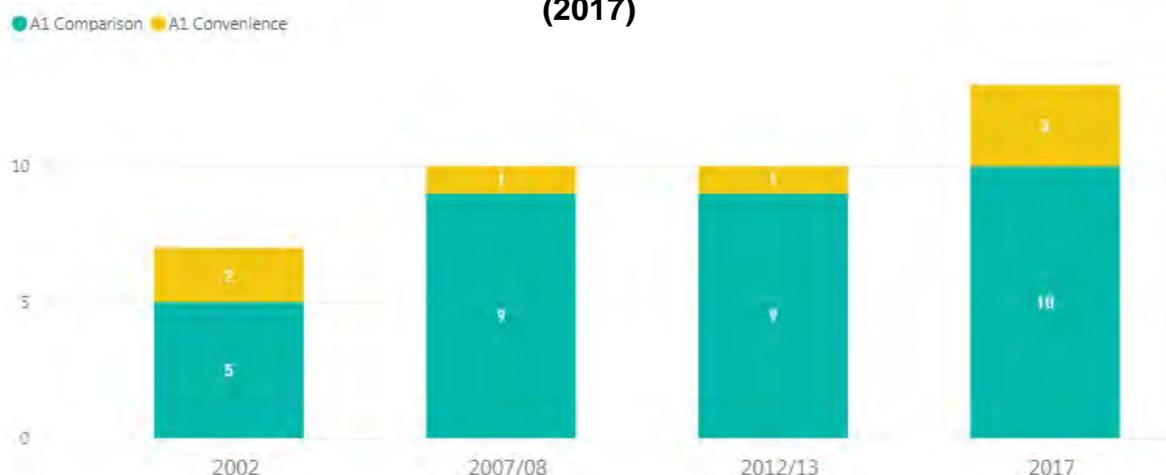
The number of A3 units has remained steady at six units since the last survey period, making 22% of total units in 2017. A4 units have dropped by one unit since the last survey period and have dropped by 2% proportionally.

Sui generis uses have remained stable across the survey periods.

The proportion of vacant units in the centre has significantly shrunk since 2007/08 when the number of vacancies peaked at eight units. Between 2007/08 and 2017, vacancies have registered a proportional drop of 22%.

#### 31.32. Comparative comparison/convenience split analysis

**Figure 31.5: Number of comparison and convenience A1 units by year, Seymour Place (2017)**



<sup>34</sup> There is no data available for 1997 for this centre.

The centre has had a broadly consistent comparison to convenience split across the years surveyed. The centre has been A1 comparison-led since 1997. In 2017, the comparison to convenience ratio is of 10:3. The 2014 Town Centre Health Check report identified the lack of convenience stores as a weakness for the centre. However, figures for 2017 show how the amount of A1 convenience has increased between 2012/13 and 2017 from one to three.

## 31.4. 2018 Site Survey

### 31.41. Accessibility and pedestrian flows

The centre has good transport links as the nearest Underground station is Marble Arch (Central line) which is a four-minute walk away.

Several bus routes also run along Edgware Road and Oxford Street. The vehicle traffic throughout the centre is quite low and is mostly made up of delivery trucks and vans.

Pedestrian flows were judged to be low. However, the area was found to be slightly busier than the nearby centre New Quebec Street. This could be caused by the close proximity to Edgware Road. It was noted that the footfall decreased towards the north of the centre, especially on the north side of Upper Berkeley Street. Accessibility is good throughout the centre.

Some on street parking is available in the centre. Limited cycle parking in the centre resulting in many bikes being locked to lampposts and fences.



### 31.42 Range of units and floorspace qualitative analysis

#### 31.421 *Area description, land uses and retail provision*

The centre presents a balanced mix of town centre uses.

There is a good mix of shops ranging from high-quality independent retailers (e.g. 'Tailare' the tailor) and local convenience stores and services (e.g. newsagent, locksmith, delicatessen shop). However, most of the comparison shopping is done on nearby Oxford Street that has a much wider range of shops. The centre also has some beauty salons and hairdressers. Some retail units have matching shop fronts and overhead signs. This consistency adds to the character of the centre.

An art gallery and a launderette can also be found on Seymour Place.

The centre hosts a significant number of high-quality cafés and restaurants including a vegetarian restaurant and some Spanish and Italian restaurants. In this sense, the centre seems to provide a higher quality A3 offer than Edgware Road (South).

A number of drinking establishments such as the Carpenters Arms and the Portman public houses are also located on Seymour Place.

The centre seems to offer a higher quality A3 than Edgware Road. When visited, most of the A3 units were busy with many local residents and workers having breakfast. It is likely that the centre is busiest during lunch time and the late afternoon/evening.



### 31.422 *Vacant units*

The 2017 land survey identified two vacant units at ground floor level. However, the 2018 site visit found four vacant units representing an increase from 2017. However, some of these vacant units were being refurbished or were awaiting new occupants.



## 31.43 State of the primary shopping area environmental quality assessment

### 31.431 *Public realm*

The quality of the public realm was judged to be high. The road is partially raised up to pavement level. This provides wheelchair access and creates bumps in the road that slow down traffic.

There was little pavement clutter despite tables and chairs outside many restaurants and cafés as well as A boards and plants. However, the pedestrian movements were not affected. Shop fronts are very well-maintained and attractive contributing to the pedestrian experience.



31.432 *Cleanliness, safety and security*

Cleanliness was judged to be average throughout the centre. Some street litter and rubbish were observed at the time of visit as well as several stains. Safety and security were judged to be high throughout the centre.



31.433 *Identity and users*

There was some street decoration in the form of bunting hanging overhead across the street adding to the character and attractiveness of the centre. The consistency between many of the shop fronts design adds to the identity and character of the centre which serves local residents, workers and visitors to the area.



### **31.5. Performance summary and recommendations**

- The centre is considered to be 'healthy'. Seymour Street presents a balanced mix of independent shops and high-quality cafés, restaurants and public houses that provide for an evening and night-time economy.
- The vacancy level has increased but the identified vacant units appear to be under alteration or were ready to be let at the time of visit. The vacancy level is therefore not considered of concern.
- The quality of the public realm was judged to be high. The centre benefits from very well-maintained shop fronts.
- The catchment of the area is restricted by the wider offer on neighbouring centres such as Edgware Road and Oxford Street.
- Due to its scale and function, it is recommended to reclassify the centre as a Local Centre. Further details on the reclassification recommendation can be found in the main report.

### **31.6. Recommended boundary changes**

No boundary changes are recommended.

## 32.0. Lupus Street

Map 32.0: Primary shopping area boundary, Lupus Street (2017)



### 32.1. Introduction

Lupus Street is a designated Other Shopping Centre within the CAZ. It currently has a secondary frontage.

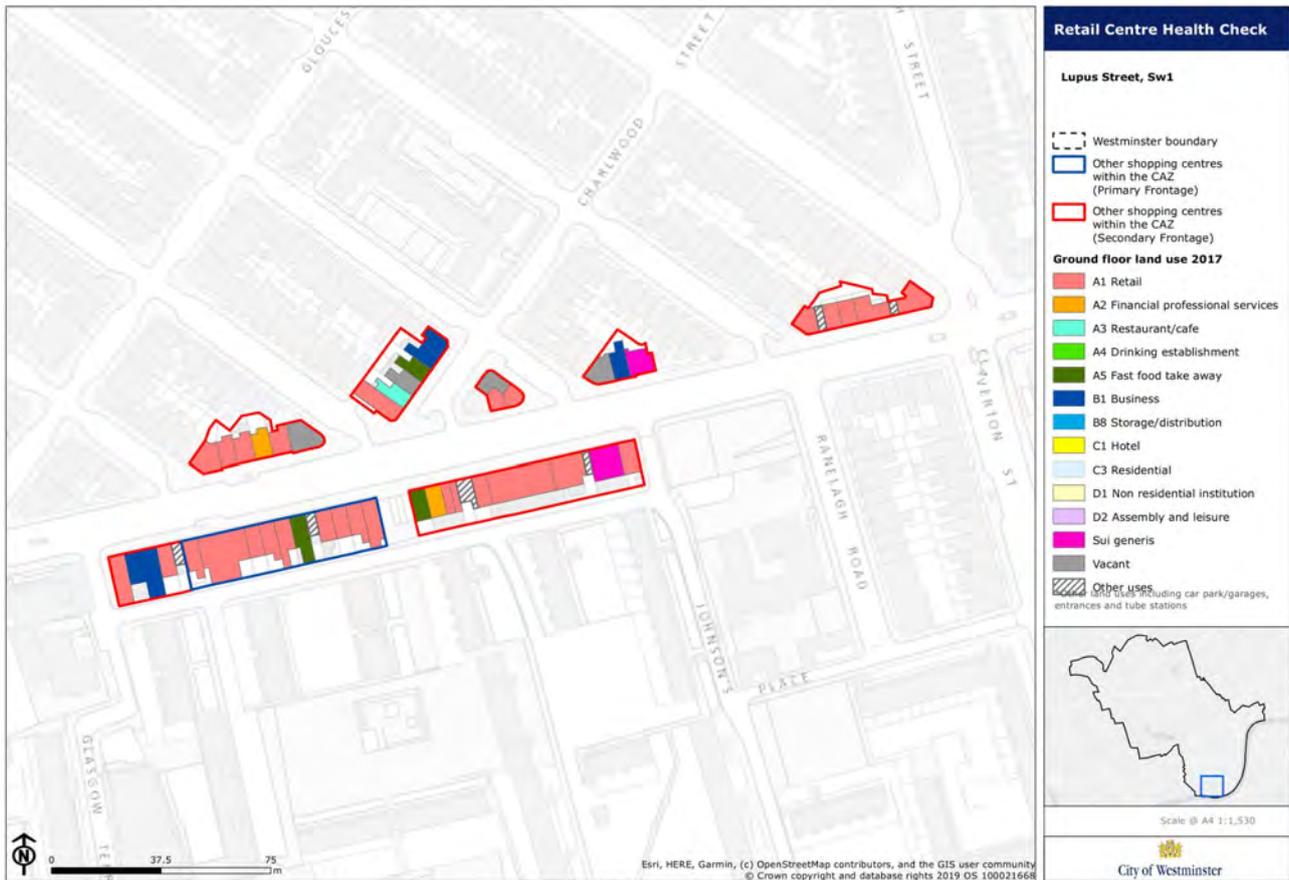
It is located in the south-west part of Westminster and is in close proximity to Vauxhall Bridge Road and the River Thames. It is close to Pimlico Underground station and to other designated shopping centres such as Moreton Street, Pimlico and Warwick Way/Tachbrook. Lupus Street is a linear centre that has convenience stores, independent retailers and a selection of specialist retailers. A number of other town centre uses complement the retail offer.

## 32.2. 2017 Land use analysis

### 32.21. Ground floor land use map (2017)

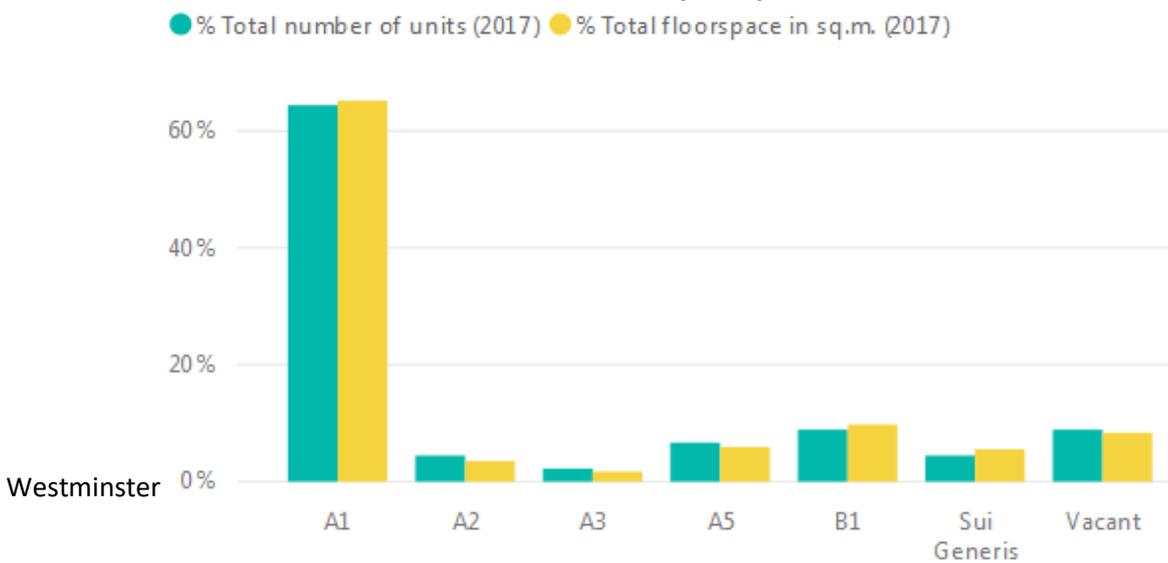
In 2017, 45 total units were identified at ground floor level. The surveyed area covered 3,381 sq m

**Map 32.1: Ground floor land use map, Lupus Street (2017)**



### 32.22. Range of units and floorspace analysis (2017)

**Figure 32.2: Ground floor total number of units and floorspace by land use, Lupus Street (2017)**



The centre is shop-led with 29 A1 units recorded in 2017. These account for 64% of all units within the centre and for 65% of the overall floorspace at ground floor level. B1 (9% of the units) and A5 (7% of the units) are second and third most numerous use.

In 2017, the survey identified four vacant units within the centre, accounting for 9% of all units and 8% of the overall floorspace. The vacant units were all located in the northern side of Lupus Street, in the secondary frontage. However, the 2018 site survey has revealed that some of these units have been occupied or are undergoing development.

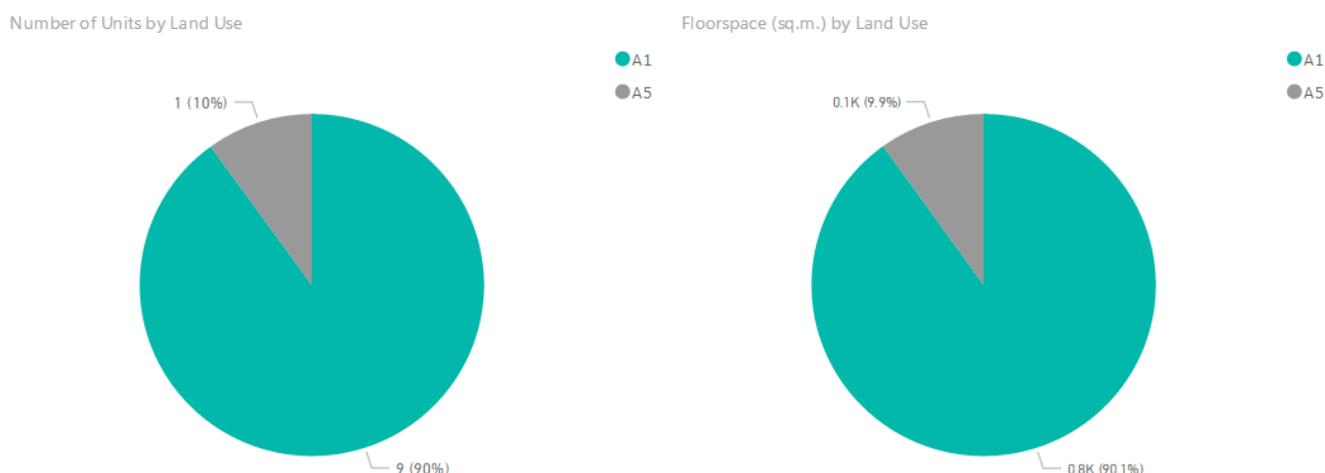
**Table 32.3: Ground floor total number of units and floorspace by land use, Lupus Street (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	29	64.44%	2205.84	65.24%
A2	2	4.44%	118.59	3.51%
A3	1	2.22%	57.94	1.71%
A5	3	6.67%	199.33	5.90%
B1	4	8.89%	330.04	9.76%
Sui Generis	2	4.44%	186.97	5.53%
Vacant	4	8.89%	282.44	8.35%
<b>Total</b>	<b>45</b>	<b>100%</b>	<b>3381.15</b>	<b>100%</b>

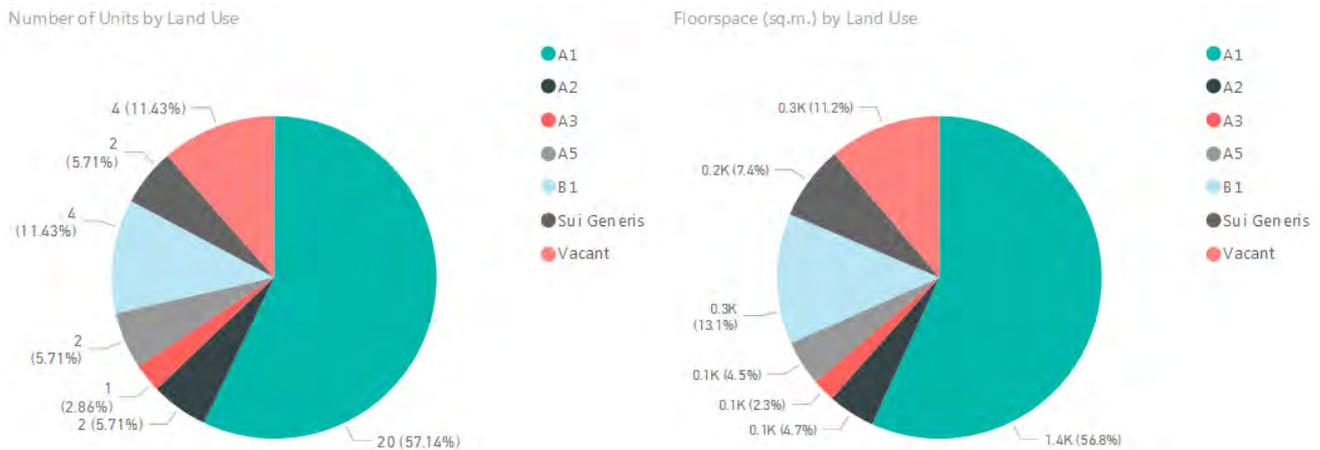
### 32.23. Frontages analysis (2017)

The primary frontage is A1-led with 90% of the units. There are two vacant units in the primary frontage (4% of the units). The secondary frontage is more diverse in terms of land uses with A1 accounting for 57% of all units. The secondary frontage hosts four vacant units accounting for 6% of all units.

**Figure 32.4: Primary Frontage - Number of units by land use and floorspace by land use (2017)**



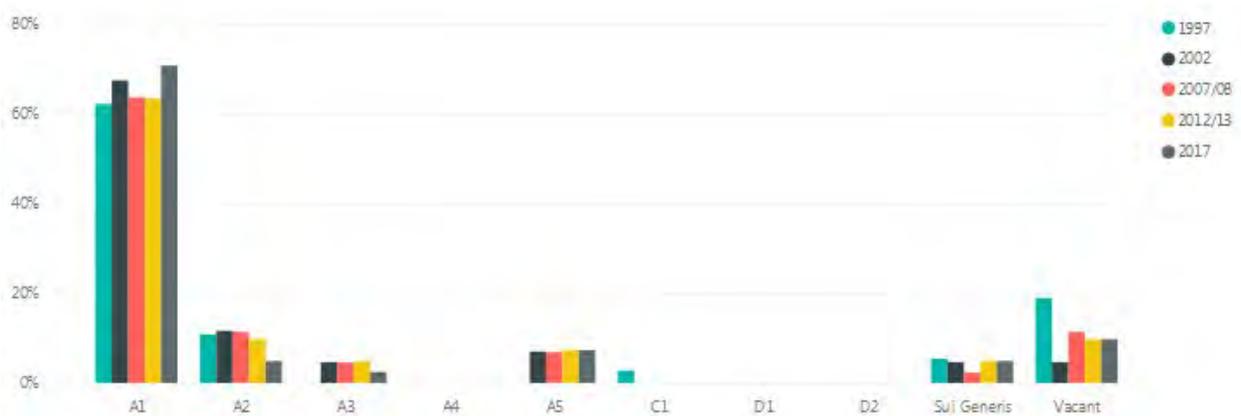
**Figure 32.5: Secondary Frontage - Number of units by land use and floorspace by land use (2017)**



### 32.3. Comparative land use analysis

#### 32.31. Comparative range of units and floorspace analysis

**Figure 32.4: Proportion of units by land use, Lupus Street (2017)**



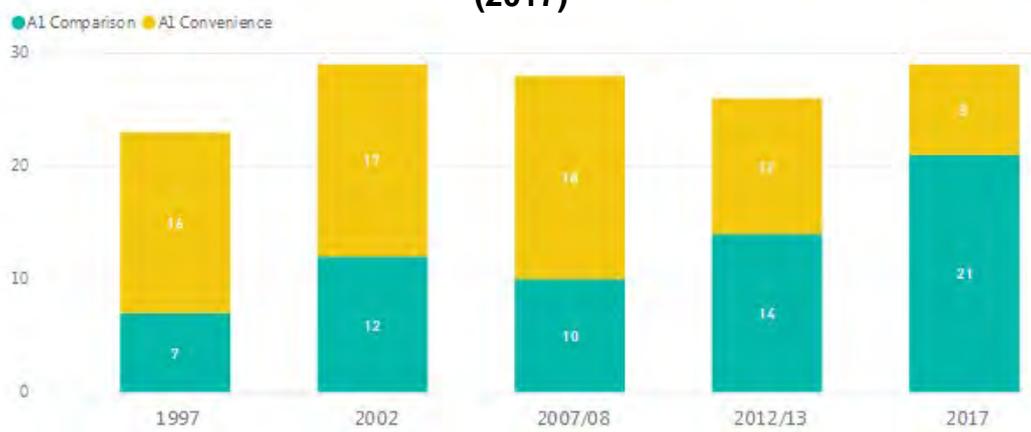
Lupus Street is more shop-led than ever: in 2017, A1 units account for 71% of all the centre's units. The actual number of A1 units also reached its maximum in 2017 (29 units).

The number of A2 and A3 units has steadily decreased between 1997 and 2017: in 2017 A2 uses represented 5% of all units (2 units) and A3 uses represented 2% of all units (1 unit). However, A5 and Sui Generis uses have increased: in 2017, there were three A5 units and two Sui Generis units.

The level of vacancy has remained broadly stable between 2007/2008 and 2017. The level of vacancy in 2017 is of 10% of the floorspace (4 units).

### 32.32. Comparative comparison/convenience split analysis

**Figure 32.5: Number of comparison and convenience A1 units by year, Lupus Street (2017)**



The centre has had a broadly consistent comparison to convenience split between 1997 and 2007/08; during that period, the centre was A1 convenience-led. However, in 2012/2013 the centre became comparison-led. In 2017, the proportion of comparison type shops continued to increase; the centre still has eight convenience type units.

## 32.4. 2018 Site Survey

### 32.41. Accessibility and pedestrian flows

The overall area is well served by transport links. There is a Underground station in close proximity, Pimlico station (Victoria line).

The centre is also served by several bus routes and is a main arterial road.

Pedestrian flows were judged to be average. Although there are limited dedicated crossings to cross from a frontage to the other one, the centre has safe crossings and is accessible.

### 32.42 Range of units and floorspace qualitative analysis

#### 32.421 Area description, land uses and retail provision

Lupus Street centre is a linear shop-led centre as it mainly accommodates shops and a range of other town centre uses that mainly serve local residents:

The centre accommodates a significant number of shops, especially within the primary frontage. Almost all the units are independent and specialist shops (e.g. bookshop, hairdresser) although there are also some franchise-type shops. There is a good offer of food and groceries shops (e.g. Tesco Express, a butcher, a baker) and some of the shops install food stalls outside with vegetables, fruits and flowers.

Throughout the centre, there are almost no restaurants and cafés and only a small Deli (shop/café) has tables and chairs outside and contributes to the local character of the centre (Delizie d'Italia). The area hosts, however, several hot-food takeaway establishments that also offer food deliveries (e.g. Domino's Pizza, Pizza Hut).

Several small offices and units offering financial and professional services (e.g. estate agent, bank) can also be found along Lupus Street including a Westminster City Council office.

A number of betting shops can be found throughout the centre. The overall area is attractive, but some shop fronts would benefit from better maintenance.



### 32.422 Vacant units

The 2017 land use survey identified four vacant units within the centre. The 2018 site survey revealed that two of the units were occupied and accommodated a new bookshop and a hairdresser. At the time of visit, it was also observed that the pharmacy on Lupus Street has closed and that the unit is undergoing development.



## 32.43 State of the primary shopping area environmental quality assessment

### 32.431 Public realm

The quality of the public realm was judged to be of average quality. The pavements are wide, well designed and encourage walking. However, the area was found to be slightly cluttered with some A boards, phone boxes, stools and tables and chairs from restaurants partially occupying the pavement, but not compromising ease of passage. The area lacks in amenity for its visitors, particularly in terms of limited resting space and there is little evidence of landscaping, reflecting a highly urbanised environment.



32.432 *Cleanliness, safety and security*

Cleanliness was judged to be average throughout the centre.

The level of safety and security was judged to be average throughout the centre.



32.433 *Identity and users*

The centre is local in feeling and whilst there are some franchises, it retains an independent feel.

Because of its location and the type of units the centre accommodates, the centre is mainly used by local residents.

## 32.5. Performance summary and recommendations

- The area is considered to be 'healthy'. Lupus Street is a very shop-led centre but also accommodates a range of other town centre uses. The retail offer is comparison-led but the centre still has a good number of convenience shops that cater for the local residents.
- The vacancy rate is low and has remained broadly stable across the years surveyed.
- Public realm, safety and security and cleanliness are average. The area would benefit from improved landscaping, more attractive shop fronts and amenity space.

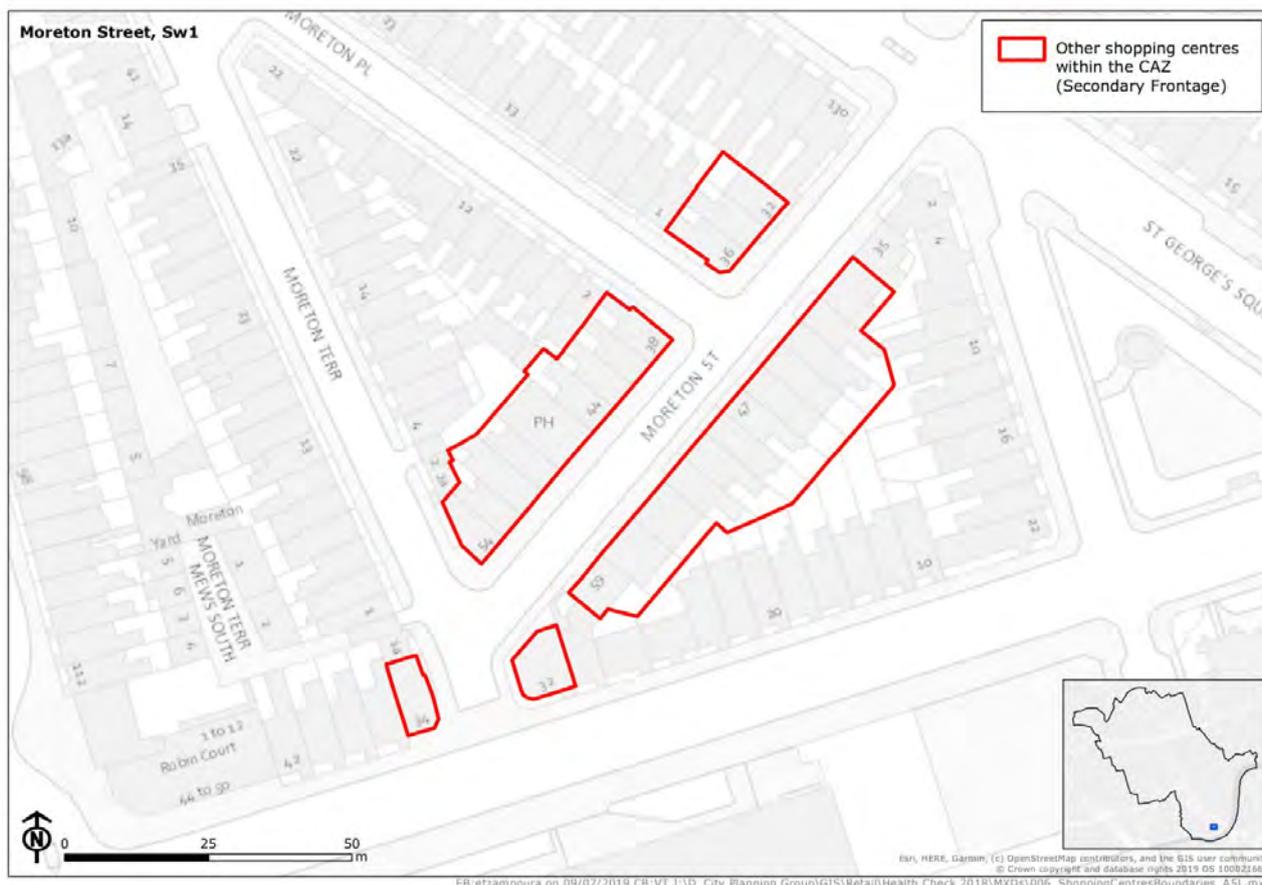
- A number of hot food takeaways and betting shops can be found throughout the centre.
- Due to its scale and function, it is recommended to reclassify the centre as a Local Centre. Further details on the reclassification recommendation can be found in the main report.

### **32.6. Recommended boundary changes**

No boundary changes are recommended.

## 33.0. Moreton Street

Map 33.0: Other Shopping Centre within the CAZ boundary, Moreton Street (2017)



### 33.1. Introduction

Moreton Street is a designated 'Other Shopping within the CAZ'. The centre comprises a secondary frontage only.

It is located in the south-west part of Westminster and is in close proximity to Pimlico Underground station (five-minute walk). The town centre is close to other designated shopping centres such as Lupus Street and Pimlico.

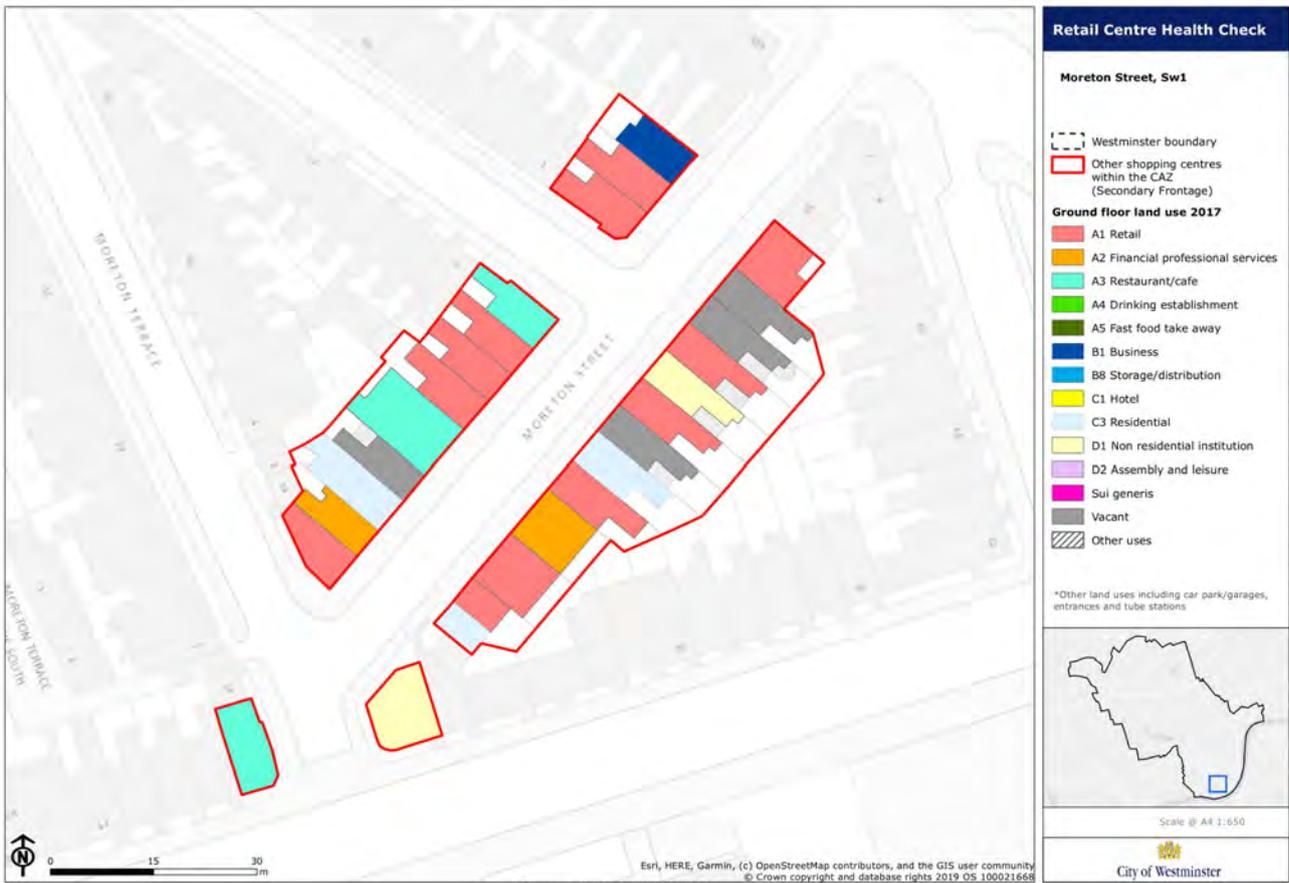
Moreton Street is a linear centre and all the units within the centre can be accessed from Moreton Street although some of them also face Lupus Street. The centre is mainly made up of independent and specialist shops, but other land uses complement the retail offer.



## 33.2. 2017 Land use analysis

### 33.21. Ground floor land use map (2017)

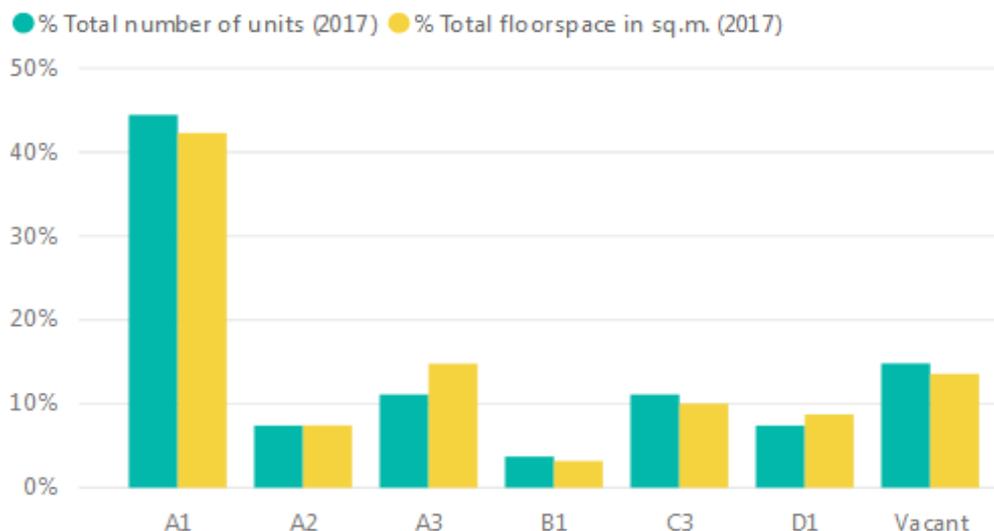
Map 33.1: Ground floor land use map, Moreton Street (2017)



### 33.22. Range of units and floorspace analysis (2017)

In 2017, 27 total units were identified at ground floor level. The surveyed area covered 1,784 sq m

Figure 33.2: Ground floor total number of units and floorspace by land use, Moreton Street (2017)



The centre is shop-led with 12 A1 units in 2017 representing 44% of the total number of units and 42% of the total floorspace.

The town centre also hosts two A2 units, three A3 units and one D1 unit which is a nursery.

In 2017, there were four vacant units that accounted for 15% of the total ground floor floorspace. However, the 2018 site survey has revealed that these identified units had been occupied.

**Table 33.3: Ground floor total number of units and floorspace by land use, Moreton Street (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	12	44.44%	754.21	42.29%
A2	2	7.41%	132.44	7.43%
A3	3	11.11%	263.74	14.79%
B1	1	3.70%	56.60	3.17%
C3	3	11.11%	178.83	10.03%
D1	2	7.41%	155.69	8.73%
Vacant	4	14.81%	242.07	13.57%
<b>Total</b>	<b>27</b>	<b>100%</b>	<b>1783.59</b>	<b>100%</b>

### 33.3. Comparative land use analysis

#### 33.31. Comparative range of units and floorspace analysis

**Figure 33.4: Proportion of units by land use, Moreton Street (2017)<sup>35</sup>**



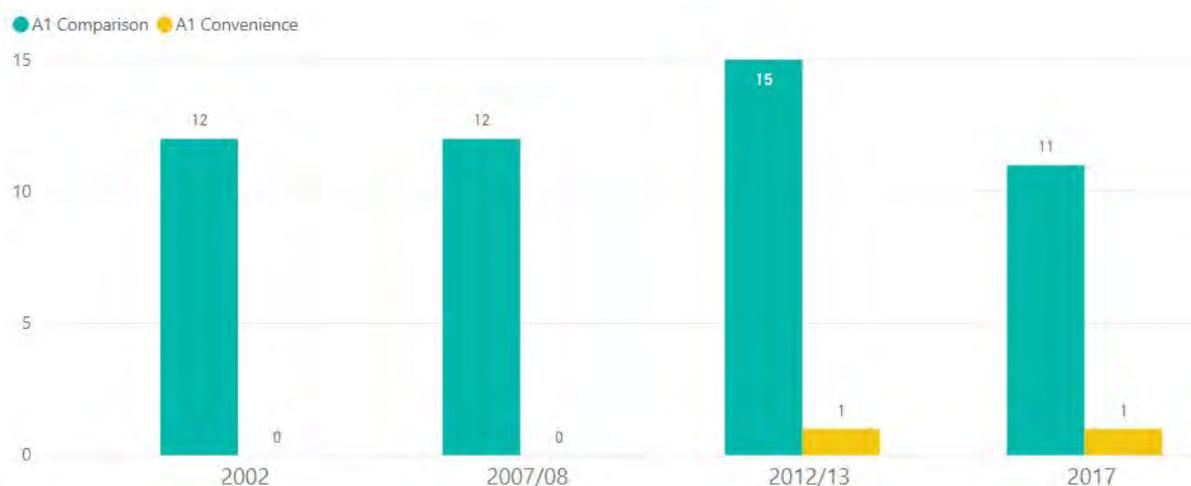
A1 units represented 71% of the total number of units over the survey periods between 2002 and 2007/08. However, since then the proportion has decreased: A1 represented in 2017 52% of the floorspace, representing a 17 percentage points drop. However, the total number of A1 units has not changed significantly: there were 12 units in 2002 and 2007/08, 16 in 2012/2013 and 12 units in 2017.

The number of A2 units has also decreased across the years surveyed. The proportion of A3 units has remained stable since the centre was last surveyed, at 13% and with three units. The vacancy level has increased across the years surveyed. The land surveys recorded one unit in 2012/13 and four in 2017.

<sup>35</sup> There is no data available for 1997 for this centre.

### 33.32. Comparative comparison/convenience split analysis

**Figure 33.5: Number of comparison and convenience A1 units by year, Moreton Street (2017)**



The centre has had a broadly consistent comparison to convenience split across the years surveyed. The centre has always been A1 comparison-led.

### 33.4. 2018 Site Survey

#### 33.41. Accessibility and pedestrian flows

The overall area is well served by public transport links, although there are no direct links serving the centre. However, there is a Underground station in close proximity, Pimlico station (Victoria line).

The centre's neighbouring areas are also well served by several bus routes and main arterial roads.

Pedestrian flows were judged to be low. Although there are limited dedicated crossings to cross from a frontage to the other one, the centre has safe crossings and is accessible.

At the time of visit, a number of cars and delivery vans were found to be illegally parked.

#### 33.42 Range of units and floorspace qualitative analysis

##### 33.421 Area description, land uses and retail provision

Moreton Street is a small mixed-use centre with a strong retail focus.

The area hosts a number of independent and specialist shops and almost all of them are comparison type (e.g. hairdresser, clothes shops, beauty salons). The centre is also home to a small Deli, Khallouk & Taylor, that has tables and chairs outside.

There are a small number of independent food premises (e.g. Goya, Pimlico Tandoori) and a Pizza Express restaurant.

The area also hosts a crèche, a small health centre, an art gallery and a small number of offices and businesses that offer a range of professional services.

### 33.422 *Vacant units*

The 2017 land use survey identified four vacant units in the centre. The 2018 site survey revealed that the units were now occupied and accommodated new businesses such as an interior designer's office, a florist and a clothing shop.



### 33.43 State of the primary shopping area environmental quality assessment

#### 33.431 *Public realm*

The quality of the public realm was judged to be of high quality. The pavements are wide and well designed and encourage walking. The area was not found to be excessively cluttered. Shop fronts are generally well-maintained and attractive. The area lacks in amenity for its visitors, particularly in terms of limited resting space and there is little evidence of landscaping, reflecting a highly urbanised environment.

#### 33.432 *Cleanliness, safety and security*

Cleanliness was judged to be high throughout the centre. The level of safety and security was judged to be high. As vehicular traffic is low, it feels safe to walk around the centre.

#### 33.433 *Identity and users*

The area caters for local residents and visitors to the area.

### 33.5. Performance summary and recommendations

- The area is considered to be 'healthy'. Moreton Street is a small shop-led centre but also accommodates a range of other town centre uses, offices and social and community uses that cater for local residents and visitors.
- Although the vacancy rate increased in 2017, the 2018 site survey revealed that most of those units have been redeveloped and are now occupied.
- The quality of the public realm, as well as safety, security and cleanliness, are high. Although the public realm and the shop fronts are well maintained, the area would benefit from improved landscaping and amenity space.

- Due to its scale and function, it is recommended to reclassify the centre as a Local Centre. Further details on the reclassification recommendation can be found in the main report.

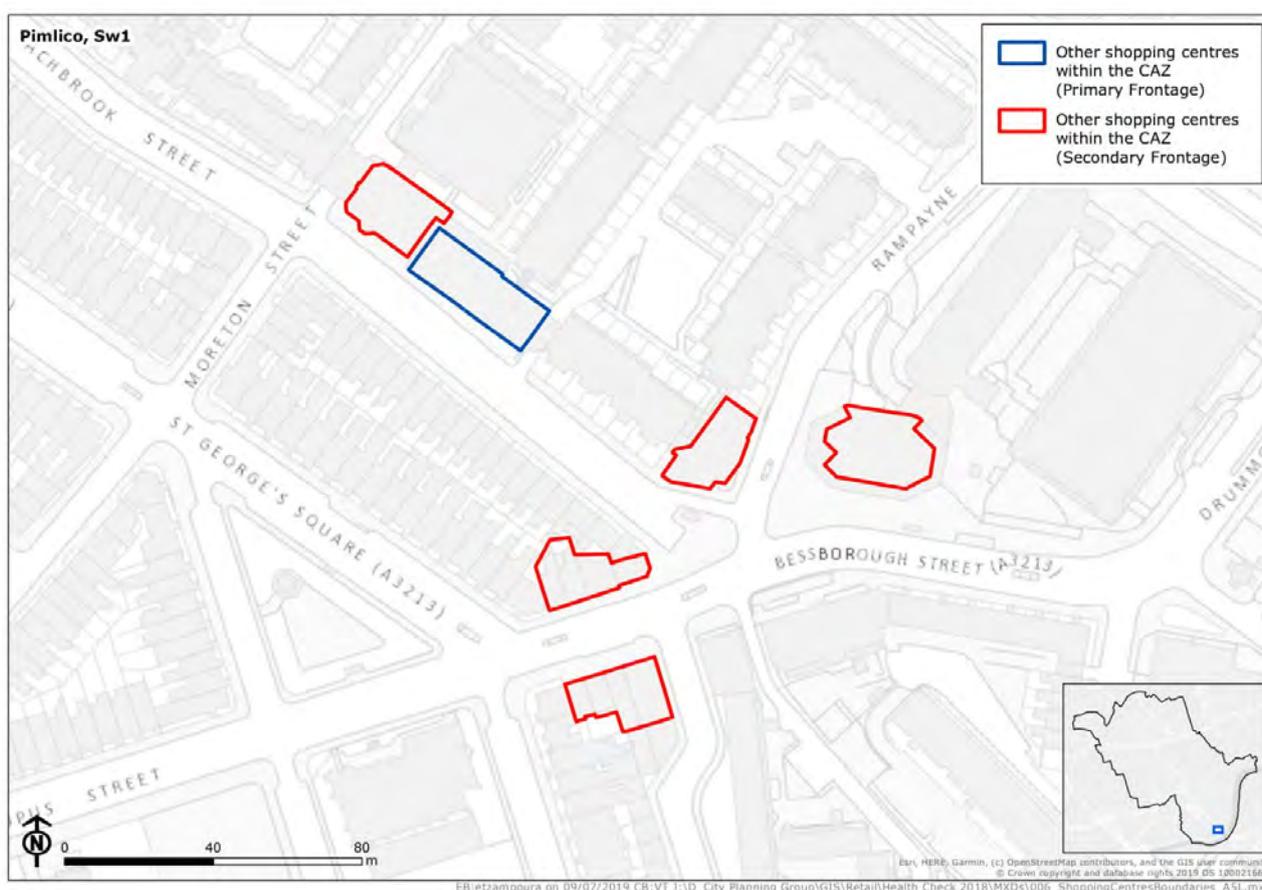
### **33.6. Recommended boundary changes**

It is recommended to include 35 Moreton Street as 35-37 Moreton Street are in occupation by the same shop and the unit is a functional part of the centre.

Further details on all boundary changes can be found in 'Appendix 3: Recommended changes to designation boundaries'.

## 34.0.Pimlico

Map 4.0: Other shopping centre within the CAZ boundary, Pimlico (2017)



### 34.1. Introduction

Pimlico is a designated Other Shopping Centre within the CAZ and is within the CAZ. It currently has a primary and a secondary frontage.

The centre is located in the south-west part of Westminster and the Pimlico Underground station (Victoria line) falls within the centre. The centre covers the junction between Tachbrook Street, Lupus Street, Rampayne Street and Bessborough Street. The units that make up the centre are not always contiguous as some areas are separated by units that do not fall within the designated town centre. The centre is close to other designated centres such as Merton Street, Lupus Street and Warwick Way/Tachbrook.

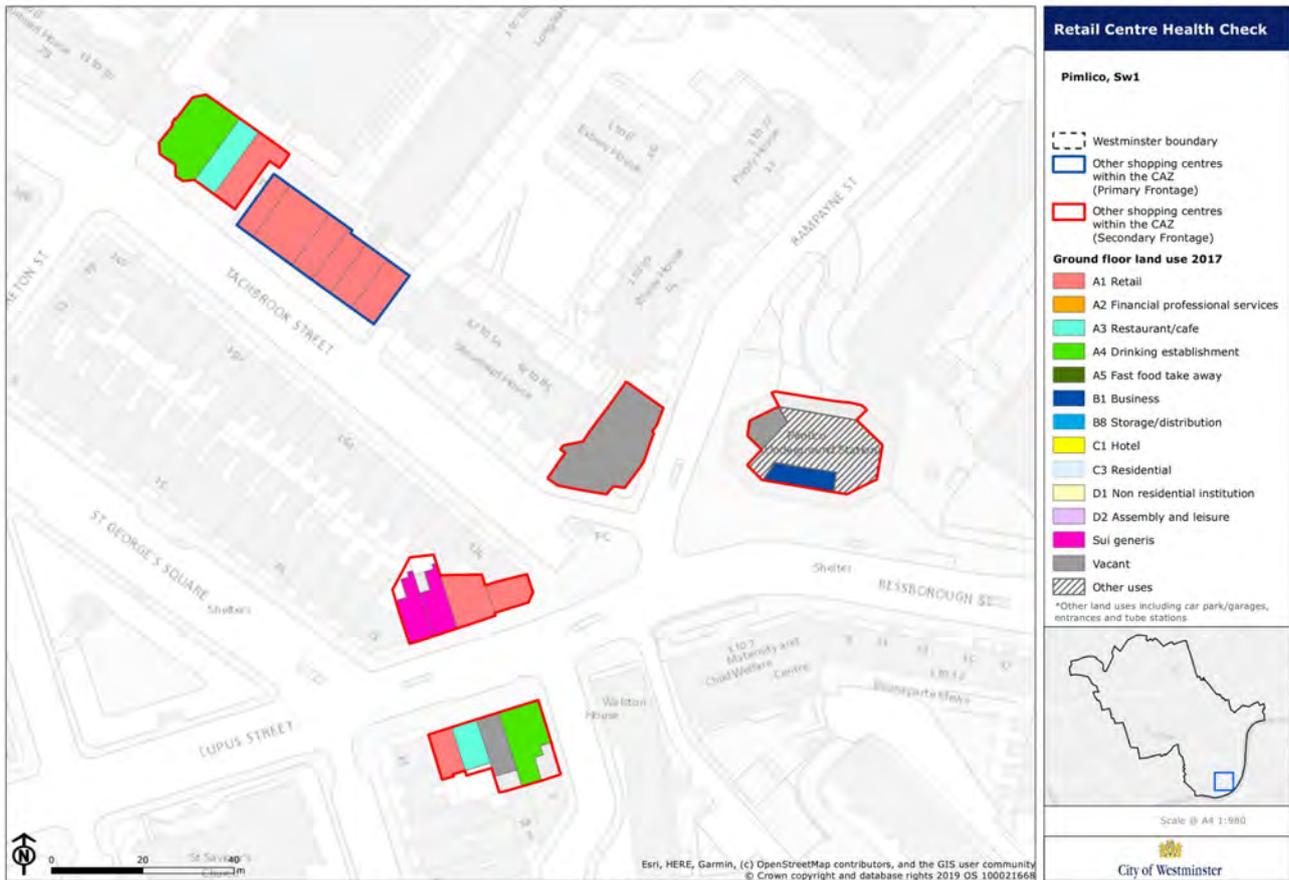
The centre is mainly made up of independent and specialist shops both convenience and comparison type but also accommodates a range of other town centre uses that shape the town centre.

## 34.2. 2017 Land use analysis

### 34.21. Ground floor land use map (2017)

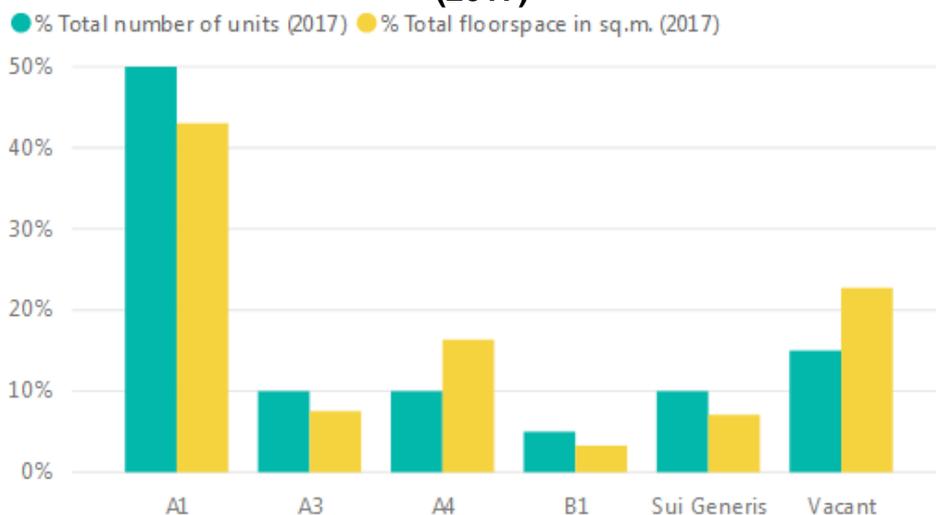
In 2017, 20 total units were identified at ground floor level. The surveyed area covered 1,911 sq m

**Map 34.1: Ground floor land use map, Pimlico (2017)**



### 34.22. Range of units and floorspace analysis (2017)

**Figure 34.2: Ground floor total number of units and floorspace by land use, Pimlico (2017)**



The centre is A1-led as shops represented 50% of the total number of units in 2017 with 10 units, making 43% of the total floorspace.

Otherwise, the centre presents a mixed balance of land uses. In 2017, there were two A3, two A4 and two Sui Generis units within the centre’s boundary. An office was also registered in 2017.

In 2017, the survey identified three vacant units, which represented 15% of the total number of units and 23% of the floorspace. However, the 2018 site survey has found that some of those units are now occupied.

**Table 34.3: Ground floor total number of units and floorspace by land use, Pimlico (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	10	50.00%	822.15	43.02%
A3	2	10.00%	143.98	7.53%
A4	2	10.00%	312.41	16.35%
B1	1	5.00%	62.80	3.29%
Sui Generis	2	10.00%	135.38	7.08%
Vacant	3	15.00%	434.45	22.73%
<b>Total</b>	<b>20</b>	<b>100%</b>	<b>1911.17</b>	<b>100%</b>

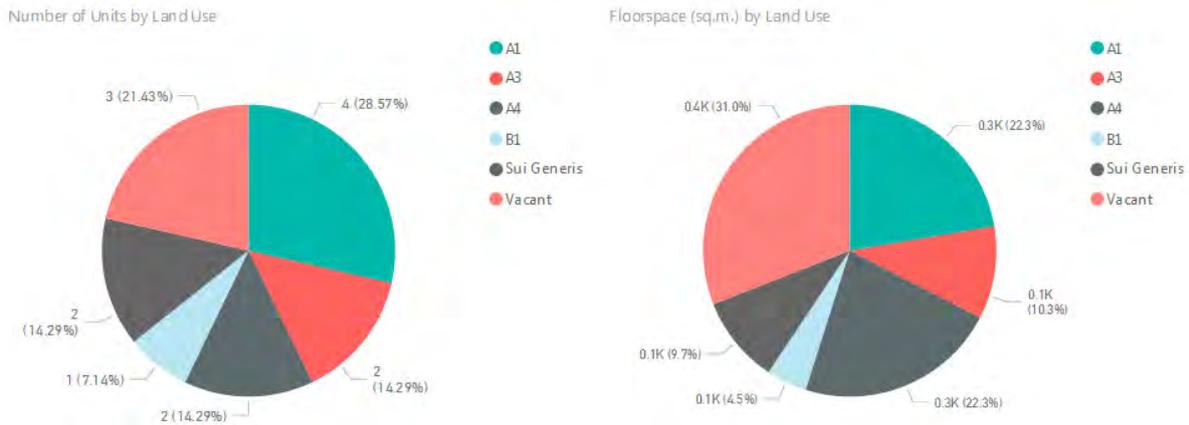
### 34.23. Frontages analysis (2017)

The primary frontage is A1-led as all the units are shops. The primary frontage has no vacant units. The secondary frontage is more varied in terms of land use with A1 accounting for 50% of all units. The secondary frontage has three vacant units.

**Figure 34.4: Primary Frontage - Number of units by land use and floorspace by land use (2017)**



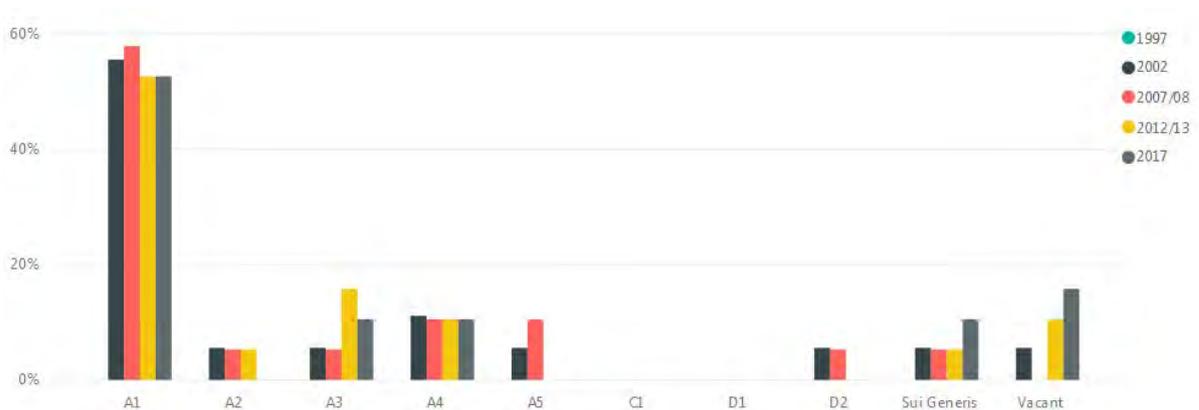
**Figure 34.5: Secondary Frontage - Number of units by land use and floorspace by land use (2017)**



### 34.3. Comparative land use analysis

#### 34.31. Comparative range of units and floorspace analysis

**Figure 34.4: Proportion of units by land use, Pimlico (2017)<sup>36</sup>**



The total number of units within the centre has remained stable at 19 units between the 2007/08 and 2017 survey periods, rising by one unit from 2002 when 18 units were recorded. A1 has always represented between 50 and 56% of the total ground floor floorspace and represented 53% of the floorspace in 2017.

The proportion of A2 and A4 uses has also remained stable across the years (5% and 10% respectively). However, in 2012/2013, a significant increase in the proportion of A3 units was registered as the number increased from one to three. In 2017, the survey only recorded two A3 units.

Although previous surveys recorded a limited number of A5 units within the centre, no A5 units have been recorded since 2007/2008. The number of Sui Generis uses has increased and represented 11% of the floorspace in 2017 with two units.

The vacancy level has increased across the years surveyed. The surveys recorded two vacant units in 2012/2013 and three in 2017.

<sup>36</sup> There is no data available for 1997 for this centre.

### 34.32. Comparative comparison/convenience split analysis

Figure 4.5: Number of comparison and convenience A1 units by year, Pimlico (2017)



The centre has had a broadly consistent comparison to convenience split between 2002 and 2012/2013 and during that period Pimlico was A1 comparison-led. However, records show that in 2017 half of the A1 units within the centre were convenience type and half were comparison type. The high number of convenience type shops indicates that the centre caters for residents.

### 34.4. 2018 Site Survey

#### 34.41. Accessibility and pedestrian flows

The overall area is well served by transport links. There is a Underground station within the centre, Pimlico station (Victoria line).

Several bus routes also serve the centre which is also in close proximity to main arterial roads such as Vauxhall Bridge Road. The level of traffic was found to be average at the time of visit. Pedestrian flows were judged to be average. The centre has moderately safe crossings and is accessible.

#### 34.42 Range of units and floorspace qualitative analysis

##### 34.421 Area description, land uses and retail provision

The eastern portion of the secondary frontage accommodates a Underground station and a retail unit that is vacant. A unit that used to accommodate the Pimlico Library, is now home to a training academy that attracts young people to the area. On Lupus Street and in the western portion of the secondary frontage, a small range of convenience shops (e.g. wine shop, groceries shop), a betting shop, a launderette, a café and a public house can be found. On Tachbook Street, the primary frontage units only accommodate shops that are both convenience type (e.g. bakery) and comparison type (e.g. hairdresser, pharmacy). The secondary frontage units accommodate a wide range of town centre uses including a café and a public house, Pride of Pimlico. Some food and drink premises have tables and chairs outside.

### 34.422 *Vacant units*

The 2017 land use survey identified three vacant units in the centre. The 2018 site survey revealed that only one of the units was vacant. The former vacant unit on Tachbrook Street now accommodates a training academy and the vacant unit on Lupus Street has been renovated and will most likely host a café or restaurant.



### 34.43 State of the primary shopping area environmental quality assessment

#### 34.431 *Public realm*

The public realm was found to be of average quality.

The area around the Underground station is underused and the junction area is not very attractive. Vehicular traffic also contributes to the disconnect between the different areas of the centre

Although the pavements are well designed and encourage walking, street furniture together with signs, phone boxes, tables and chairs and stalls from some shops contribute to create a light sense of clutter, especially in the Tachbrook area.

The area lacks green infrastructure and provision of amenity space.

#### 34.432 *Cleanliness, safety and security*

Cleanliness was judged to be average throughout the centre.

The level of safety and security was judged to be average throughout the centre.

#### 34.433 *Identity and users*

The area around the junction does not have a very strong identity itself. However, the primary frontage feels very local as the units are part of the Tachbrook Estate.

The area serves local residents and visitors. However, as the area now hosts a training centre, it is more used by young people.

### **34.5. Performance summary and recommendations**

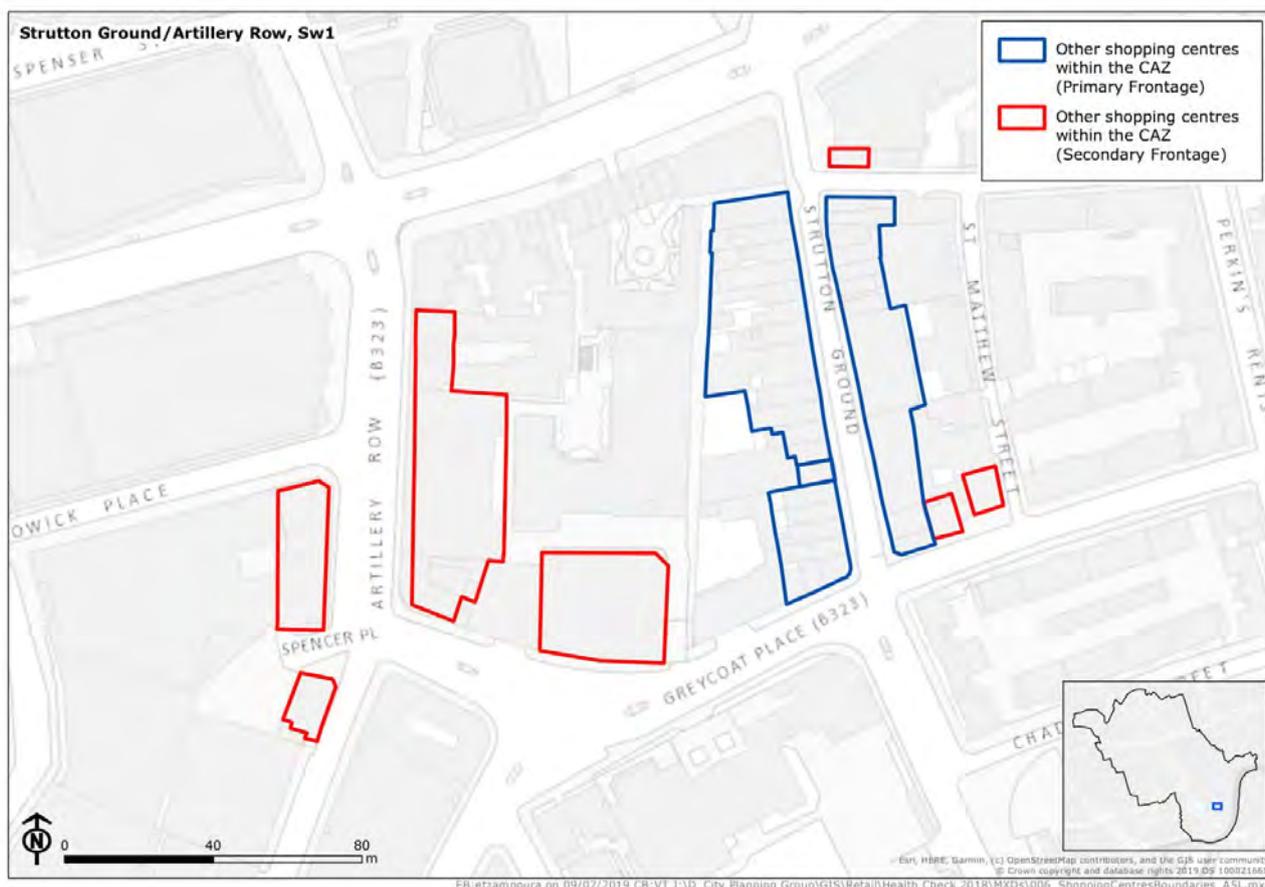
- The area is considered to be 'healthy'. Pimlico is a small shop-led centre that offers a mixed balance of both convenience and comparison type retail. It also accommodates a wide range of other town centre uses that serve the local community.
- The centre accommodates a small number of vacant units, all located within the secondary frontage.
- The area would benefit from improved cleanliness and public realm, especially around Pimlico Underground station.
- Due to its scale and function, it is recommended to re-classify the centre as a Local Centre. Further details on the reclassification recommendation can be found in the main report.

### **34.6. Recommended boundary changes**

No boundary changes are recommended.

## 35.0.Strutton Ground/Artillery Row

Map 35.0: Other Shopping Centre within the CAZ boundary, Strutton Ground/Artillery Row (2017)



### 35.1. Introduction

Strutton Ground/Artillery Row centre is a designated Other Shopping Centre within the CAZ and is within the CAZ. It currently has a primary and a secondary frontage.

The area is adjacent to Victoria Street which is a designated CAZ Frontage and where are located a number of Underground stations. A number of buses also run along Victoria Street. The centre is made up of two streets, Strutton Ground (primary frontage) and Artillery Row (secondary frontage). Strutton Ground is closed most of the time to traffic as it



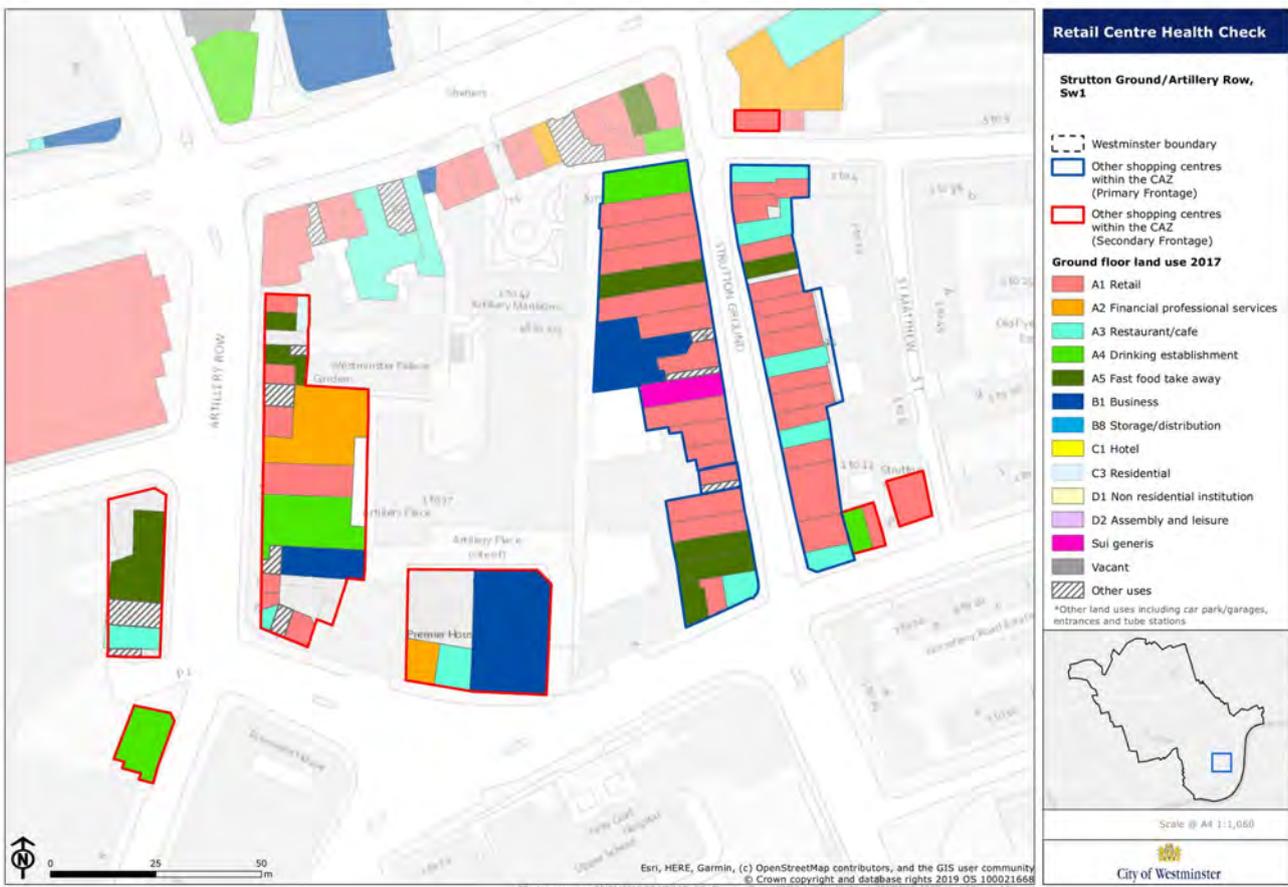
accommodates the council-run Strutton Ground street market. Strutton Ground is shop-led and Artillery Row hosts a wide range of uses and is traffic dominated.

## 35.2. 2017 Land use analysis

### 35.2.1. Ground floor land use map (2017)

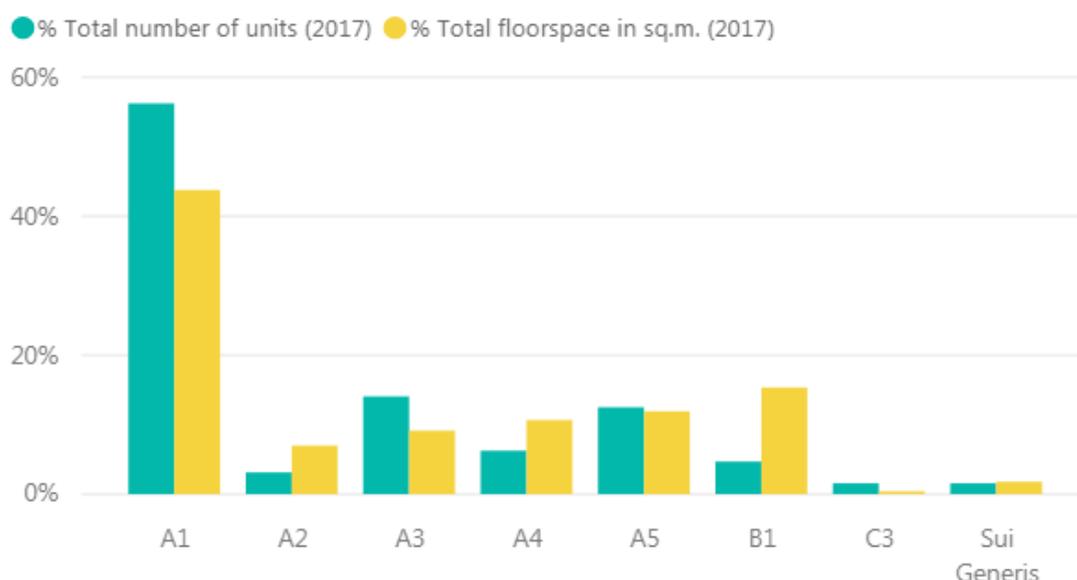
In 2017, 64 total units were identified at ground floor level. The surveyed area covered 6,058 sq m

**Map 35.1: Ground floor land use map, Strutton Ground/Artillery Row (2017)**



### 35.22. Range of units and floorspace analysis (2017)

**Figure 35.2: Ground floor total number of units and floorspace by land use, Strutton Ground/Artillery Row (2017)**



The centre is shop-led with 36 A1 units recorded in 2017 that account for 56% of all units within the centre and for 44% of the overall floorspace at ground floor level. The shops include a significant number of sandwich bars among other uses.

The second and third land uses are A3 and A5. Together they make up 17 units and 27% of the total number of units.

Other uses in the centre include a limited amount of A2, A4, B1, C3 and Sui Generis uses. In 2017, no vacant units were recorded within centre. However, the 2018 site survey found that two units were closed and construction/decoration works were ongoing.

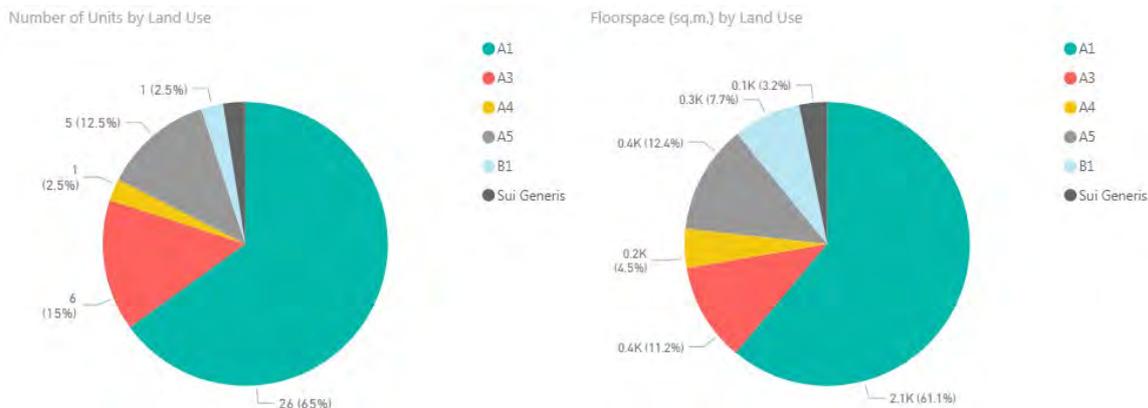
**Table 35.3: Ground floor total number of units and floorspace by land use, Strutton Ground/Artillery Row (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	36	56.25%	2652.31	43.78%
A2	2	3.13%	423.01	6.98%
A3	9	14.06%	553.29	9.13%
A4	4	6.25%	646.16	10.67%
A5	8	12.50%	721.67	11.91%
B1	3	4.69%	929.58	15.34%
C3	1	1.56%	24.17	0.40%
Sui Generis	1	1.56%	108.18	1.79%
<b>Total</b>	<b>64</b>	<b>100%</b>	<b>6058.37</b>	<b>100%</b>

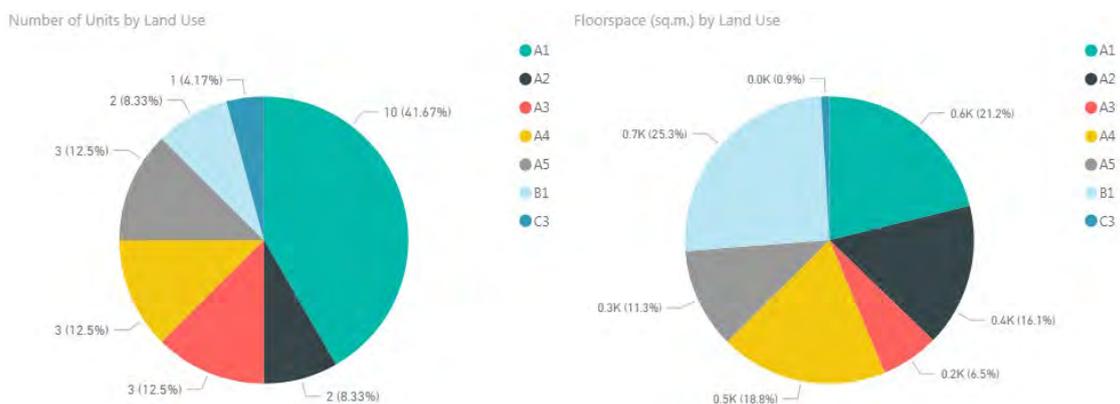
### 35.23. Frontages analysis (2017)

The primary frontage is A1-led with 65% of the units. The primary frontage hosts no vacant units. The secondary frontage is more varied in terms of land use with A1 accounting for 42% of all units. The secondary frontage hosts no vacant units.

**Figure 35.4: Primary Frontage - Number of units by land use and floorspace by land use (2017)**



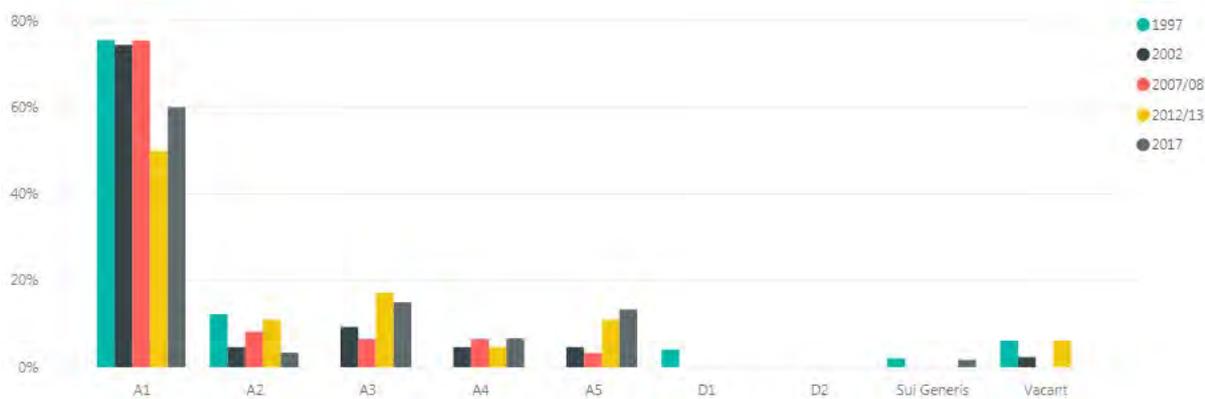
**Figure 35.5: Secondary Frontage - Number of units by land use and floorspace by land use (2017)**



### 35.3. Comparative land use analysis

#### 35.31. Comparative range of units and floorspace analysis

**Figure 35.4: Proportion of units by land use, Strutton Ground/Artillery Row (2017)**



The proportion of A1 units has increased between 2012/2013 and 2017 as they represent 60% of all units in 2017 indicating a trend of recovery from a drop of 46 to 32 units between the 2007/08 and 2012/13 survey periods.

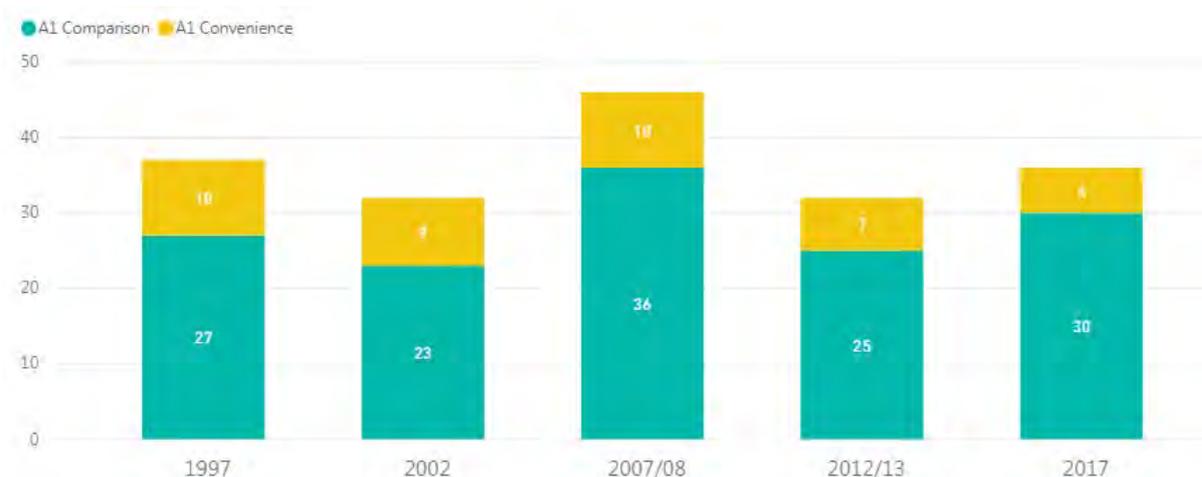
A2 units have experienced a decrease and have reached its lowest point across the years surveyed: in 2017, only two A2 units were recorded within the centre.

A3 uses have marginally decreased between 2012/2013 and 2017. However, A4 and A5 uses have seen marginal increases in the proportion of total units between 2012/13 and 2017 and are at their highest.

The proportion of vacant units in the centre has decreased from 6% in 2012/13 to 0% in 2017.

### 35.32. Comparative comparison/convenience split analysis

**Figure 35.5: Number of comparison and convenience A1 units by year, Strutton Ground/Artillery Row (2017)**



The centre has had a broadly consistent comparison to convenience split across the years surveyed. Strutton Ground/Artillery Row has been A1 comparison-led since 1997. However, a marginal decrease in the number of A1 convenience units has been recorded across the years.

## 35.4. 2018 Site Survey

### 35.41. Accessibility and pedestrian flows

Although there are no Underground stations within the centre, the area is within a five-minute walk to St James’s Park station (Circle, District lines) and ten-minute walk to Victoria (Circle, District, Victoria lines) and Westminster (Circle, District, Jubilee lines) stations.

A number of buses run along Artillery Row, along Victoria Street to the north of the centre and along Horseferry Road to the south of the centre.

Pedestrian flows were judged to be high around lunch time as workers are attracted by the market and the shop’s food offer. However, outside of work hours pedestrian flows are lower.

## 35.42 Range of units and floorspace qualitative analysis

### 35.421 *Area description, land uses and retail provision*

The Strutton Ground/Artillery Road centre adds to the Victoria centre offer as it provides a wide range of goods and services to both its local residents and local workers. In terms of land uses, two different areas can be identified.

The Strutton Ground area is shop-led and hosts a wide range of convenience and comparison type shops. The area attracts workers that visit the centre especially during lunch time as there is a good offer of food shops and market stalls. The area accommodates a significant number of sandwich shops, bakeries and delicatessen food shops. A number of these belong to chains (e.g. Leonidas, Gregg's) but some of them are independent businesses. The centre also offers a range of comparison shops including hairdressers, household and technology shops.

A number of cafés and restaurants complement the retail offer: some of the cafés belong to multiples (e.g. Pret a Manger, Coco di Mama) but not all of them. The area also hosts a significant number of hot-food takeaway premises and a public house, the Grafton Arms.

The area is home to the council-run Strutton Ground market that takes place every day from Monday to Friday. A number of stalls are installed and offer a variety of products and hot food.



The Artillery Road area is more mixed in terms of land uses as the area accommodates office buildings above ground floor level and a mixed balance of uses at ground floor level. The street is perpendicular to Victoria Street and has moderately dense traffic.

There are a small number of comparison type shops (e.g. hairdressers, household) and a small number of cafés. Restaurants and drinking establishments, such as the Slug and Lettuce bar, are also located on Artillery Row.

A small number of betting offices and a charity shops can be found throughout the centre.



#### 35.422 *Vacant units*

The 2017 land use survey identified no vacant units within the centre. At the time of visit, it was observed that two units were empty: one of the units was on Strutton Ground (primary frontage) and the other one on Great Peter Street (secondary frontage). However, it looked like works were ongoing.

### **35.43 State of the primary shopping area environmental quality assessment**

#### 35.431 *Public realm*

The public realm was judged to be of average quality.

On the one hand, Strutton Ground Street has attractive cobbled paving and is closed to traffic during the working day. However, the presence of the market narrows pedestrian space, making accessibility a challenge as the street can have a chaotic feel and be difficult to navigate through.

On the other hand, Artillery Row fronts on to a large road and pavements have an average normal width. Parking of vans alongside the pavement create a closed-in feel. Crossing the road can also be a challenge owing to the width of the road and the fact that there is only one dedicated pedestrian crossing.

The area lacks landscaping and amenity space.

#### 35.432 *Cleanliness, safety and security*

Cleanliness was judged to be average throughout the centre. At the time of visit, no street litter was observed and only a small number of commercial refuse bags (and refuse from the market stalls) awaiting collection were seen.

The level of safety and security were judged to be average.

#### 35.433 *Identity and users*

The area has a strong local identity thanks to the street market which mainly serves workers but also local residents.

Rough sleepers and beggars were observed in the area.

## **35.5. Performance summary and recommendations**

- The area is considered to be 'healthy'. Strutton Ground/Artillery Row is a small centre that caters for workers and residents attracted by its food offer and the Strutton Ground market. A range of other town centre uses complement the offer.
- In 2017, no vacancies were recorded within the centre making Strutton Ground/Artillery Row one of the centres in Westminster with a lowest number of vacancies.
- The public realm was found to be of average quality and would benefit from improved landscaping and amenity space.

- Due to its scale and function, it is recommended to reclassify the centre as a Local Centre. Further details on the reclassification recommendation can be found in the main report.

### **35.6. Recommended boundary changes**

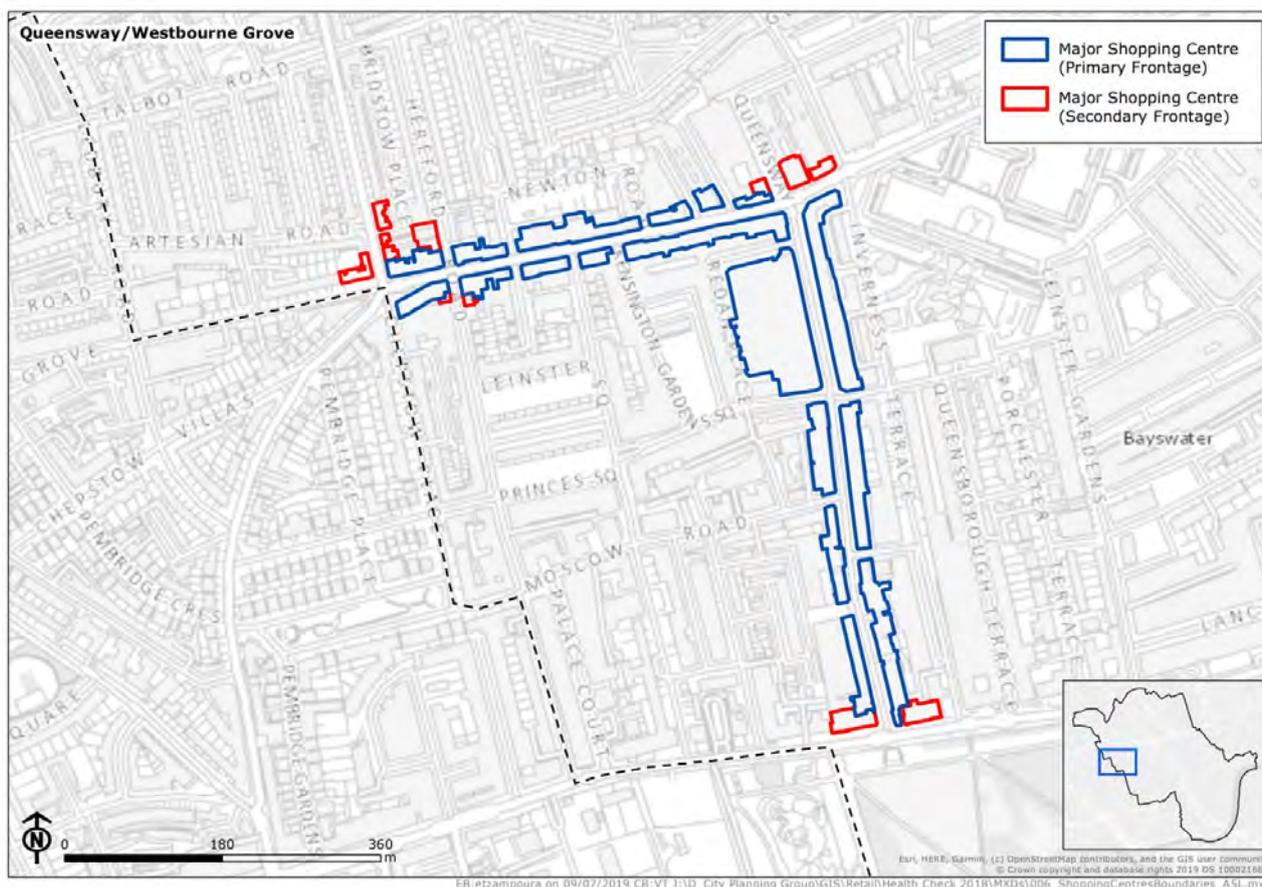
A number of units currently fall both within Victoria Street (CAZ Frontage) and Strutton Ground/Artillery Row (Other Shopping Centre Within the CAZ). It is considered that the type and function of the units on Artillery Row are more consistent to the offer on Victoria Street. Therefore it is recommended to include the units on Artillery Row to Victoria Street (CAZ Frontage) and the units on Strutton Ground to Strutton Ground/Artillery Row (Other Shopping Centre Within the CAZ). Due to these boundary changes, it is recommended that the centre's name is changed to 'Strutton Ground'.

Further details on all boundary changes can be found in 'Appendix 3: Recommended changes to designation boundaries'.

## SECTION E: Major Shopping Centres

### 36.0. Queensway/Westbourne Grove

Map 36.0: Major Shopping Centre boundary, Queensway/Westbourne Grove (2017)



#### 36.1. Introduction

Queensway/Westbourne Grove is a designated Major Shopping Centre. It currently has a primary and a secondary frontage.

It is adjacent to the Royal Borough of Kensington and Chelsea. The centre is located in the western portion of Westminster and is close to Hyde Park and a number of tourist attractions. The area accommodates two Underground stations: Bayswater and Queensway. The area is close to other designated town centres including Porchester Road, Ledbury Road and Moscow Road.

The centre is made up of two primary shopping streets (Queensway and Westbourne Grove) and forms an 'L' shape. The area accommodates Whiteleys, a covered shopping mall and has a mix of retailers and food stores. In addition to the retail facilities, there are a large number of other non-retail services, including restaurants, cafés and entertainment facilities.

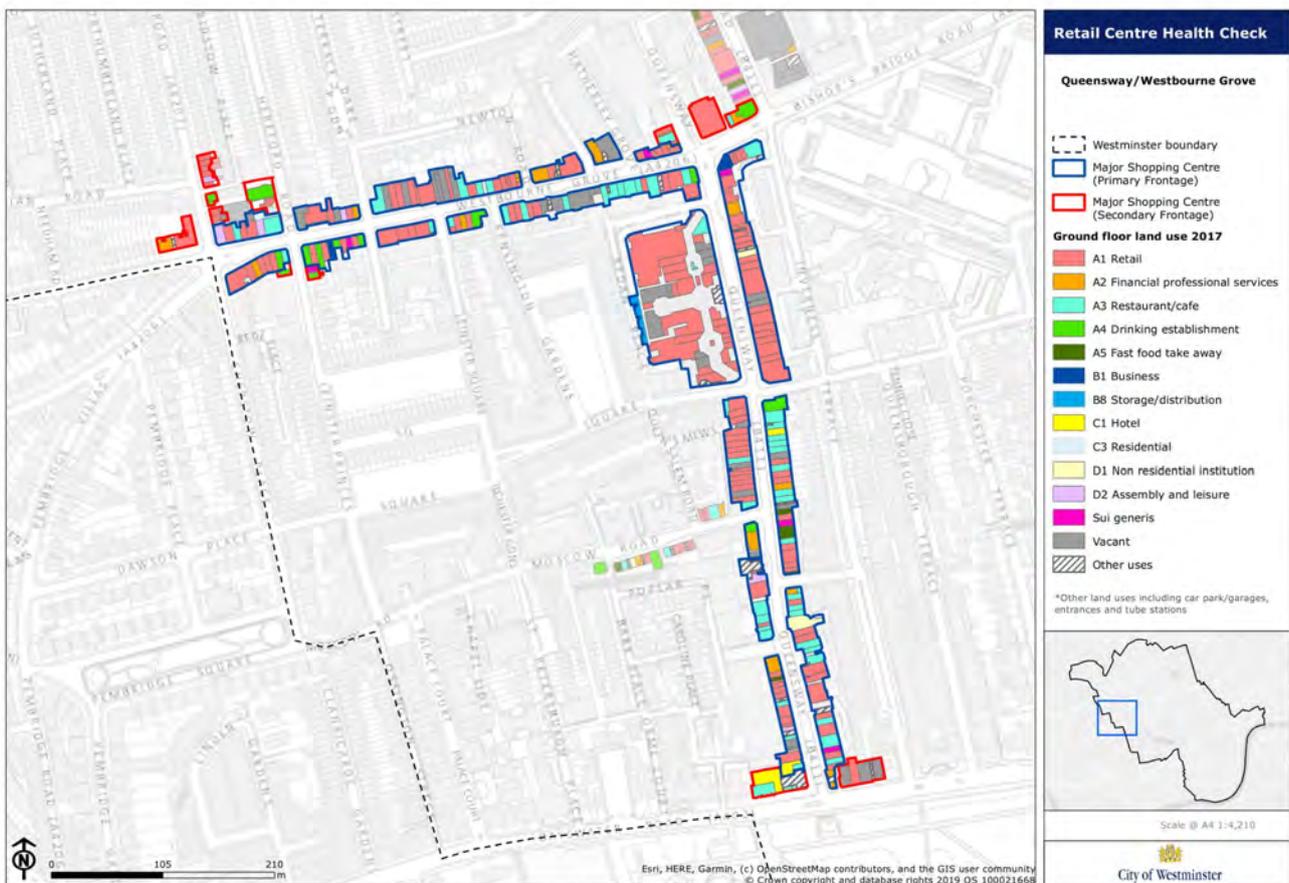


## 36.2. 2017 Land use analysis

### 36.21. Ground floor land use map (2017)

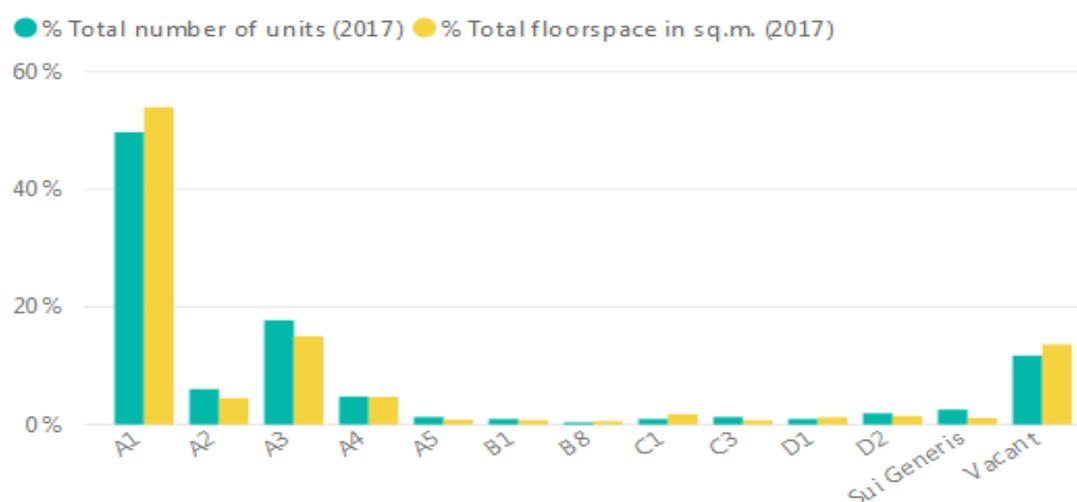
In 2017, 315 total units were identified at ground floor level. The surveyed area covered 41,640 sq m

**Map 36.1: Ground floor land use map, Queensway/Westbourne Grove (2017)**



### 36.22. Range of units and floorspace analysis (2017)

**Figure 36.2: Ground floor total number of units and floorspace by land use, Queensway/Westbourne Grove (2017)**



The centre is shop-led with 157 A1 units recorded within the centre. These account for 50% of all units and for 54% of the overall floorspace at ground floor level.

The second most prevalent land use is A3 with 56 units (18% of the units) and third land use is A2 (6% of the units).

Other uses in the centre include a limited amount of A4, A5, B1, B8, C1, C3, D1, D2 and Sui Generis.

The 2017 land use survey recorded 37 vacant units within the centre, accounting for 12% of all units and 14% of the overall floorspace. The vacant units are located in two main areas: on Westbourne Grove Street and in the Whiteleys Centre. A small number of vacant units are also located on Queensway Street close to Whiteleys and in the Queensway/Westbourne Grove secondary frontage close to Hyde Park. However, the 2018 site visit identified that the units in the southern part of the centre were under construction. There is still an evident concentration of vacant units in the Whiteleys shopping centre and its surrounding area.

**Table 36.3: Ground floor total number of units and floorspace by land use, Queensway/Westbourne Grove (2017)**

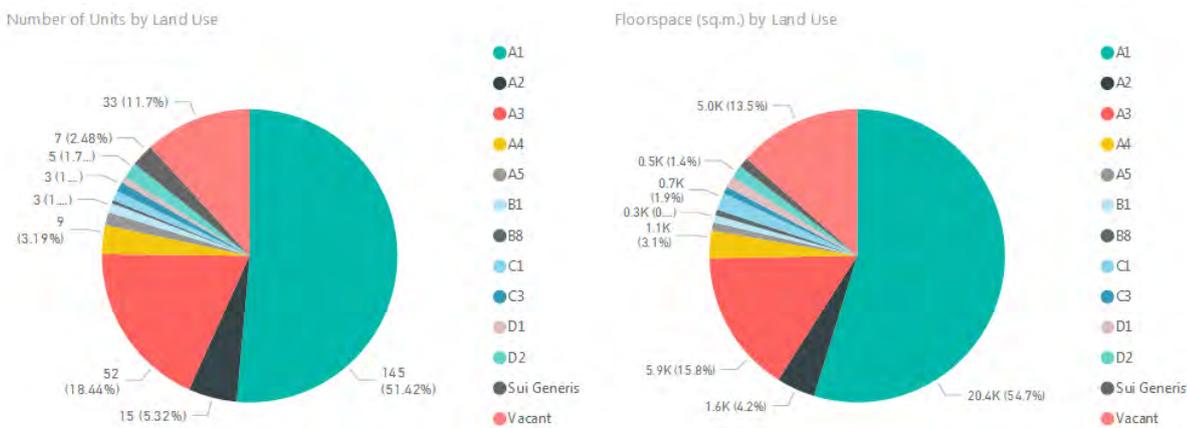
Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	157	49.84%	22463.34	53.95%
A2	19	6.03%	1854.29	4.45%
A3	56	17.78%	6249.10	15.01%
A4	15	4.76%	1952.73	4.69%
A5	4	1.27%	334.65	0.80%
B1	3	0.95%	298.16	0.72%
B8	1	0.32%	239.09	0.57%
C1	3	0.95%	719.25	1.73%
C3	3	0.95%	282.63	0.68%
D1	3	0.95%	517.27	1.24%
D2	6	1.90%	601.61	1.44%

Sui Generis	8	2.54%	462.91	1.11%
Vacant	37	11.75%	5665.76	13.61%
<b>Total</b>	<b>315</b>	<b>100%</b>	<b>41640.79</b>	<b>100%</b>

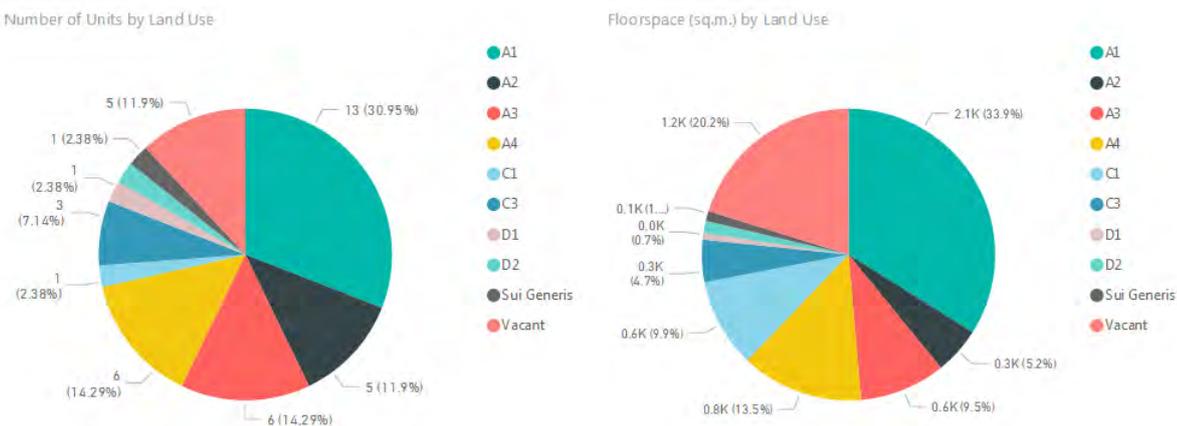
**36.23. Frontages analysis (2017)**

The primary frontage is A1-led with 51% of the units. The primary frontage hosts 33 vacant units accounting for 12% of all units. The secondary frontage is more varied in terms of land use with A1 accounting for only 31% of all units. The secondary frontage hosts five vacant units accounting for 12% of all units.

**Figure 36.4: Primary Frontage - Number of units by land use and floorspace by land use (2017)**



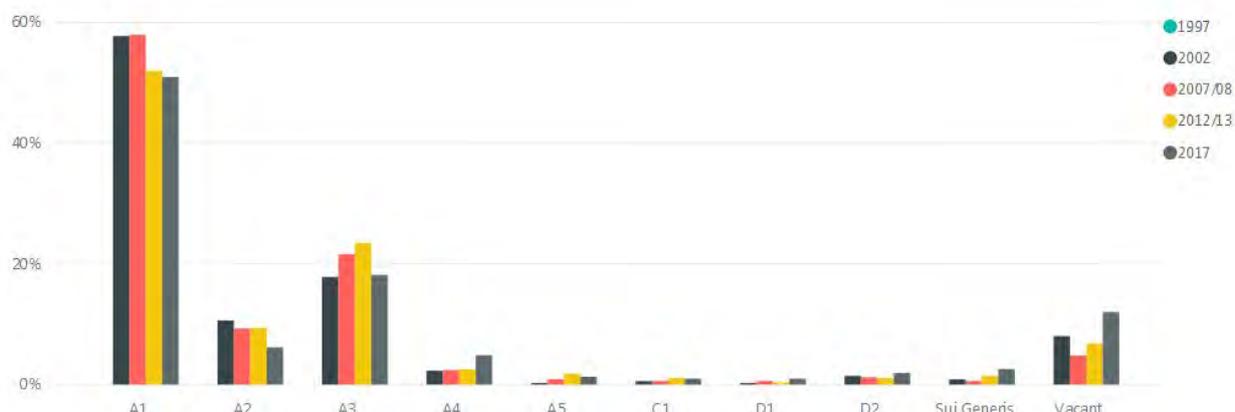
**Figure 36.5: Secondary Frontage - Number of units by land use and floorspace by land use (2017)**



### 36.3. Comparative land use analysis

#### 36.31. Comparative range of units and floorspace analysis

**Figure 36.4: Proportion of units by land use, Queensway (2017)<sup>37</sup>**



The proportion of A1 units has decreased between 2002 and 2017 but has remained mainly stable between 2012/2013 and 2017: in 2017 A1 accounts for 51% of all the centre’s units. Although the proportional weight of A1 uses has decreased between 2002 and 2012/2013, the actual number of units has risen from 144 in 2012/2013 to 157 in 2017.

The proportion of A3 units increased between 2002 and 2012/2013 but has recently dropped down: in 2017 it represents 18% of all units. However, the number of A3 units has been decreasing since 2007/2008.

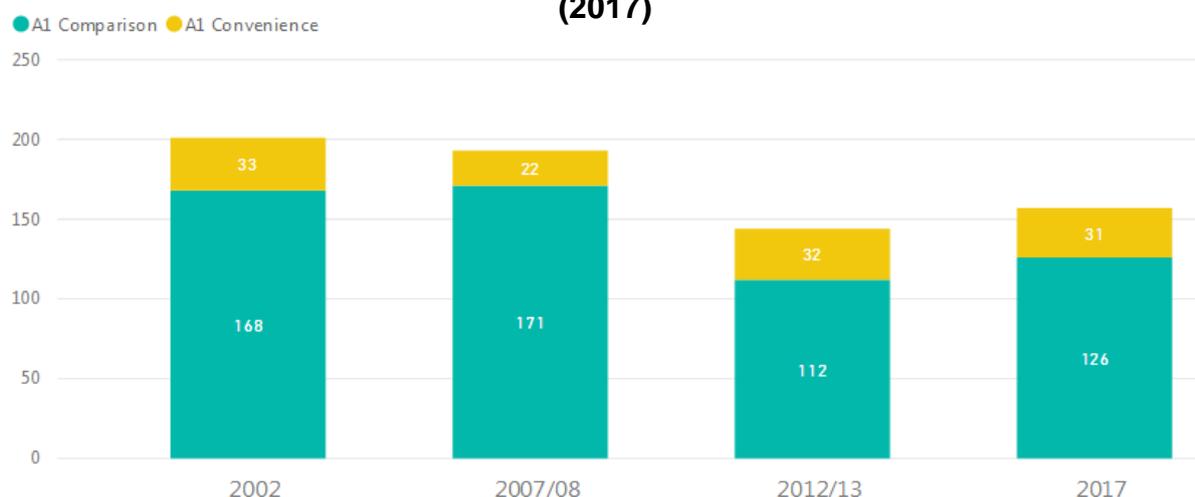
A2 uses have decreased across the years surveyed and account in 2017 for 6% of all units.

The proportion of other land uses has remained stable or slightly increased over the years but still remain marginal in relation to A1, A2 and A3 uses.

The centre’s vacancy level had never been so high as in 2017 with 12% of all units being vacant.

#### 36.32. Comparative comparison/convenience split analysis

**Figure 36.5: Number of comparison and convenience A1 units by year, Queensway (2017)**



<sup>37</sup> There is no data available for 1997 for this centre.

The centre has had a broadly consistent comparison to convenience split across the years surveyed. Queensway has been A1 comparison-led since 1997. The number of A1 convenience units recorded has remained broadly stable although the total number of A1 units has decreased across the years surveyed.

## 36.4. 2018 Site Survey

### 36.41. Accessibility and pedestrian flows

The centre is well served by public transport as two Underground stations are located within the boundary of the centre: Queensway (Central line) and Bayswater (Circle, District lines). A number of buses also run along Westbourne Grove. A small amount of through traffic was however evident on the site visit.

Pedestrian flows were judged to be average although higher close to the Underground stations' entrances. The area has safe crossings and is moderately accessible although clutter and heavy traffic can make it hazardous.

There is a reasonable amount of bike, motorbike and car parking spaces throughout the centre although some unauthorised use of roads for additional cars and delivery vans parking was observed.



### 36.42 Range of units and floorspace qualitative analysis

#### 36.421 *Area description, land uses and retail provision*

The Queensway/Westbourne Grove centre is a mixed centre. In terms of land uses, different areas can be identified.

Queensway Street (from the south edge to the Whiteleys Shopping Centre) is shop-led although also offers a mix of other town centre uses.

The type of shops show that the area attracts a high number of tourists as there a number of souvenirs shops and telephony shops. The area also accommodates several food stores: some belong to national multiples (e.g. Tesco Express, Sainsbury's) and some are small independent convenience and groceries shops.

A number of cafés and restaurants that offer different types of food (e.g. Indian, Mediterranean, Italian) and some small hot-food take-away restaurants (e.g. McDonald's, Burger King) can also be found in the area. Two public houses provided for an evening and night-time economy (The Bayswater Arms and Prince Alfred).

The area also accommodates a hotel and a small number of banks among other uses.

The buildings close to Hyde Park are under construction and, accordingly, the area was found to be very quiet.

Although the Queensway Street (from the southern edge to the Whiteleys Shopping Centre) is slightly cluttered, it is very vibrant if compared to the Whiteleys shopping centre area where pedestrian flows were judged to be lower.



The Whiteleys Shopping Centre is not performing well as there are several vacant units at ground floor level (more than what recorded by the 2017 land survey). Moreover, the first floor of the shopping centre is almost empty.

Almost all the units located close to the Whiteleys Shopping Centre are shops. The area hosts a small number of convenience type and food shops (e.g. Tesco Express, Patisserie Valerie) but the area is comparison-led as it also accommodates a number of pharmacies, opticians, travel agents and technology shops. However, a number of vacant units are also concentrated in the area. There are also accommodates a library.



Westbourne Grove is not as shop-led as Queensway and presents a mix of land uses. The area has a good offer of food stores: there are a small number of food grocers and supermarkets as well as other specialist food shops (e.g. cake shop, healthy food shops). However, the area is comparison-led as it hosts a number of hairdressers and opticians among other.

The area also concentrates a series of furniture, interior design and household shops towards its eastern edge (e.g. Bo Concept, Tiger). It is also home to a Heal's department store.

Westbourne Grove accommodates a significant number of cafés and restaurants: the area hosts independent cafés and restaurants but also premises belonging to national or international multiples (e.g. Nando's, Franco Manca). A significant number of premises offer

food deliveries. The area also has a bar and public houses (e.g. No65 and King, The Redan) that provide for an evening and night-time economy.

Although there are a number of vacant units, the overall area seems to be attracting new development.

Throughout the centre can be found a number of premises where it is possible to smoke shisha outside.

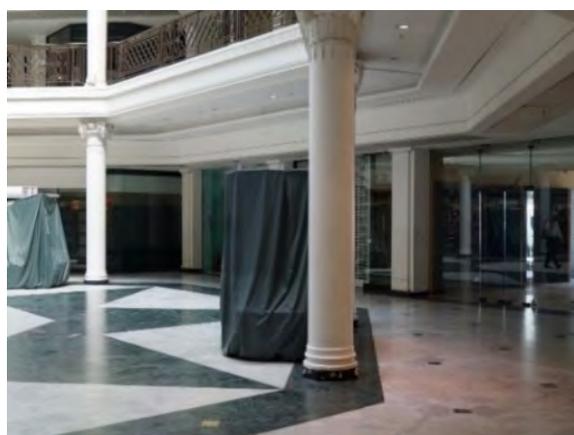


The Queensway/Westbourne Grove designated shopping centre is contiguous to the Porchester Road designated Local Shopping Centre. The character and function of the local centre is changing as a new large Waitrose and a furniture shop have opened in the area. Accordingly, the relationship between both centres is strengthened.

#### 36.422 Vacant units

The 2017 land use survey identified 37 vacant units within the centre. The 2018 site survey revealed that a number of these units are being developed, for instance the units located close to Hyde Park. A number of vacant units are concentrated in the Whiteleys centre and its surroundings. The Whiteleys centre has been granted planning permission to be turned into a new mixed-used development that, if constructed, will accommodate new residential and retail floorspace among other uses<sup>38</sup>. In the Westbourne Grove area, some units of the units identified as vacant by the 2017 land use survey have been occupied and accommodate, for instance, a new café and a new ice-cream shop.

#### 36.43 State of the primary shopping area environmental quality assessment



<sup>38</sup> See planning application 15/10072/FULL for Whiteleys Centre Queensway London W2 4YH.

### 36.431 *Public realm*

The public realm was judged to be of average quality.

Pavements are narrow throughout the centre which is also slightly cluttered: phone boxes, bus stops, bins, lamp posts, A boards and tables and chairs and stalls from restaurants and shops occupy part of the pavement and difficult pedestrian movement. The sense of clutter is higher in the Queensway area than in the Westbourne Grove area.

There was little evidence of landscaping and amenity space, reflecting the highly urbanised environment. The area would also benefit from better maintained and active shop fronts and more activity in the Whiteleys shopping centre area.



### 36.432 *Cleanliness, safety and security*

Cleanliness was judged to be average throughout the centre. At the time of visit, a small number of commercial refuse bags awaiting collection were observed.

Safety and security were judged to be average throughout the centre. Dense traffic contributes to a taste of pollution and crossings can be hazardous.

### 36.433 *Identity and users*

The area does not have a strong identity and there are no flagship stores apart from the Whiteleys centre that is however under-utilised.

The area serves local residents and workers but also visitors attracted by neighbouring tourist areas, the Underground stations and the food and drink offer of the centre.

## 36.5. Performance summary and recommendations

- The area is considered to have a 'neutral' performance. Queensway presents a mix of land uses but has a strong retail offer which is both convenience and comparison type. It also hosts a significant number of cafés, restaurants, hot food takeaways and drinking establishments that provide for an evening and night-time economy. The centre attracts residents, workers and visitors.
- The vacancy level has increased to 12% in 2017. Most of the vacant units are located in the Whiteleys shopping centre and its surrounding area.
- The public realm was found to be of average quality and would benefit from decluttering, improved landscaping and amenity space.

- A number of betting shops and shisha-smoking premises can be found throughout the centre.

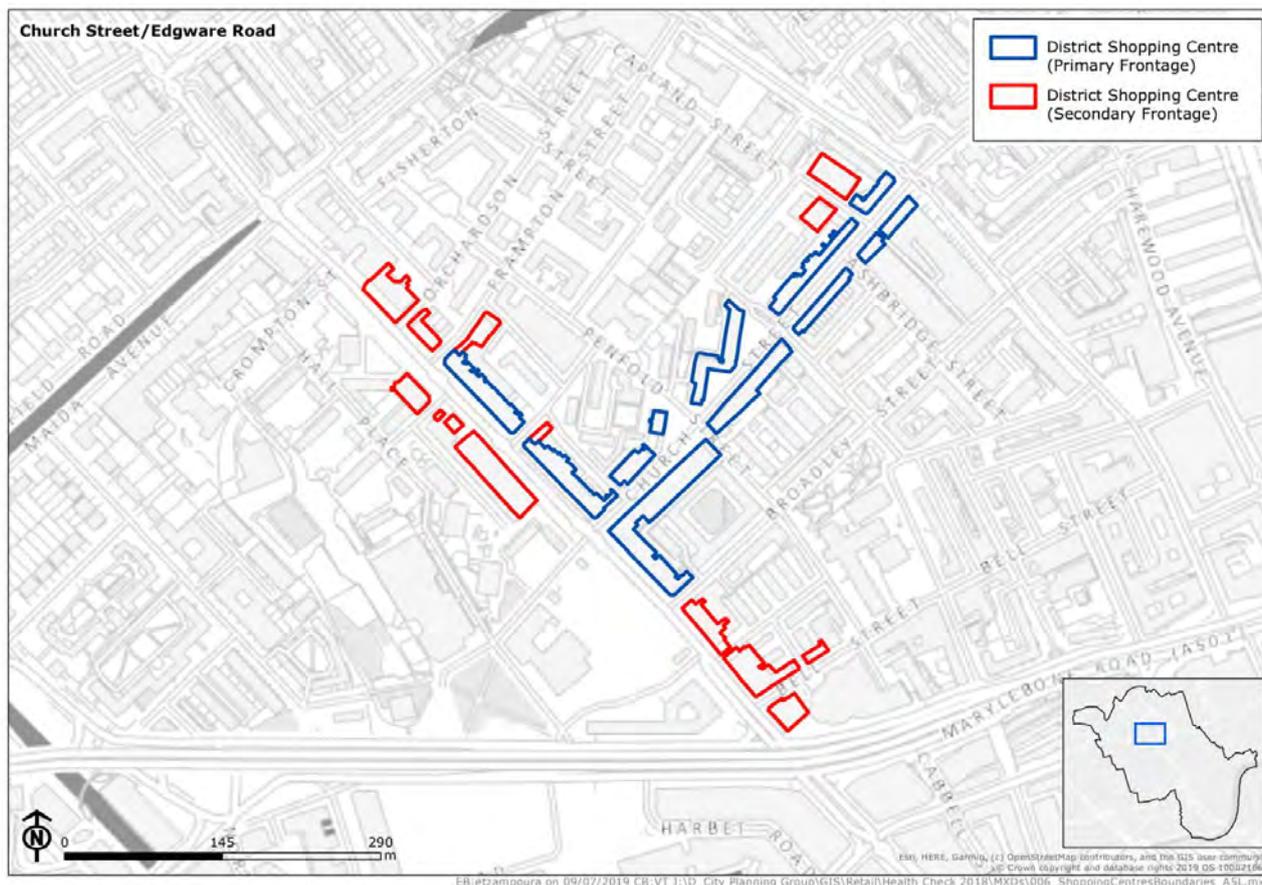
### **36.6. Recommended boundary changes**

No boundary changes are recommended.

## SECTION F: District Shopping Centres

### 37.0. Church Street/Edgware Road

Map 37.0: District Shopping Centre boundary, Church Street/Edgware Road (2017)



#### 37.1. Introduction

Church Street/Edgware Road is a designated District Shopping Centre and is within the CAZ. It currently has a primary and a secondary frontage.

The centre is located in the north part of Westminster and in close proximity to Edgware Road Underground station and Marylebone Underground and rail station. The area is close to other designated town centres including Edgware Road South, Marylebone Road and Praed Street.

The centre is made up of two main streets (Edgware Road and Church Street) and forms a 'T' shape. The centre offers a mix of town centre uses and accommodates the council-run Church Street market. The council recently published the Church Street Masterplan which promotes and guides the development of a number of place shaping, housing and regeneration programs in the area.

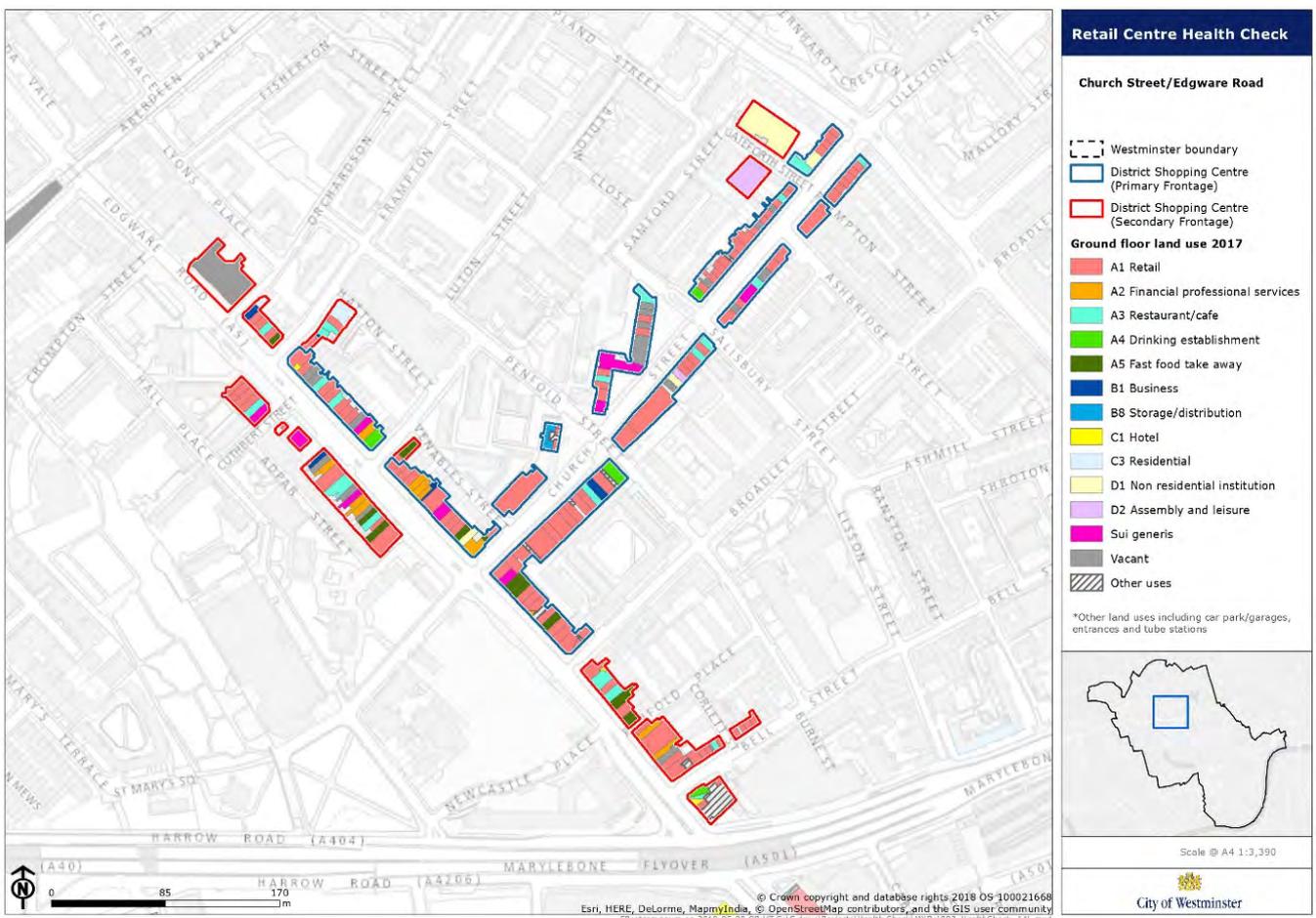


## 37.2. 2017 Land use analysis

### 37.21. Ground floor land use map (2017)

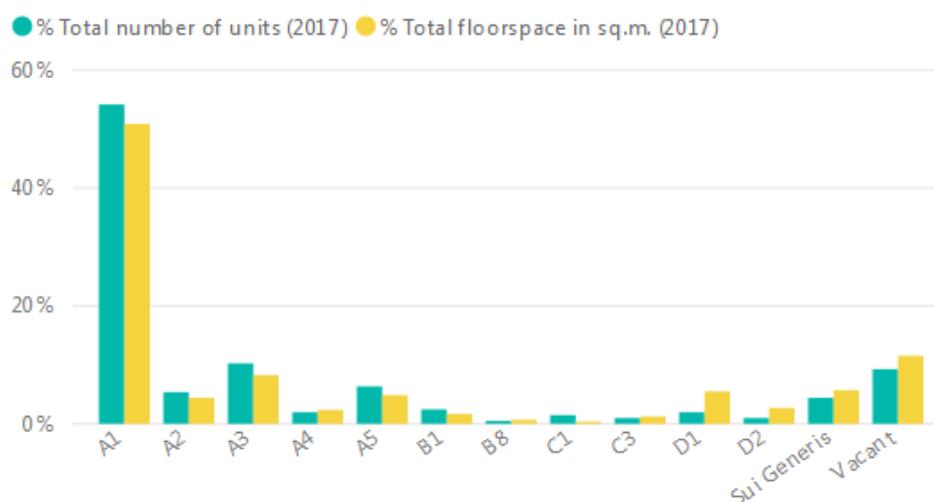
In 2017, 205 total units were identified at ground floor level. The surveyed area covered 21,542 sq m

**Map 37.1: Ground floor land use map, Church Street/Edgware Road (2017)**



### 37.22. Range of units and floorspace analysis (2017)

**Figure 37.2: Ground floor total number of units and floorspace by land use, Church Street/Edgware Road (2017)**



Church Street/Edgware Road is a shop-led centre with 111 A1 units recorded in 2017. These account for 54% of all units and for 51% of the overall floorspace at ground floor level. The second most prevalent ground floor land use is A3 with 21 units, taking up 10% of the total number of units and 8% of the total floorspace.

Other uses in the centre include a limited amount of A2, A4, A5, B1, B8, C1, C3, D1, D2 and Sui Generis.

There are 19 vacant units in the centre, accounting for 9% of all units and 12% of the overall floorspace. The vacant units are located on Church Street and in the edges of Edgware Road. However, the 2018 site survey revealed that a number of these units were under alteration.

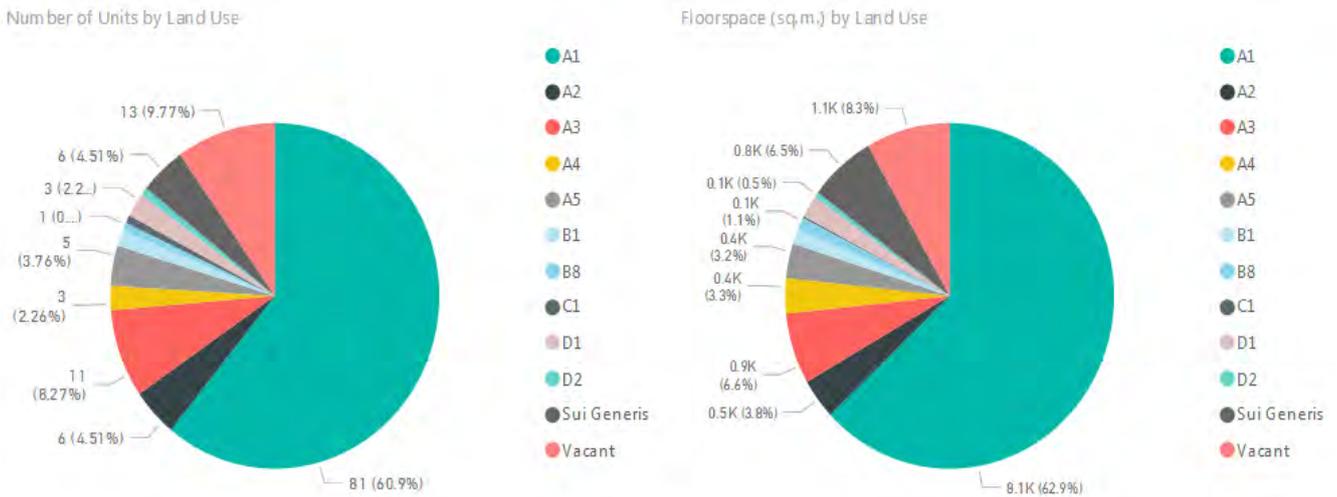
**Table 37.3: Ground floor total number of units and floorspace by land use, Church Street/Edgware Road (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	111	54.15%	10960.45	50.88%
A2	11	5.37%	945.99	4.39%
A3	21	10.24%	1773.00	8.23%
A4	4	1.95%	508.40	2.36%
A5	13	6.34%	1044.32	4.85%
B1	5	2.44%	357.74	1.66%
B8	1	0.49%	144.88	0.67%
C1	3	1.46%	76.75	0.36%
C3	2	0.98%	263.78	1.22%
D1	4	1.95%	1179.67	5.48%
D2	2	0.98%	577.20	2.68%
Sui Generis	9	4.39%	1226.33	5.69%
Vacant	19	9.27%	2484.42	11.53%
<b>Total</b>	<b>205</b>	<b>100%</b>	<b>21542.93</b>	<b>100%</b>

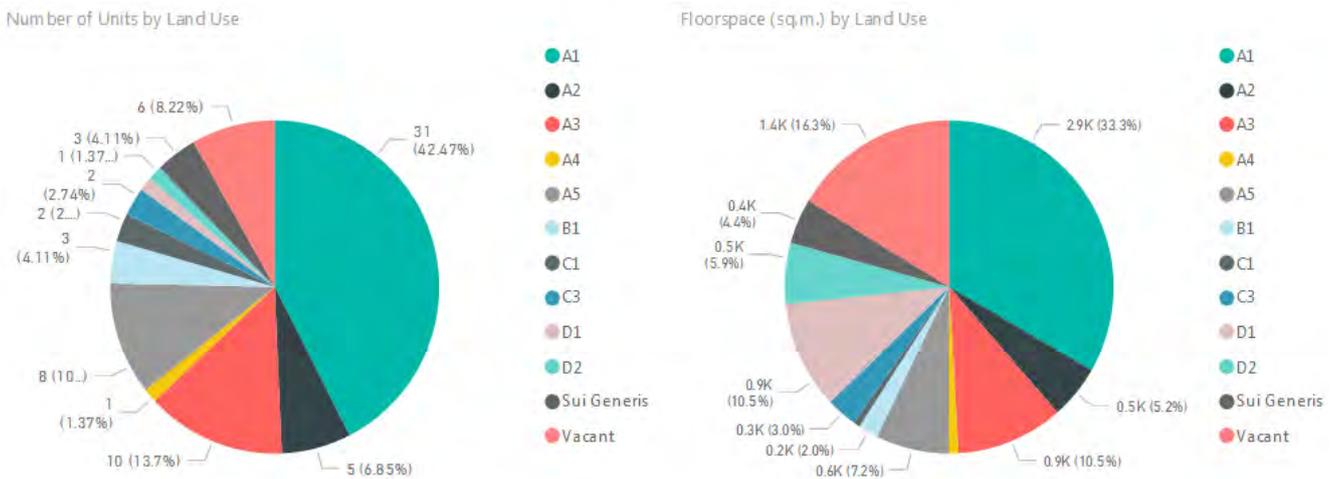
### 37.23. Frontages analysis (2017)

The primary frontage is A1-led with 61% of the units. The primary frontage hosts 13 vacant units accounting for 10% of all units. The secondary frontage is more varied in terms of land use with A1 accounting for 42% of all units. The secondary frontage hosts six vacant units accounting for 8% of all units.

**Figure 37.4: Primary Frontage - Number of units by land use and floorspace by land use (2017)**



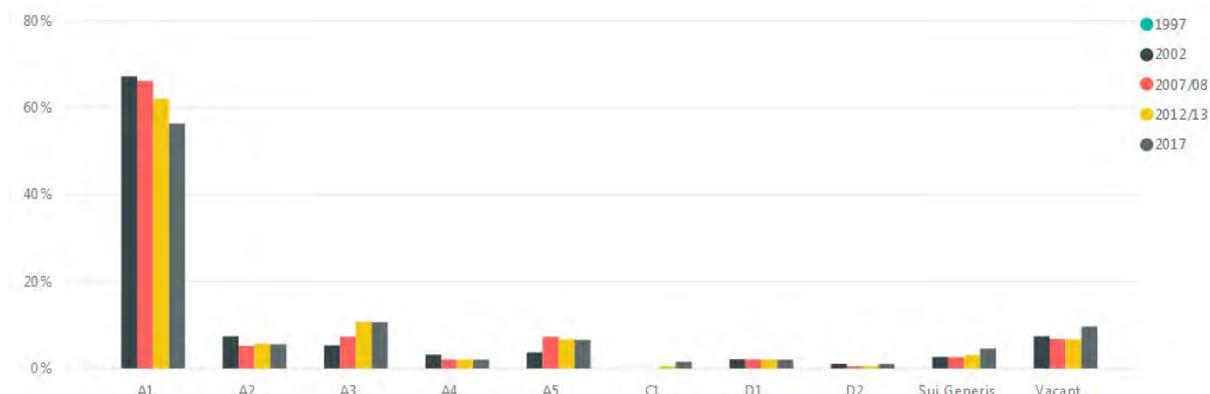
**Figure 37.5: Secondary Frontage - Number of units by land use and floorspace by land use (2017)**



### 37.3. Comparative land use analysis

#### 37.31. Comparative range of units and floorspace analysis

**Figure 37.4: Proportion of units by land use, Church Street/Edgware Road (2017)<sup>39</sup>**



The proportion of A1 units has decreased between 2002 and 2017. In 2017, A1 uses accounted for 56% of all the centre’s units. The actual number of retail units has also dropped down between 2002 and 2017: the number of units was of 127 in 2002 and 111 in 2017.

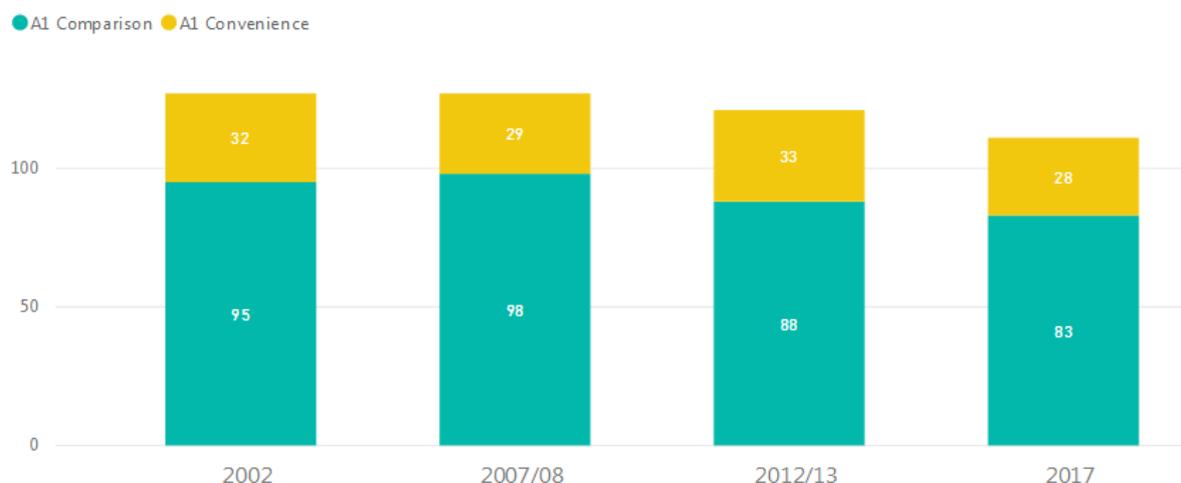
The proportion of A3 units increased between 2002 and 2012/2013 but has remained stable since then: in 2017, A3 uses represented 11% of all units. The proportion of A2 uses and A4 uses has slightly decreased since 2002.

Other land uses have always represented small proportions and include a limited amount of A2, A4, A5, C1, D1, D2 and Sui Generis units.

The vacancy level in 2017 was the highest level ever recorded for this centre. In 2017, 10% of the units were vacant with 19 actual vacant units.

#### 37.32. Comparative comparison/convenience split analysis

**Figure 37.5: Number of comparison and convenience A1 units by year, Church Street/Edgware Road (2017)**



<sup>39</sup> There is no data available for 1997 for this centre.

The centre has had a broadly consistent comparison to convenience split across the years surveyed. Church Street/Edgware Road has been A1 comparison-led since 1997. Although the total number of units has decreased across the years surveyed, the number of A1 convenience units recorded has remained broadly stable.

## 37.4. 2018 Site Survey

### 37.41. Accessibility and pedestrian flows

Although there are no Underground stations within the boundary of the centre, the centre is within a five-minute walk to Edgware Road (Circle, District, Hammersmith & City lines) and Marylebone (Bakerloo lines) Underground and train stations.

A number of buses directly serve the centre and run along Edgware Road. Edgware Road is a busy road and traffic was dense at the time of visit.

Pedestrian flows were judged to be high, especially along the street market. The area has safe crossings and is accessible.

### 37.42 Range of units and floorspace qualitative analysis

#### 37.421 *Area description, land uses and retail provision*

Church Street/Edgware Road Street is a shop-led centre as it accommodates a large number of shops complemented by other town centre uses. In terms of land uses, three different areas can be identified.

Edgware Road is shop-led and accommodates a significant number of convenience and groceries shops, both chain type (e.g. Sainbury's) and independent. The area also hosts a large number of comparison type shops (e.g. hairdresser, clothes, electronics).

The area has a small number of cafés and restaurants. A significant number of units are hot-food takeaway premises.

A number of banks, bureaux de change, travel agents, betting offices and a petrol station can also be found along the street.

On Edgware Road, several shops have stalls and products outside that contribute to a sense of street clutter. Shop fronts are not very well-maintained.



Church Street (from Edgware Road to Salisbury Street) accommodates a daily council-run street market. Shoppers can buy fresh food, clothes and household products among others. The market area is closed to traffic and is heavily used by pedestrians.

At ground floor level, the units are occupied by a significant number of shops. There street has a large Tesco shop, a significant number of household and fabrics shops as well as other comparison type shops (e.g. pharmacist, clothes shop).

In terms of food and drink establishments, the area accommodates a small number of cafés and grills and a public house (the Lord High Admiral).

The area also hosts a betting shop and a charity shop.

The area is home to a council building that is currently being used as a community centre where local residents and other stakeholders can ask for information in relation to the Church Street Masterplan among others.

Although the area does not have very well-maintained shop fronts, the area is vibrant and heavily used. A small triangular square between Penfold Street and Salisbury Street provides for amenity space although the area is under-utilised and would benefit from improved landscaping.



Church Street (from Salisbury Street to Lisson Grove) is different in character compared to the rest of the centre and is home to a cluster of antiques shops. Some antique shops are located within the Alfie's Antiques Centre. A number of shops have very attractive and well-maintained shop fronts.

This part of the centre also hosts a number of cafés and a public house (The Trader's Inn) and some of them have tables and chairs outside.

The area is also home to a drop-in Newpin Family Centre, the Lisson Grove Health Centre and the Cockpit Theatre.

The area also hosts a betting shop.



The area is affected by the Church Street Masterplan, which gives some explanation as to the level of vacancy observed on Edgware Road and in the Church Street area.

### 37.422 Vacant units

The 2017 land use survey identified 19 vacant units within the centre. The 2018 site survey revealed that several vacant units on Edgware Road are still vacant. However, some of them have been demolished and works are ongoing: a whole new building located in the Edgware Road/Orchardson Street junction is under-construction<sup>40</sup>. The new development will accommodate new homes and new retail floorspace. Moreover, in the Church Street area several units were also found to be occupied although others remain vacant.

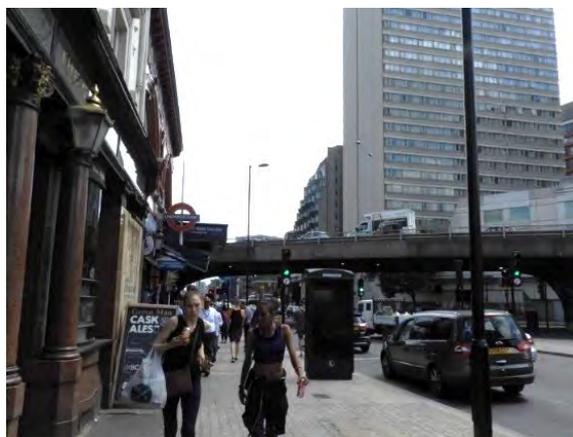
### 37.43 State of the primary shopping area environmental quality assessment

#### 37.431 Public realm

The public realm was judged to be of average quality.

The Edgware Road portion of the centre is very noisy owing to heavy traffic. Moreover, although pavements are relatively wide, they are cluttered with telephone boxes, lamp posts, signs and stalls, products, A boards and tables and chairs from the shops. A small number of food premises have tables and chairs outside.

The Church Street portion of the centre has dropped pavements for wheelchair access although it might be difficult to access the market from the pavement. As the market occupies part of the street, the direction of traffic can be confusing when looking to cross the road as trade vehicle serving the market stalls are parked all around. There is a small square with a few trees and some attractive paving, but the area seems to be under-utilised. Moreover, there are public toilets, but these have been closed for some time.



<sup>40</sup> See planning application 13/12709/FULL for 466-490 Edgware Road London W2 1EL.



### 37.432 *Cleanliness, safety and security*

Cleanliness was judged to be average throughout the centre. At the time of visit, a small number of commercial refuse bags awaiting collection were observed. Safety and security were judged to be average throughout the centre.

### 37.433 *Identity and users*

Although there are no flagship stores or buildings, the area has a unique character and identity owing to the thriving Church Street market and the antiques quarter. The area mainly serves local residents and workers and visitors to a smaller extent as it provides for a safe pedestrian environment.

## 37.5. Performance summary and recommendations

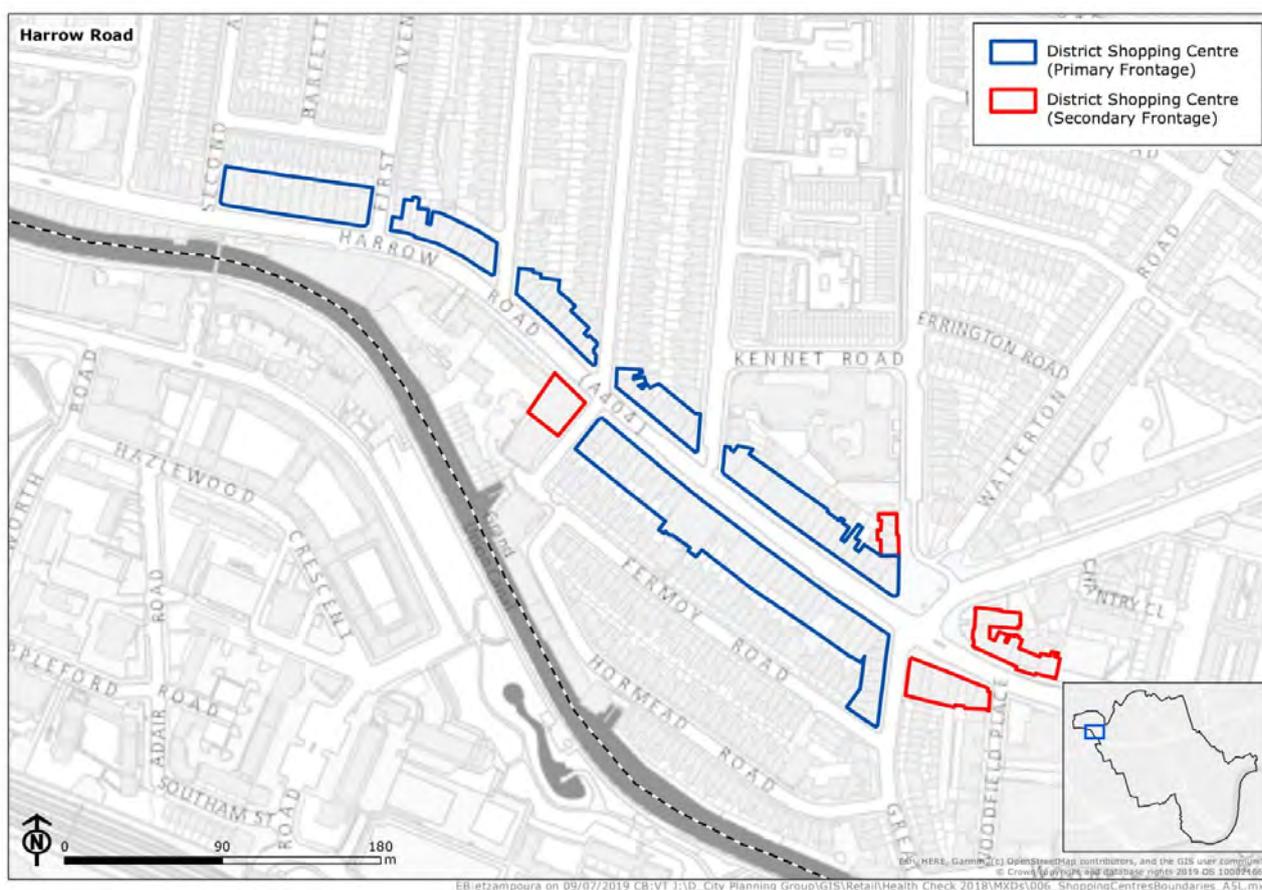
- The area is considered to have a 'neutral' performance. Church Street/Edgware Road presents a mix of land uses but has a strong retail offer which is both of convenience and comparison type. The centre is also home to a cluster of antiques shops, the Church Street market and a wide range of other town centre uses that complement the retail offer. The centre mainly serves local residents.
- The vacancy level has recently increased to 9% in 2017. However, the area is affected by a number of large-scale development schemes and by the Church Street Masterplan.
- The public realm was found to be of average quality and the area would benefit from decluttering, better-maintained shop fronts, landscaping and amenity space.
- A number of betting shops and shisha-smoking premises can be found throughout the centre.

## 37.6. Recommended boundary changes

It is recommended to include 67 Lisson Street (Lisson Gallery) as the unit hosts a town centre use that complements the existing offer. Further details on all boundary changes can be found in 'Appendix 3: Recommended changes to designation boundaries'.

## 38.0 Harrow Road

Map 38.0: District Shopping Centre boundary, Harrow Road (2017)



### 38.1. Introduction

Harrow Road is a designated District Shopping Centre. It currently has a primary and a secondary frontage.

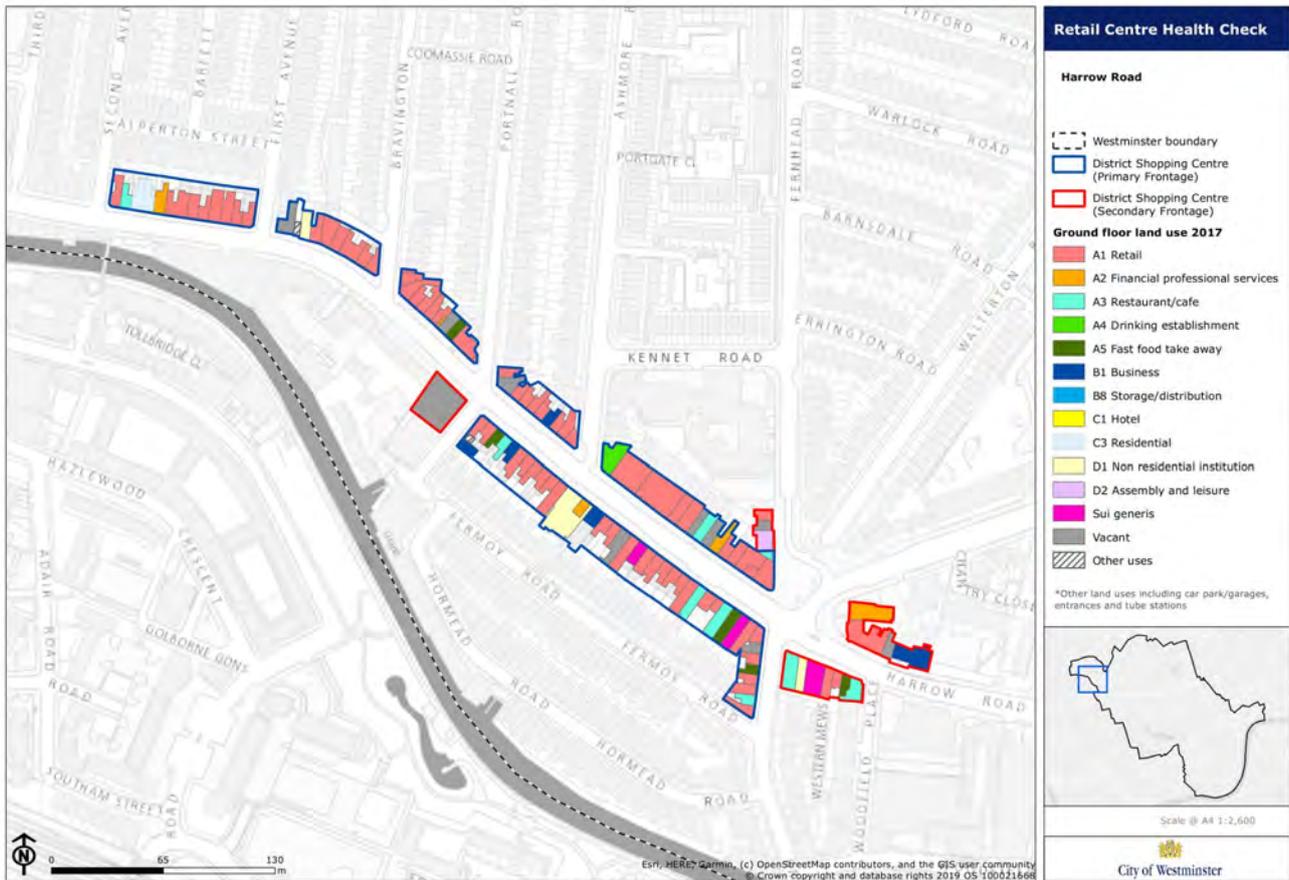
The area is located in the north-west part of Westminster, in close proximity to the London Borough of Brent and the Royal Borough of Kensington and Chelsea. The centre is located in close proximity to Westbourne Grove Underground station, to the east of the town centre. The area is close to other designated town centres including Harrow Road east, Fernhead Road and Shirland Road/Chippenham Road. It is a linear centre that mainly serves the local community as it accommodates a significant number of shops and a wide range of other town centre uses. It is also home to the council-run Maida Hill market.

## 38.2. 2017 Land use analysis

### 38.21. Ground floor land use map (2017)

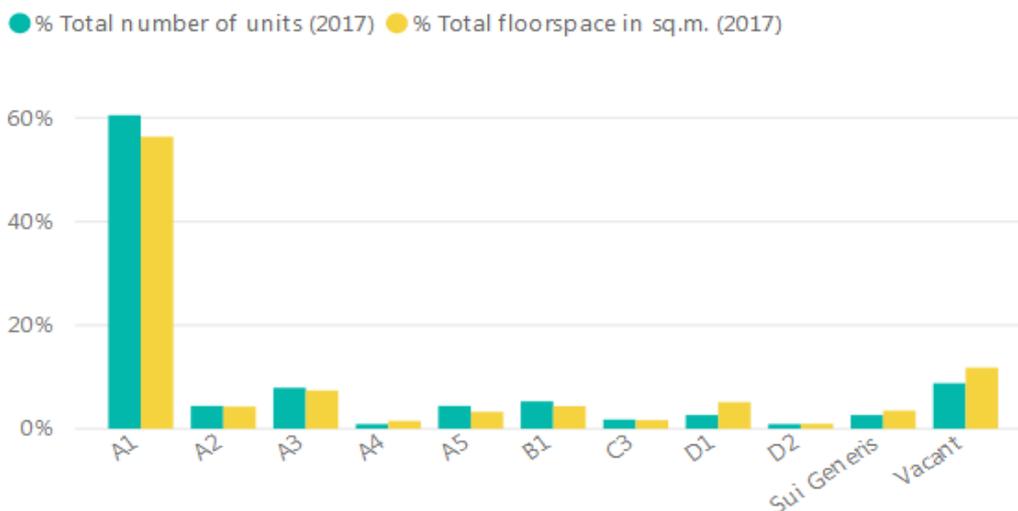
In 2017, 114 total units were identified at ground floor level. The surveyed area covered 12,192 sq m

Map 38.1: Ground floor land use map, Harrow Road (2017)



### 38.22. Range of units and floorspace analysis (2017)

Figure 38.2: Ground floor total number of units and floorspace by land use, Harrow Road (2017)



The centre is shop-led with 69 A1 units recorded in 2017. These account for 61% of all units and for 56% of the overall floorspace at ground floor level.

The second most prevalent land use is A3 with 9 units, taking up 8% of the total number of units and 7% of the total floorspace.

Other uses in the centre include a limited amount of A2, A4, A5, C1, D1, D2 and Sui Generis. There is a limited amount of B1 units (6 units) and C3 units (2 units).

There are 10 vacant units in the centre, taking up 9% of the total number of units and 12% of the overall floorspace. These are located in the centre’s primary shopping frontage, towards the western edge of the centre. However, the 2018 site survey revealed that the majority of these units were under alteration.

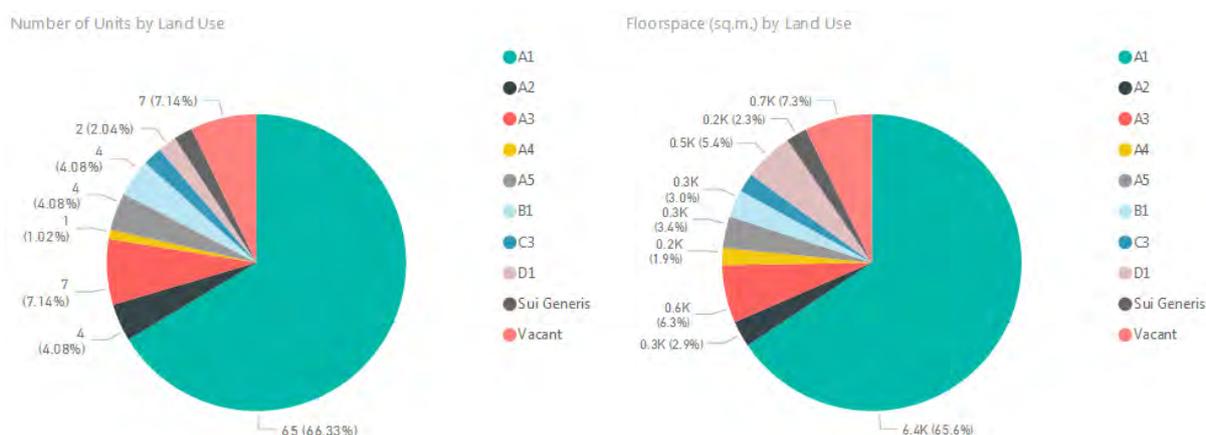
**Table 38.3: Ground floor total number of units and floorspace by land use, Harrow Road (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	69	60.53%	6871.91	56.36%
A2	5	4.39%	518.51	4.25%
A3	9	7.89%	899.17	7.37%
A4	1	0.88%	181.75	1.49%
A5	5	4.39%	395.36	3.24%
B1	6	5.26%	527.23	4.32%
C3	2	1.75%	199.21	1.63%
D1	3	2.63%	624.67	5.12%
D2	1	0.88%	113.73	0.93%
Sui Generis	3	2.63%	424.93	3.49%
Vacant	10	8.77%	1435.72	11.78%
<b>Total</b>	<b>114</b>	<b>100%</b>	<b>12192.19</b>	<b>100%</b>

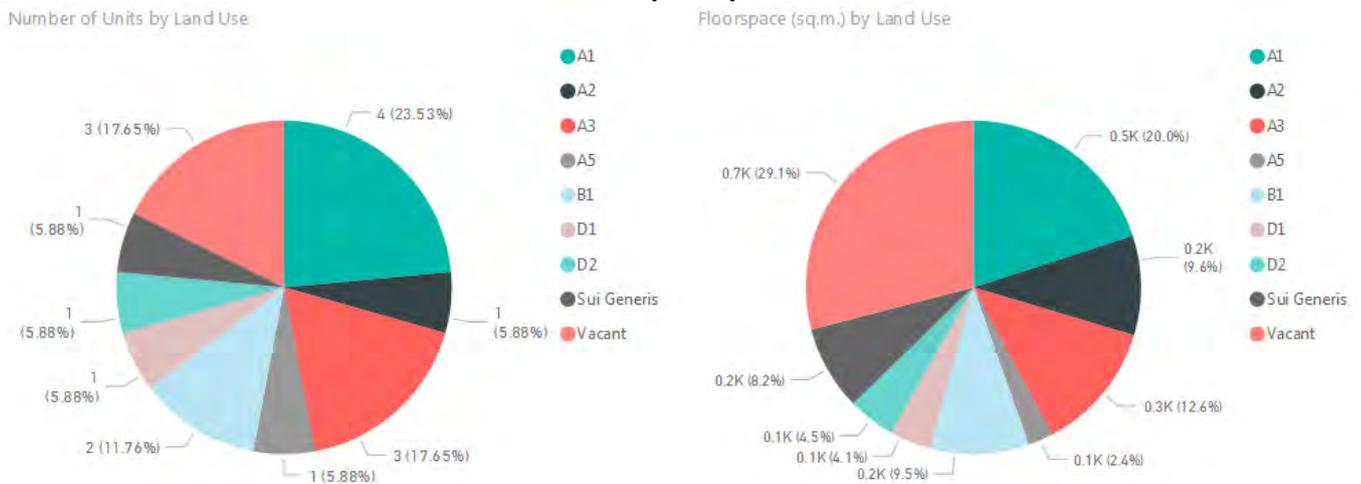
### 38.23. Frontages analysis (2017)

The primary frontage is A1-led with 66% of the units. The primary frontage hosts seven vacant units accounting for 7% of all units. The secondary frontage is more varied in terms of land use with A1 accounting for 24% of all units. The secondary frontage hosts three vacant units accounting for 18% of all units.

**Figure 38.4: Primary Frontage - Number of units by land use and floorspace by land use (2017)**



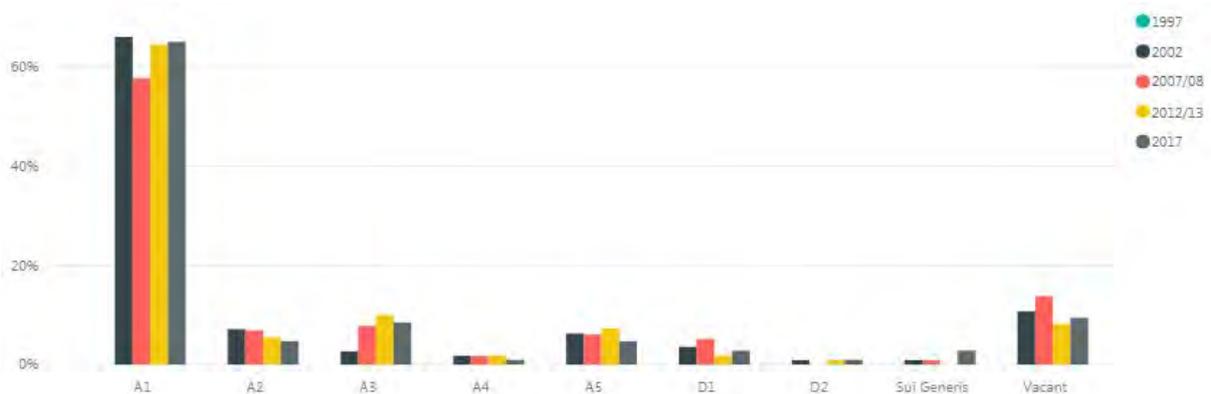
**Figure 38.5: Secondary Frontage - Number of units by land use and floorspace by land use (2017)**



### 38.3. Comparative land use analysis

#### 38.31. Comparative range of units and floorspace analysis

**Figure 38.4: Proportion of units by land use, Harrow Road (2017)<sup>41</sup>**



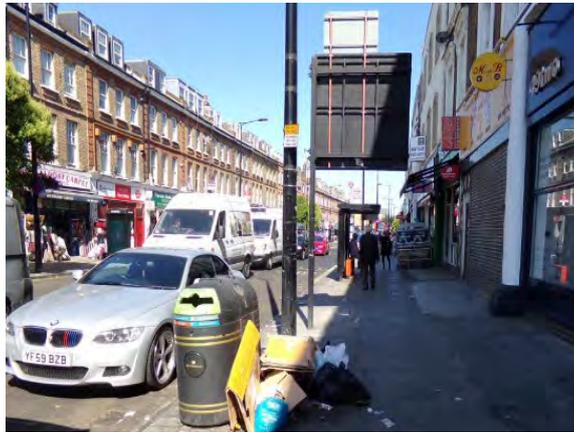
The proportion of A1 units has remained stable across the years surveyed, accounting for around 60-65% of all the centre's units. A1 has always been the most prevalent land use. The number of A3 units increased between 2002 and 2007/8 but A3 uses have recorded a loss of two units between 2012/13 and 2017.

A2, A4 and A5 units have also marginally shrunk since the previous survey.

There are a small number of D1, D2 and Sui Generis units within the town centre. Although the proportion they represent has slightly increased, they still represent a very small proportion of the total number of units and floorspace.

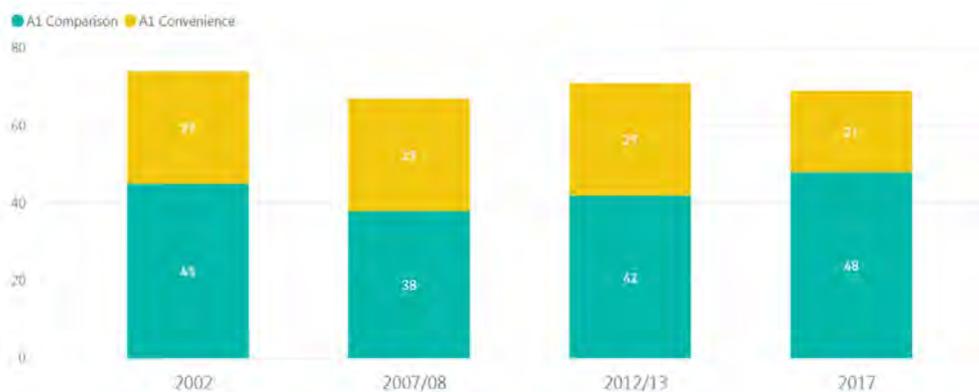
The 2017 vacancy level is broadly consistent with what recorded in the previous surveys. Vacancies peaked in 2007/08 with 16 vacant units (14% of all units) while 10 units were recorded in 2017 representing 9% of the total number of units.

<sup>41</sup> There is no data available for 1997 for this centre.



### 38.32. Comparative comparison/convenience split analysis

**Figure 38.5: Number of comparison and convenience A1 units by year, Harrow Road (2017)**



The centre has had a broadly consistent comparison to convenience split across the years surveyed. Church Street has been A1 comparison-led since 1997. Although the total number of units has remained broadly stable across the years surveyed, the number of A1 convenience units recorded has decreased.

## 38.4. 2018 Site Survey

### 38.41. Accessibility and pedestrian flows

Although there are no Underground stations within the boundary of the centre, the area is within a five-minute walk to Westbourne Park (Circle, Hammersmith & City line) Underground station.

Several bus routes directly serve the centre. A certain amount of traffic was evident at the time of visit and a number of delivery vans were observed doing an unauthorised use of the streets, sometimes blocking traffic and junctions.

Pedestrian flows were judged to be average, as it was an early morning and the shops were still opening with traders installing the market stalls. The area has safe crossings supported by traffic lights and is accessible.

## 38.42 Range of units and floorspace qualitative analysis

### 38.421 *Area description, land uses and retail provision*

Harrow Road is a shop-led medium-size town centre.

The area hosts many convenience-type and food shops. The area has at least three supermarkets that belong to national multiples (e.g. Co-op, Iceland, Sainsbury's) but also hosts a significant number of independent food stores; almost all of them sell groceries and fresh products, and very often have stalls outside. There are also a number of other specialist food stores including butchers and fishmongers.

A few comparison-type shops can also be found throughout the centre: there are a number of shops that sell clothes, household products or that accommodate hairdressers and beauty centres among others. A small number of charity shops can also be found throughout the centre.

The quality of the shops and its shop fronts declines towards the west of the town centre (particularly from Queen's Park Hall). Betting shops can be found throughout the centre.

The area accommodates the council-run Maida Hill street market daily from Monday to Saturday. The market contributes to the local feeling of the area and to its vibrancy: it has few stalls and traders sell fruits, vegetables, sandwiches, household goods and clothes among other products.

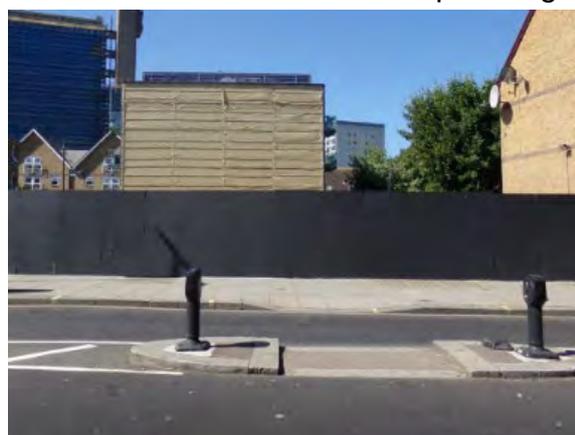
A number of restaurants and cafés are located on Harrow Road and several of them offer Mediterranean and Middle-eastern food. There are a number of hot food takeaway premises spread out across the centre as well as a public house, Kenrick's.

Although the centre is shop-led, a range of other land uses complement the retail offer. Although there are no banks in the area, the area accommodates a post-office, an NHS Health Centre (just outside of the designated boundary) and an art gallery (also outside of the designated area) among other specialist uses.

Throughout the centre, a number of churches can be found: one at the centre, one on the eastern edge and one on the western edge of the centre. There is also evidence showing some units have converted to residential use in the west edge of the centre whilst a number of office units shape the east of the centre but have no active frontages.

### 38.422 *Vacant units*

The 2017 land use survey identified ten vacant units within the centre. The 2018 site survey revealed that a number of these units are now occupied and host new shops, restaurants and among other uses. The vacant bank unit on Maida Hill square was recorded as still vacant. A whole building on the corner with Fermoy Road has been demolished and a planning



application has been received to build a new residential building with A1 and A2 floorspace at ground floor level (the application is pending decision)<sup>42</sup>. A number of other vacant units seemed to be under alteration.

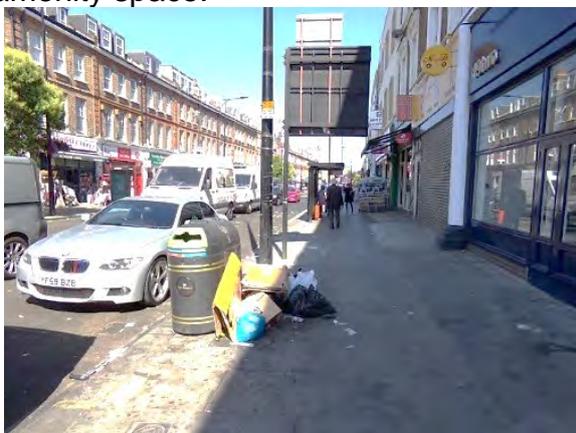
### **38.43 State of the primary shopping area environmental quality assessment**

#### *38.431 Public realm*

The quality of the public realm was judged to be 'average'. The street is slightly cluttered with telephone boxes, bins, lamp posts and bus stops. Moreover, several shops install stalls, products and A boards outside occupying the pavement. However, as the pavements are wide, clutter does not affect pedestrian's access.

Harrow Road has heavy traffic which also contributes to a sense of clutter and a taste of air pollution.

The whole area would benefit from better maintained shop fronts and improved landscaping and amenity space.



#### *38.432 Cleanliness, safety and security*

Cleanliness was judged to be average throughout the centre. At the time of visit, street litter and a small number of commercial refuse bags awaiting collection were observed. Safety and security were judged to be average throughout the centre.

#### *38.433 Identity and users*

The area does not have a strong identity itself but offers a good range of goods and services that help meet the daily needs of its local community. The street market contributes to the local feeling of the area and its vibrancy

### **38.5. Performance summary and recommendations**

- The area is considered to be in 'decline'. Harrow Road is shop-led with both convenience and comparison type units that offer similar products. It also hosts the council-run Maida Hill market and a very small number of other town centre uses. The centre mainly serves local residents.
- The vacancy level has recently increased to 9% in 2017.

<sup>42</sup> See planning application 18/05929/FULL for 413-419 Harrow Road London W9 3QJ.

- The public realm was found to be of average quality and the area would benefit from decluttering, better-maintained shop fronts, landscaping and amenity space.
- A number of charity shops and betting shops have appeared throughout the centre.
- It is recommended to closely monitor the performance of this centre due to its non-diversified retail offer and low environmental quality.

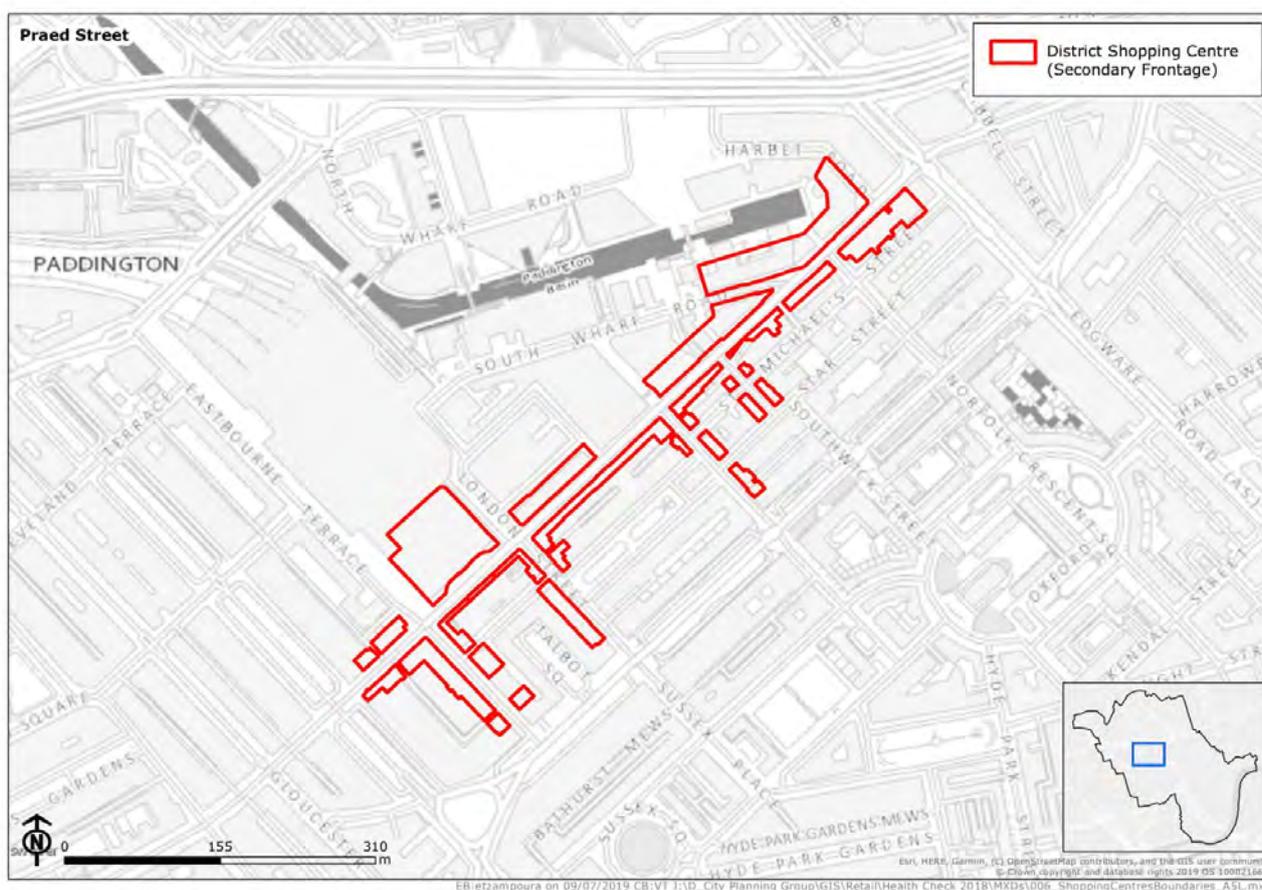
### **38.6. Recommended boundary changes**

It is recommended to include the new development at the south-western edge of Harrow Road within the boundary of the centre as it includes a pharmacy, an NHS centre and art gallery at ground floor level that complement the offer of the centre.

Further details on all boundary changes can be found in 'Appendix 3: Recommended changes to designation boundaries'.

## 39.0 Praed Street

Map 39.0: District Shopping Centre boundary, Praed Street (2017)



### 39.1. Introduction

Praed Street is a designated District Shopping Centre. It currently has a secondary frontage. The centre is located in the north-west part of Westminster and is home to Paddington Station. The centre is also at a walking distance to Edgware Road and Lancaster Gate Underground stations. A significant number of buses also run along Praed Street. The area is close to other town centres including Edgware Road and Church Street/Edgware Road.

Praed Street is a linear centre that presents a mix of land uses that mainly serve commuters and visitors to the area. The centre includes shops and a large number of other non-retail services including restaurants, cafés, hotels and entertainment facilities.

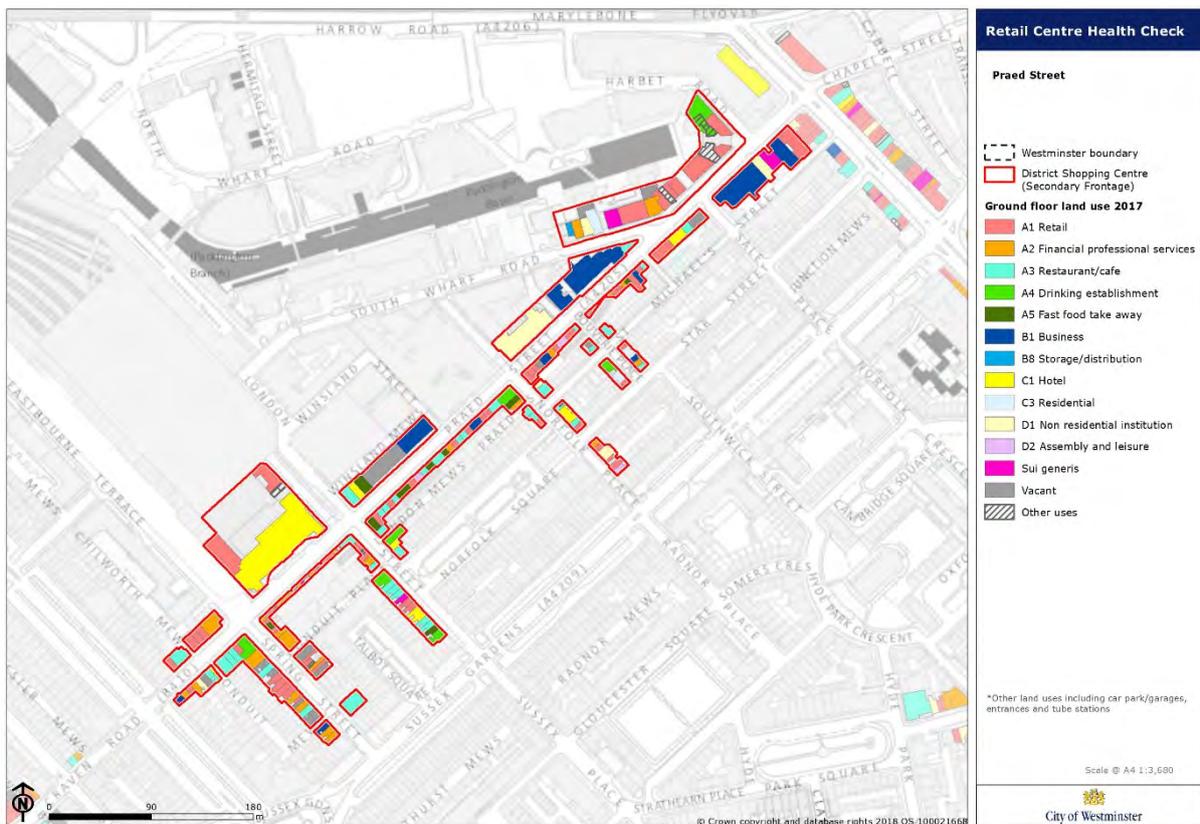


## 39.2. 2017 Land use analysis

### 39.21. Ground floor land use map (2017)

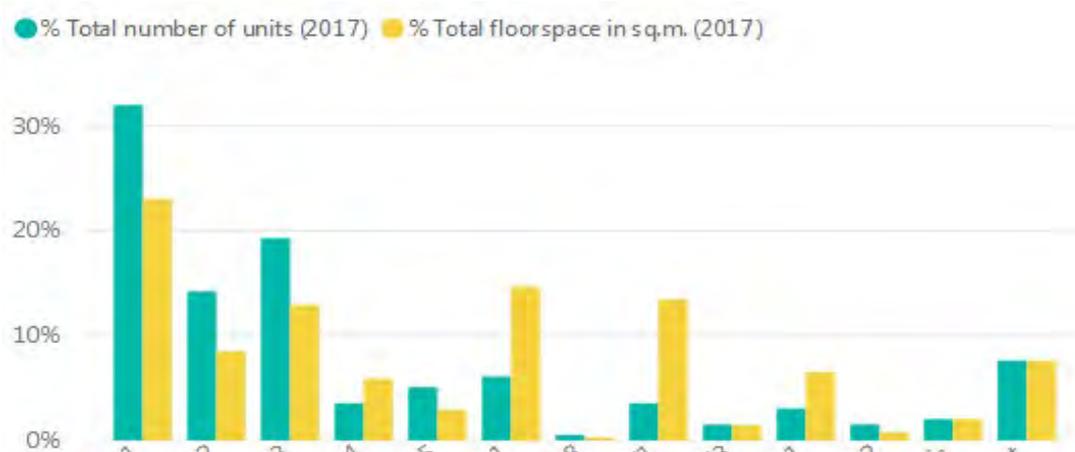
In 2017, 197 total units were identified at ground floor level. The surveyed area covered 24,612 sq m

**Map 39.1: Ground floor land use map, Praed Street (2017)**



### 39.22. Range of units and floorspace analysis (2017)

**Figure 39.2: Ground floor total number of units and floorspace by land use, Praed Street (2017)**



The centre is a mixed-use centre with 63 A1 units recorded in 2017. These account for 32% of all units and for 23% of the overall floorspace at ground floor level. A1 is the most significant land use.

A3 (19% of the units) and A2 (14%) are the second and third most represented land uses. Other uses in the centre include a limited amount of A4, A5, B1, B8, C1, C3, D1, D2 and Sui Generis.

There are 15 vacant units within the centre, accounting for 8% of all units and 8% of the overall floorspace. The vacant units are mainly located in two different areas: in the north-eastern end of the centre (close to the Paddington Basin) and on Spring Street, towards the south-western end of the centre. There is another large vacant unit located in the vicinity of Paddington Station. However, the 2018 site survey identified that the majority of these units were being refurbished or occupied.

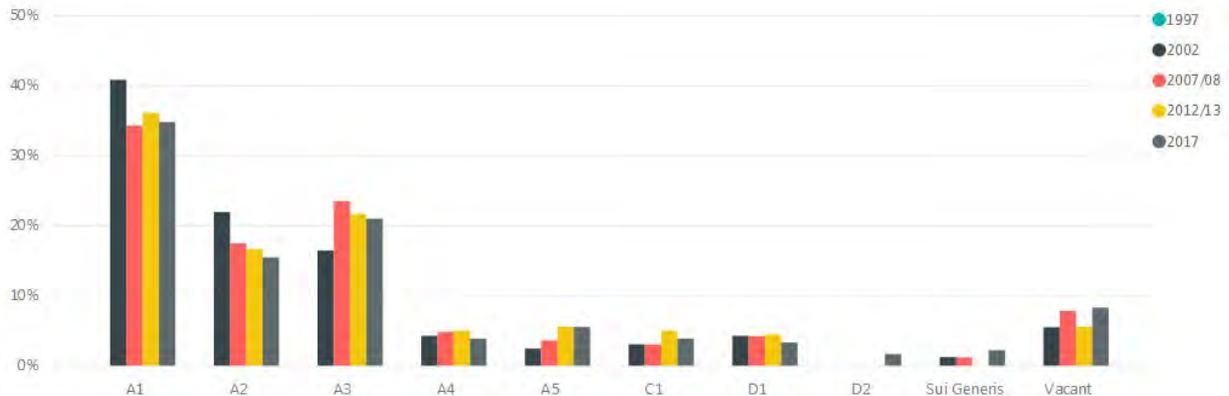
**Table 39.3: Ground floor total number of units and floorspace by land use, Praed Street (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	63	31.98%	5665.42	23.02%
A2	28	14.21%	2094.98	8.51%
A3	38	19.29%	3179.35	12.92%
A4	7	3.55%	1447.06	5.88%
A5	10	5.08%	723.16	2.94%
B1	12	6.09%	3593.76	14.60%
B8	1	0.51%	64.10	0.26%
C1	7	3.55%	3312.35	13.46%
C3	3	1.52%	359.21	1.46%
D1	6	3.05%	1606.42	6.53%
D2	3	1.52%	195.58	0.79%
Sui Generis	4	2.03%	502.80	2.04%
Vacant	15	7.61%	1868.73	7.59%
<b>Total</b>	<b>197</b>	<b>100%</b>	<b>24612.93</b>	<b>100%</b>

### 39.3. Comparative land use analysis

#### 39.31. Comparative range of units and floorspace analysis

**Figure 39.4: Proportion of units by land use, Praed Street (2017)<sup>43</sup>**



The proportion of A1 units has decreased between 2002 and 2017 but has remained mainly stable between 2007/2008 and 2017: in 2017 A1 accounted for 35% of all the centre’s units. Although the proportional weight of A1 uses has remained relatively stable across the years, the actual number of retail units has fallen from 67 in 2002 to 63 in 2017.

The number of A3 units increased between 2002 and 2007/2008 but has dropped down since then: in 2017, A3 uses represented 21% of all units.

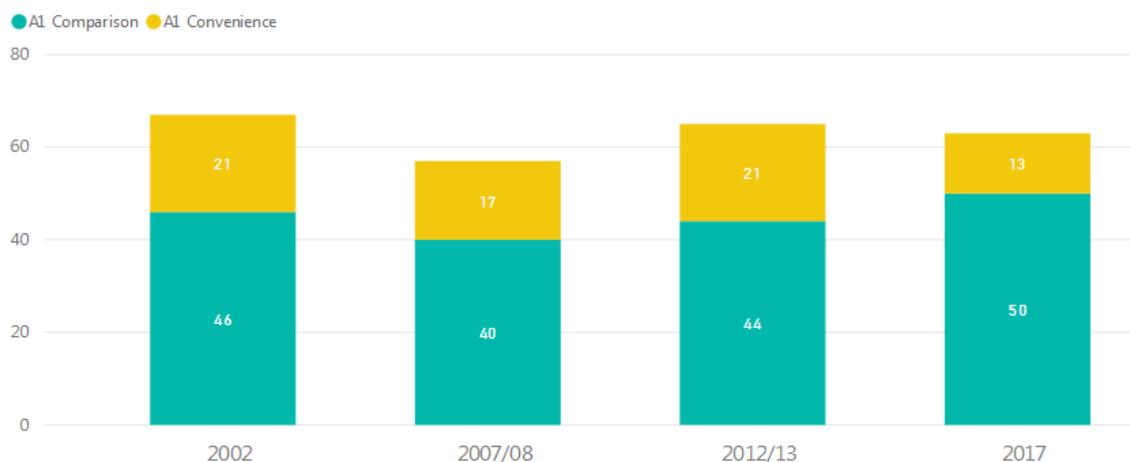
A2 uses have decreased since 2002 and accounted in 2017 for 15% of all units. A4, A5 and D1 uses have remained stable over the years. In 2017, for the first time since 2002, the surveys recorded a small proportion of D2 uses with three new D1 units.

There were no Sui Generis uses in 2012/2013 but the last survey has revealed that there are now four Sui Generis units within the centre.

The vacancy level has reached its maximum in 2017 (8% of all units). Although the number of vacant units increased by 50% between 2012/2013 and 2017, the numbers are broadly consistent with what recorded in the previous surveys.

#### 39.32. Comparative comparison/convenience split analysis

**Figure 39.5: Number of comparison and convenience A1 units by year, Praed Street (2017)**



<sup>43</sup> There is no data available for 1997 for this centre.

The centre has had a broadly consistent comparison to convenience split across the years surveyed. Praed Street has been A1 comparison-led since 1997. The number of A1 convenience units recorded has decreased overtime.

## 39.4. 2018 Site Survey

### 39.41. Accessibility and pedestrian flows

The centre is well served by public transport as the Paddington Underground (Bakerloo, Circle, District, Hammersmith & City lines) and train station falls within the boundary of the centre. Edgware Road and Lancaster Gate Underground stations are also at a walking distance.

A number of buses also serve the centre and run along Praed Street. A small amount of through traffic was also evident at the time of visit.

Pedestrian flows were judged to be 'average' but higher around the station. The area has safe crossings and is moderately accessible although street clutter and heavy traffic can make crossings hazardous.

Some unauthorised uses of streets for parking of delivery vans and use of railings for cycle parking were observed at the time of visit.

Construction works are ongoing in the vicinity of Paddington station as the station is being



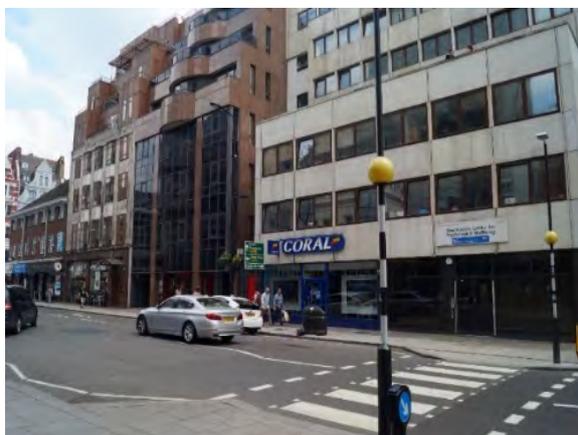
prepared for the opening of the Elizabeth Line.

### 39.42 Range of units and floorspace qualitative analysis

#### 39.421 *Area description, land uses and retail provision*

Praed Street centre is a mixed-use centre. In terms of land uses, different areas can be identified.

The Praed Street/South Wharf Road junction area is now connected to the Paddington Basin and almost all the new ground floor units seem to be occupied. The northern side of South Wharf Road is shop-led and hosts a number of comparison type shops (e.g. pharmacy, hairdresser) but also a Tesco Express, a post-office, a nursery and a series of A2 units. The southern side of Praed Street accommodates a number of office buildings, the Westminster Centre for Psychological Wellbeing and a hotel.



The central portion of Praed Street is home to the Paddington Underground and train station which is very busy at peak time. There are ongoing construction works as the station is being prepared for the arrival of the Elizabeth line.

The area is home to a number of hotels including the Hilton London Paddington.

Praed Street hosts several health-related buildings including an entrance to the St Mary's Hospital, Imperial's College facilities and the Alexander Fleming Laboratory Museum. There are several smaller health-related services occupying units along the street.

The area is very mixed in terms of other land uses: it hosts a small proportion of shops (e.g. souvenirs shops, bakery), banks and bureaux de change. However, there are a significant number of hot-food takeaway premises (both independent and multiple type) and at least four public houses can be found in the area, mainly in the secondary frontage (on London Street). A small number of vacant units were observed in the area although some of them appeared to be under alteration.



Spring Street accommodates a significant number of A2 uses including banks, bureaux de change and estates agents. The area is also home to the Pride of Paddington public house.

Although the 2017 land use survey suggested that there were a significant number of vacant units in the area, the 2018 site survey has revealed that the area is now thriving with many

vacancies occupied. A number of these units host cafés and restaurants but also new A1, A2 and A4 uses.

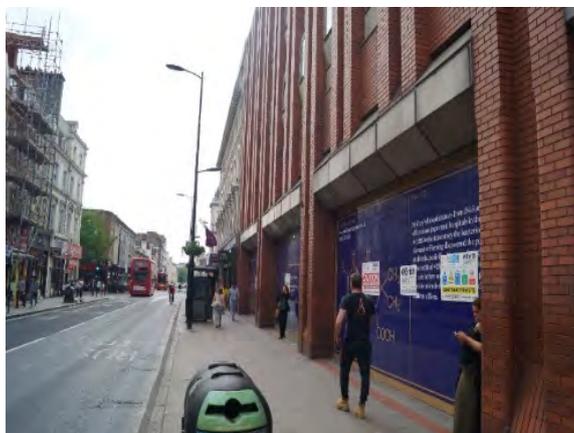
A number of premises where it is possible to smoke shisha and several betting offices can be found throughout the Praed Street centre.

Shop fronts and facades are not very well-maintained in some areas.



### 39.422 *Vacant units*

The 2017 land use survey identified 15 vacant units within the centre. The 2018 site survey revealed that the canal-side units are now occupied and host, for instance, a new gym. Almost all the Spring Street units are also occupied. However, a number of units remain vacant on Praed Street as development is ongoing in the area.



## 39.43 State of the primary shopping area environmental quality assessment

### 39.431 *Public realm*

The quality of the public realm was judged to be average. Pavements are narrow, and the centre is slightly cluttered with phone boxes, bus stops, bins, lampposts, A boards and tables and chairs and stalls from restaurants and shops that occupy part of the pavement and make pedestrian movement difficult.

Although the centre is now connected to the Paddington Basin, there is little evidence of landscaping and amenity space, reflecting the highly urbanised environment.



#### 39.432 *Cleanliness, safety and security*

Cleanliness was judged to be average throughout the centre. At the time of visit, street litter and a small number of commercial refuse bags awaiting collection were observed. Dense traffic and clutter contribute to a taste of air pollution.

Safety and security were judged to be average throughout the centre although crossings can sometimes be hazardous.

#### 39.433 *Identity and users*

The area does not have a strong identity itself and there are no flagship stores, the whole centre seems to depend on the flows generated by the presence of the station. The centre appears to be serving commuters and visitors to the area.

### 39.5. Performance summary and recommendations

- The area is considered to have a 'neutral' performance. Praed Street is a mixed-use centre that mainly caters for commuters and visitors using Paddington Station. The centre is changing due to ongoing development works in neighbouring areas.
- Although the vacancy increased to 8% in 2017, the 2018 site survey has revealed that a number of units had been occupied or were being refurbished
- The public realm was found to be of average quality and the area would benefit from decluttering, better-maintained shop fronts, landscaping and amenity space. However, the recently opened Paddington Basin contributes positively to the centre.
- A number of betting shops and shisha-smoking premises can be found throughout the centre.

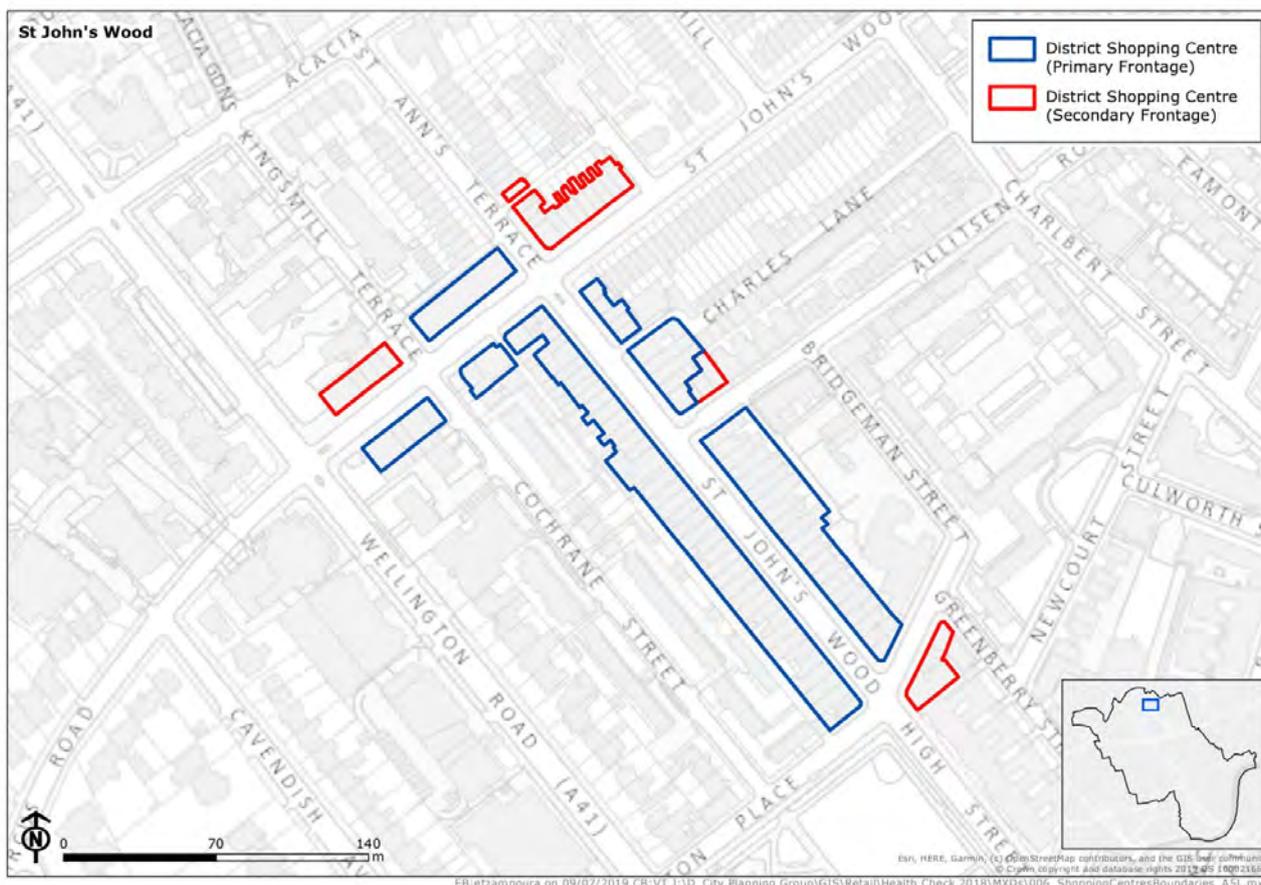
### 39.6. Recommended boundary changes

It is recommended to include the A1 unit at 10 Praed Street (currently occupied by a hairdresser) as the unit is part of the frontage.

It is also recommended to include the new Paddington Square site as it is being developed to host a mixed-use scheme that will provide a series of new retail units at ground floor level. Further details on all boundary changes can be found in 'Appendix 3: Recommended changes to designation boundaries'.

## 40. St John's Wood

Map 40.0: District Shopping Centre boundary, St John's Wood (2017)



### 40.1. Introduction

St John's Wood is a designated District Shopping Centre. It currently has a primary and a secondary frontage.

The centre is in the north-east part of Westminster. The centre is located in close proximity to St John's Wood Underground station (five-minute walk). The area is close to other designated town centres such as Charlbert Court. The centre is close to a number of London attractions including Regent's Park, the Lord's Cricket Ground and the Abbey Road Studios.

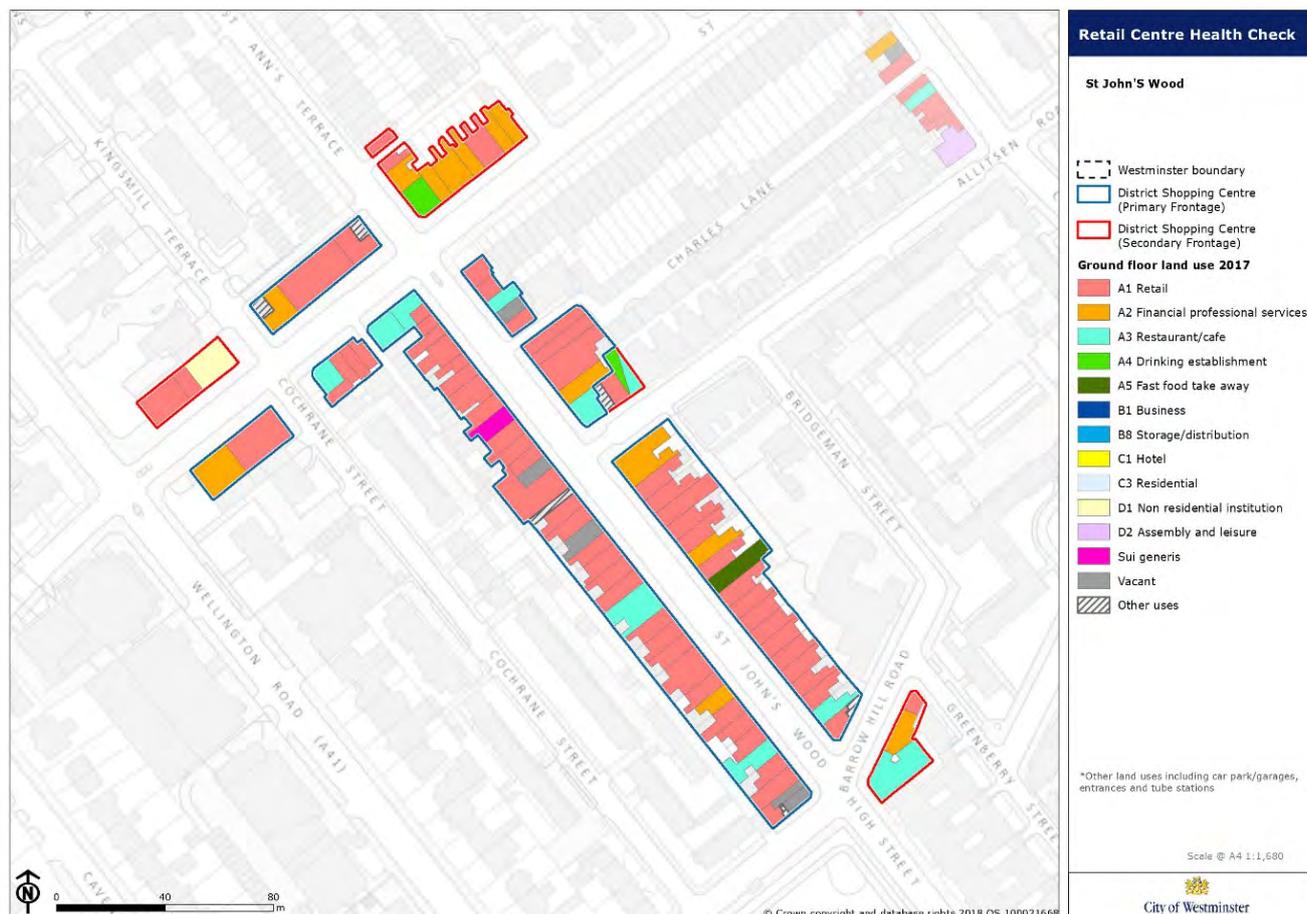
The centre has an 'L' shape as it covers a part of St John's Wood High Street and St John's Wood Terrace. The centre is shop-led but also offers a wide range of town centre uses that cover the local community's main needs.

## 40.2. 2017 Land use analysis

### 40.21. Ground floor land use map (2017)

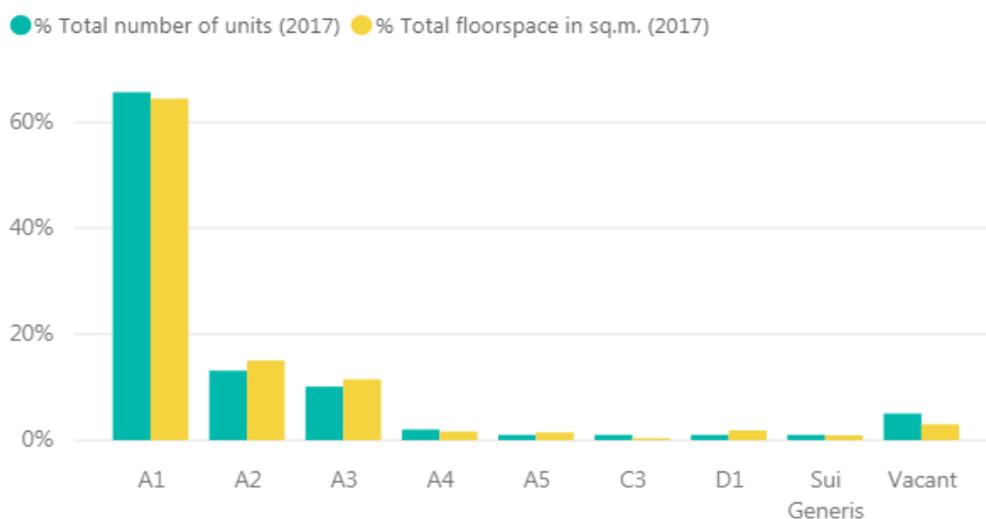
In 2017, 99 total units were identified at ground floor level. The surveyed area covered 12,685 sq m

**Map 40.1: Ground floor land use map, St John's Wood (2017)**



### 40.22. Range of units and floorspace analysis (2017)

**Figure 40.2: Ground floor total number of units and floorspace by land use, St John's Wood (2017)**



The centre is shop-led with 65 A1 units recorded in 2017. These account for 66% of all units within the centre and for 64% of the overall floorspace at ground floor level.

The second most prevalent ground floor land use is A2 with 13 units, taking up 13% of the total number of units and 15% of the total floorspace.

Third most numerous use is A3 with 10 units taking up 10% of the total number of units and 12% of the overall floorspace.

Other uses in the centre include a limited amount of A4, A5, C3, D1 and Sui Generis.

Together these represent less than 11% of all units in the centre.

The 2017 land use survey identified five vacant units in the centre, accounting for 5% of all units and 3% of the overall floorspace and all located in the primary frontage. However, the 2018 site survey has identified that most of these units had been occupied or were being refurbished.

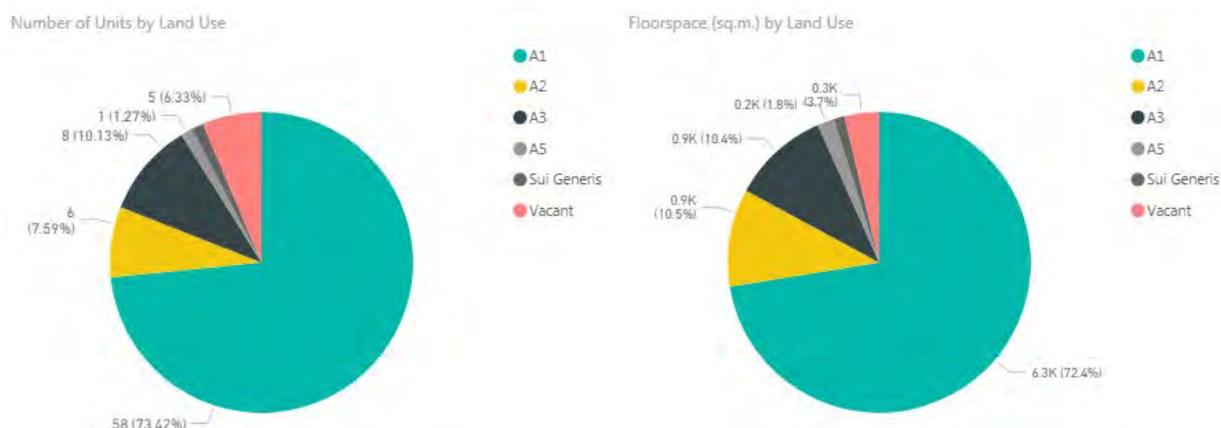
**Table 40.3: Ground floor total number of units and floorspace by land use, St John’s Wood (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	65	65.66%	6885.46	64.44%
A2	13	13.13%	1604.62	15.02%
A3	10	10.10%	1229.59	11.51%
A4	2	2.02%	176.15	1.65%
A5	1	1.01%	155.96	1.46%
C3	1	1.01%	15.20	0.14%
D1	1	1.01%	198.34	1.86%
Sui Generis	1	1.01%	99.47	0.93%
Vacant	5	5.05%	320.65	3.00%
<b>Total</b>	<b>99</b>	<b>100%</b>	<b>10685.44</b>	<b>100%</b>

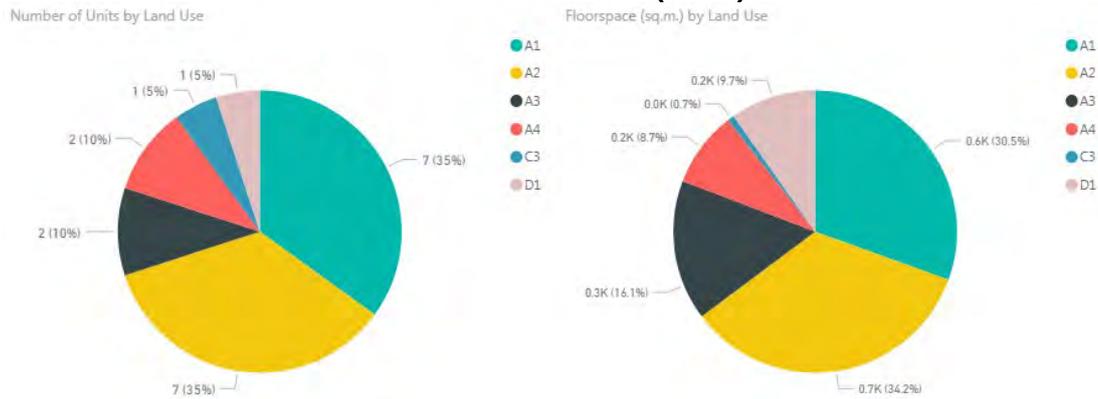
### 40.23. Frontages analysis (2017)

The primary frontage is A1-led with 73% of the units. The primary frontage hosts five vacant units accounting for 6% of all units. The secondary frontage is more varied in terms of land use with A1 accounting for 35% of all units. The secondary frontage hosts no vacant units.

**Figure 40.4: Primary Frontage - Number of units by land use and floorspace by land use (2017)**



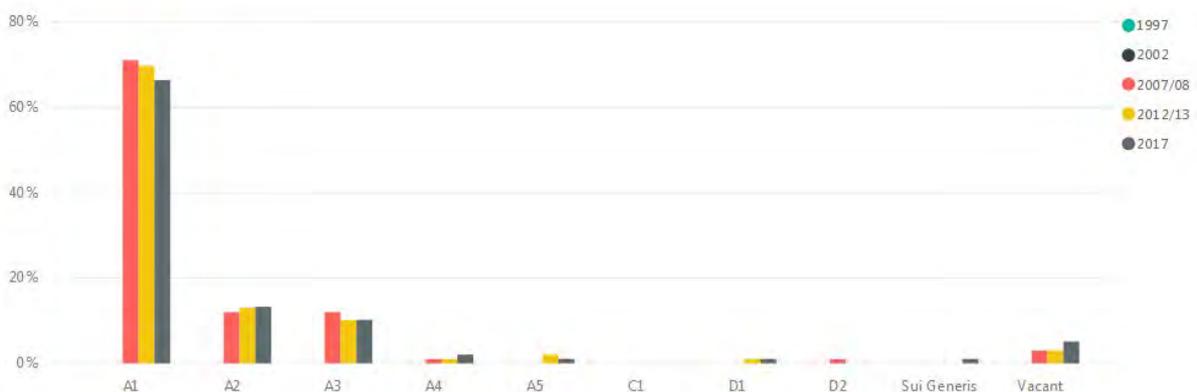
**Figure 40.5: Secondary Frontage - Number of units by land use and floorspace by land use (2017)**



### 40.3. Comparative land use analysis

#### 40.31. Comparative range of units and floorspace analysis

**Figure 40.4: Proportion of units by land use, St John’s Wood (2017)<sup>44</sup>**



The proportion of A1 units has been steadily decreasing over the years surveyed. In 2007/08, A1 took up 71% of all units compared to 66% in 2017, representing a drop of four units. A3 uses have remained stable since the last survey period while A2 uses have experienced a similar trend since 2012/13.

The centre has always hosted a very low amount of other uses including A5, D1, D2 and Sui Generis uses.

The proportion of vacant units has increased from 3% to 5% in 2017, from three to five units and although is higher than in previous years it remains low.

<sup>44</sup> There is no data available for 1997 and 2002 for this centre.

## 40.32. Comparative comparison/convenience split analysis

**Figure 40.5: Number of comparison and convenience A1 units by year, St John's Wood (2017)**



The centre has had a broadly consistent comparison to convenience split across the years surveyed. St John's Wood has been A1 comparison-led since 2007/08. The number of A1 convenience units recorded has decreased between 2012/13 and 2017.

## 40.4. 2018 Site Survey

### 40.41. Accessibility and pedestrian flows

Although there are no Underground stations within the boundary of the centre, the area is within a five-minute walk to St John's Wood Underground station (Jubilee line).

No buses directly serve the centre but many routes run along Prince Albert Road to the south of the centre and along Wellington Road at the western end of the centre.

Pedestrian flows were judged to be average at the time of visit although the streets became busier with parents collecting children from school around 4pm. The area has safe crossings and is highly accessible, although some crossings can be hazardous as the area is very parked up

There is a reasonable amount of bike, motorbike and car parking spaces throughout the centre; the centre was fully parked up during the site visit. The centre also hosts on street loading bays for commercial purposes.



## 40.42 Range of units and floorspace qualitative analysis

### 40.421 *Area description, land uses and retail provision*

St John's Wood is a shop-led centre that mainly serves local residents and workers. The area accommodates a significant number of shops that are both convenience and comparison type. Throughout the centre, a number of food shops can be found: some of them belong to national multiples (e.g. Tesco Express, Holland and Barrett) but there are also a number of independent food specialists (e.g. butcher, baker, confectionery). There are a significant number of comparison type shops (e.g. pharmacy, optician, clothes shops), some belong to well-known chains (e.g. Boots, Gap Kids) and some are independent shops. The comparison offer is clearly upmarket with a significant number of clothes shops attracting shoppers to the area.

A number of charity shops have also appeared throughout the centre.

In terms of food and drink premises, the centre hosts a small number of cafés and restaurants that are both chain type and independent. There is also a public house, the Duke of York. Some of the premises have tables and chairs outside that contribute to the vibrancy of the area.

The centre also accommodates a few estate agents, banks, a post office, a library and a betting office.

Units throughout the centre are small-medium sized and generally have well-maintained and active shop fronts.



### 40.422 *Vacant units*

Although the 2017 land use survey identified five vacant units in St John's Wood, the 2018 site survey revealed that only one was still vacant. The other units now host new uses including acafé and ahairdresser.

However, it was also observed that a number of new vacant units have appeared including the former The Kooples shop, the former Natwest Bank, the unit occupied by Mori (take-away restaurants) and the former Carluccio's restaurant unit.



#### 40.43 State of the primary shopping area environmental quality assessment

##### 40.431 *Public realm*

The quality of the public realm was judged to be high.

Pavements are wide and well-maintained and provide for an attractive pedestrian environment. Although there are a number of signs, lamp posts, A boards and tables and chairs from cafés on the pavement, but they do not hinder pedestrian movement. The centre has a village ambience and shop fronts are well-maintained, active and sometimes decorated with plants and flowers.

The overall area encourages walking although some crossings can be hazardous as the area busy and very parked up.

The centre would benefit from amenity space although St John's Wood Church Gardens are in close proximity.



##### 40.432 *Cleanliness, safety and security*

Cleanliness was judged to be high throughout the centre. At the time of visit, no street litter was observed.

Safety and security were judged to be high throughout the centre. A couple of police officers on patrol were seen during the visit.



#### 40.433 *Identity and users*

The centre is vibrant and has a local identity. It caters for a very prosperous catchment area. It offers a wide range of goods and services that cover local resident's needs, from convenience and comparison shops to financial services and libraries. However, it also attracts workers and visitors to the area as it provides for a nice pedestrian environment and a diverse retail offer.

### **40.5. Performance summary and recommendations**

- The centre is considered to be 'healthy'. St John's Wood is a shop-led centre that caters for local residents, workers and visitors to the area. The centre presents a good comparison offer supported by a number of other uses, including restaurants and cafés. The centre has however lost a number of convenience type shops.
- The vacancy level remains low and is of 5% in 2017.
- The public realm was found to be of high quality as pavement and shop fronts are well-maintained and provide for a nice pedestrian environment. Crossings can however be hazardous, and the centre would benefit from amenity space.
- A number of betting shops and charity shops can be found throughout the centre.
- There is little evidence that this is a centre in need of regeneration. Its inclusion in a strategic area for regeneration by the Mayor of London (see Annex 1 to the draft New London Plan) appears to be a statistical anomaly.

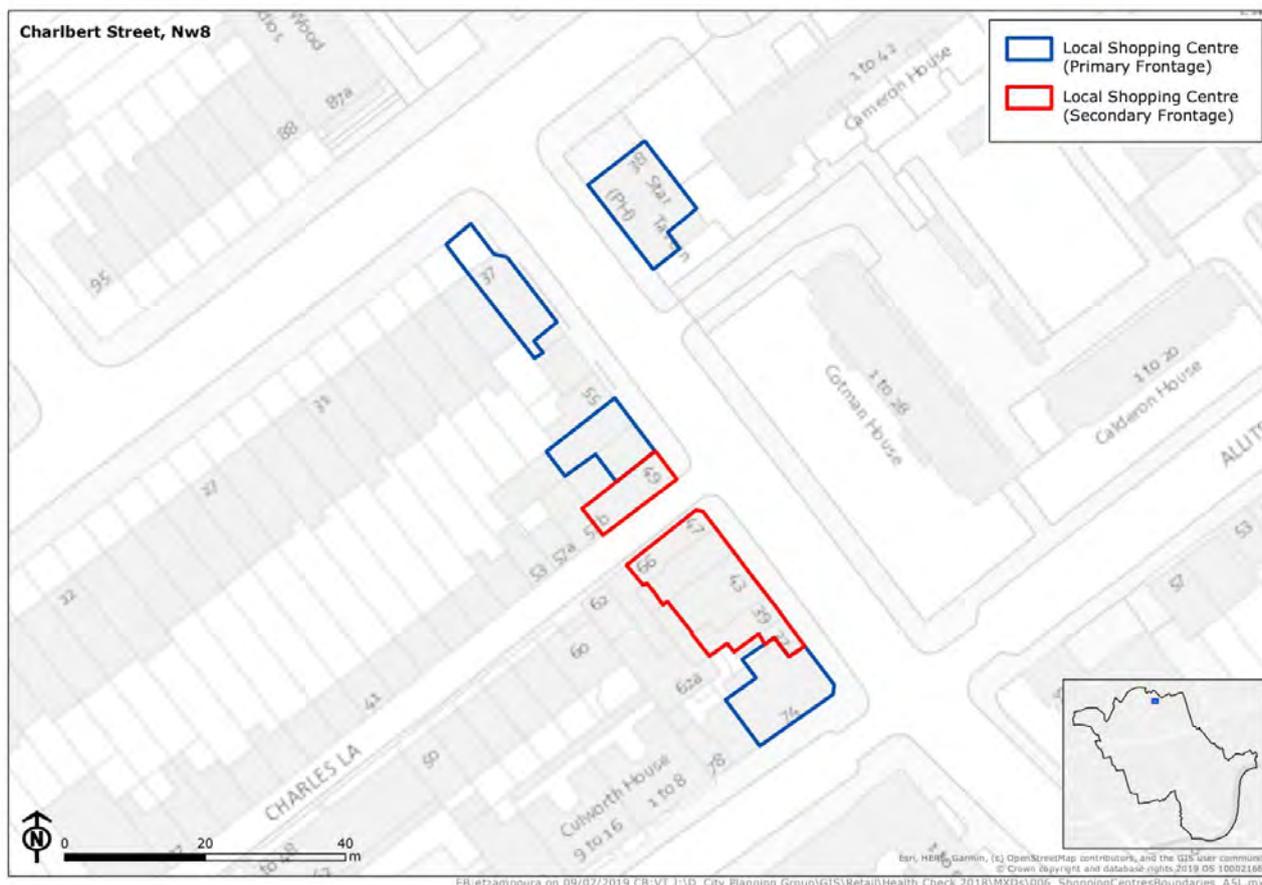
### **40.6. Recommended boundary changes**

No boundary changes are recommended.

## SECTION G: Local Shopping Centres

### 41. Charlbert Street

Map 41.0: Shopping centre boundary, Charlbert Street (2017)



#### 41.1. Introduction

Charlbert Street is a designated Local Shopping Centre. It currently has a primary and a secondary frontage.

Charlbert Street is a very small linear centre located in the north of Westminster and which runs parallel to the larger St John's Wood District Shopping Centre. It is close to Regent's Park.

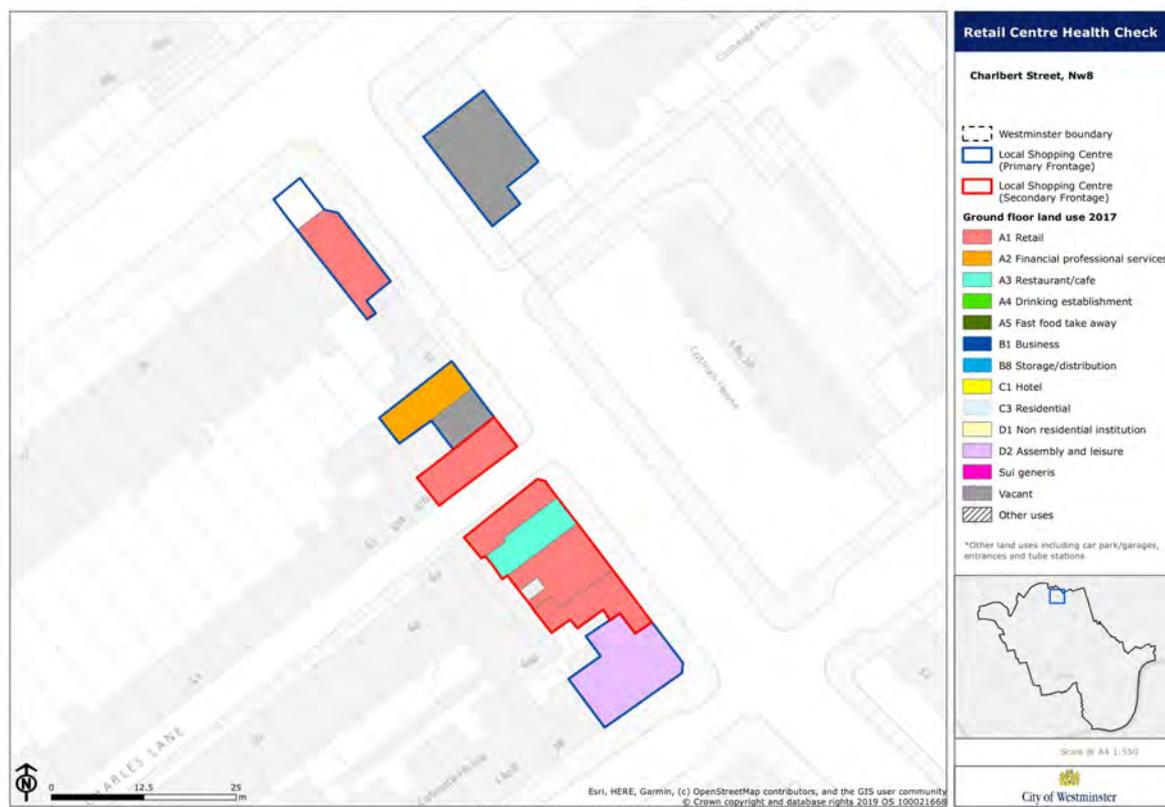
The centre offers a mix of uses that mainly cater for local residents however its catchment area is restricted by its proximity to the larger St. John's Wood District Shopping Centre.

## 41.2. 2017 Land use analysis

### 41.21. Ground floor land use map (2017)

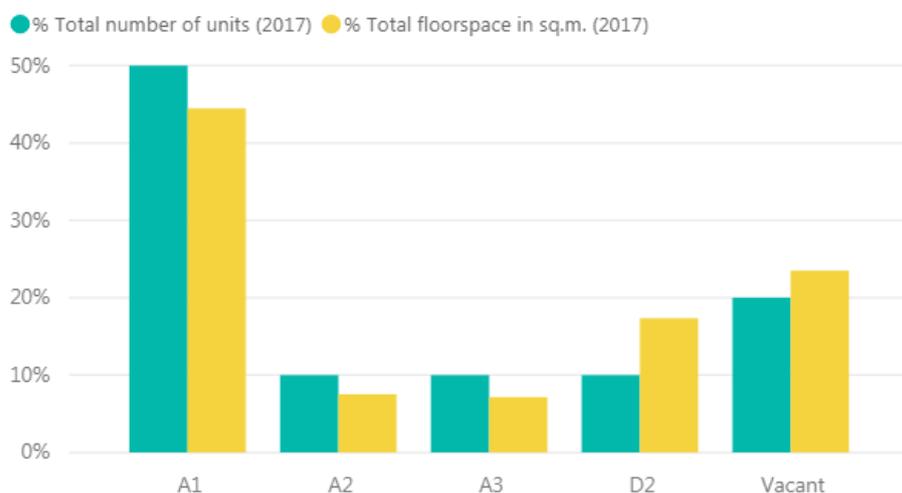
In 2017, 10 total units were identified at ground floor level. The surveyed area covered 749.25 sq m

Map 34.1: Ground floor land use map, Charlbert Street (2017)



### 41.22. Range of units and floorspace analysis (2017)

Figure 41.2: Ground floor total number of units and floorspace by land use, Charlbert Street (2017)



Charlbert Street is a very small shopping centre with only 10 units.

The shopping centre is shop-led with five A1 units recorded in 2017. These account for 50% of all units and 44% of the overall floorspace.

In 2017, two vacant units were recorded in the centre, accounting for 20% of the total number of units. The vacancy rate was above the average for this type of centre in Westminster.

However, the 2018 site survey has identified only one remaining vacancy within the centre.

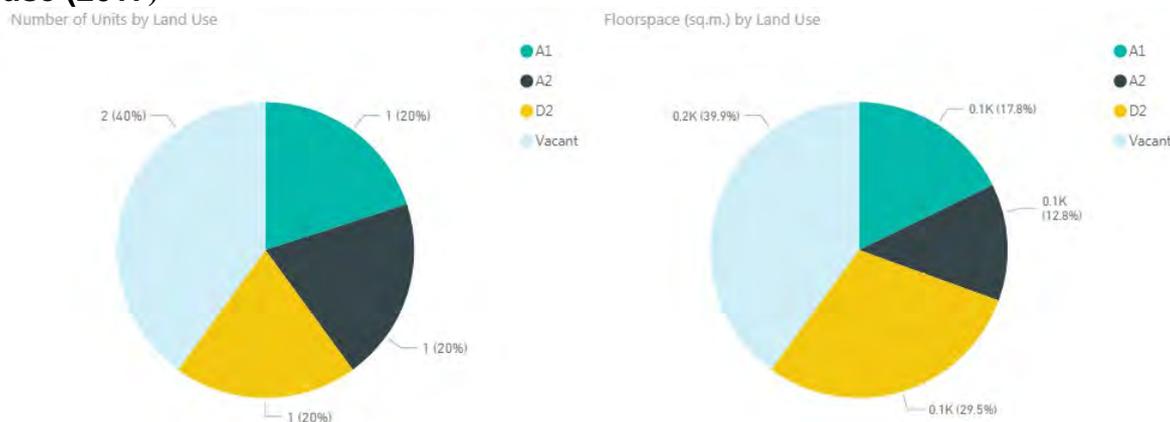
**Table 41.3: Ground floor total number of units and floorspace by land use, Charlbert Street (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	5	50.00%	333.15	44.46%
A2	1	10.00%	56.47	7.54%
A3	1	10.00%	53.60	7.15%
D2	1	10.00%	129.95	17.34%
Vacant	2	20.00%	176.08	23.50%
<b>Total</b>	<b>10</b>	<b>100%</b>	<b>749.25</b>	<b>100%</b>

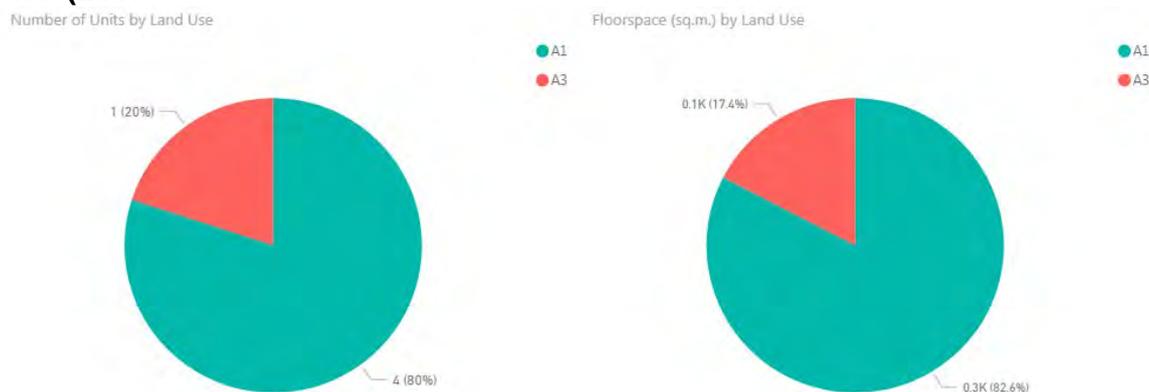
### 41.23. Frontage analysis (2017)

All vacant units are in the primary frontage accounting for 40% of its extent with two units. Other uses in the primary frontage include a limited amount of D2, A1 and A2. The secondary frontage is A1-led with 4 units accounting for 80% of all units. The secondary frontage hosts no vacant units.

**Figure 41.4: Primary Frontage - Number of units by land use and floorspace by land use (2017)**



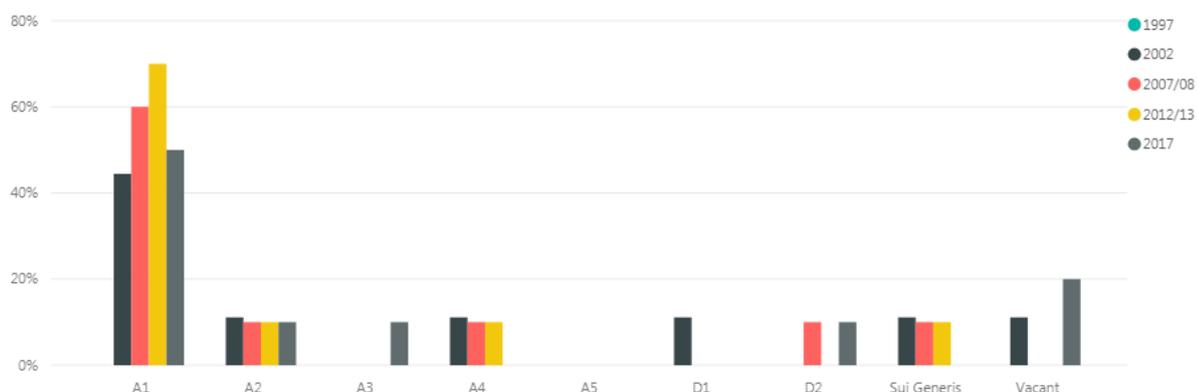
**Figure 41.5: Secondary Frontage - Number of units by land use and floorspace by land use (2017)**



### 41.3. Comparative land use analysis

#### 41.31. Comparative range of units and floorspace analysis

**Figure 41.4: Proportion of units by land use, Charlbert Street (2017)<sup>45</sup>**



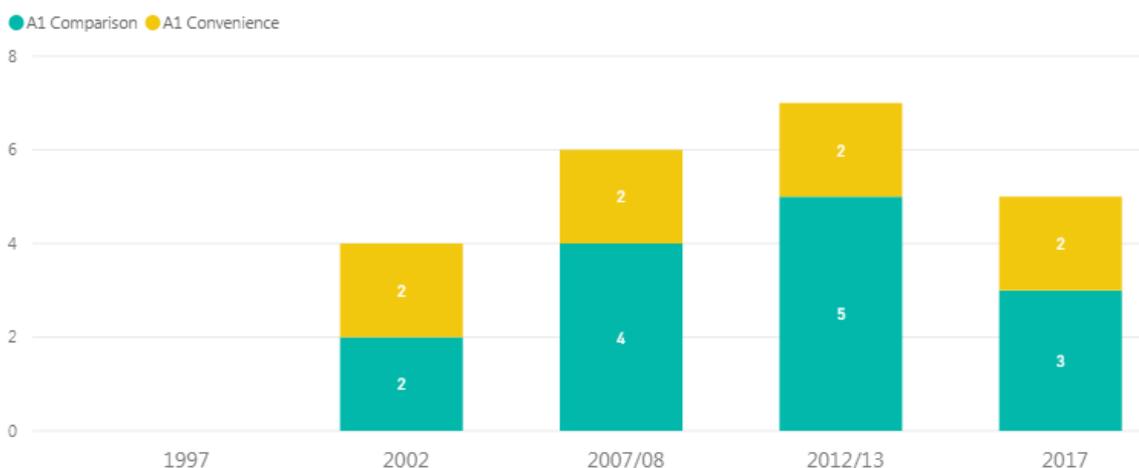
The total number of units in the centre has remained stable across the years surveyed (9 total units in 2002, 10 total units in 2007/08, 10 total units in 2012/13 and 10 total units in 2017).

The proportion of A1 units has fluctuated across the years surveyed with the most recent survey recording a decrease from 70% units in 2002 to 50% in 2017. The 2017 land survey also revealed that the centre no longer contains any Sui Generis or A4 units.

A number of vacancies appeared in the centre in 2017. No vacant units had been recorded in Charlbert Street since 2002. In 2017, vacancies marked 20% of all the centre’s units and 24% of the total floorspace. The 2018 site survey has identified only one remaining vacancy in the centre.

#### 41.32. Comparative comparison/convenience split analysis

**Figure 41.5: Number of comparison and convenience A1 units by year, Charlbert Street (2017)**



<sup>45</sup> There is no data available for 1997 for this centre.

The centre has had a broadly consistent comparison to convenience split across the years surveyed. Charlbert Street has been comparison-led across all survey periods except for 2002 where the ratio between comparison and convenience A1 was 1:1. The figures for 2017 show that the comparison offer in the centre has shrunk by two units against the previous survey in 2012/13, while the number of convenience units has remained the same across the years.

## 41.4. 2018 Site Survey

### 41.41. Accessibility and pedestrian flows

The area is within a five-minute walk from St. John's Wood Underground station (Jubilee line) and Wellington Road, which is served by a number of bus services.

Pedestrian flows were judged to be low across the centre.



### 41.42 Range of units and floorspace qualitative analysis

#### 41.421 Area description, land uses and retail provision

The centre's offer is mostly catered to local residents and includes a small supermarket, a fishmonger, a dry cleaner, a hairdresser and a hardware shop. In addition, a café, a restaurant and an estate agent are also found in the centre.

The Lyndhurst Club at the southern edge of the centre is a private members' Japanese karaoke club which provides a night-time economy function.



41.422 *Vacant units*

One vacant unit was observed at the time of visit. The other vacancy identified by the 2017 land use survey appears to have now been occupied by an A3 use.

**41.43 State of the primary shopping area environmental quality assessment**

41.431 *Public realm*

The quality of the public realm is judged to be average, with uneven pavements and clutter due to A boards, bins and planters.



41.432 *Cleanliness, safety and security*

Cleanliness was judged to be average throughout the centre. Safety and security were judged to be average in this centre.



41.433 *Identity and users*

The centre does not have any distinctive feature and largely caters for the local residential population.

## **41.5. Performance summary and recommendations**

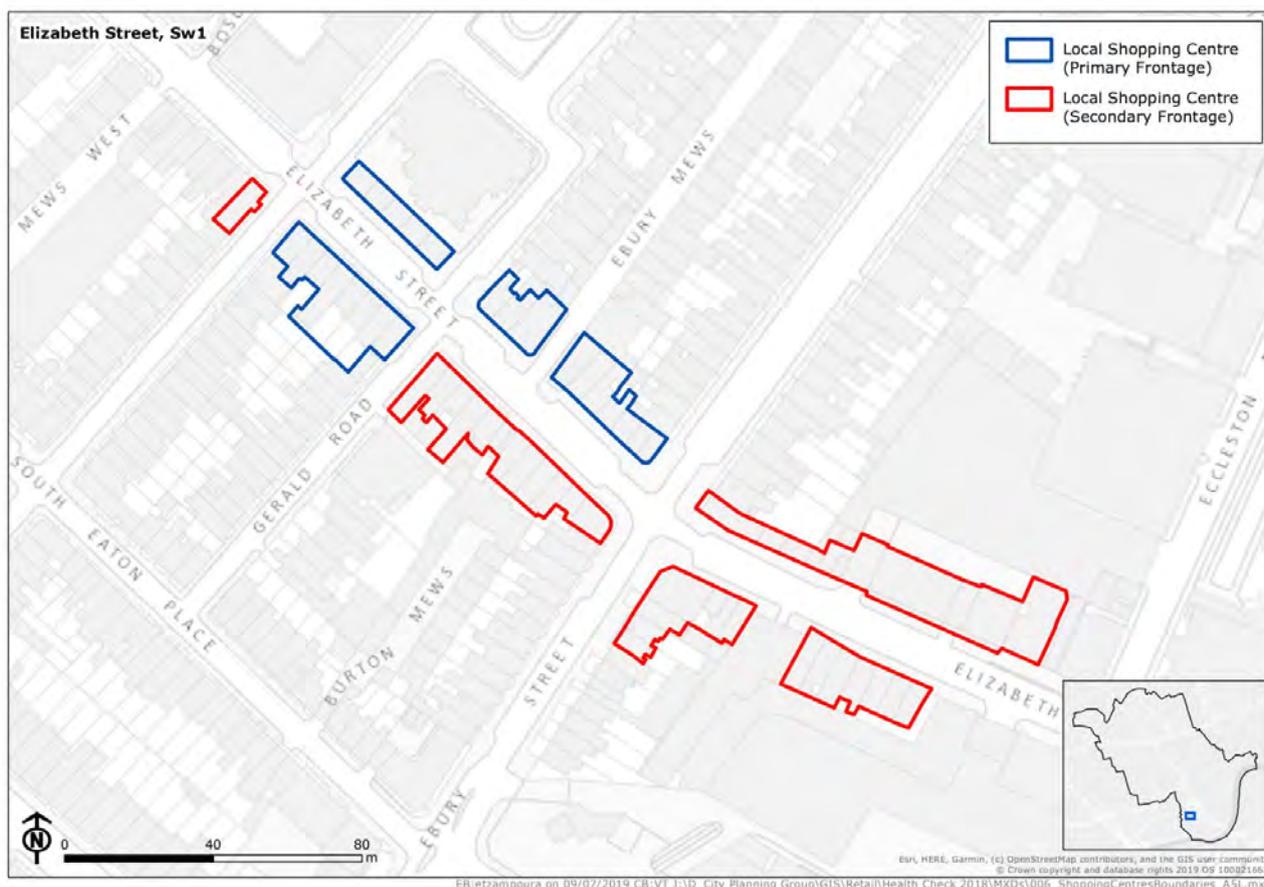
- The centre is considered to have a 'neutral' performance. Charlbert Street provides a mix of uses that mainly cater for local residents.
- Most of the vacant units identified by the 2017 land use survey were found to have been occupied in 2018. Only one remaining vacant unit remains in the centre, which brings the figure below the average for Westminster's Local Shopping Centres.
- The centre scored average on all qualitative assessment criteria. The public realm and cleanliness of the area would benefit from improvement.

## **41.6. Recommended boundary changes**

No boundary changes are recommended.

## 42. Elizabeth Street

Map 42.0: Shopping centre boundary, Elizabeth Street (2017)



### 42.1. Introduction

Elizabeth Street is a designated Local Shopping Centre. It currently has a primary and a secondary frontage.

This linear medium-sized centre is located in the south west part of Westminster in close proximity to Victoria Coach Station. The centre is adjacent to Buckingham Palace Road (A3214) at its eastern end, a main arterial road and is close to Victoria railway and Underground stations.

The centre provides a mix of uses that cater for visitors, local residents and workers. Its catchment area is restricted by the proximity to Victoria Station, Victoria Street and, to a smaller extent, to other Local Shopping Centres including Pimlico Road and Ebury Bridge Road located to the south of Elizabeth Street.

## 42.2. 2017 Land use analysis

### 42.21. Ground floor land use map (2017)

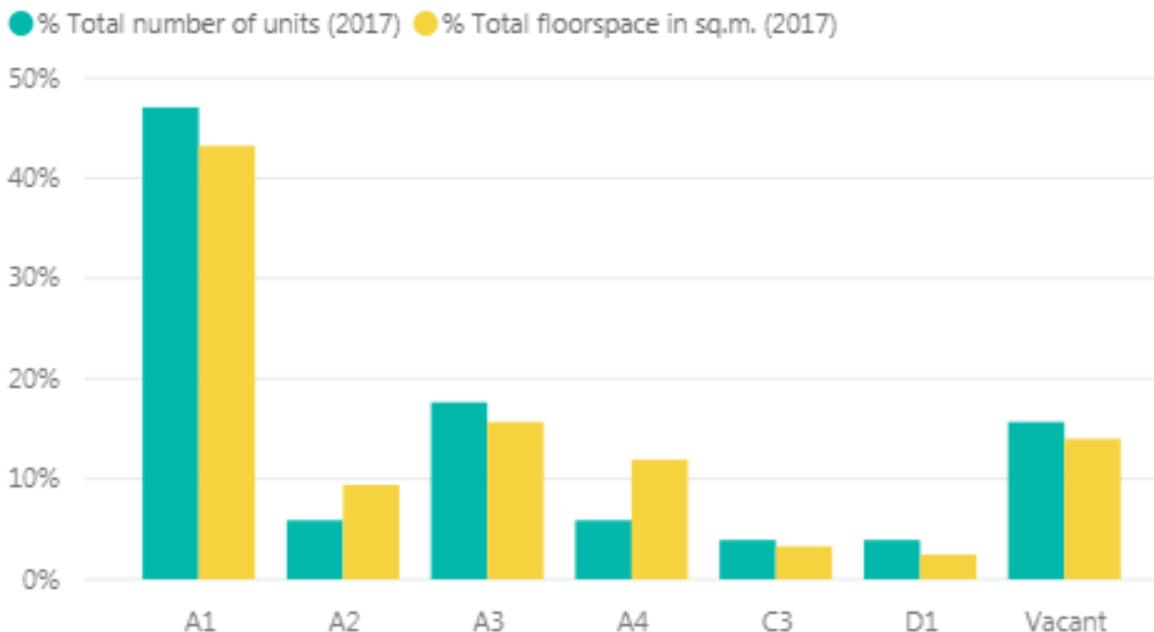
In 2017, 51 total units were identified at ground floor level. The surveyed area covered 4126,95 sq m

**Map 42.1: Ground floor land use map, Elizabeth Street (2017)**



### 42.22. Range of units and floorspace analysis (2017)

**Figure 42.2: Ground floor total number of units and floorspace by land use, Elizabeth Street (2017)**



The centre is shop-led with 24 A1 units recorded in 2017. These account for 47% of all units within the centre and for 43% of the overall floorspace.

The second largest use is A3 with nine units making 16% of the total floorspace.

Other uses in the centres include a limited amount of A2, A4, C3 and D1.

The 2017 land use survey identified eight vacant units in the centre, accounting for 16% of all units and 14% of the total floorspace. Although this is above the average for Westminster's local centres, the 2018 site survey has found that these units have now been occupied and only two vacant units were observed.

**Table 42.3: Ground floor total number of units and floorspace by land use, Elizabeth Street (2017)**

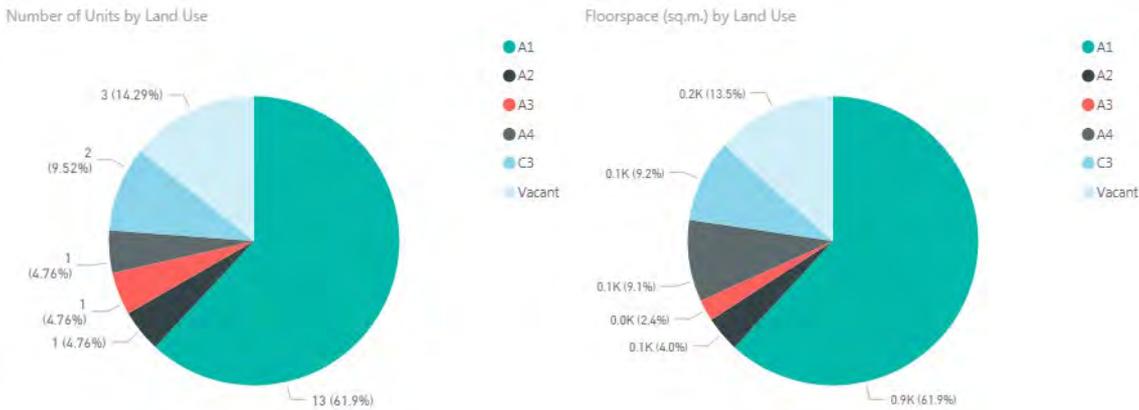
Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	24	47.06%	1783.69	43.22%
A2	3	5.88%	388.16	9.41%
A3	9	17.65%	647.38	15.69%
A4	3	5.88%	492.68	11.94%
C3	2	3.92%	135.35	3.28%
D1	2	3.92%	101.40	2.46%
Vacant	8	15.69%	578.28	14.01%
<b>Total</b>	<b>51</b>	<b>100%</b>	<b>4126.95</b>	<b>100%</b>

### 42.23. Frontage analysis (2017)

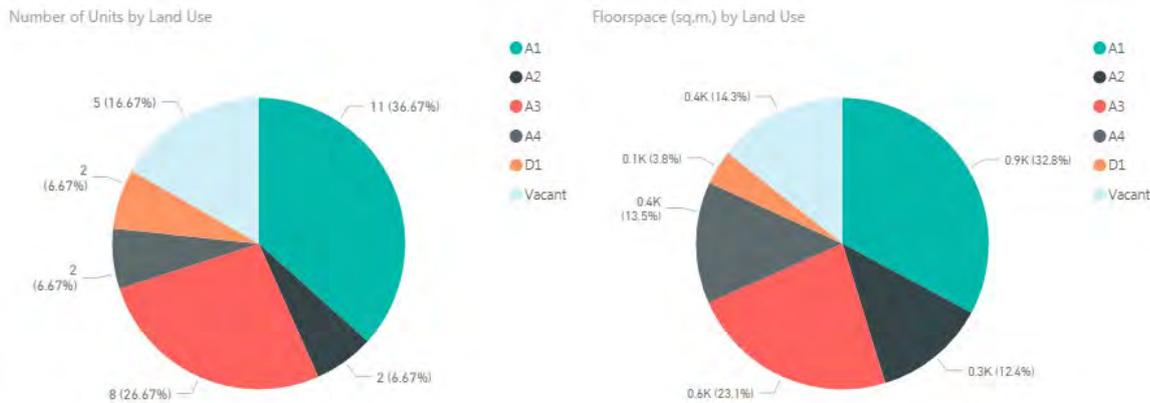
The primary frontage is A1-led with 13 units making 62% of the total number of units and floorspace in the frontage. Other uses recorded include a limited amount of A2, A3, A4 and C3. The secondary frontage presents a more balanced mix of uses with 11 A1 units taking up 37% of all units) A3 is a significant use in the secondary frontage, making 27% of all units (23% of the total floorspace). Other uses in this frontage include a limited amount of A2, A4 and D1.

Vacant units are equally distributed between the primary and the secondary frontage, where three and five vacant units were recorded, making 14% and 17% of the frontage's floorspace respectively.

**Figure 42.4: Primary Frontage - Number of units by land use and floorspace by land use (2017)**



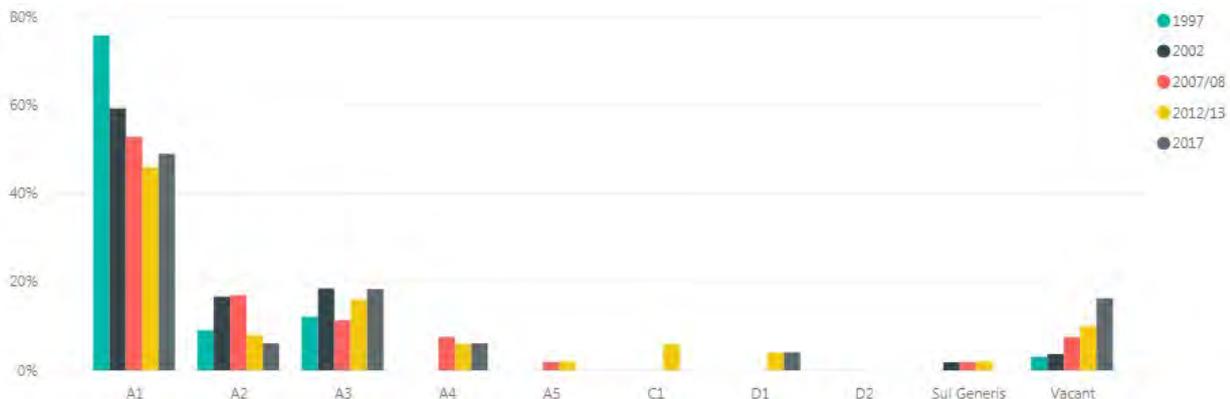
**Figure 42.5: Secondary Frontage - Number of units by land use and floorspace by land use (2017)**



### 42.3. Comparative land use analysis

#### 42.31. Comparative range of units and floorspace analysis

**Figure 42.4: Proportion of units by land use, Elizabeth Street (2017)**



The total number of units in the centre shows an interesting trend. In 1997, there was a total of 33 units; the centre then experienced rapid growth to 54 units in 2002. Larger units being divided into smaller units could have caused this. Since 2002 the centre's total number of units has marginally decreased and now stands at 49.

The proportion of A1 units has decreased across the years surveyed until 2012/13 where they accounted for 46% of all units. In 2017, 49% A1 units were recorded in the centre. There

seems to be a negative correlation between A2 and A3 uses since 2007/08, as A2 decreased while A3 increased to a similar rate.

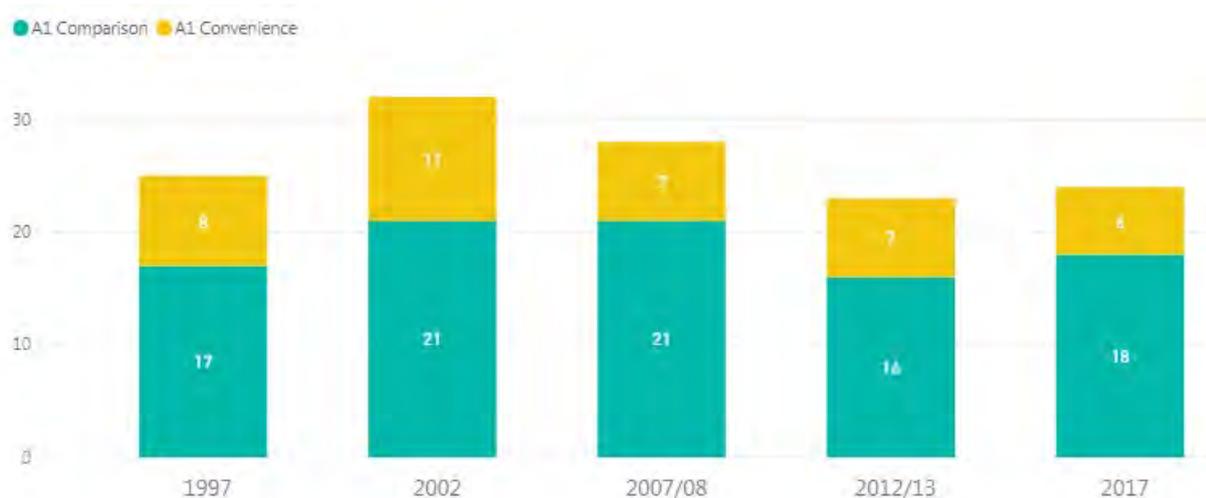
The proportion of A4 and D1 uses has remained stable, however the centre has had a very limited proportion of A5 and Sui Generis uses across the years surveyed, and the last survey has found that there were no longer any A5 or Sui Generis units within the boundary of this centre.

The number of vacancies in Elizabeth Street has steadily increased over the years. In 1997, there was one vacant unit taking up 3% of total units compared to eight vacant units in 2017 taking up 16% of all units.

A5, C1 and Sui generis have experienced a 100% loss between the 2012/13 and 2017 surveys, meaning that they are no longer present in this centre.

#### 42.32. Comparative comparison/convenience split analysis

**Figure 42.5: Number of comparison and convenience A1 units by year, Elizabeth Street (2017)**



The centre has had a broadly consistent comparison to convenience split across the years surveyed. Elizabeth Street has been comparison-led across all survey periods. The current 2017 ratio is 3:1 in favour of comparison uses.

### 42.4. 2018 Site Survey

#### 42.41. Accessibility and pedestrian flows

Although there is no Underground station within the centre boundary, Victoria Coach Station sits just outside of it while Victoria railway station is also at a walking distance. Sloane Square (Circle, District lines) and Victoria (Circle, District, Victoria lines) Underground stations are as well a ten-minute walk away.

The area is also easily accessible via a number of bus routes which stop along Buckingham Palace Road.

Pedestrian flows in the area were judged to be average, with the western portion of the centre near the Victoria Coach Station very busy and the western one much quieter.

## 42.42 Range of units and floorspace qualitative analysis

### 42.421 *Area description, land uses and retail provision*

The centre offers a mix of uses, with a mixed offer in proximity to the coach station and a more upmarket presence concentrated in the portion of the centre west of Ebury Street. In this portion, shops include luxury clothes shops, accessories (e.g. Philip Treacy) shops and health and beauty shops. The centre also features a number of upmarket patisseries and bakeries (e.g. Dominique Ansel, Peggy Porchen).

A large Sainsbury's, a chemist's, a veterinary shop, a bank and two estate agents are also present in the centre.

A number of cafés and restaurants can also be found within the centre boundary and a public house complements their offer. Some of them have tables and chairs outside.



### 42.422 *Vacant units*

Most of the vacant units identified by the 2017 land use survey were found to have been occupied. Two remaining vacant units were observed at the time of visit. Of these, one was being let after recent development and the other one (a wine bar at the north-east corner of Elizabeth Street with Ebury Street) is currently undergoing development.



## 42.43 State of the primary shopping area environmental quality assessment

### 42.431 *Public realm*

Overall, the quality of the public realm is considered to be high. Pavements are wide, there is extensive presence of dropped kerbs and shop fronts are well maintained and look attractive. The easternmost portion of the centre, in proximity to the coach station, would benefit from improvements.



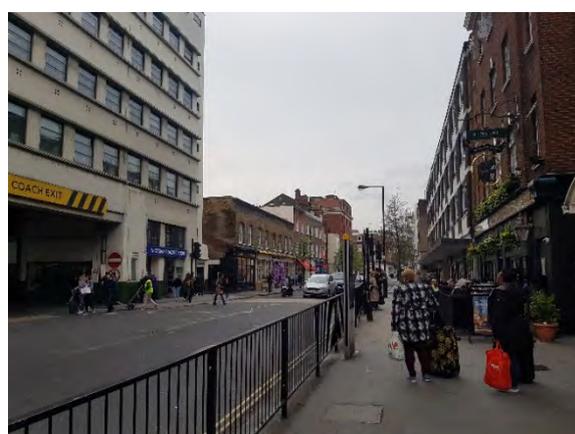
### 42.432 *Cleanliness, safety and security*

Cleanliness was judged to be high throughout the centre.

Safety and security were judged to be average throughout the centre.

### 42.433 *Identity and users*

Although it sits just outside the centre boundary, Victoria Coach Station is one of the defining elements of the area. Most people observed in the eastern portion of the centre were visitors who were likely to be either coming from or on the way to the coach station. The westernmost portion has a stronger local feel and appears to cater more to residents and local workers.



## **42.5. Performance summary and recommendations**

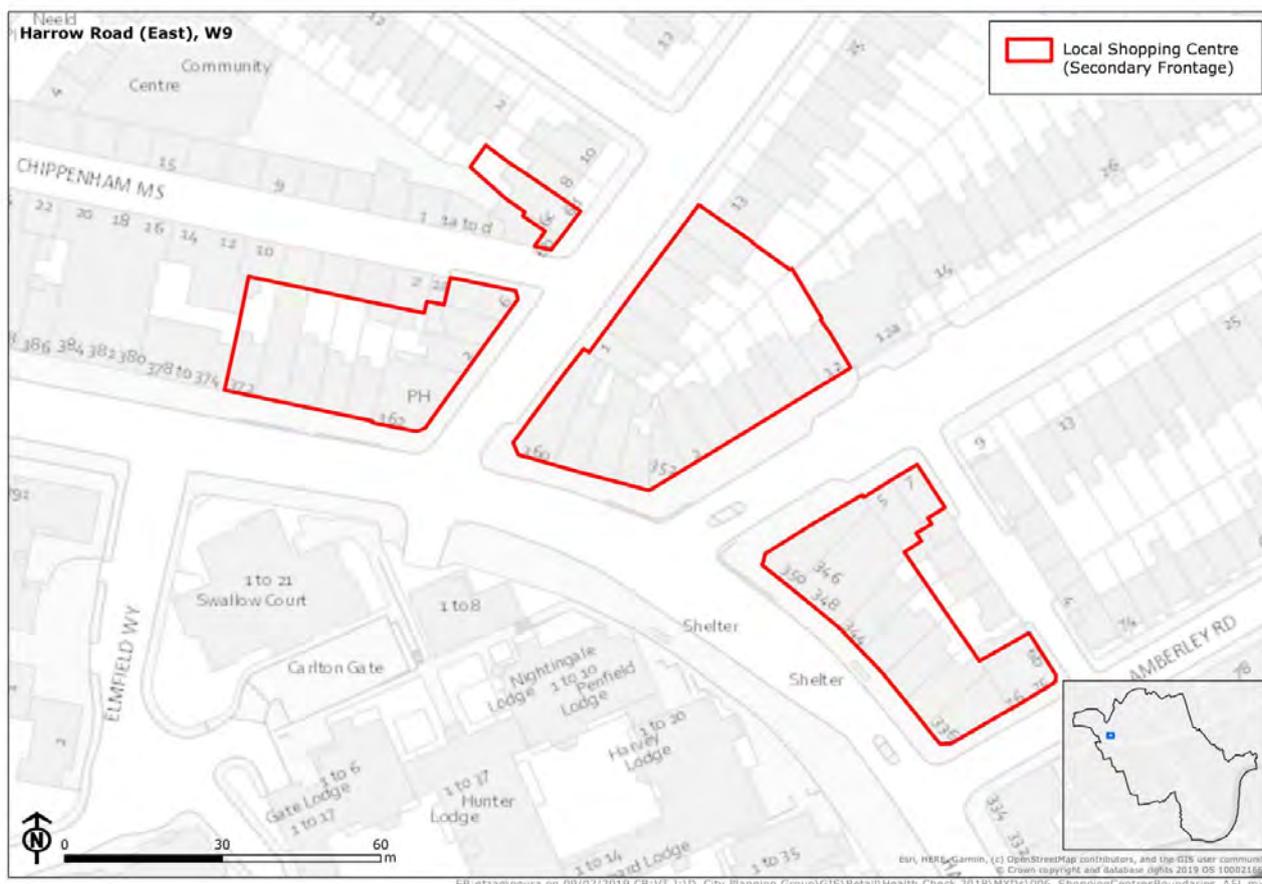
- The centre is considered to be 'healthy'. Elizabeth Street provides a mix of uses that cater for visitors, local residents and workers.
- Most of the vacant units identified by the 2017 land use survey were found to have been occupied. Two vacant units remain in the centre, which brings the figure below the average for Westminster's Local Shopping Centres.
- The centre scores high on public realm and cleanliness. However, the easternmost portion of the centre, in proximity to Victoria Coach Station, would benefit from improvements.

## **42.6. Recommended boundary changes**

No boundary changes are recommended.

## 43. Harrow Road (East)

Map 43.0: Shopping centre boundary, Harrow Road (East) (2017)



### 43.1. Introduction

Harrow Road (East) is a designated Local Shopping Centre. It currently has a secondary frontage.

This medium-sized local centre is located in close proximity to the Paddington Community Hospital, the Westminster Academy on Harrow Road, and the A40 (M) Westway.

The centre provides a mix of uses that mainly cater for local residents. Its catchment area is limited by the proximity of the Westway and by other centres, including the larger Harrow Road District Shopping Centre to the west, and the small Harrow Road/Bourne Terrace Local Shopping Centre to the east.

## 43.2. 2017 Land use analysis

### 43.21. Ground floor land use map (2017)

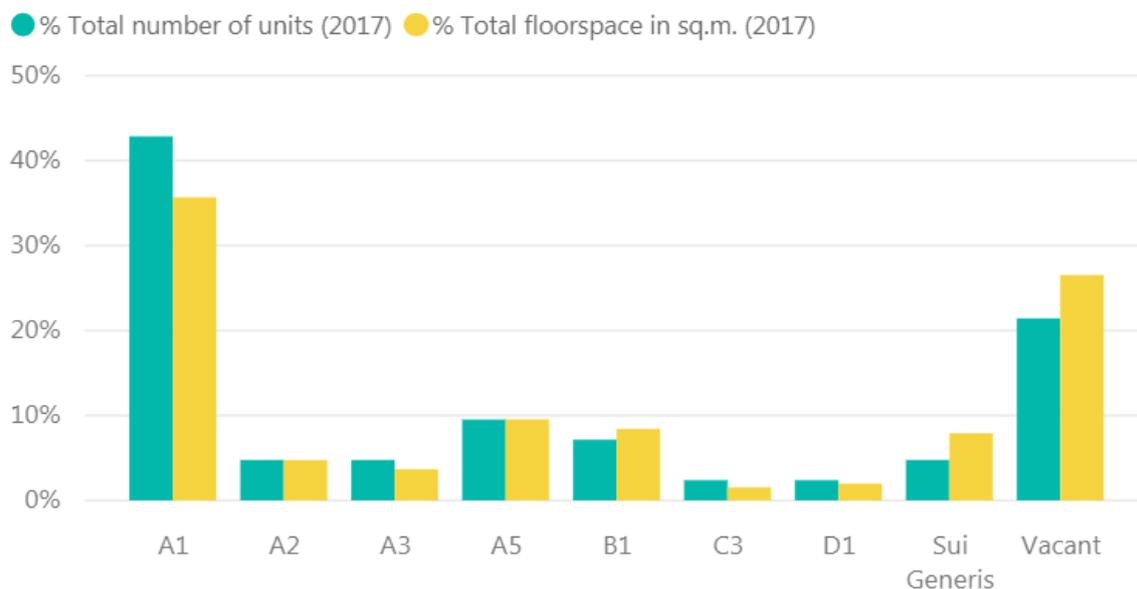
In 2017, 42 total units were identified at ground floor level. The surveyed area covered 3028.57 sq m

**Map 43.1: Ground floor land use map, Harrow Road (East) (2017)**



### 43.22. Range of units and floorspace analysis (2017)

**Figure 43.2: Ground floor total number of units and floorspace by land use, Harrow Road (East) (2017)**



The centre is A1-led with 43% of the total number of units and 36% of the centre's floorspace.

A5 is the second largest use with four units, accounting for 10% of the total units and of the overall floorspace, followed by three units of B1 (accounting for 7% of all units and 8% of all the floorspace). There is an equal proportion of A2, A3, and Sui Generis units (two units each, both accounting for 5% of all units but with Sui Generis units occupying more floorspace proportionally – 8% of the total floorspace). Other uses recorded in this centre include a limited amount of D1 and C3 with one unit each.

The second largest share of land uses is taken up by vacant units (nine were recorded in 2017), which account for 21% of all units and for 26% of the total floorspace. Vacancies are concentrated towards the north-west of the centre, particularly between Harrow Road and Marylands Road. This figure is considerably higher than the Westminster average for Local Shopping Centres. The 2018 site survey revealed that a number of these units were undergoing development, while four units remained vacant.

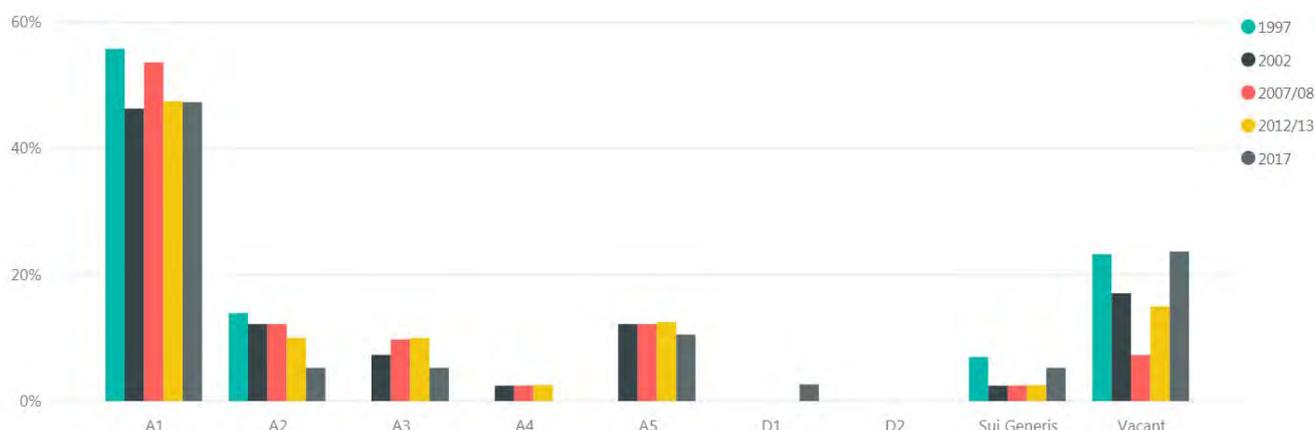
**Table 43.3: Ground floor total number of units and floorspace by land use, Harrow Road (East) (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	18	42.86%	1080.55	35.68%
A2	2	4.76%	143.53	4.74%
A3	2	4.76%	110.96	3.66%
A5	4	9.52%	288.97	9.54%
B1	3	7.14%	255.43	8.43%
C3	1	2.38%	46.30	1.53%
D1	1	2.38%	59.79	1.97%
Sui Generis	2	4.76%	239.28	7.90%
Vacant	9	21.43%	803.76	26.54%
<b>Total</b>	<b>42</b>	<b>100%</b>	<b>3028.57</b>	<b>100%</b>

### 43.3. Comparative land use analysis

#### 43.31. Comparative range of units and floorspace analysis

**Figure 43.4: Proportion of units by land use, Harrow Road (East) (2017)**



The total number of units within the boundary of this centre has experienced a marginal yet steady reduction, moving from 43 units in 1997 to 38 in 2017.

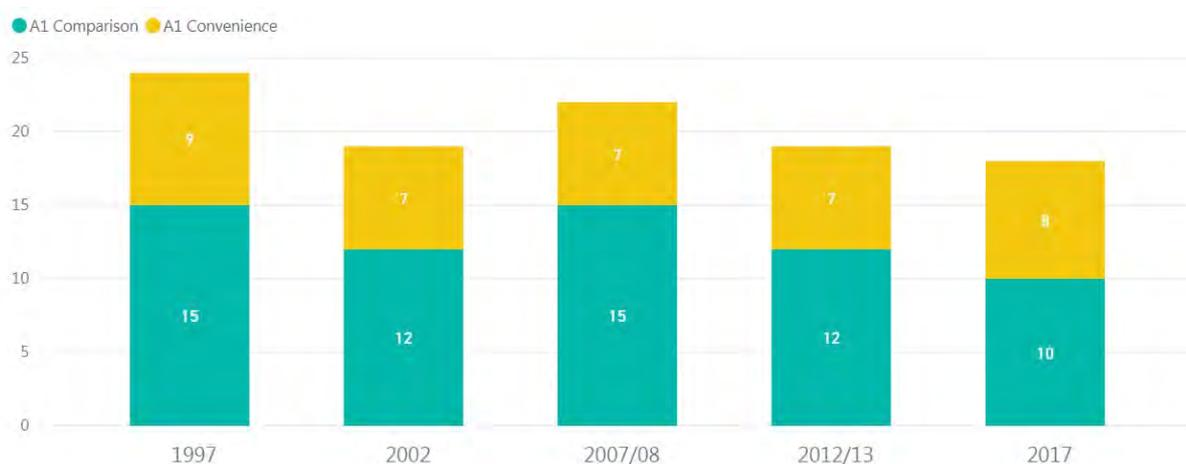
The proportion of A1 units has remained relatively stable across the years surveyed, with almost no change compared to the previous survey.

Of all land uses A2, A3 and A4 appear to have experienced the most significant loss, particularly between 2012/13 and 2017, when they lost respectively 50%, 50% and 100% of their units.

The number of Sui Generis uses has increased marginally between 2012/13 and 2017 (+1 unit), while the most prominent change is represented by the steep increase in vacant units within the centre, totalling 9 units in 2017 (27% of all floorspace) – a net increase by 3 units, 50% more than what recorded in the previous survey.

### 43.32. Comparative comparison/convenience split analysis

**Figure 43.5: Number of comparison and convenience A1 units by year, Harrow Road (East) (2017)**



The shopping centre has had a broadly consistent comparison to convenience split across the years surveyed. The centre has been comparison-led since 1997. The 2017 figures show that A1 convenience has now taken up a larger share of units, the latest convenience to comparison ratio being four to five.

## 43.4. 2018 Site Survey

### 43.41. Accessibility and pedestrian flows

There are no Underground stations within the designation, however Westbourne Park (Circle, Hammersmith and City lines), Royal Oak (Circle, Hammersmith and City lines) and Warwick Avenue (Bakerloo line) stations are within ten-minute walk.

A number of buses also run along Harrow Road and serve the centre directly.

Pedestrian flows were judged to be low throughout the centre.

## 43.42 Range of units and floorspace qualitative analysis

### 43.421 Area description, land uses and retail provision

Although the centre's designation covers the portion of Harrow Road between Elmfield Way to the west to Amberley Road to the east, other town centre uses can be found until the crossing of the Grand Union Canal to the east and Chippenham Road to the west.

The centre's offer is focussed on A1 uses, with the largest proportion being hairdressers, barbers and beauty salons. These are complemented by a number of grocery and convenience shops, and a chemist.

Four hot food takeaway shops, two estate agents, two business units, one small mosque, one betting shop and a minicab office are also present in the centre.



### 43.422 Vacant units

Of the vacancies identified by the 2017 land use survey, the 2018 site survey has confirmed that four units are still in long-term vacancy.

## 43.43 State of the primary shopping area environmental quality assessment

### 43.431 Public realm

The quality of the public realm was judged to be low.

This is particularly due to the overpowering presence of the A road with its constant vehicular traffic which negatively affects the pedestrian experience. Although dropped kerbs were



observed, pavements have uneven surfaces, are cluttered with planters, fences, bollards, A boards and rubbish bags and are not particularly well-maintained. Unkept shop fronts and vacant units in a state of disrepair negatively add to this.



#### 43.432 *Cleanliness, safety and security*

Cleanliness was judged to be low throughout the centre.

Safety and security were judged to be low throughout the centre.



#### 43.433 *Identity and users*

There are no local landmarks or key anchor shops in this area. The centre and its offer appear to cater primarily to local people.

### **43.5. Performance summary and recommendations**

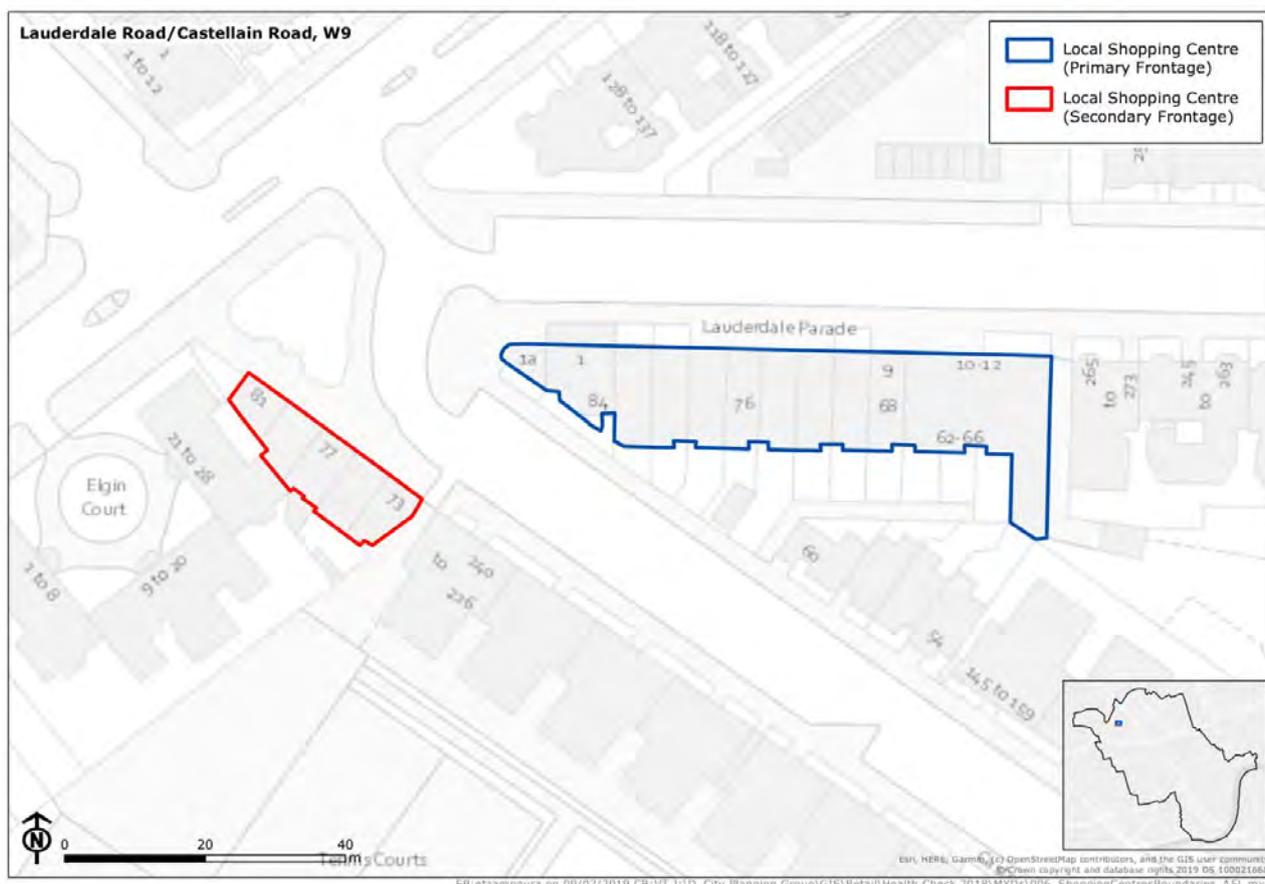
- The centre is considered to be 'in decline'. Harrow Road (East) provides a mix of uses that mainly cater for local residents.
- Of the vacant units identified by the 2017 land use survey, four units remain in long-term vacancy, which brings the figure below the average for Westminster's Local Shopping Centres.
- A number of hot food takeaway shops, a betting shop and premises offering shisha smoking are present in the centre.
- The centre scored low on all qualitative assessment criteria and would benefit from improved public realm and cleanliness.
- It is recommended to closely monitor the performance of this centre due to its reduced accessibility, low environmental quality and competition from other nearby centres.

### **43.6. Recommended boundary changes**

No boundary changes are recommended.

## 44. Lauderdale Road/Castellain Road

Map 44.0: Shopping centre boundary, Lauderdale Road/Castellain Road (2017)



### 44.1. Introduction

Lauderdale Road/Castellain Road is a designated Local Shopping Centre. It currently has a primary and a secondary frontage.

It is a small centre located in the north of Westminster and set around a road junction located in close proximity to Paddington Recreation Ground and the A5 Maida Vale to the east.

The centre offers a mix of uses that mainly cater for local residents in the Maida Vale area.

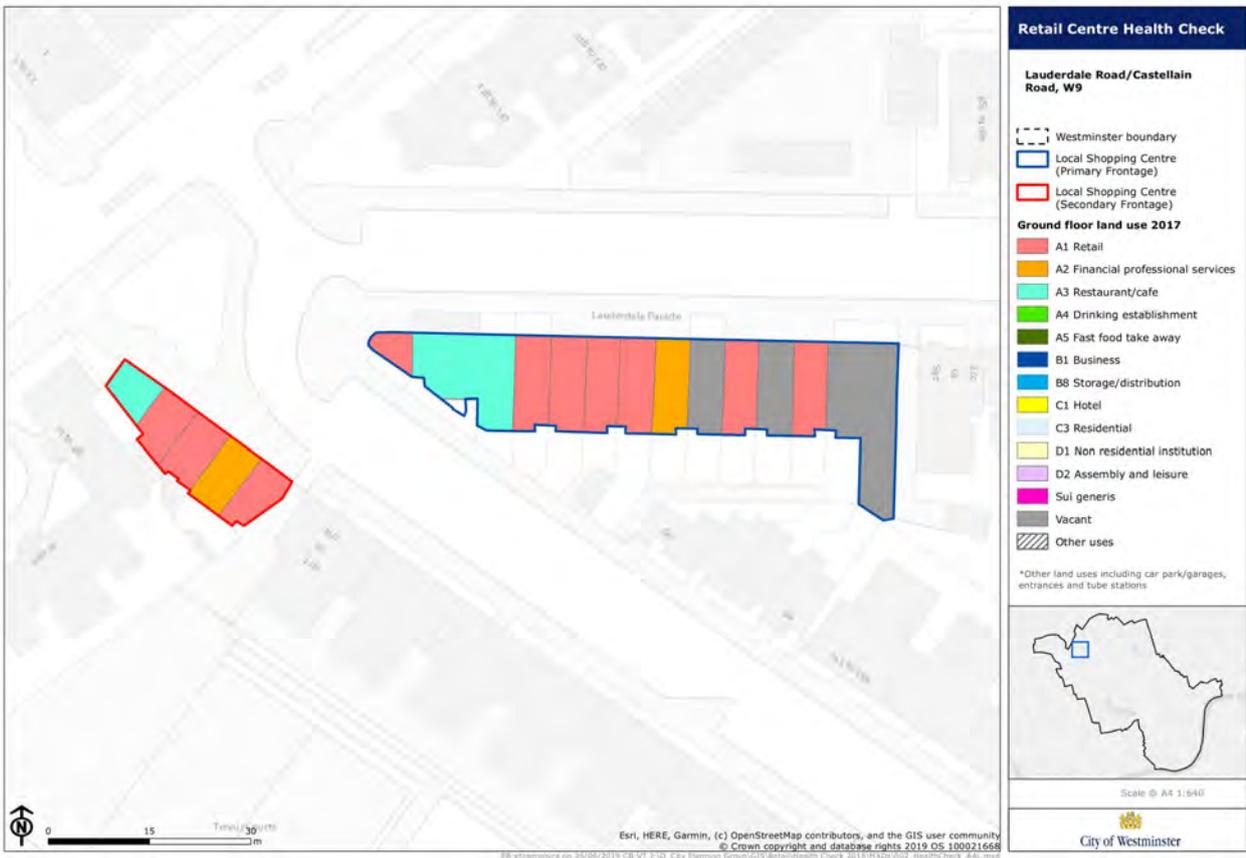
Its catchment area is limited by the proximity of other Local Shopping Centres, such as Maida Vale to the east and Shirland Road Junction to the west.

## 44.2. 2017 Land use analysis

### 44.21. Ground floor land use map (2017)

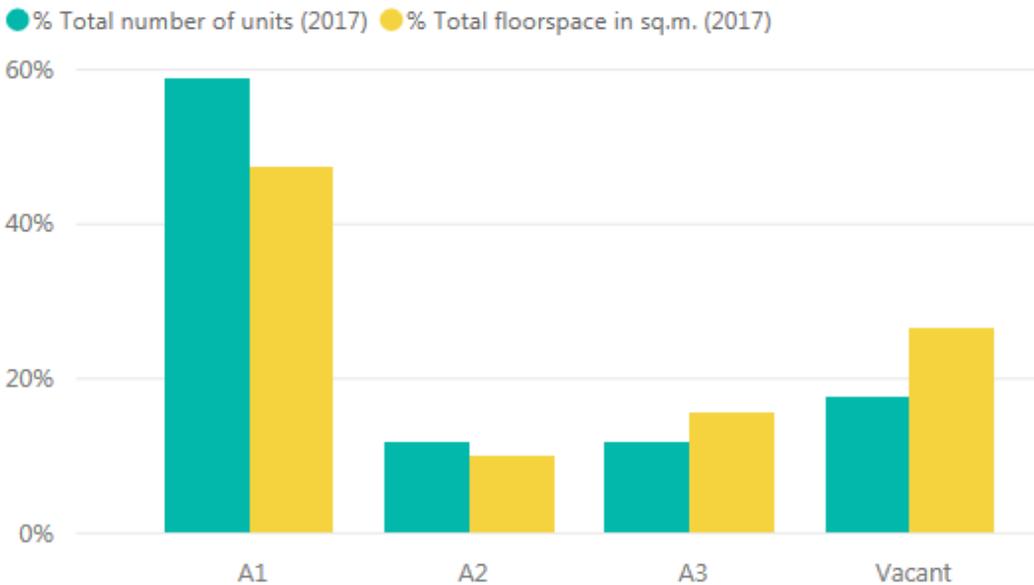
In 2017, 17 total units were identified at ground floor level. The surveyed area covered 1307 sq m

**Map 44.1: Ground floor land use map, Lauderdale Road/Castellain Road (2017)**



### 44.22. Range of units and floorspace analysis (2017)

**Figure 44.2: Ground floor total number of units and floorspace by land use, Lauderdale Road/Castellain Road (2017)**



The centre is predominantly shop-led with ten A1 units recorded in 2017. These account for 59% of all units within the centre and for 48% of the overall floorspace at ground floor level.

A2 and A3 units are equally split (two units each), although A3 holds a larger amount of floorspace at 16% to 10% of A2.

The 2017 land use survey recorded three vacant units within the centre accounting for 18% of the total number of units and 27% of the overall floorspace. However, the 2018 site survey has revealed that these units have now all been occupied.

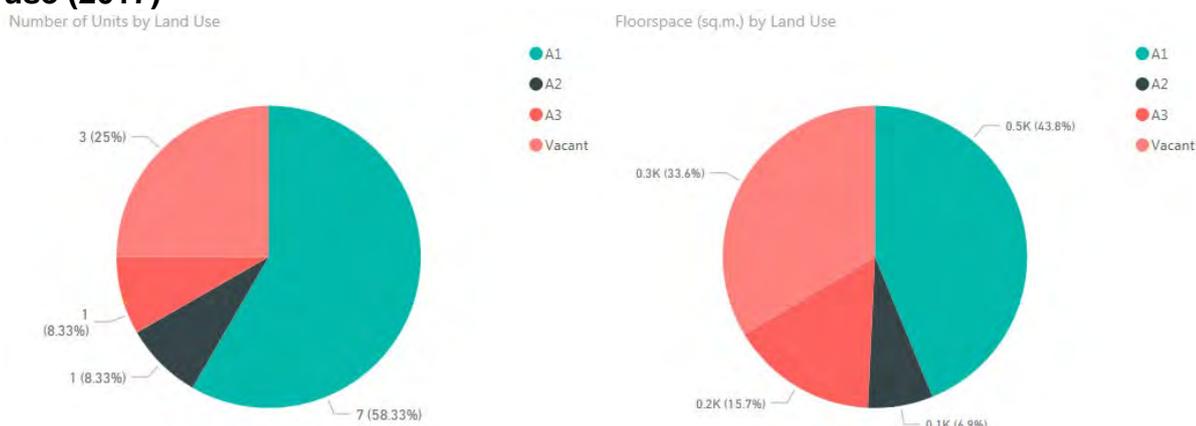
**Table 44.3: Ground floor total number of units and floorspace by land use, Lauderdale Road/Castellain Road (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	10	58.82%	621.02	47.53%
A2	2	11.76%	131.81	10.09%
A3	2	11.76%	205.13	15.70%
Vacant	3	17.65%	348.68	26.69%
<b>Total</b>	<b>17</b>	<b>100%</b>	<b>1306.63</b>	<b>100%</b>

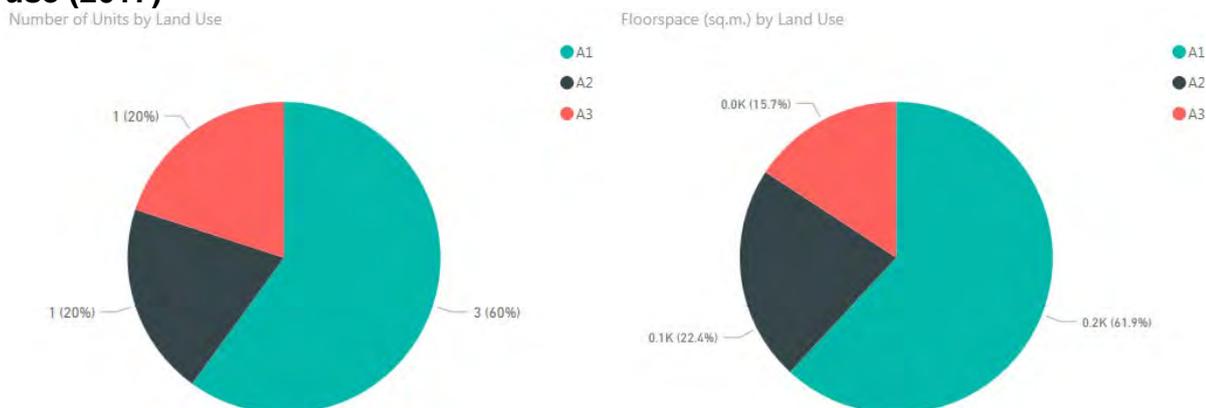
### 44.23. Frontage analysis (2017)

The proportion of A1 units is greater in the secondary frontage where seven units occupy 62% of all the frontage’s floorspace against three units in the primary frontage (44% of the frontage’s floorspace). There are one A2 and one A3 unit in both frontages, while all of the centre’s vacancies are located in the primary frontage.

**Figure 44.4: Primary Frontage - Number of units by land use and floorspace by land use (2017)**



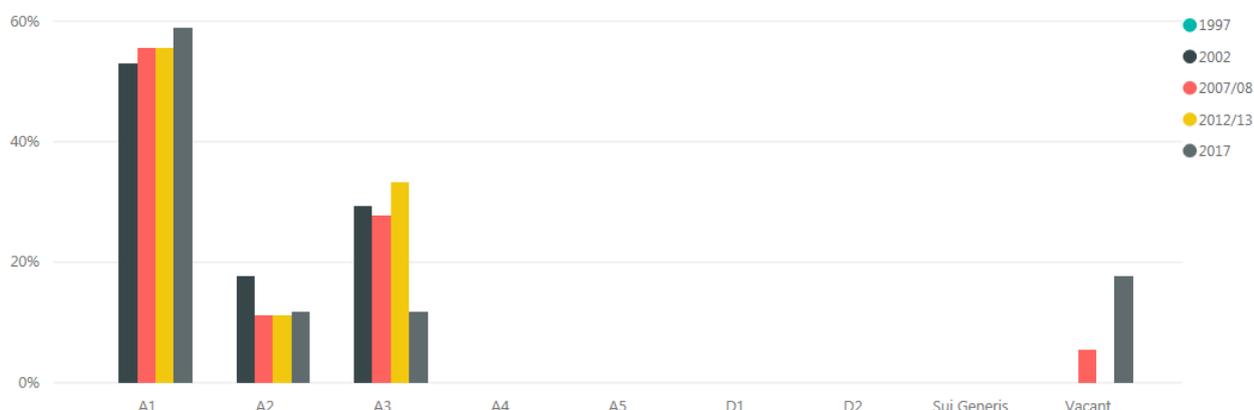
**Figure 44.5: Secondary Frontage - Number of units by land use and floorspace by land use (2017)**



### 44.3. Comparative land use analysis

#### 44.31. Comparative range of units and floorspace analysis

**Figure 44.4: Proportion of units by land use, Lauderdale Road/Castellain Road (2017)<sup>46</sup>**



The total number of units within the boundary of the centre has experienced negligible change over the survey periods 2002-2017, fluctuating by one unit only between 17 and 18 units.

While the proportion of A1 units has experienced a 3% increase between 2012/13 and 2017, the total number of units has not changed during that period. The most substantial change in unit numbers has affected A3 uses with a drop from six to two units, a 67% decrease.

Vacancies appear to have peaked since 2007/08, trebling from one to three units in 2017. Since the previous survey the centre has experienced an increase of 300% in vacancies as there were no vacant units in 2012/13. However, the 2018 site survey has found that there are no vacant units in Lauderdale Road/Castellain Road.

<sup>46</sup> There is no data available for 1997 for this centre.

## 44.32. Comparative comparison/convenience split analysis

**Figure 44.5: Number of comparison and convenience A1 units by year, Lauderdale Road/Castellain Road (2017)**



The centre has had a broadly consistent comparison to convenience split across the years surveyed. The centre has been comparison-led since 2002. The strength of A1 comparison peaked in 2012/13 with a ratio of 3:7. In 2017, the comparison to convenience ratio was 3:2.

## 44.4. 2018 Site Survey

### 44.41. Accessibility and pedestrian flows

The centre is not directly served by public transport; however, it is within a five and ten-minute walk of Maida Vale (Bakerloo line) and Warwick Avenue (Bakerloo line) Underground stations respectively.

A number of buses also serve the A5 (Maida Vale) which is also a ten-minute walk away.

Pedestrian flows in the centre were judged to be low.

### 44.42 Range of units and floorspace qualitative analysis

#### 44.421 Area description, land uses and retail provision

The centre appears to cater to a more affluent clientele, with several independent upmarket restaurants and cafés with some outdoor seating.

The centre also features a delicatessen, a convenience store, a wine merchant, a hairdresser, a beauty salon and a florist. Two letting agents and two design businesses can also be found in the centre.



**44.422**      *Vacant units*

The 2018 site survey has found that the centre has no vacant units. The three vacant units identified by the 2017 land use survey have now been occupied by two restaurants, one of which offering sushi, and by an ice cream shop.



**44.43 State of the primary shopping area environmental quality assessment**

**44.431**      *Public realm*

The quality of the public realm was judged to be high. Pavements are wide and uncluttered, with several dropped kerbs, and there is some green landscaping on the northern end of Castellain Road which includes bike rails and a series of benches. Most shop fronts look appealing and are well maintained.



#### 44.432 *Cleanliness, safety and security*

Cleanliness was judged to be high throughout the centre.

Safety and security were judged to be average throughout the centre.

#### 44.433 *Identity and users*

The centre appears to cater primarily for local residents.



### 44.5. Performance summary and recommendations

- The centre is considered to be 'healthy'. Lauderdale Road/Castellain Road provides a mix of upmarket restaurants and cafés and convenience uses that mainly cater for local residents.
- No vacant units have been identified in the centre.
- The centre scores high on public realm and cleanliness.

### 44.6. Recommended boundary changes

No boundary changes are recommended.

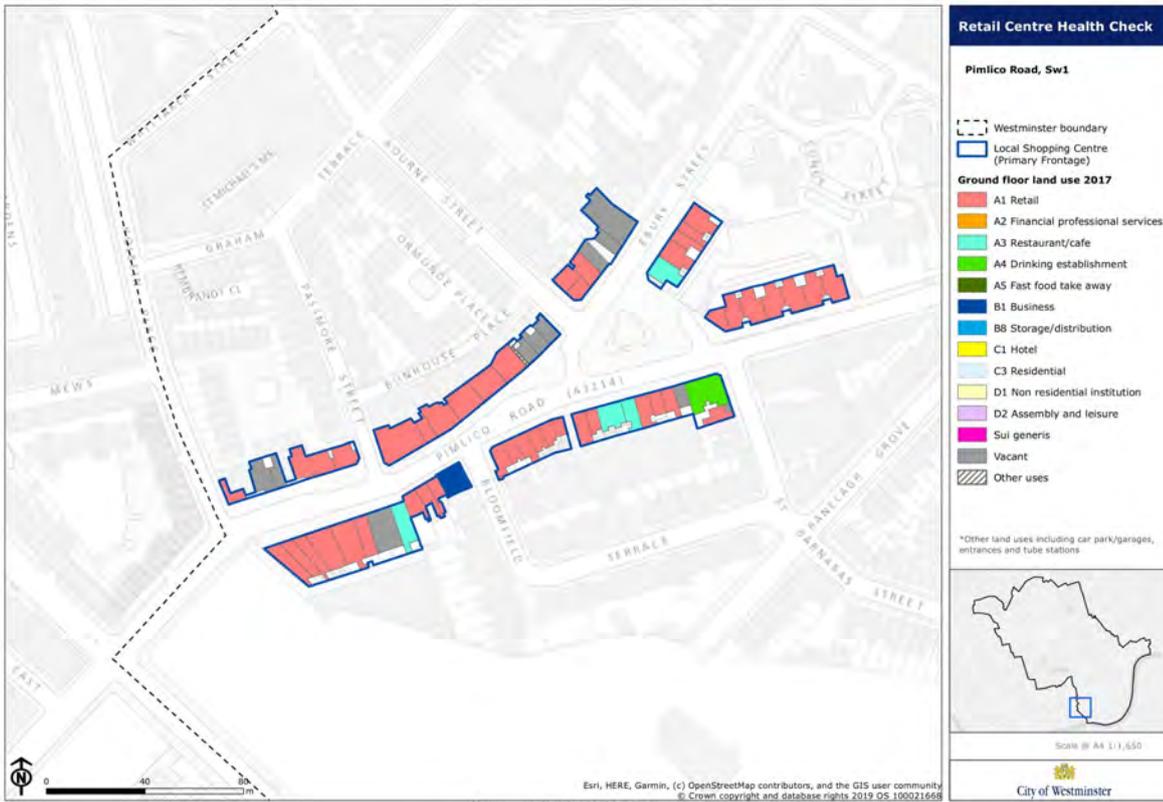


## 45.2. 2017 Land use analysis

### 45.21. Ground floor land use map (2017)

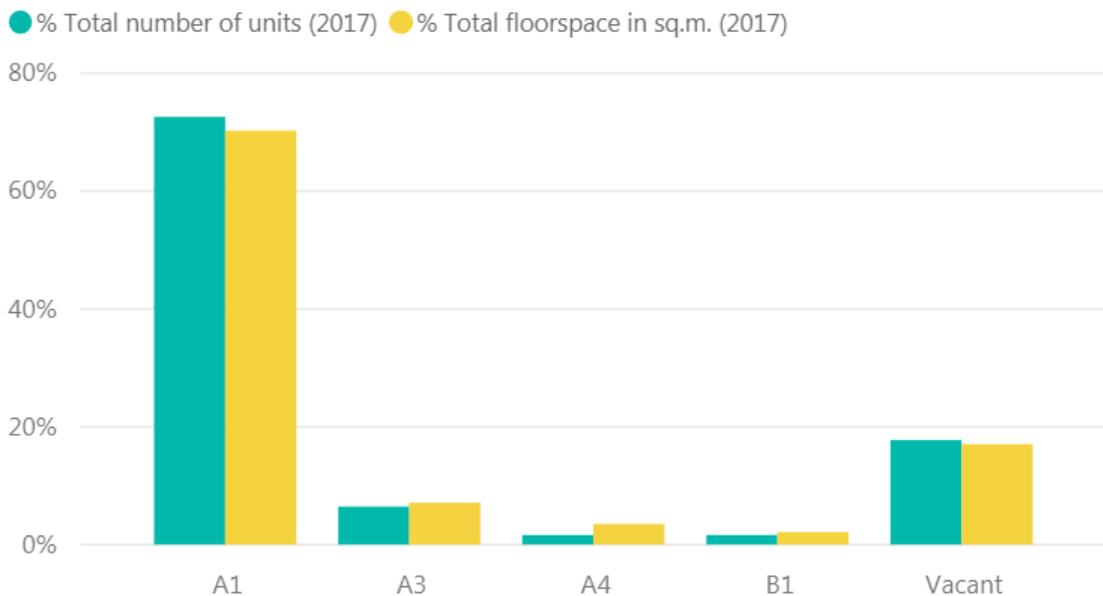
In 2017, 62 total units were identified at ground floor level. The surveyed area covered 5420.53 sq m

**Map 45.1: Ground floor land use map, Pimlico Road (2017)**



### 45.22. Range of units and floorspace analysis (2017)

**Figure 45.2: Ground floor total number of units and floorspace by land use, Pimlico Road (2017)**



The centre is predominantly shop-led with 45 A1 units recorded in 2017. These account for 73% of all units within the centre and for 70% of the overall floorspace at ground floor level. There is a smaller proportion of A3 (four units, accounting for just 6% of the total units), A4 (one unit) and B1 uses (one unit) in the centre.

The second largest share of land uses is taken up by vacant units (11 in 2017), which account for 18% of all units and for 17% of the total floorspace. However, the 2018 site survey has revealed that there does not seem to be any obvious spatial pattern to vacant units, however a small concentration can be observed towards the North East of the centre. It is noted that a number of these units, such as 40-44 Pimlico Road, are undergoing construction or refurbishment works and this should be considered in assessing the overall viability and performance of this centre.

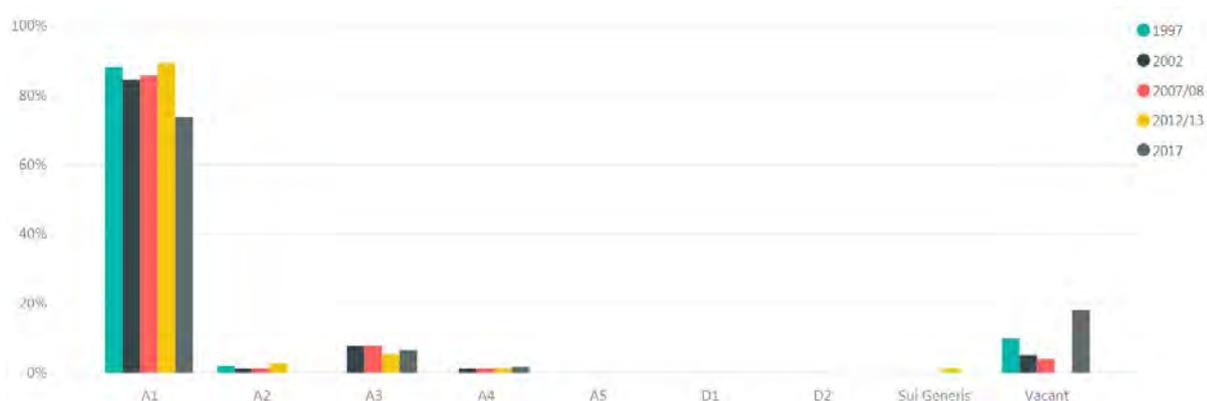
**Table 45.3: Ground floor total number of units and floorspace by land use, Pimlico Road (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	45	72.58%	3808.25	70.26%
A3	4	6.45%	384.88	7.10%
A4	1	1.61%	189.31	3.49%
B1	1	1.61%	114.47	2.11%
Vacant	11	17.74%	923.61	17.04%
Total	62	100%	5420.53	100%

### 45.3. Comparative land use analysis

#### 45.31. Comparative range of units and floorspace analysis

**Figure 45.4: Proportion of units by land use, Pimlico Road (2017)**



The total number of units within the boundary of this centre has experienced a peak in 2002, when a 53% increase was recorded, bringing the total number from 51 to 78 units. However, the following surveys have shown a steady marginal decrease in the number of units. The total number of units recorded in 2017 was 61.

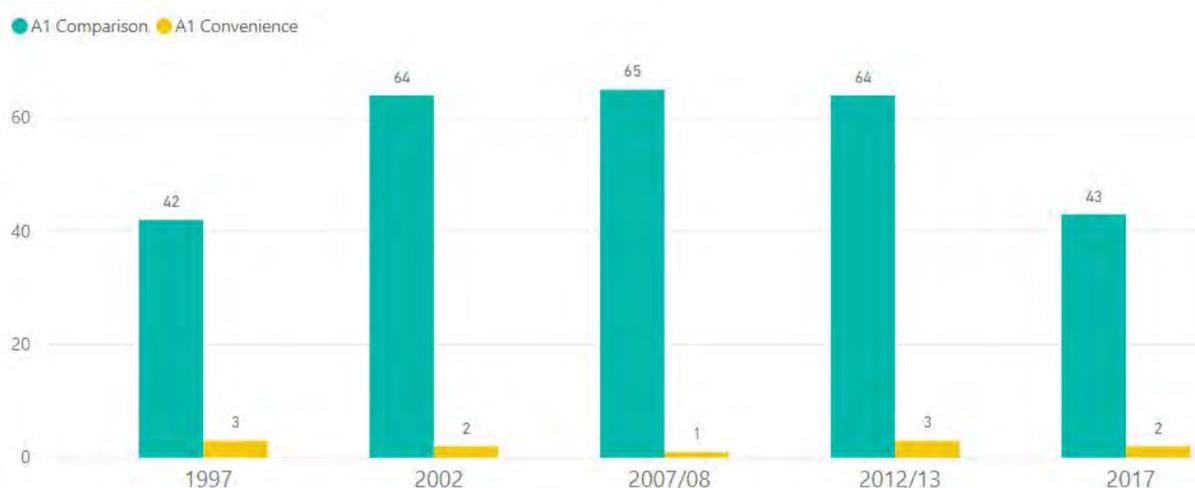
The proportion of A1 units has experienced a significant drop from the last survey in 2012/13. A1 has lost 22 units – a 33% loss compared to the previous survey and a drop by 16% in the share of A1 on the total number of units.

As there was no change in the number of A3 and A4 units between 2012/13 and 2017, it can reasonably be assumed that the drop in A1 units is likely to be a result of either the amalgamation of some of these A1 units into larger retail spaces and the loss of some A1 spaces to vacancy.

Past surveys recorded a steady reduction of vacant units since 1997 with the vacancy count falling to zero in the 2012/13 survey. The 2017 land use survey recorded a peak in vacancies, which have moved from none being recorded in 2012/13 to 11 units in 2017 accounting for 18% of the total.

#### 45.32. Comparative comparison/convenience split analysis

**Figure 45.5: Number of comparison and convenience A1 units by year, Pimlico Road (2017)**



The centre has had a broadly consistent comparison to convenience split across the years surveyed. The centre has been comparison-led since 1997. The strength of A1 comparison peaked in 2012/13 with a ratio of 3:7. In 2017, the comparison to convenience ratio was 3:2. The comparison to convenience ratio in 2017 was roughly 22 to 1.

## 45.4. 2018 Site Survey

### 45.41. Accessibility and pedestrian flows



Sloane Square Underground station (District, Circle lines) and Victoria Coach Station are a five-minute walk, and several bus services run along Buckingham Palace Road, with bus stops within a three-minute walk of the centre.

Pedestrian flows in the centre were judged to be average.

### 45.42 Range of units and floorspace qualitative analysis

#### 45.421 Area description, land uses and retail provision



The offer in this centre is mostly retail-orientated, with a large presence of art galleries, antique, interior, furniture and design shops. Alongside this specialist offer, a limited number of neighbourhood shops remain. These include a convenience store, a florist and a chemist. Four restaurants and cafés and one public house were also recorded.

#### 45.422 *Vacant units*

The 2018 site survey has found that half of the vacancies recorded by the 2017 land use survey to have been occupied. However, five vacant units still remain in the centre, three of which have been recently redeveloped.



#### 45.43 State of the primary shopping area environmental quality assessment

##### 45.431 *Public realm*



The quality of the public realm was judged to be high.

Pavements are overall wide and uncluttered, with dropped kerbs, and a large portion to the north west of the centre is paved and closed to road traffic. Some landscaping and public seating are present, as are several bike racks.

Shop fronts are appealing and well-maintained.

However, there is sustained vehicular traffic along Pimlico Road, which detracts from the public realm. This includes several buses and coaches, also due to the proximity to Victoria Coach Station.

##### 45.432 *Cleanliness, safety and security*

Cleanliness was judged to be high throughout the centre.

Safety and security were judged to be average throughout the centre.



#### 45.433 *Identity and users*

The centre's specialist art, antiques and design offer suggests that its customer base is mostly made of people on a specialist shopping trip.

On the other hand, a few units such as the public house and restaurants are used by local residents and workers.



### 45.5. Performance summary and recommendations

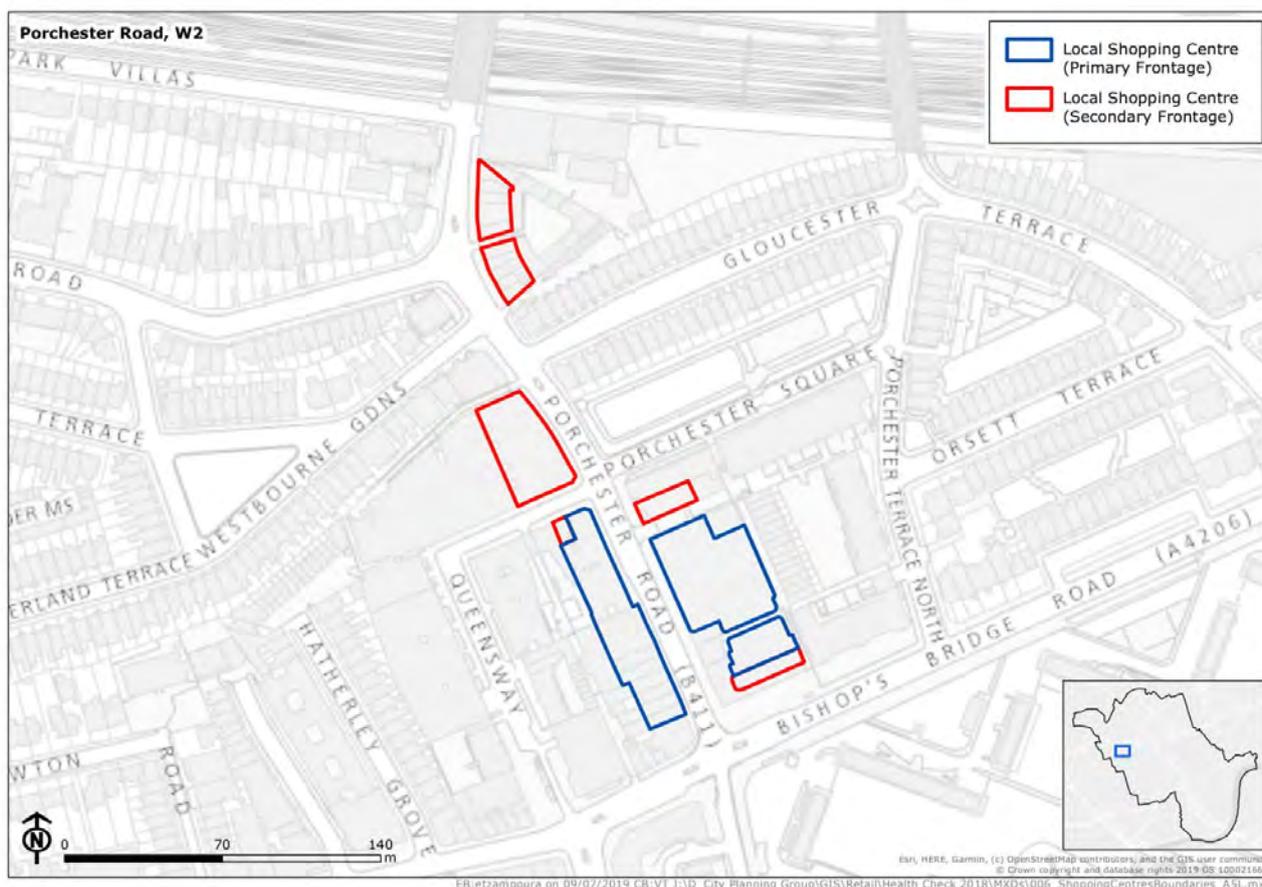
- The centre is considered to be 'healthy'. Pimlico Road provides a specialist retail offer alongside a limited local convenience function.
- Half of the vacant units identified by the 2017 land use survey have now been occupied. However, five vacant units remain in the centre, three of which have been recently redeveloped. The vacancy figure is below the average for Westminster's Local Shopping Centres.
- The centre scores high on public realm and cleanliness.
- The Chelsea Barracks development should be taken into account for the potential increased customer base and retail offer that this centre could provide.

## **45.6. Recommended boundary changes**

No boundary changes are recommended.

## 46. Porchester Road

Map 46.0: Shopping centre boundary, Porchester Road (2017)



### 46.1. Introduction

Porchester Road is a designated Local Shopping Centre. It currently has a primary and a secondary frontage.

This medium-sized linear centre is located in the west of Westminster and consists in a more localised extension of the neighbouring larger Queensway/Westbourne Grove Major Shopping Centre, running up to the rail tracks at Royal Oak station.

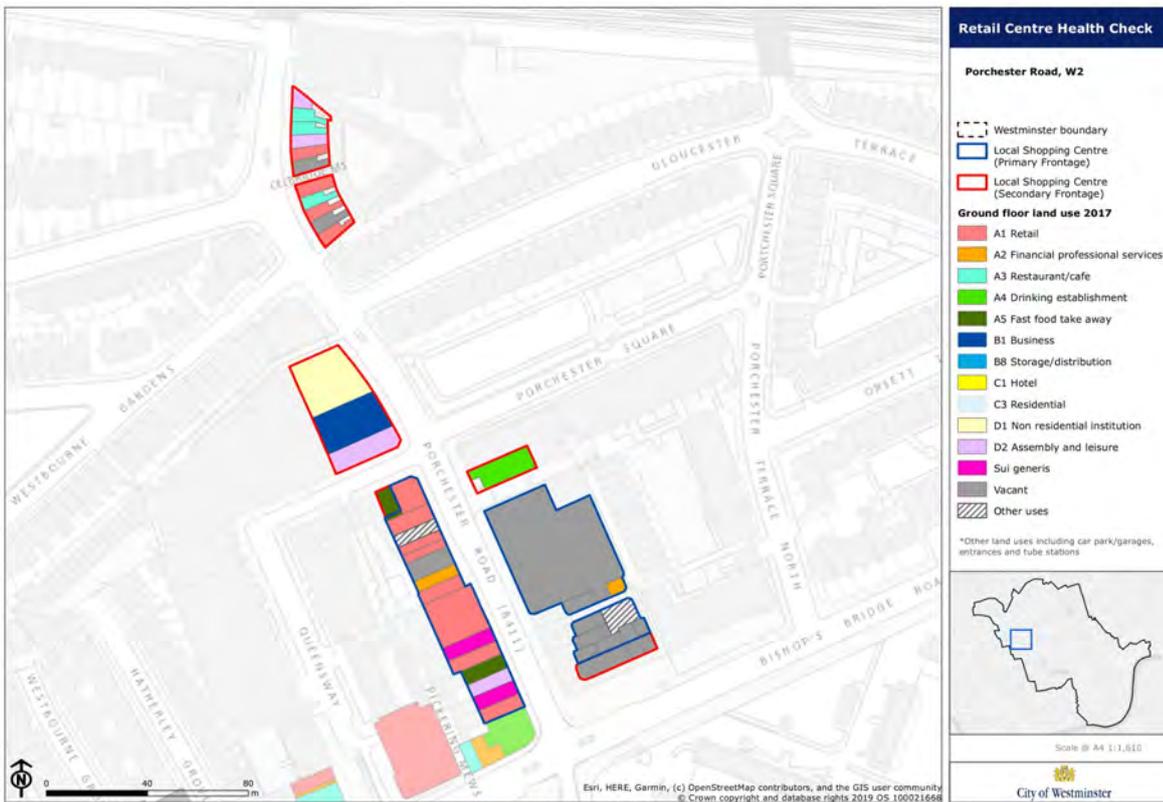
The centre provides a range of uses which serve local residents and workers. Its catchment area is limited by its proximity to the Westway to the north and the Queensway/Westbourne Grove Major Shopping Centre to the south.

## 46.2. 2017 Land use analysis

### 46.21. Ground floor land use map (2017)

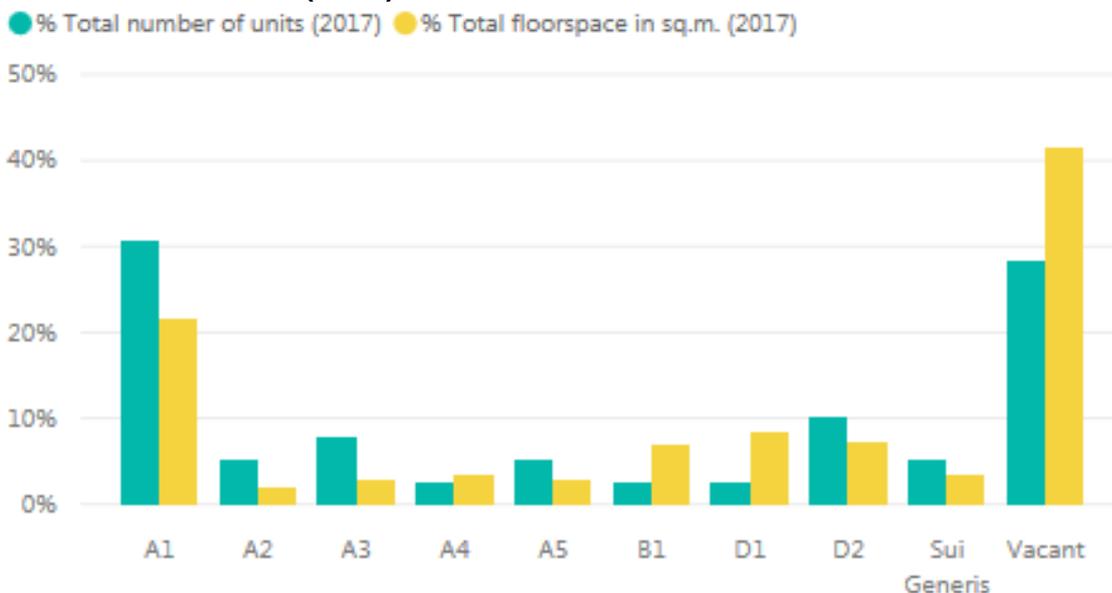
In 2017, 39 total units were identified at ground floor level. The surveyed area covered 6360 sq m

**Map 46.1: Ground floor land use map, Porchester Road (2017)**



### 46.22. Range of units and floorspace analysis (2017)

**Figure 46.2: Ground floor total number of units and floorspace by land use, Porchester Road (2017)**



The centre's offer is shop-led with 12 A1 units recorded in 2017. These account for 31% of all units within the centre and for 21% of the overall floorspace.

D2 is the second most numerous use in the centre, with four units making 10% of the total number of units and 7% of total floorspace.

The remaining uses in the centre include a limited amount of A3, A5, A2, D1, B1, A4 and Sui Generis.

There are 11 vacant units in the centre, accounting for 28% of all units and 42% of the overall floorspace. The largest proportion of vacancies is found in the primary frontage (37% of all units, 59% of floorspace). Vacancies are spatially concentrated in the south-eastern corner of Porchester Road. The 2018 land use survey has found that the site has now been occupied by a new development comprising a Waitrose on the first floor and a number of retail and restaurant units on the ground floor. Of these, only two units were still vacant at the time of visit. This reduces the vacancy data significantly.

**Table 46.3: Ground floor total number of units and floorspace by land use, Porchester Road (2017)**

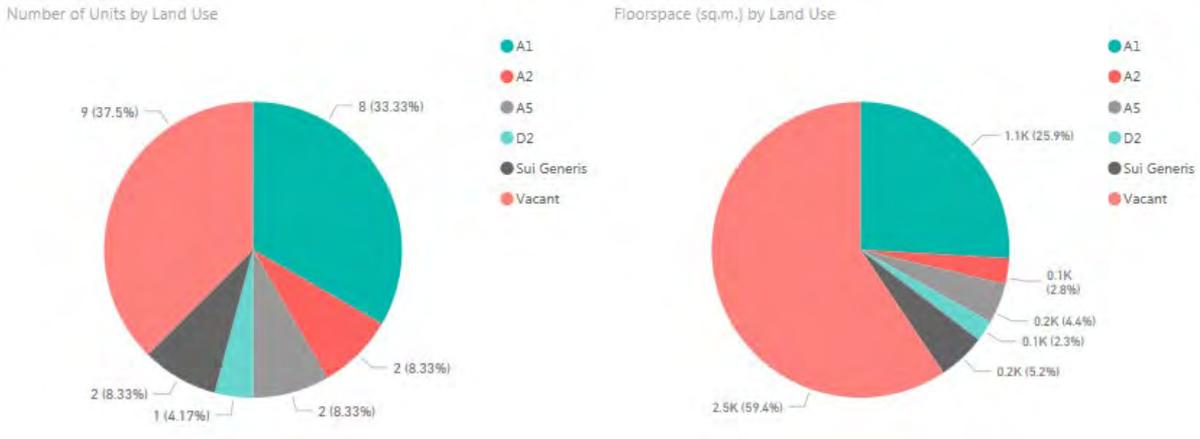
Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	12	30.77%	1364.68	21.46%
A2	2	5.13%	119.87	1.88%
A3	3	7.69%	181.59	2.86%
A4	1	2.56%	226.44	3.56%
A5	2	5.13%	185.80	2.92%
B1	1	2.56%	433.37	6.81%
D1	1	2.56%	532.58	8.37%
D2	4	10.26%	455.27	7.16%
Sui Generis	2	5.13%	220.07	3.46%
Vacant	11	28.21%	2639.88	41.51%
<b>Total</b>	<b>39</b>	<b>100%</b>	<b>6359.56</b>	<b>100%</b>

#### 46.23. Frontage analysis (2017)

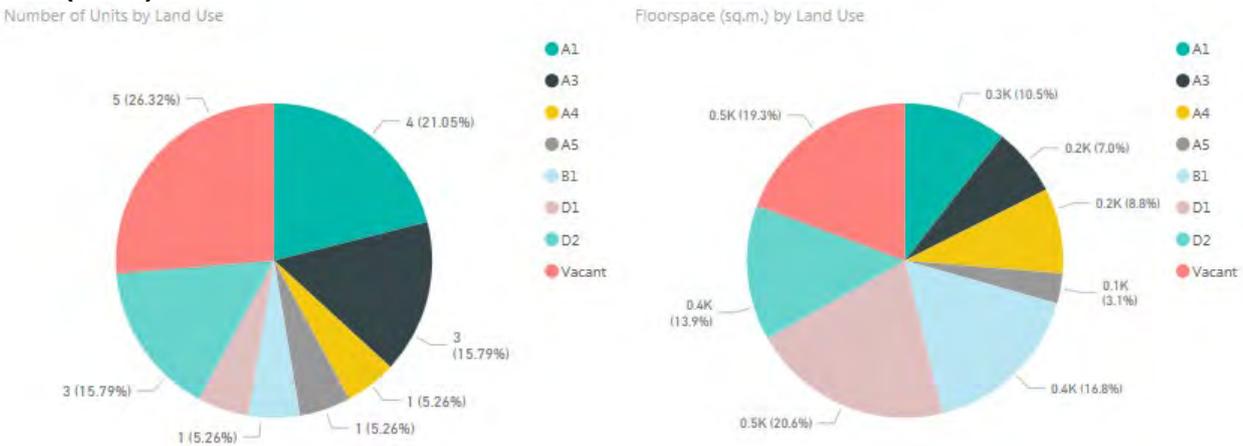
The largest proportion of the primary frontage (59% of its floorspace) is occupied by vacant units, while they occupy 19% of the secondary frontage. The proportion of A1 units is also greater in the primary frontage, where they occupy 26% of the floorspace, compared to 10% in the secondary frontage.

Other uses in the primary frontage include a limited amount of A2, A5, D2 and Sui Generis, each occupying between two and five percent of the floorspace. The secondary frontage presents three A3 and one A4 unit. There are also a D1, a D2 and a B1 unit which all take up a large proportion of the frontage (14-21%).

**Figure 46.4: Primary Frontage - Number of units by land use and floorspace by land use (2017)**



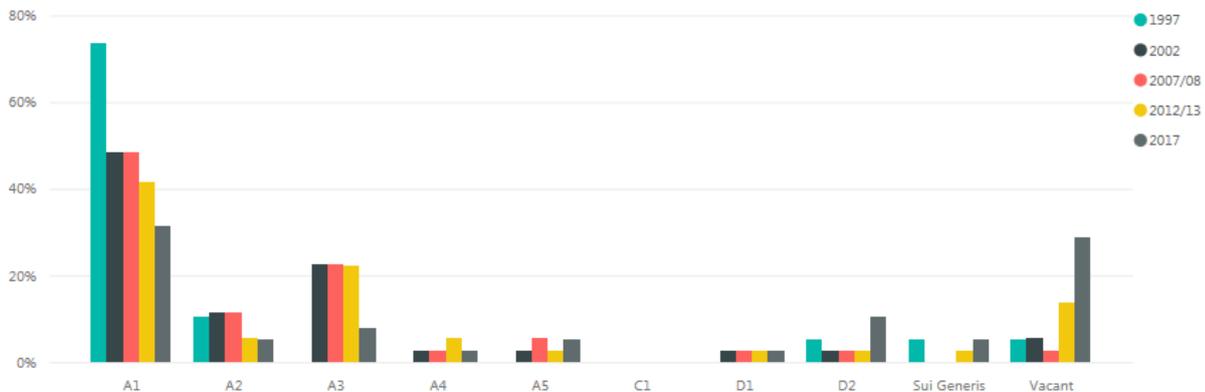
**Figure 46.5: Secondary Frontage - Number of units by land use and floorspace by land use (2017)**



### 46.3. Comparative land use analysis

#### 46.31. Comparative range of units and floorspace analysis

**Figure 46.4: Proportion of units by land use, Porchester Road (2017)**

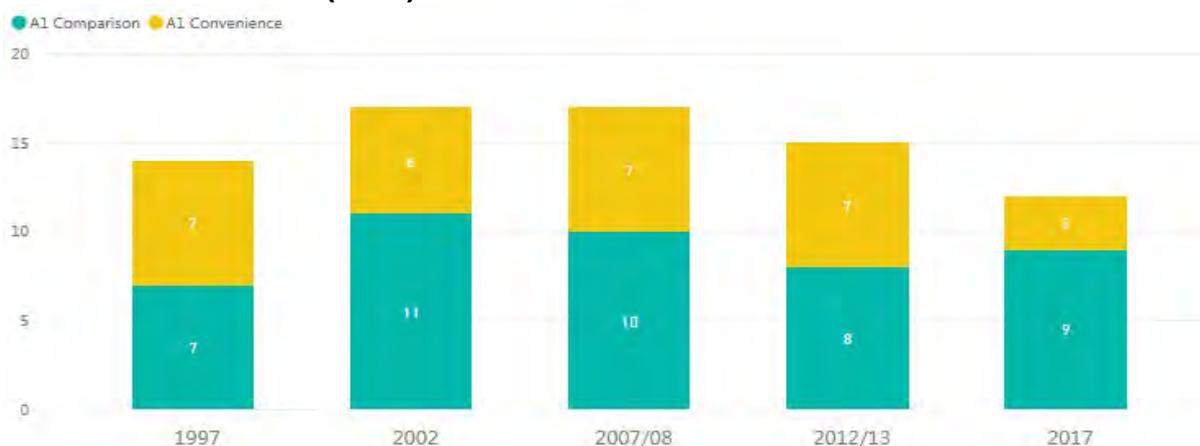


The total number of units in the centre has gradually risen across the survey periods, increasing from 19 in 1997 to 38 in 2017.

The centre has always been shop-led although the proportion of A1 units has reduced steadily across the years surveyed. Since the last survey period 2012/13, the number of A1 units has dropped by 20% and by 10% proportionally. Although A3 had always been the second most prevalent use, A3 units have more than halved in number and dropped proportionally by 14%. The number of A2 units has remained stable since the last survey period but remains low. The centre has always had a very low proportion of A4, A5, D1, D2 and Sui Generis uses. A4 units have halved while A5 units and Sui Generis have doubled since the last survey period. However, there has not been a considerable variation in the proportion of these two uses across the years surveyed. D1 uses have remained stable across the entire survey period, while D2 uses have risen sharply, trebling since the last survey period. The vacancy level in 2017 is considerably higher than all other survey periods. It has more than doubled since the last survey period in 2012/13, making it a 15% rise in its proportion against other uses.

#### 46.32. Comparative comparison/convenience split analysis

**Figure 46.5: Number of comparison and convenience A1 units by year, Porchester Road (2017)**



The centre has had a broadly consistent comparison to convenience split across the years surveyed. The centre has been comparison-led since 1997. From a 1:1 ratio in 1997, comparison retail has expanded in the centre reaching a 3:1 ratio over convenience in 2017.

### 46.4. 2018 Site Survey

#### 46.41. Accessibility and pedestrian flows

The centre is in close proximity to several transport interchanges, such as Paddington Station and the A40 Westway, and is well served by bus routes at its southern end, while also being close to Royal Oak Underground station (Circle, Hammersmith lines), located at the northern end of the centre.

Pedestrian flows were judged to be average throughout the centre.

## 46.42 Range of units and floorspace qualitative analysis

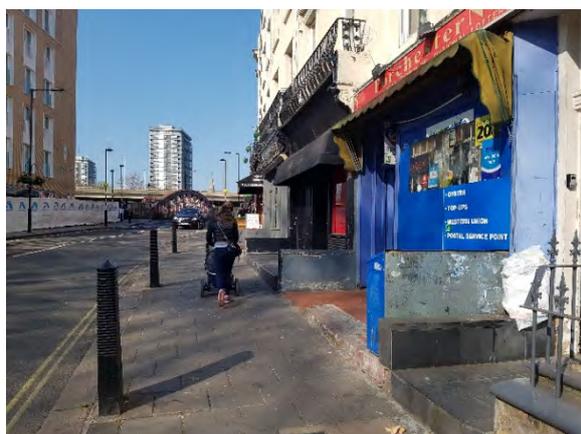
### 46.421 Area description, land uses and retail provision

The south-western portion of Porchester Road has a relatively low-quality retail offer, consisting mainly of local convenience shops, a betting shop, a tanning shop and several off licenses amongst other units.

Further along are the spa at Porchester Hall and Paddington Library.

The northern end of Porchester Road presents smaller scale and generally low-quality units comprising a number of ethnic restaurants and hot food takeaway shops, a Pilates gym, a health shop, two hairdressers, a dry cleaner, a night club and an off license.

To the south east of the centre, the new Bishops Quarter development provides a more upmarket offer comprising a gym, and interior design shop and a large Waitrose.



### 46.422 Vacant units

Almost all vacancies identified by the 2017 land use survey were due to the Bishops Quarter development, which has now been completed and almost fully let.

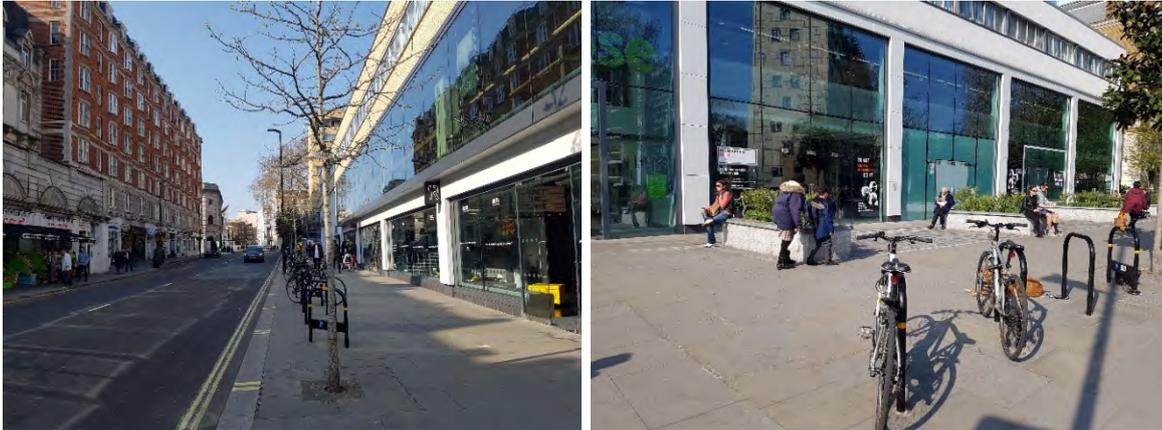
## 46.43 State of the primary shopping area environmental quality assessment



#### 46.431 *Public realm*

The quality of the public realm was judged to be average. While the south-eastern portion around the Bishops Quarter now presents wide, uncluttered pavements with public seating, planting and bike rails, there is limited amenity space in the rest of the centre. While the whole block at Bishop Quarter is new and well maintained, units in the rest of the centre have tired and unkept shop fronts.

There is also moderate traffic on Bishop's Bridge Road, which detracts from the public realm.



#### 46.432 *Cleanliness, safety and security*

Cleanliness was judged to be average throughout the centre. There is significant difference between the level of upkeep of the new Bishops Quarter and the rest of the centre.

Safety and security were judged to be average throughout the centre.

#### 46.433 *Identity and users*

The centre serves local residents and workers in the north Bayswater area.



### 46.5. Performance summary and recommendations

- The centre is considered to be 'healthy'. Porchester Road provides a range of uses which serve local residents and workers.

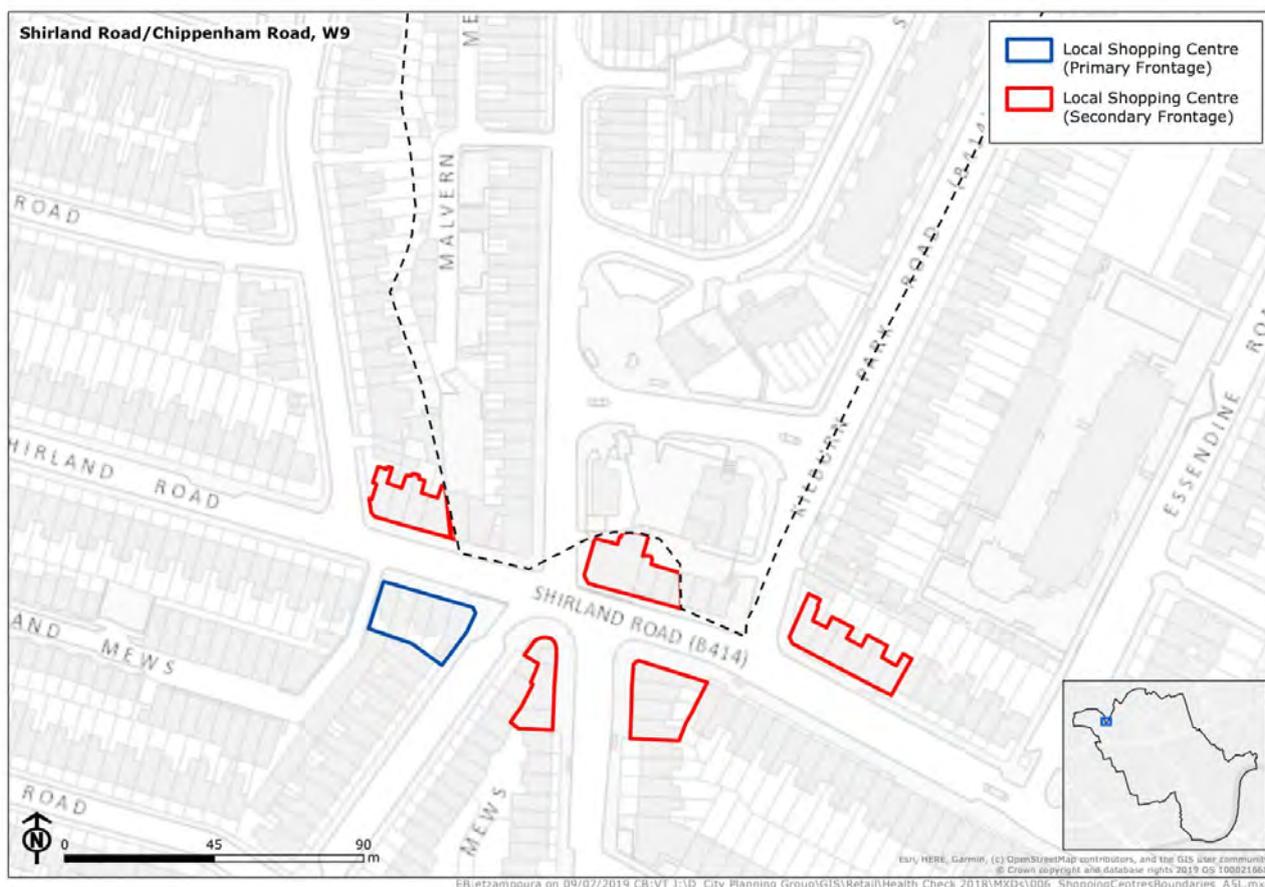
- Nearly all vacancies identified by the 2017 land use survey were due to the Bishops Quarter development, which has now been completed and almost fully let. This brings the vacancy figure in line with the average for Westminster's Local Shopping Centres.
- The centre scores average on all qualitative assessment criteria. There is significant difference between the public realm quality and level of upkeep around the new Bishops Quarter and the rest of the centre, which would benefit from improvement.

#### **46.6. Recommended boundary changes**

No boundary changes are recommended.

## 47. Shirland Road/Chippenham Road

Map 47.0: Shopping centre boundary, Shirland Road/Chippenham Road (2017)



### 47.1. Introduction

Shirland Road/Chippenham Road is a designated Local Shopping Centre. It currently has a primary and a secondary frontage.

Only a portion of the centre falls within Westminster as the rest of the centre falls within the London Borough of Brent. This report only considers the area that lies within Westminster.

It is a medium-sized centre located in the north west of Westminster and it is set around a junction of several main roads.

The centre offers a mix of uses which cater mainly for local residents. Its catchment area is limited by the proximity of the centre to other Local Shopping Centres including Fernhead Road to the west, Lauderdale/Chippenham Road and Shirland Road Junction to the east, and Harrow Road District Shopping Centre to the south.

## 47.2. 2017 Land use analysis

### 47.21. Ground floor land use map (2017)

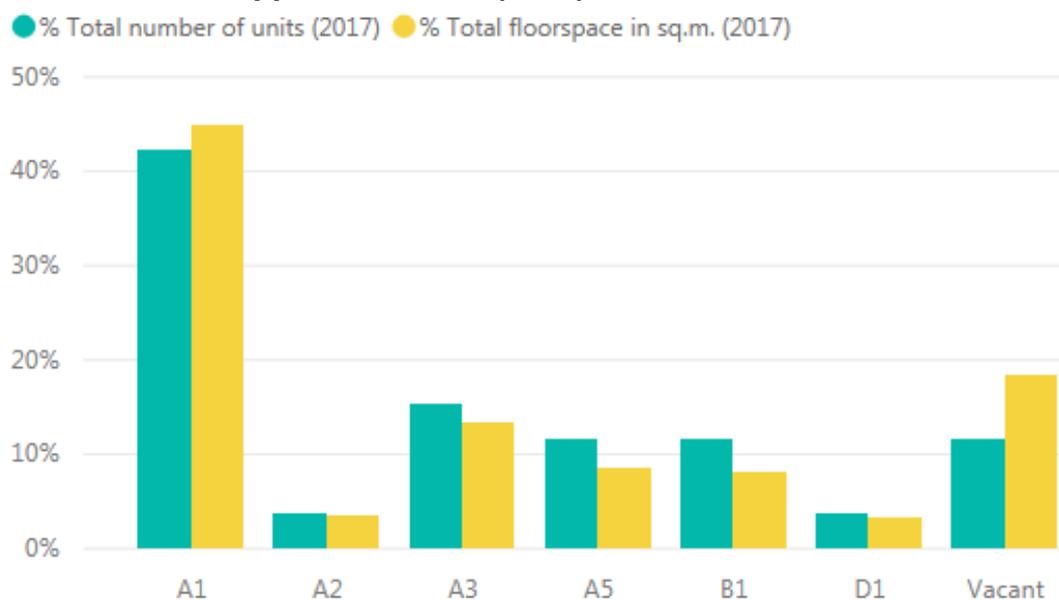
In 2017, 26 total units were identified at ground floor level. The surveyed area covered 19521 sq m

Map 47.1: Ground floor land use map, Shirland Road/Chippenham Road (2017)



### 47.22. Range of units and floorspace analysis (2017)

Figure 47.2: Ground floor total number of units and floorspace by land use, Shirland Road/Chippenham Road (2017)



The centre is shop-led with 11 A1 units recorded in 2017. These account for 42% of all units within the centre and for 45% of the overall floorspace.

The second use in the centre is A3 with four units, accounting for 15% of all units and 13% of the total floorspace. A3 has three units, accounting for 12% of all units and 9% of the floorspace. A5 has three units accounting for 12% of the units and 9% of the floorspace. A2 and D1 have each one unit in the centre, accounting for 4% of all units and for 3% of the total floorspace.

The 2017 land use survey recorded three vacant units, making 12% of the total units and 18% of the centre’s floorspace. The 2018 site survey has not revealed any significant changes to the vacancy level.

**Table 47.3: Ground floor total number of units and floorspace by land use, Shirland Road/Chippenham Road (2017)**

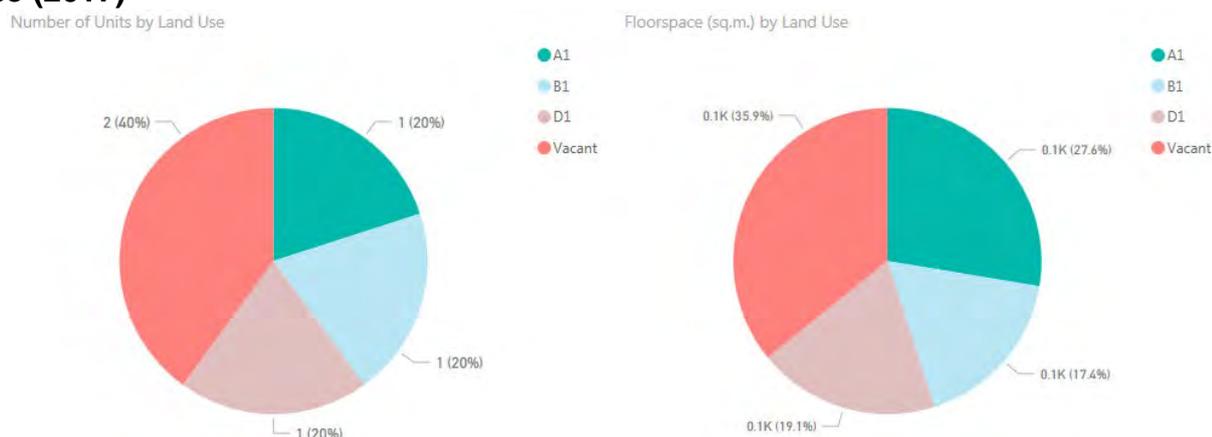
Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	11	42.31%	876.14	44.89%
A2	1	3.85%	67.04	3.44%
A3	4	15.38%	262.69	13.46%
A5	3	11.54%	167.70	8.59%
B1	3	11.54%	156.56	8.02%
D1	1	3.85%	62.79	3.22%
Vacant	3	11.54%	358.69	18.38%
<b>Total</b>	<b>26</b>	<b>100%</b>	<b>1951.63</b>	<b>100%</b>

### 47.23. Frontage analysis (2017)

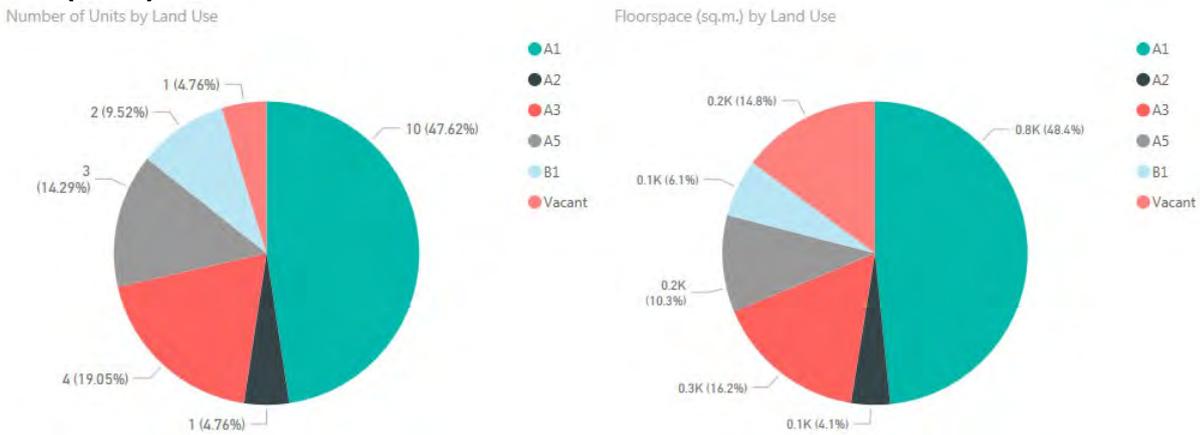
The primary frontage has a smaller proportion of A1 units compared to the secondary frontage, 27% of the frontage’s floorspace against 48% in the secondary frontage. The primary frontage has a larger proportion of B1 units compared to the secondary frontage, 17% of the floorspace against 6% in the other frontage. D1 uses are found only in the primary frontage, while A2, A3 and A5 are present only in the secondary frontage.

Most of the centre’s vacancies (two units) are concentrated in the primary frontage, accounting for 40% of the frontage’s units and floorspace, against 19% of the units and 16% of the floorspace in the secondary frontage.

**Figure 47.4: Primary Frontage - Number of units by land use and floorspace by land use (2017)**



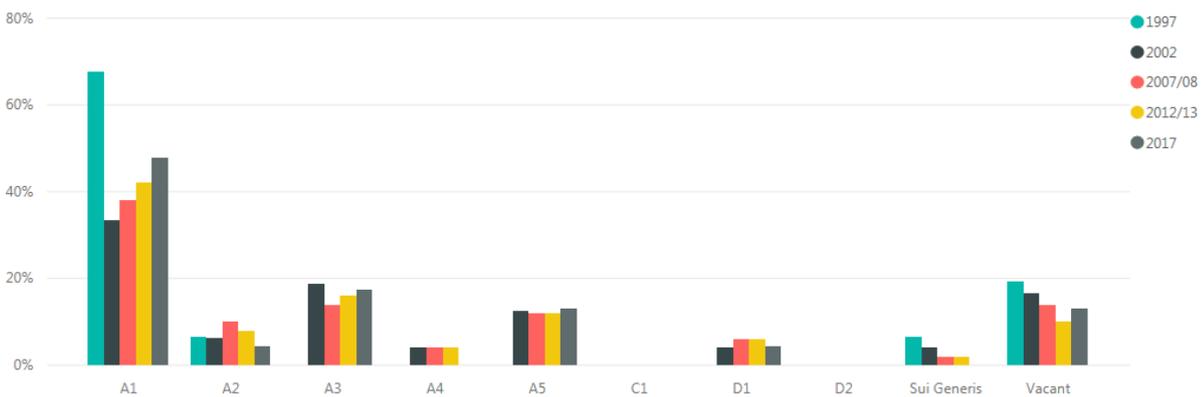
**Figure 47.5: Primary Frontage - Number of units by land use and floorspace by land use (2017)**



### 47.3. Comparative land use analysis

#### 47.31. Comparative range of units and floorspace analysis

**Figure 47.4: Proportion of units by land use, Shirland Road/Chippenham Road (2017)**



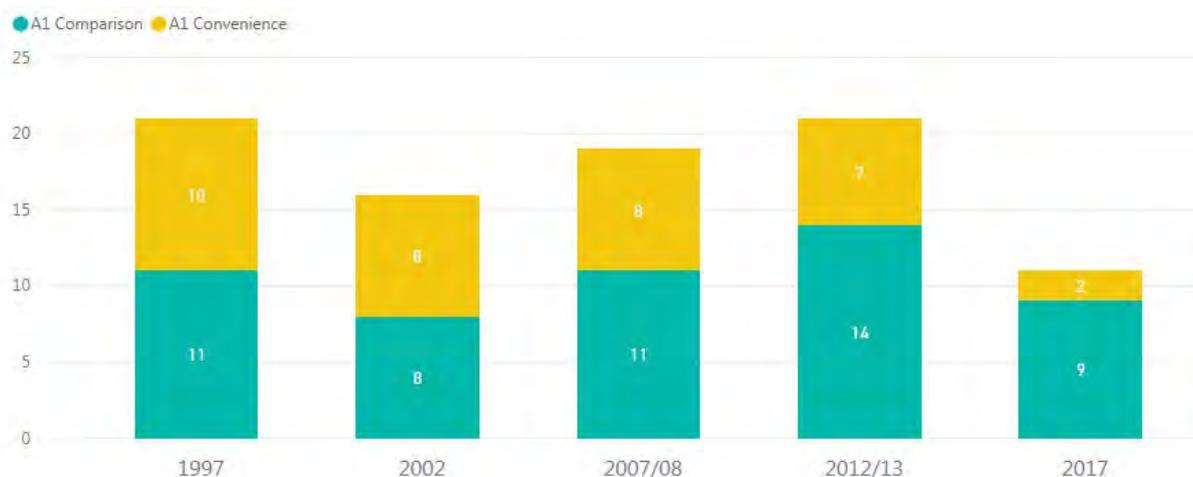
A1 units have nearly halved since the last survey, with the 2017 record showing 11 units in this centre. The proportion of these units has, however, increased to 48% against the previous record of 42% and the centre remains A1-led

A2 uses have experienced a drop from four to one unit. A3 and A5 have halved, shrinking from eight to four units and from six to three units respectively. While there used to be two A4 and one Sui Generis units in 2012/13, these are no longer present in 2017.

Vacancies have fallen from five in 2012/13 to three units in 2017.

## 47.32. Comparative comparison/convenience split analysis

**Figure 47.5: Number of comparison and convenience A1 units by year, Shirland Road/Chippenham Road (2017)**



The centre has had a broadly consistent comparison to convenience split across the years surveyed. The centre has been A1 comparison-led since 1997 although in 2002 the centre had the same number of comparison and convenience shops. However, the number of A1 units has significantly decreased between 2012/13 and 2017 and specially the number of convenience shops. In 2017, the comparison to convenience ratio was 9:2.

## 47.4. 2018 Site Survey

### 47.41. Accessibility and pedestrian flows

The centre does not have an Underground station within its boundary, but is close to Queen's Park (Bakerloo line, Overground services), Westbourne Park (Circle, Hammersmith & City lines), Maida Vale (Bakerloo line) and Kilburn Park (Bakerloo line) stations which are all within a ten-minute walk.

On the other hand, several buses run through Chippenham Road and Shirland Road, serving the centre directly. The A404 Harrow Road and the A40 Westway are also within easy access for motorists.

Pedestrian flows were judged to be average.

### 47.42 Range of units and floorspace qualitative analysis

#### 47.421 Area description, land uses and retail provision

The centre's offer comprises a series of typically local establishments – including a convenience store, a newsagent's, an estate agent, a dry cleaner, cafés and restaurants, and several hairdressers/beauty salons – with a number of building services and hardware shops. The latter is likely to cater to a wider area and to benefit from the good accessibility via the Harrow Road and the Westway.



**47.422**      *Vacant units*

The 2018 site survey has not identified any new vacant unit in addition to the ones recorded by the 2017 land use survey.



**47.43 State of the primary shopping area environmental quality assessment**

**47.431**      *Public realm*

The quality of the public realm was judged to be low. The centre is cut by roads into several portions, which requires visitors to carry out numerous crossings. Pavements are wider on the southern portion of the centre, but several metal railings create clutter and overall there is no amenity for visitors.



#### 47.432 *Cleanliness, safety and security*

Cleanliness was judged to be average throughout the centre.  
Safety and security were judged to be average throughout the centre.



#### 47.433 *Identity and users*

The centre caters mostly for local residents.

### **47.5. Performance summary and recommendations**

- The centre is considered to have a 'neutral' performance. Shirland Road/Chippenham Road provides a mix of uses that cater mostly for residents in the Maida Vale and Harrow Road area.
- There are two vacant units in the centre, as identified by the 2017 land use survey. The vacancy figure is below the average for Westminster's Local Shopping Centres.
- The centre scored high on public realm and cleanliness.

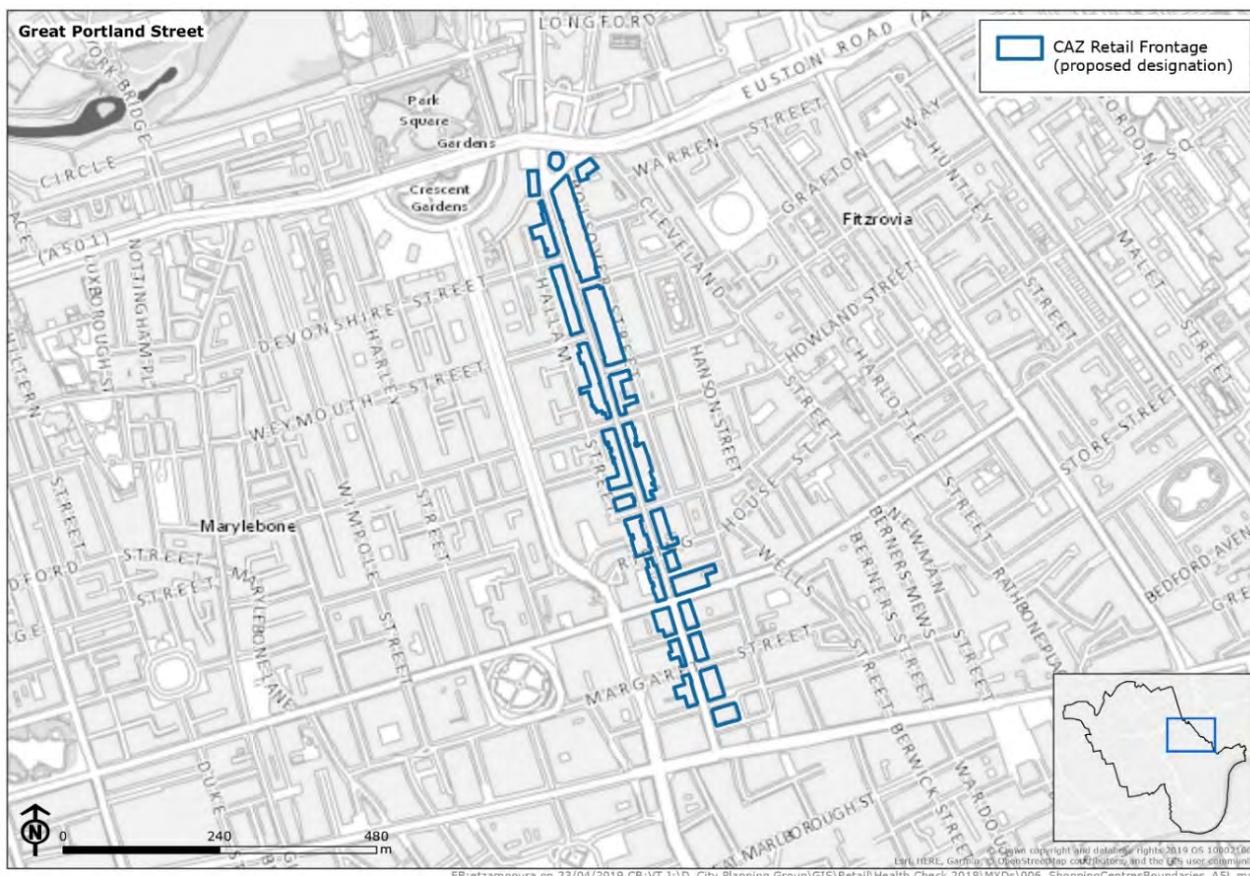
### **47.6. Recommended boundary changes**

No boundary changes are recommended.

## SECTION H: Other non-designated areas

### 48. Great Portland Street (proposed designation)

Map 48.0: Centre boundary, Great Portland Street (2017)



#### 48.1. Introduction

Great Portland Street is a non-designated linear cluster of town centre uses and is within the CAZ.

It is located at the heart of Westminster. It is close to other designated Shopping Centres including the wider West End, Cleveland Street and Great Titchfield Street.

The centre is a linear centre that has a significant amount of office stock and other town centre uses: it runs from north to south and connects the north of the city with the wider West End and the creative cluster of Fitzrovia.

#### 48.2. 2017 Land use analysis

##### 48.2.1. Ground floor land use map, Great Portland Street (2017)

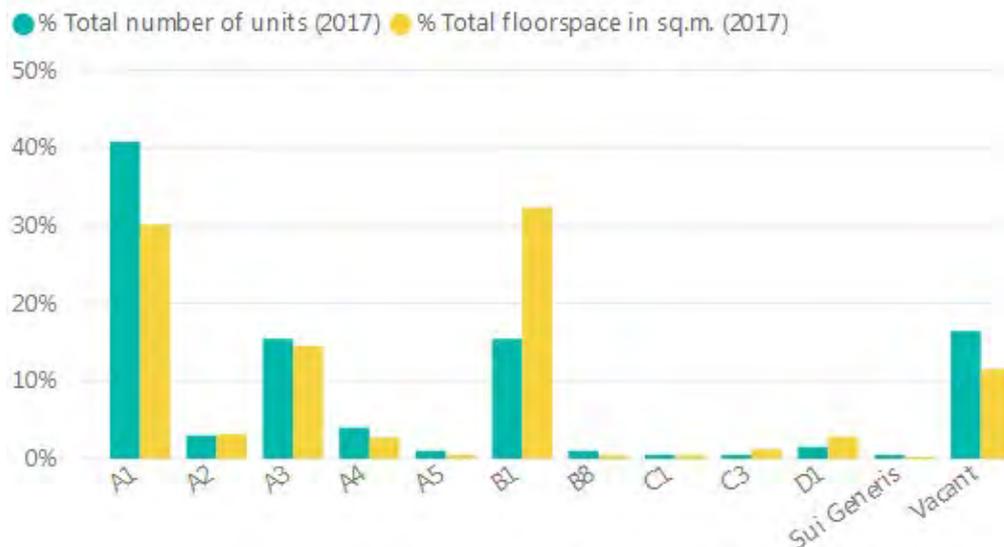
In 2017, 201 total units were identified at ground floor level. The surveyed area covered 38,304 sq m

## Map 48.1: Ground floor land use map, Great Portland Street (2017)



### 48.22. Range of units and floorspace analysis (2017)

**Figure 48.2: Ground floor total number of units and floorspace by land use, Great Portland Street (2017)**



The centre is A1-led, with 82 units recorded in 2017 making up 41% of the total number of units and 30% of the overall floorspace in the centre. The shops are mainly comparison type (e.g. clothes, cycle and repairs shops, furniture, hairdresser) but the area also hosts a number of convenience and food shops.

The second most prevalent ground floor land use in the centre is B1 floorspace with 31 units, taking up 15% of the total number of units but 32% of the total floorspace, which suggests these units have a larger floorplate compared to other uses in the area.

The third most numerous use is A3 with 31 units taking up 15% of the total number of units and of the overall floorspace.

Other uses in the centre include a limited amount of A4, A5, B8, C1, C3, D1 and Sui Generis uses.

In 2017, there are 33 vacant units in the centre, taking up 16% of the total number of units and 12% of the overall floorspace. However, the 2018 site visit has revealed that the majority of these units were being redeveloped.

**Table 48.3: Ground floor total number of units and floorspace by land use, Great Portland Street (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	82	40.80%	11545.81	30.14%
A2	6	2.99%	1203.64	3.14%
A3	31	15.42%	5560.82	14.52%
A4	8	3.98%	1022.10	2.67%
A5	2	1.00%	185.37	0.48%
B1	31	15.42%	12379.85	32.32%
B8	2	1.00%	166.00	0.43%
C1	1	0.50%	176.03	0.46%
C3	1	0.50%	452.12	1.18%
D1	3	1.49%	1087.33	2.84%
Sui Generis	1	0.50%	106.83	0.28%
Vacant	33	16.42%	4418.41	11.54%
<b>Total</b>	<b>201</b>	<b>100%</b>	<b>38304.30</b>	<b>100%</b>

## 48.3. 2018 Site Survey

### 48.31. Accessibility and pedestrian flows

Great Portland Street Underground station (Circle, Hammersmith and City, Metropolitan lines) is located at the north edge of the street and Regent’s Park Underground station (Bakerloo, Circle, Hammersmith and City, Jubilee, Metropolitan lines) is also within walking distance. Oxford Circus Underground station (Bakerloo, Central, Victoria lines) is at walking distance at the southern edge.

Although no buses directly serve the street, many routes run along Portland Place, Oxford Street and Marylebone Road. The area is mainly accessed on foot, bike, taxi, motorcycle or car. A small amount of through traffic is present, although with a higher presence of delivery vans rather than private cars.

Pedestrian flows were judged to be 'average' and were overall lower than those in the surroundings centres (Oxford Street and Marylebone), which attract a greater number of people. The area has safe crossings and is highly accessible.

There is a reasonable amount of bike and motorbike parking spaces throughout the centre although some unauthorised use of railings for additional cycle parking were observed. There are on street car parking spaces, especially in the western half of the street. The centre also hosts on street loading bays for commercial purposes.

### **48.32. Range of units and floorspace qualitative analysis**

#### *48.431 Area description, land uses and retail provision*

Great Portland Street is a mixed area that accommodates a wide range of town centre uses and a significant stock of office floorspace.

The area hosts a number of shops at ground floor level. Almost all the shops are comparison type (e.g. barber, pharmacy, furniture). A small cluster of bike-related shops was observed towards the southern edge of the centre. Convenience-type shops include three supermarkets (Tesco, Sainsbury's, Co-op) in the northern part of the centre.

A small number of banks and estate agents are also found in the area.

The area also accommodates a significant number of food and drink premises which are mainly located in the northern part of the centre. Although a number of business have a local character and are independent, a number of restaurants belong to national multiples (e.g. Pizza Express, Nando's, Caravan). A small number of cafés also are sandwich bar type. A small number of public houses and bars are located on Great Portland Street and adjacent streets.

The area hosts a significant amount of office buildings. A significant number of offices are also based at ground floor level; however, office uses generally do not have active frontages. Of note is the presence of the BBC which occupies a number of businesses on Great Portland Street. In addition, a number of residential buildings are also found within the centre. The centre is home to the Central United Synagogue. The Embassy of the Democratic Republic of Congo is located in the southern part of the street, showing a connection between Great Portland Street and the institutional area of Portland Place. Likewise, Great Portland Street accommodates a private hospital and a series of medical facilities as the area is close to the medical cluster of Harley Street.



#### 48.432 *Vacant units*

A number of vacant units can be found along the street. However, a significant proportion of these are under alteration or ready to be let. There is evidence showing that the southern and central part of Great Portland Street are experiencing change as a number of units that were vacant in 2017 are now occupied, are under alteration and have new frontages or are ready to be let. However, in the northern part of the centre a small number of vacant units remain.



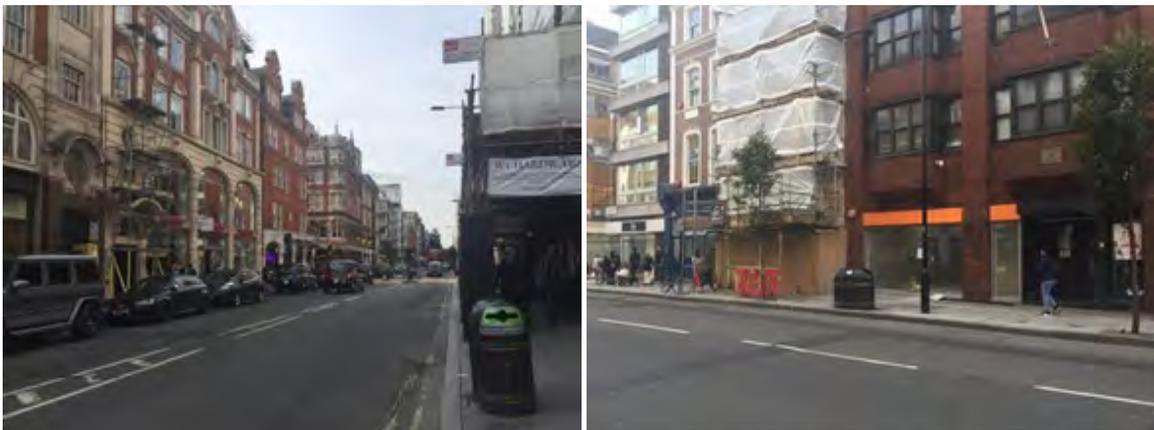
#### 48.43 State of the primary shopping area environmental quality assessment

##### 48.431 *Public realm*

The quality of the public realm was considered to be average.

Minimal vehicular movements encourage walking from south to north and north to south. Pavements are average size but slightly cluttered with bins, lampposts, telephone boxes, signs and A boards occupying part of them and negatively affecting the pedestrian experience.

There was little evidence of landscaping, reflecting the highly urbanised environment. As the area hosts a significant number of office units and residential buildings, a significant number of buildings have non-active frontages. The area would therefore benefit from better maintained and more active frontages and shop fronts.



#### 48.432 *Cleanliness, safety and security*

Cleanliness was judged to be average throughout the centre. During the site visit, no street litter was observed and only a small number of commercial refuse bags awaiting collection were seen.

Safety and security were judged to be high throughout the centre.

#### 48.433 *Identity and users*

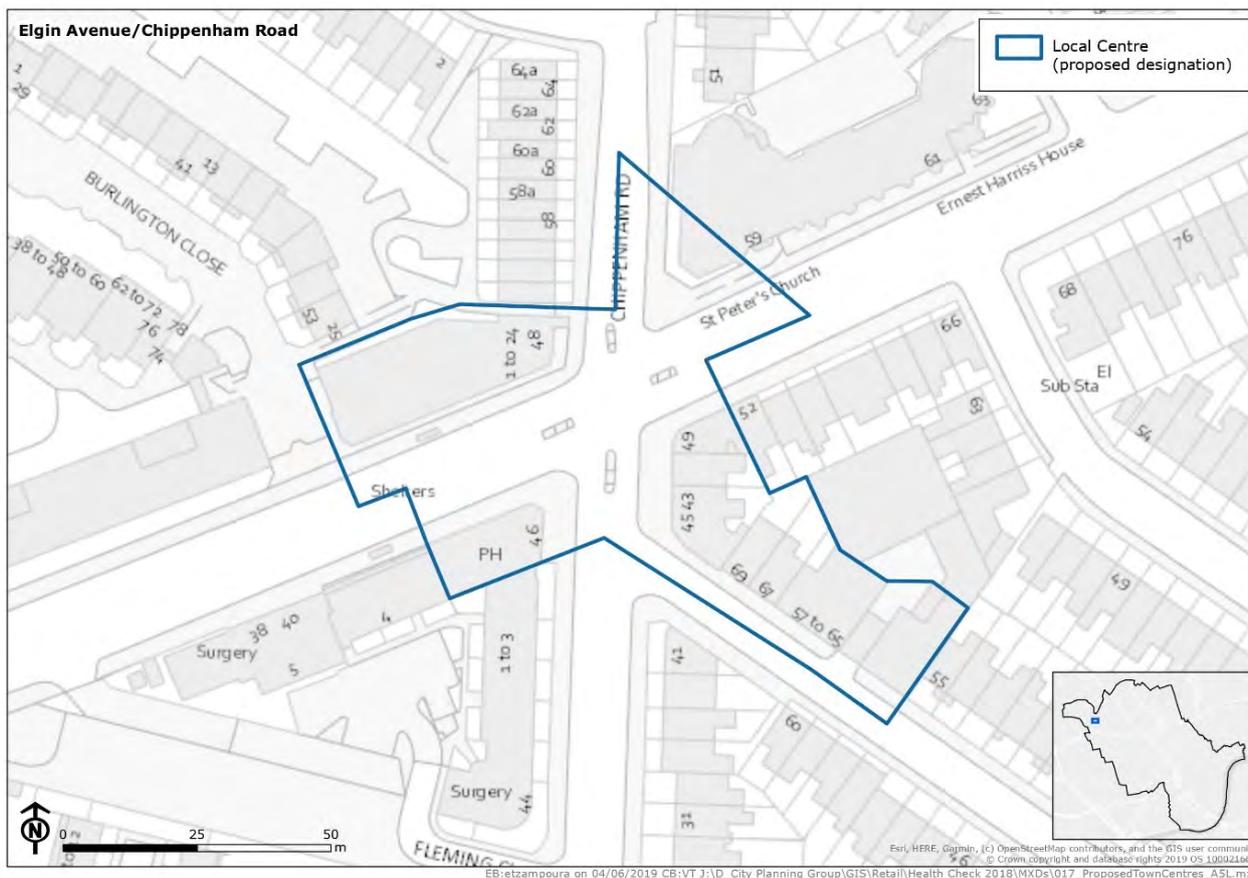
The area hosts a mixed balance of uses and connects different areas of Westminster with very different characteristics including Portland Place, the residential areas of Regent's Park, the creative cluster of Fitzrovia and the West End shopping area. Although the area does not have a strong identity itself, it operates as a high street which has a significant role in the eastern part of the city and that mainly serves workers and local residents.

### **48.4. Performance summary and recommendations**

- The area is considered to have a 'neutral' performance. Great Portland Street has significant office stock and a wide range of town centre uses including convenience and comparison shops alongside a good offer of restaurants and cafés which mainly cater for local workers and residents.
- The vacancy level was of 12% in 2017.
- The public realm was found to be of average quality and the area would benefit from decluttering and better-maintained and more active frontages and shop fronts.
- It is recommended that Great Portland Street is designated as a CAZ Retail Cluster to recognise and protect its function. The detailed proposed boundaries are shown in Appendix 3.

## 49. Elgin Avenue/Chippenham Road (proposed designation)

Map 49.0: Shopping centre boundary, Elgin Avenue/Chippenham Road (2017)



### 49.1. Introduction

Elgin Avenue/Chippenham Road is a small non-designated cluster of town centre uses set around the Elgin Avenue/Chippenham Road junction in Maida Vale, in the north of Westminster.

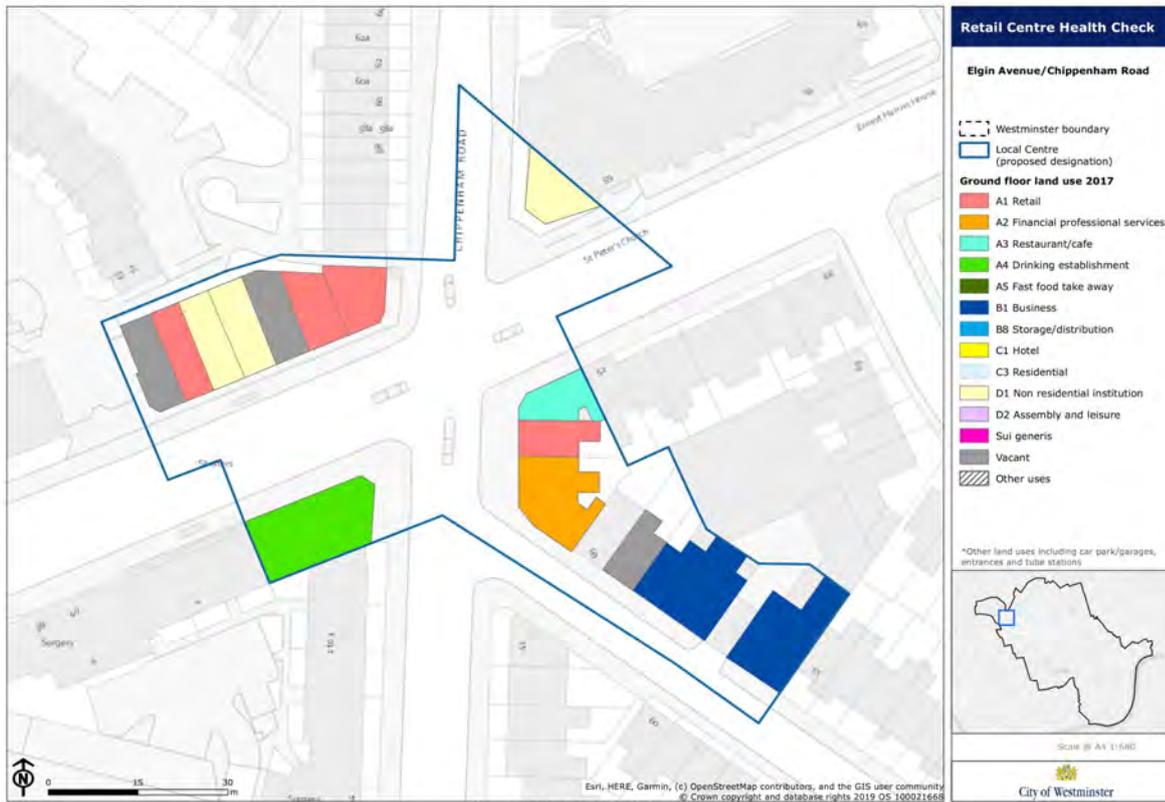
The proposed centre serves the local population and has a limited catchment area as other local centres are also found in proximity to the area: Lauderdale Road to the east, Shirland Road Junction to the north west, and the Harrow Road to the south.

## 49.2. 2017 Land use analysis

### 49.21. Ground floor land use map (2017)

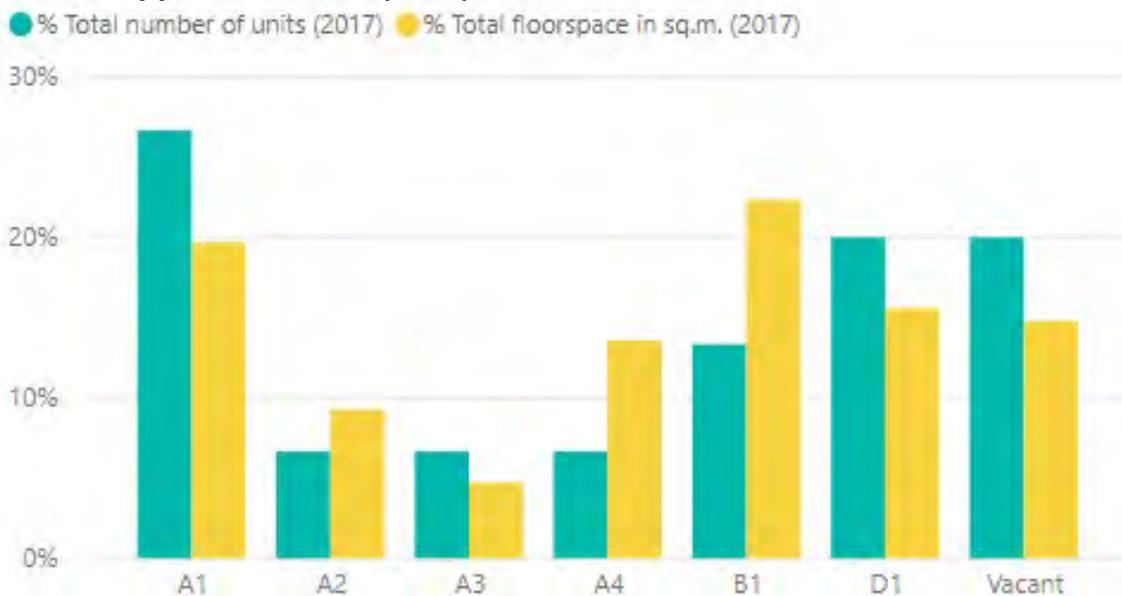
In 2017, 15 total units were identified at ground floor level. The surveyed area covered 1,696.52 sq m

Map 49.1: Ground floor land use map, Elgin Avenue/Chippenham Road (2017)



### 49.22. Range of units and floorspace analysis (2017)

Figure 49.2: Ground floor total number of units and floorspace by land use, Elgin Avenue/Chippenham Road (2017)



There are four A1 uses making 27% of the centre's units and 19% of its floorspace. The second largest use is D1 with three units making 20% of the total units and 16% of the floorspace. A2, A3 and A4 each have one unit in this centre, accounting for 7% of all units while 9%, 5% and 14% of the floorspace respectively, reflecting the different size of each unit.

The 2017 land use survey recorded three vacancies in this centre, accounting for 20% of all units and 15% of the total floorspace. In addition, the 2018 site survey has found the Squirrel pub (A4) to also be vacant.

**Table 49.3: Ground floor total number of units and floorspace by land use, Elgin Avenue/Chippenham Road (2017)**

Ground Floor Land Use	Total number of units (2017)	% Total number of units (2017)	Total floorspace in sq m (2017)	% Total floorspace in sq m (2017)
A1	4	26.67%	334.15	19.70%
A2	1	6.67%	157.32	9.27%
A3	1	6.67%	80.02	4.72%
A4	1	6.67%	230.51	13.59%
B1	2	13.33%	378.94	22.34%
D1	3	20.00%	264.64	15.60%
Vacant	3	20.00%	250.94	14.79%
<b>Total</b>	<b>15</b>	<b>100%</b>	<b>1,696.52</b>	<b>100%</b>

### 49.3. 2018 Site Survey

#### 49.41. Accessibility and pedestrian flows

Pedestrian flows were judged to be low. Westbourne Park Underground Station (Circle, Hammersmith and City lines) is within a ten-minute walk. The centre is also directly served by a number of bus services running along Elgin Avenue and the neighbouring Harrow Road.

#### 49.42 Range of units and floorspace qualitative analysis

##### 49.421 Area description, land uses and retail provision

The centre's offer comprises a mix uses which include a convenience store, a dry cleaner's, a chemist, a betting shop, a restaurant, a catering business, a hairdresser, a community centre, and two churches.



#### 49.422 *Vacant units*

The site survey has identified three vacant shop units on Elgin Avenue (numbers 45, 53, 55) and a vacant public house (The Squirrel).



#### 49.43 State of the primary shopping area environmental quality assessment

##### 49.431 *Public realm*

The quality of the public realm was considered to be average. Elgin Avenue and Chippenham Road cut the centre into a series of separate portions, which generates several pedestrian crossings. Traffic domination, lack of amenity for visitors, some uneven pavements and railings clutter negatively affect the pedestrian experience.



##### 49.432 *Cleanliness, safety and security*

The level of cleanliness in the centre was considered to be high. The level of safety and security was judged to be average.

##### 49.433 *Identity and users*

The area caters mostly for local residents.

#### **49.4. Performance summary and recommendations**

- The area is considered to have a 'neutral' performance. Elgin Avenue/Chippenham Road provides a mix of uses that cater mostly for residents in the Maida Vale and Harrow Road area.
- There are four vacant units in the centre, which is above the average for Westminster's Local Shopping Centres.
- The centre scored average on public realm and high on cleanliness.
- It is recommended that Elgin Avenue/Chippenham Road is designated as a Local Centre to recognise and protect the local services and convenience role provided by these units to the neighbouring residential areas. The detailed proposed boundaries are shown in Appendix 3.