
2017 London Town Centre Health Check Analysis Report

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Acknowledgements

The 2017 Town Centre Health Check has created a comprehensive database of indices showing the vitality and viability of town centres in London. The GLA would like to take this opportunity to thank everyone who was involved in the project, including colleagues from London Boroughs, Transport for London and various departments within the GLA.

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EXECUTIVE SUMMARY

The 2017 London Town Centre Health Check (TCHC) provides a snapshot of the health of over 200 of London's town centres using a selection of strategic health check indicators and illustrates how these have changed over time. It informs the full review of the London Plan and contributes to the evidence base for Local Plan policies, development proposals and implementation of town centre and local strategies in accordance with the National Planning Policy Framework (NPPF) and London Plan.

Summary of conclusions

1. TOWN CENTRE USES AND VACANCY

- **Retail** remains at the heart of London's town centres, with retail floorspace on average constituting between 55 and 75 per cent of all floorspace (excluding offices) in town centres.
- The proportion of **retail floorspace** to **total commercial floorspace** has shown a slight downward trend since 2007, except for Metropolitan centres.
- International and Metropolitan centres and CAZ frontages continue to be dominated by **comparison retail** floorspace, and Major and District centres have greater proportions of **convenience and service retail** floorspace
- The health check suggests that town centre demand – and related growth – is **polarising**, with selected larger centres growing at a greater pace than smaller centres.
- There is some evidence of town centres **diversifying** their uses, in particular in Major and District centres with growth in the proportion of restaurants, pubs, nightclubs and takeaways over the period 2007 to 2016.
- **Offices** play an important role in town centres and make up a significant proportion of total occupied commercial floorspace, particularly in Canary Wharf, central London, inner London Major and District centres, and outer London Metropolitan and Major centres.
- The overall London-wide **vacancy rate** in 2016 (6.1 per cent) is broadly similar to that in 2007 (5.9 per cent). This is considered to be a healthy vacancy rate allowing for the efficient functioning of the market. Vacancy rates in the International and Metropolitan centres have increased on average since 2007, whereas vacancy rates in Major and District centres dropped.

2. DEVELOPMENT TRENDS

- There were positive average **gains in retail and leisure floorspace** across all classifications of town centre over the period April 2012 to March 2016, mostly associated with the International, Metropolitan and Major centres. In contrast, there

were **significant losses of offices** (-82,000 sqm in total) across all centre classifications on average except the CAZ Frontages.

- An estimated 601,000 sqm of office floorspace could potentially change to residential through central Government's **permitted development rights** initiative, of which more than 117,000 sqm had been completed by March 2016. A substantial proportion of the potential losses are in outer London.
- There were **17,214 net housing completions** within London's town centres over the three-year period April 2013 to March 2016 - more than 5,700 units per annum - compared to 3,000 per annum over the period April 2008 to March 2013.
- At the end of March 2016, a total of **34,834 net additional dwellings** were under construction within London's town centres suggesting that recent rates of town centre housing completions are set to increase further.
- A further **19,486 net additional dwellings** with planning permission in town centres were recorded as 'not started' at the end of March 2016, taking the total town centre pipeline to **54,320 net additional dwellings** (including dwellings under construction).
- An additional total of 96,027 net additional dwellings were either under construction or with planning permission and not started in **edge of centre locations** at 31 March 2016.

3. AIR QUALITY

- All town centres meet the **National Air Quality Objective targets** of 40µg/m³ for PM10 and 25µg/m³ for PM2.5.
- No town centres meet the world **Health Organisation Guidelines** for PM2.5. All but five of the town centres exceed the target value of 10 µg/m³ by more than 50 per cent. Meeting this longer-term target and will depend on co-ordinated action with partners both within and outside London.
- For **Nitrogen Dioxide**, nearly all centres in central and inner London exceeded limits in 2013, and around half in outer London. Significant improvement to this is forecast for 2020, particularly in inner and central London.

4. HISTORIC ENVIRONMENT

- Many town centres are the historic core of the wider area, or contain buildings and places of **historic and architectural significance**. Two-thirds of centres have conservation areas, although for most centres the conservation area covers less than half of the designated town centre area. A third of town centres do not contain any conservation areas, mostly in outer London.

5. TRANSPORT AND CONNECTIVITY

- Town centres are generally well-connected, with nearly 95 per cent of centres having a **Public Transport Accessibility Level** (PTAL) of 3 or more. For inner London, nearly three quarters have a PTAL of 6a or 6b, the highest accessibility levels.
- Over the lifetime of the London Plan, all classifications of town centre are projected to see an increase in the **accessibility of employment**. In outer London town centres employment accessibility is forecast to increase on average by 84 per cent.
- Town centres are also set to see significant **increases in the residential population** that is within 45 minutes' travel to the centre. On average, inner London centres are forecast to see an increase from 1.57m residents within 45 minutes' travel in 2011 to 2.71m by 2031.

6. TOWN CENTRE MANAGEMENT

- Only 22 per cent of London's town centres have a **town centre strategy** in place.
- 19 per cent of London's town centres have an existing or proposed **Business Improvement District**.
- 30 per cent of town centres have a **town centre manager**.

7. EMPLOYMENT

- Employment in London's town centres in central and inner London has grown over the period 2009 to 2015.
- Employment in outer London centres has reduced, particularly between 2009 and 2011, levelling off after 2012.

8. TOWN CENTRE RENTS

- **Average retail rents** across all centres grew by 3 per cent per annum over the period 2005 to 2016
- Average retail rents fell by 9 per cent between 2008 and 2009 during the **financial downturn**. However, since the downturn average rents have increased, growing at 4 per cent per annum over the period 2009 to 2016.

- There are significant variations in **retail rent growth** trends at individual town centre level. Stratford, Marylebone High Street, the West End, Fulham and Baker Street witnessed the highest growth rates varying between 8 and 11 per cent, whereas in contrast Ilford, Enfield and Harrow saw rents fall by around 3 to 5 per cent over the period 2009 to 2016.
- The highest **office rents** are to be found in Central Activities Zone locations (including the West End) and selected town centres in south and west London (particularly Hammersmith, Wimbledon, Chiswick and Richmond) reflecting the strength of these locations as viable office markets.
- **Growth in Grade A office rents** over the period 2013 to 2016 was strongest in Vauxhall at 22 per cent, Knightsbridge 20 per cent, and Wimbledon 17 per cent.

9. NIGHT TIME ECONOMY USES

- The **night time economy** plays an important part in the diverse role of town centres, extending commercial activity into the night and providing Londoners and visitors to the capital with access to entertainment, culture and other activities.
- There has been a **loss of 226 pubs** and other drinking establishments in London's town centres between 2007 and 2016 – a loss of over 16 per cent in that time.
- The **West End** has seen the highest number of losses, with a net loss of 10 pubs.

10. CENTRES IN STRATEGIC AREAS FOR REGENERATION

- For some uses there are typically higher amounts of floorspace in town centres in Strategic Areas for Regeneration, notably **hot food takeaways, charity shops, pay-day loan shops, betting shops, bingo and amusement premises**.
- Centres within Strategic Areas for Regeneration tend to have **fewer employees** working in the town centres across all classifications and lower levels of **office floorspace**.
- Centres in Strategic Areas for Regeneration tend to have **higher total vacancy rates** than other areas. This is a long-term issue; the proportions are similar for 2007 and 2016.

Town Centre Network Review: Summary of recommendations

The 2017 London Town Centre Health Check includes a **review of the London Plan town centre network** and the various town centre classifications and guidelines. A summary of the

recommendations for the current town centre network classifications is set out in Table A below. A summary of the recommendations for the future potential town centre network classifications is set out in Tables B and C below.

Table A: Recommended reclassifications of town centres

| Centre | Current classification (adopted London Plan) | Recommended classification in new draft London Plan |
|----------------------------|-----------------------------------------------------|------------------------------------------------------------|
| Canary Wharf | Major | Metropolitan |
| Elephant and Castle | District | Major (combined with Walworth Road) |
| Walworth Road | District | Major (combined with Elephant and Castle) |
| New Cross | District | District (combined with New Cross Gate) |
| Southfields | Unclassified | District |
| Shoreditch | Unclassified | CAZ Retail Cluster |
| Farringdon | Unclassified | CAZ Retail Cluster |

The Town Centre Health Check identifies some centres that may have a potential role and function within the town centre network that is different to the existing role of the centre. These are set out in Table B.

Table B: Recommended future potential classifications of town centres

| Centre | Future potential classification, adopted London Plan | Recommended future potential classification in new draft London Plan |
|----------------------------|-------------------------------------------------------------|-----------------------------------------------------------------------------|
| Shepherds Bush | International | International |
| Stratford | International | International |
| Woolwich | Metropolitan | Metropolitan |
| Brent Cross | Metropolitan | Metropolitan |
| Camden Town | N/A | Metropolitan |
| Lewisham | N/A | Metropolitan |
| Canada Water | Major | Major |
| Old Oak High Street | N/A | Major |
| Gallions Reach | N/A | Major |
| North Greenwich | District | District |
| Tottenham Hale | District | District |
| Colliers Wood | District | District |
| Hackbridge | District | District |

| | | |
|----------------------------------------|--------------|--------------------|
| Bromley-by-Bow | District | District |
| Crossharbour | District | District |
| Barking Riverside | N/A | District |
| Merriellands Crescent | N/A | District |
| Old Kent Road/East Street | N/A | District |
| Old Kent Road/Peckham Park Road | N/A | District |
| Vauxhall | CAZ Frontage | CAZ retail cluster |
| Battersea | CAZ Frontage | CAZ retail cluster |

Policy Recommendations

Recommendation:

For new locations to be considered for classification as a town centre, it is important that a clear **strategy** is implemented that secures:

- A broader mix of store sizes and formats;
- A variety of town centre uses including retail, leisure, culture, employment, night time economy uses, and social infrastructure and civic functions;
- Reduction in reliance on car travel;
- Creation of attractive and welcoming places;
- Walking, cycling and the use of public transport;
- Integration into the surrounding area.

The approach to planning for future potential town centres should be specified in the new London Plan, along with a requirement for a strategy setting out how the new town centre will fulfil its potential.

Recommendation:

Set out a policy requirement in the new London Plan for each town centre to have a **strategy**, produced in partnership with local stakeholders.

Recommendation:

There should be a policy **protecting pubs** in the new London Plan.

Recommendation:

Boroughs should consult upon and introduce **Article 4 Directions** to ensure that the CAZ, Northern Isle of Dogs, Tech City, the Royal Docks Enterprise Zones, Kensington & Chelsea and geographically-defined parts of other existing and viable strategic and local office clusters (including town centres) are not undermined by office to residential permitted development rights. Boroughs should also ensure that the need to retain sufficient industrial and logistics capacity in town centres is not undermined by permitted development rights by introducing Article 4 Directions where appropriate.

Recommendation:

Local Plans should set **proportionate policies** with regards to the protection of shopping frontages and should set appropriate town centre boundaries, in order to promote a diverse range of uses in their town centres and support their vitality and vibrancy. Local Plan policy should have regard to the **commercial growth potential classifications** in the new London Plan.

Recommendation:

In Local Plans, OAPFs and town centre strategies, local authorities and other stakeholders should consider how these town centres could provide greater **access to employment opportunities**, and how **over-concentration of specific uses** should be managed in order to mitigate impacts on public health and improve the vitality and vibrancy of the town centre.

1 INTRODUCTION

1.1.1 The 2017 London Town Centre Health Check (TCHC) is part of an ongoing series of strategic London-wide health checks undertaken by the Greater London Authority (GLA) with support from the London boroughs. It provides a snapshot of the health of over 200 of London's town centres using a selection of strategic health check indicators and illustrates how these have changed over time. This strategic town centre health check has informed a full review of the London Plan and will contribute to the evidence base for Local Plan policies, development proposals and implementation of town centre and local strategies in accordance with the National Planning Policy Framework (NPPF) and London Plan.

1.2 Policy Context

National Planning Policy

1.2.1 The National Planning Policy Framework (NPPF)¹ sets out the Government's planning policies for England. At the heart of the NPPF is a presumption in favour of sustainable development. It recognises that planning policies should be positive, promote competitive town centre environments and manage growth of centres over the plan period. In drawing up Local Plans, local planning authorities should define a network and hierarchy of centres that is resilient to anticipated future economic growth. The NPPF requires local planning authorities to use adequate, up-to-date and relevant evidence to assess the role and function of town centres and the relationship between them, including trends in the performance of centres.

1.2.2 The associated Planning Practice Guidance (PPG)² sets out the indicators that should be used to determine the health of town centres. The indicators are:

- a) Diversity of uses
- b) Proportion of vacant street level property
- c) Commercial yields on non-domestic property
- d) Customers' views and behaviour
- e) Retailer representation and intentions to change
- f) Commercial rents
- g) Pedestrian flows
- h) Accessibility
- i) Perception of safety and occurrence of crime
- j) State of town centre environmental quality.

London Plan

1.2.3 The adopted London Plan (2016)³ identifies London's town centres as a key spatial priority (Policy 2.15). They are the main focus beyond the Central Activities Zone for commercial development and intensification including residential development. Town centres also provide the structure for sustainable access to a range of goods and services and contribute to local identity. The adopted London Plan states that:

1.2.4 "The current role of town centres should be tested through regular town centre 'health checks'. This process should ensure that the network is sufficiently flexible to

¹ Communities and Local Government, National Planning Policy Framework, March 2012

² Paragraph: 005 Reference ID: 2b-005-20140306

³ Mayor of London, The London Plan: spatial development strategy for Greater London, GLA March 2016

accommodate change in the role of centres and their relationships to one another. Centres can be reclassified and, where appropriate, new centres designated, in the light of these through subsequent reviews or alterations to this plan and DPDs. Changes to the upper tiers in the network (Major and above) should be co-ordinated first through this Plan” (London Plan paragraph 2.74).

- 1.2.5 Policy 4.7, part A affirms the importance of a collaborative approach to assessing need for development across the town centre network and monitoring the health of centres within it and encourages boroughs through LDF preparation to: “undertake regular town centre health checks to inform strategic and local policy and implementation.” (Policy 4.7, part C).

1.3 Objectives

- 1.3.1 The GLA’s approach to the Town Centre Health Check is devised for cooperative working with boroughs and partner organisations to create a comprehensive information database to assess the vitality and viability of town centres and their changing roles in addressing Londoners’ needs for access to a competitive range of goods and services. The objectives of the health check are:

- 1) To co-ordinate across all London boroughs and other relevant agencies the collection of data on strategic indicators of town centre vitality and viability and the identification of capacity of different centres within the network to meet likely future needs (including commercial, residential development and associated infrastructure) in accordance with Government policy in the NPPF and adopted London Plan policies 2.15 and 4.7;
- 2) To provide thresholds for selected indicators against which the performance of centres can be assessed, identifying their scale, role and function in the network; their potential to accommodate additional housing and commercial development; their roles in the regeneration process; and strategic clusters of night time economic activities (adopted London Plan Annex 2);
- 3) To inform change and development in the London town centre network including potential future changes in the classification of centres;
- 4) To monitor the implementation of the London town centre network and inform a full review of the London Plan and its Examination in Public;
- 5) To support the preparation and implementation of Local Plans including town centre policies and proposals and town centre management strategies;
- 6) To contribute to inter-regional working through a co-ordinated approach to town centre development across the wider city region;
- 7) To streamline the data collection process, deliver cost effectiveness and add value through strategic working.

1.4 Scope

- 1.4.1 This health check measures the performance of centres within the town centre network classified in the adopted London Plan, using key indicators of town centre vitality and viability, to provide strategic evidence for both local and strategic stakeholders. The scope of the project is focused on the London Plan International, Metropolitan, Major and

District centres, as well as the CAZ frontages in the Central Activities Zone. Other locations including neighbourhood and more local centres are only examined in this strategic health check where characteristics suggest that they may be fulfilling an elevated role and function in the network and therefore could merit explicit recognition in the London Plan. The health check also provided an opportunity for boroughs to put forward potential new town centres for consideration in the full review of the London Plan.

1.5 Methodology

1.5.1 The 2017 health check streamlines the methodology adopted in the 2009 and 2013 health checks to obtain robust data by working proactively with relevant GLA departments, agencies and London boroughs. A summary of the key stages involved in the 2017 TCHC are outlined below:

Stage 1a: Consult on draft methodology and indicators

1.5.2 The initial methodology was produced and consulted on with boroughs, alongside the indicators that were proposed to be assessed. The full list of indicators is provided in Appendix 1 of this report.

1.5.3 In the 2017 health check there are 41 indicators compared to 60 in the 2013 health check. The 2017 health check indicators have been selected having regard to (a) the objective to focus mostly on strategic matters and provide robust data to support the full review of the London Plan; (b) the availability of consistent, pan-London datasets, to help reduce the need for boroughs to supply data; (c) emerging issues, such as office to residential permitted development rights; (d) meeting the requirements of the NPPG from a strategic perspective and (e) complementing related research including the Strategic Housing Land Availability Assessment (SHLAA), Consumer Expenditure and Comparison Goods Floorspace Need study and the London Office Policy Review.

1.5.4 Sixteen of the 41 indicators are not an explicit requirement in the NPPG, mostly related to capacity, development trends, and employment. These indicators have been included to inform town centre policy in the London Plan full review as well as implementation of existing policy.

1.5.5 Further details including data sources, GLA/TfL/borough inputs and time series are provided in the technical appendix (appendix 4) and links with the NPPG are set out in Appendix 1.

Stage 1b: Define, consult and finalise town centre boundaries

1.5.6 For the 2017 health check, Local Plan policy boundaries for all town centres have been sourced from boroughs including:

- Town centre boundaries
- Primary Shopping Areas
- Primary Shopping Frontages
- Secondary Shopping Frontages

1.5.7 The above Local Plan policy boundaries have been used to generate a boundary or 'polygon' for each town centre which formed the primary basis for GIS mapping and GLA data collection. Boroughs were given an opportunity to review these boundaries before they were finalised for the data collection Stage 2.

Stage 2a: GLA data collection

- 1.5.8 As for previous TCHCs, the 2017 TCHC adopted an interactive approach to share and collect data with boroughs. The majority of information was collated from a variety of sources (see the technical appendix, Appendix 4) based upon the finalised town centre boundaries (Stage 1b) and data was made available to boroughs during the borough data entry phase of the health check (Stage 2b below). Data for town centres that cross borough boundaries was sourced for the whole centre.

Stage 2b: Survey form for borough data entry

- 1.5.9 The GLA sent to the boroughs the GLA-sourced pan-London town centre datasets. Boroughs were given an opportunity to view/verify the GLA-sourced data and put forward alternative data where appropriate and if desired. Using their local expertise, boroughs were requested to provide additional data for 16⁴ indicators where the GLA was unable to source the data on a consistent pan-London basis. Guidance was provided to support the borough data entry phase and ensure consistency in data collection including definitions of uses within each category/indicator.

Stage 3: Data analysis

- 1.5.10 Following collection of borough data through the survey forms, the GLA analysed the data and the results are presented in this report. The health check report also seeks to further enhance the value of data collected by including time-series analysis, where feasible, to show significant trends and distinguish apparent short-term risks and the long-term health of London's town centres.
- 1.5.11 The roles and function of centres have been assessed against a set of core indicators and broad thresholds; see Appendix 2 for details.

Stage 4: London Town Centre Network and associated policy review

- 1.5.12 The analysis and interpretation of health check data and trends in Stage 3 can be used for several different purposes. First, it helped to inform town centre policy and a review of the town centre network (including potential new town centres) in the full review of the London Plan. Secondly, information gathered from the health check can be used by boroughs to form the basis for their own town centre health checks (supplemented by more local and qualitative indicators, as appropriate) to inform preparation of Local Plan and Neighbourhood Plan documents and town centre management strategies. Thirdly, findings of the health check can be used for development management purposes, providing baseline information to help evaluate and comment upon development proposals for London and its surrounding areas.

Stage 5: Final Report

- 1.5.13 This report contains a summary of the key findings of the health check and the town centre network review. It is accompanied by a technical appendix (Appendix 4) in Excel format containing the final datasets which will be made available through the London Datastore.

⁴ Compared to 28 datasets in the 2013 Town Centre Health Check. There may be exceptions for a limited number of District centres where pan-London floorspace data availability has historically been problematic including Plumstead, Elm Park, Harold Hill, Leyton, New Addington and Rosehill. The increase in the number from 9 to 16 is in response to borough requests for additional indicators during the consultation period and due to the GLA not being able to source data for some of the indicators.

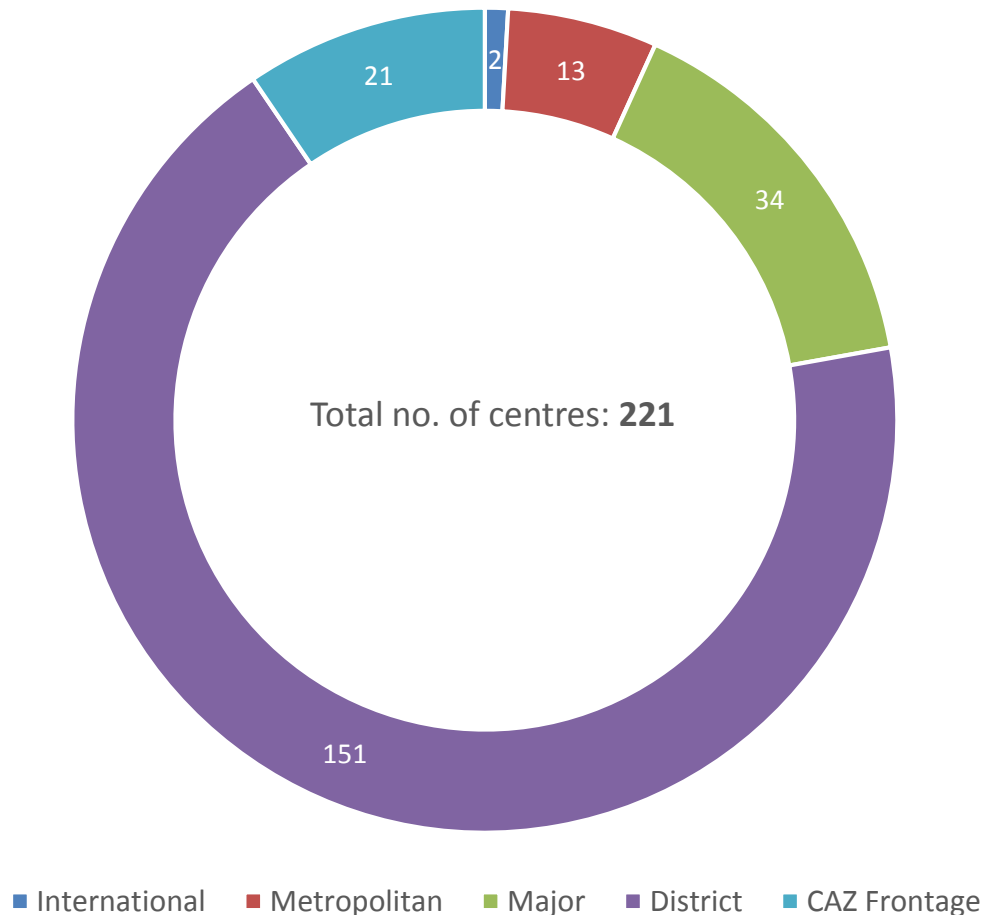
1.6 Project Timeline

Table 1: Town Centre Health Check Project Timeline

| Stage | Dates |
|--------------------------------------------------------------------|--------------------------|
| 1a: Draft methodology and indicators (borough consultation) | April 2016 |
| 1b: Define town centre boundaries (borough consultation) | April 2016 |
| 2a: GLA data collection | June – October 2016 |
| 2b: Borough data entry | November – December 2016 |
| 3: Data analysis | January – June 2017 |
| 4: London Town Centre Network and associated policy review | March – September 2017 |
| 5. Publication of final report | January 2018 |

2 TOWN CENTRE NETWORK CLASSIFICATIONS

2.1.1 In the adopted London Plan, there are a total of 221 designated town centres, classified as International, Metropolitan, Major, and District centres or as a CAZ⁵ frontage. Together with Local and Neighbourhood centres⁶, these make up London's town centre network.

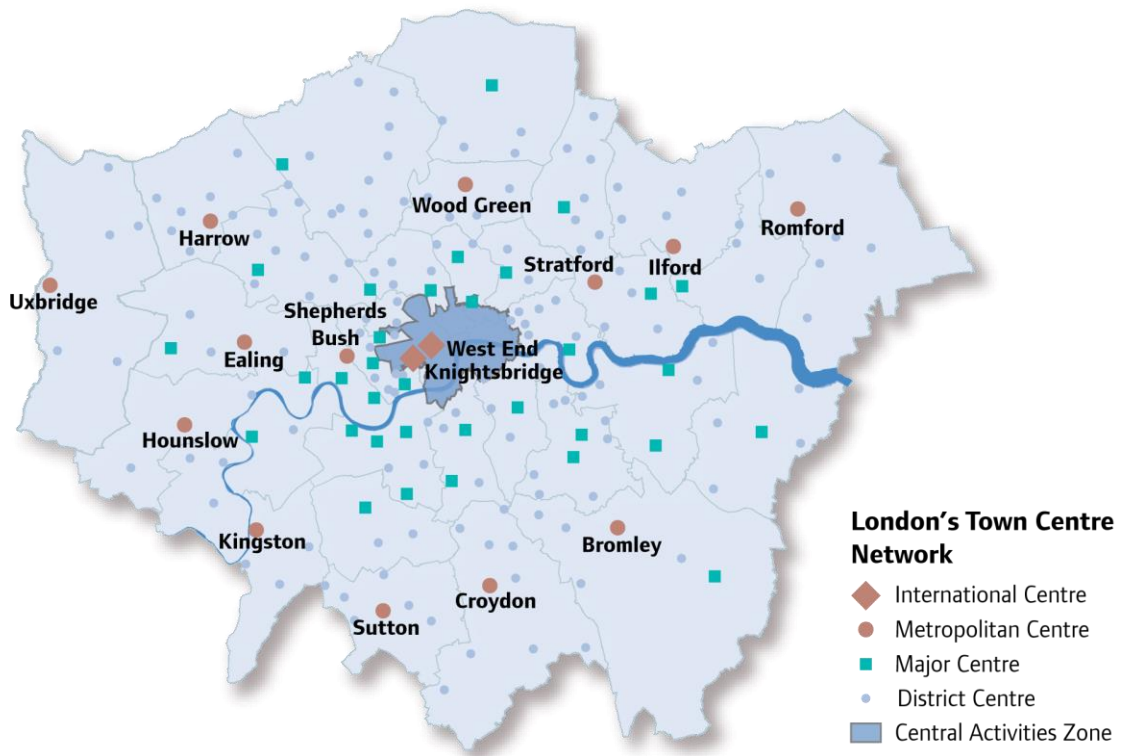


2.1.2 London's town centres follow a typical radial distribution pattern, with the International centres in the geographical centre of London complemented by the CAZ frontages. Outer London tends to be a mixture of Metropolitan centres complemented by District centres and a few Major centres, whereas inner London tends to have a mixture of Major and District centres.

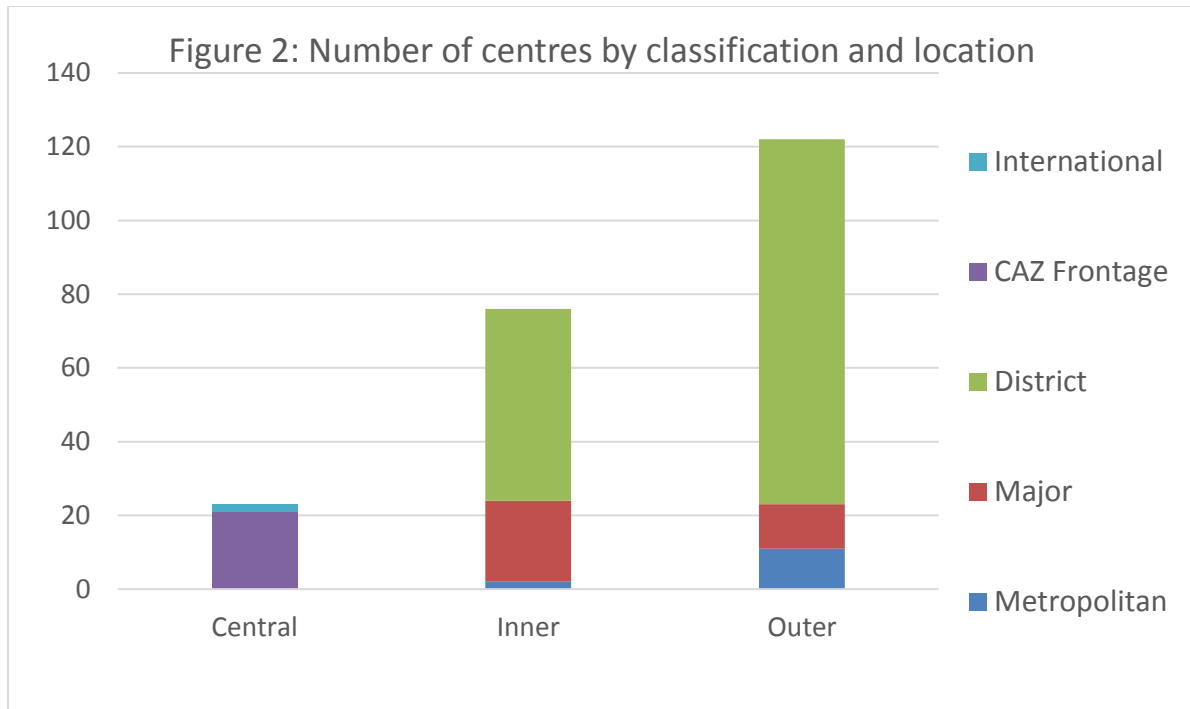
⁵ These are centres that have a significant retail function within the Central Activities Zone.

⁶ Local and Neighbourhood centres are designated in Local Plans and not in the London Plan. They are therefore outside the scope of this Town Centre Health Check.

Figure 1: London's Town Centre Network



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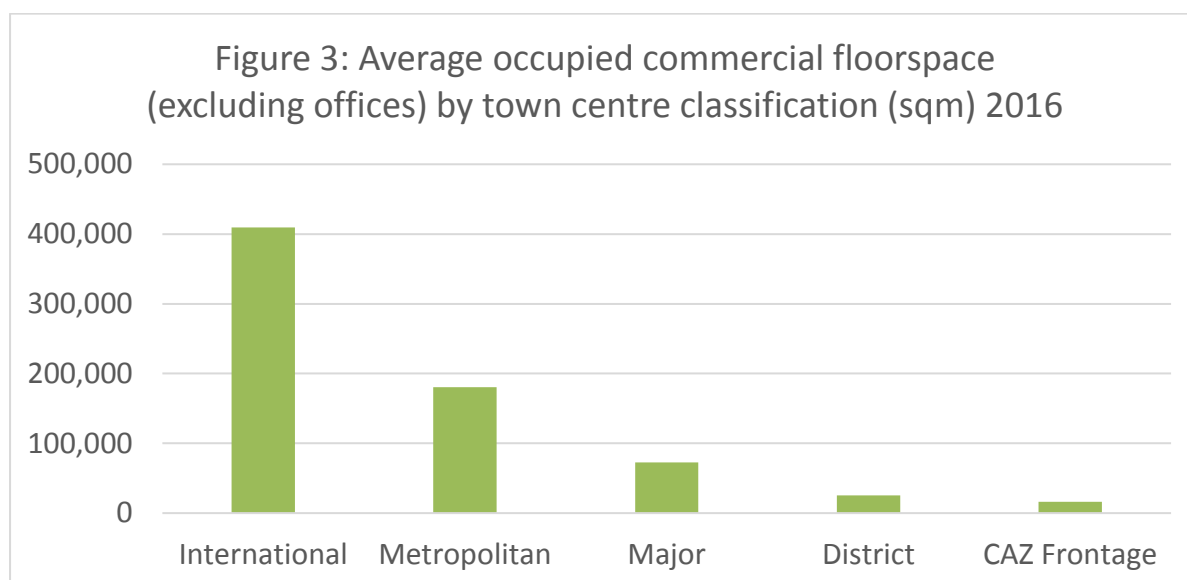


Source: GLA

3 TOWN CENTRE ANALYSIS

3.1 Total Floorspace

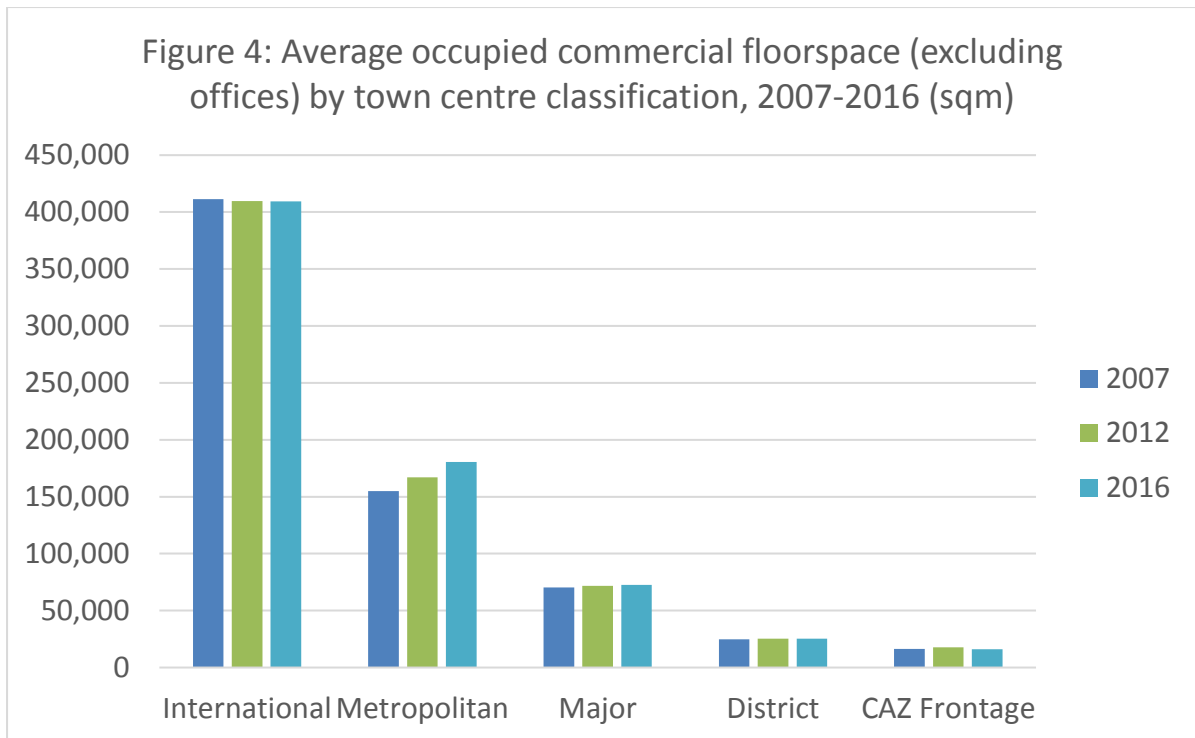
3.1.1 A useful measure of a town centre is the overall amount of commercial⁷ floorspace. This gives an indication of the amount of commercial activity in different centres. Excluding offices from this measure helps to compare centres more directly, as quantities of office floorspace can vary significantly between different centres that are otherwise commercially similar.



Source: Experian / GLA

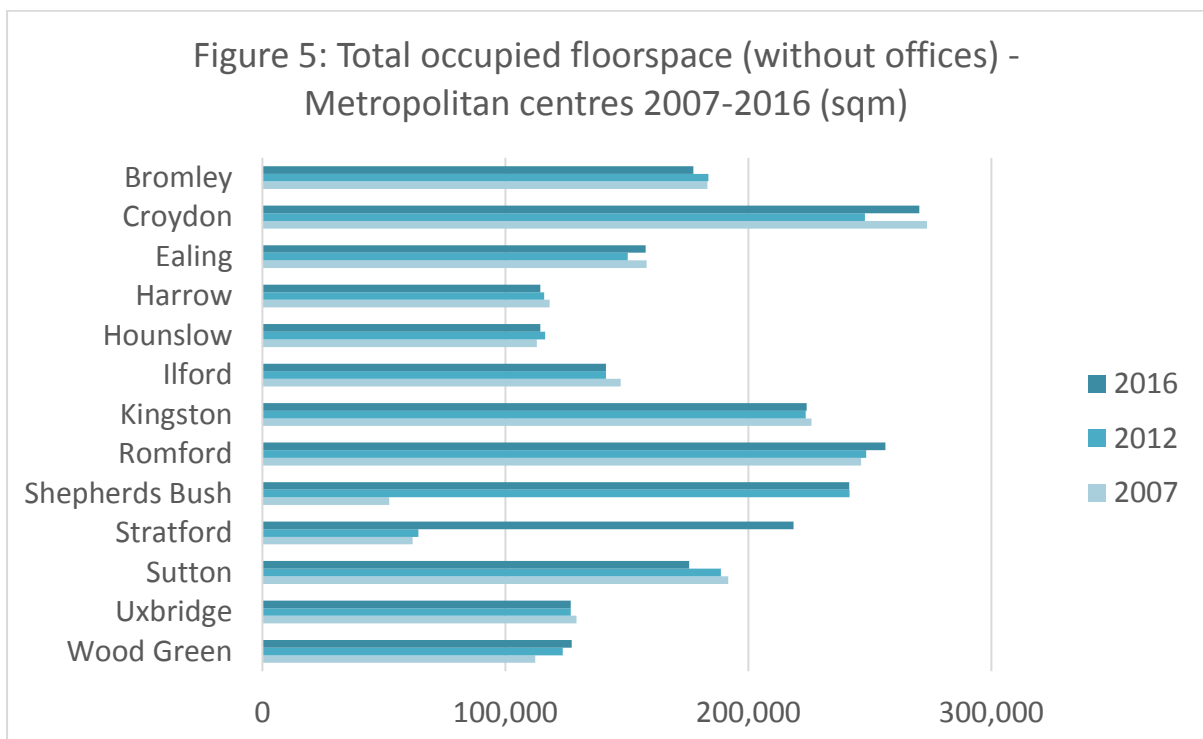
3.1.2 Figure 3 shows that there are marked differences in the average amount of total floorspace of different classifications of town centre. Figure 3 shows that for most types of centre this average has remained relatively constant since 2007. However, Metropolitan centres tend to have increased on average, from 155,000 sqm to 180,000 sqm.

⁷ Commercial floorspace (for this study) relates to use classes A1-A5 inclusive, C1 hotels, some D2 uses (cinemas, bingo halls, tourist attractions and other assembly and leisure uses), some *sui generis* uses (theatres, night clubs, casinos, betting shops) as well as public services and transport services (as categorised by Experian).



Source: Experian / GLA

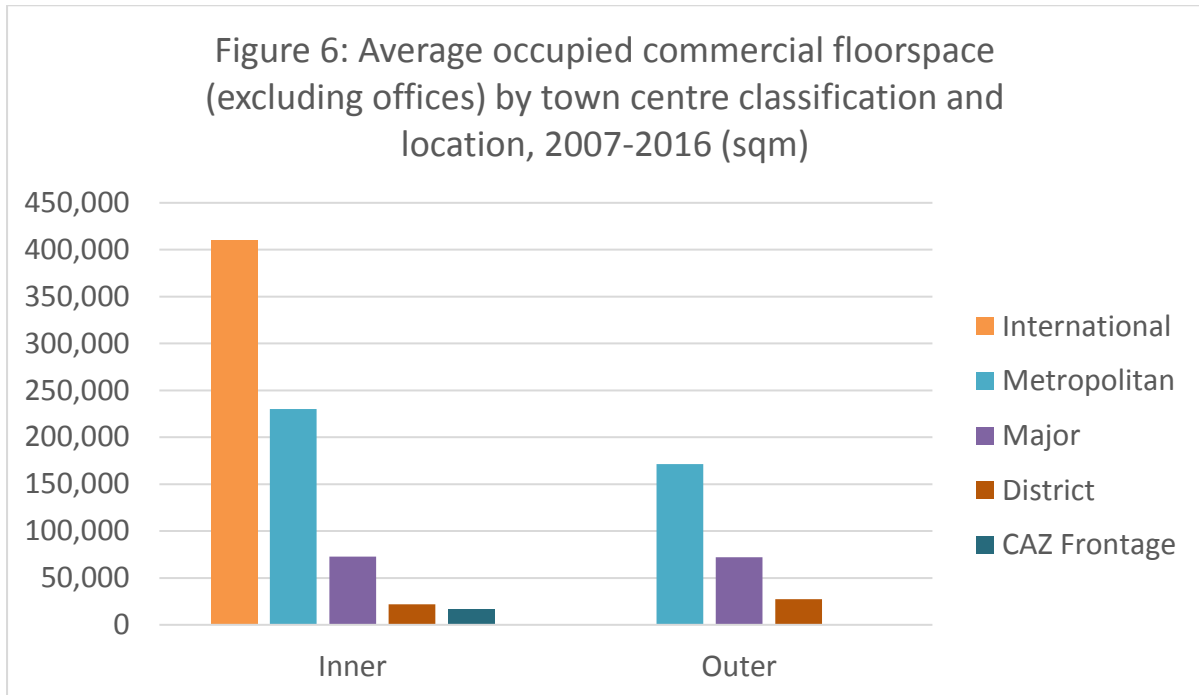
3.1.3 This increase in average size of Metropolitan centres is largely driven by very significant increases in floorspace in two centres – Stratford and Shepherds Bush, as shown in Figure 4.



Source: Experian / GLA

3.1.4 There is broad consistency between centres of the same classification in inner and outer London. Inner London Metropolitan centres (of which there are only two in the adopted London Plan – Stratford and Shepherds Bush) tend to have around 60,000 sqm more

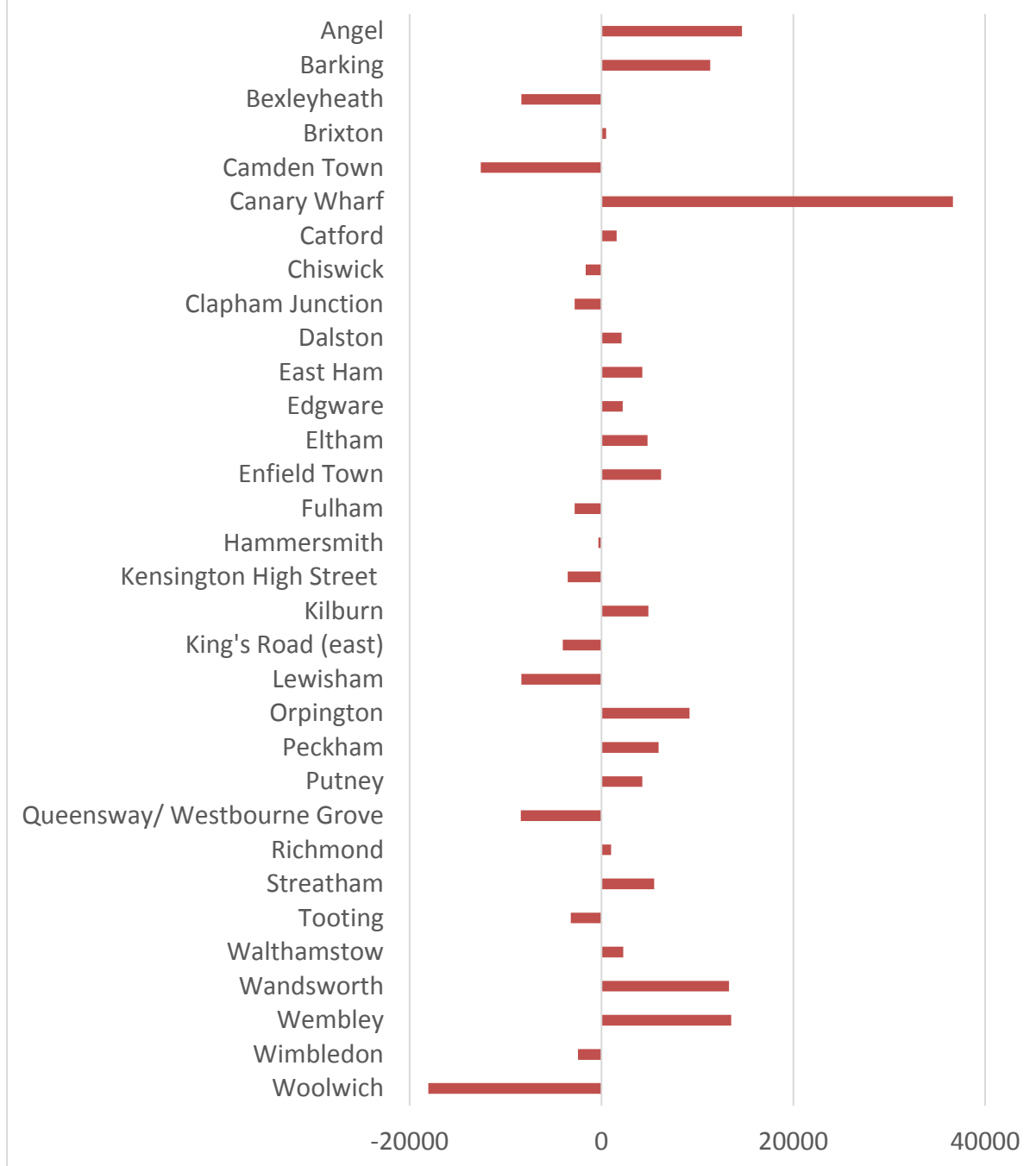
commercial floorspace than outer London centres, and outer London District centres are on average 24 per cent larger than inner London District centres, as shown in Figure 6.



Source: Experian / GLA

3.1.5 There have been some significant shifts in total occupied floorspace across Major centres – notably the very substantial increase in floorspace in Canary Wharf, which has increased from around 68,000 sqm in 2007 to around 105,000 sqm in 2016. It is worth noting, given the character of Canary Wharf, that this excludes office floorspace. Figure 7 shows a significant loss of commercial floorspace in Woolwich town centre; it is unclear whether this data is accurate, and it may be influenced by the amount of redevelopment underway in Woolwich town centre. Further investigation at borough level would assist in understanding this, to inform whether the continued classification of Woolwich as a future potential Metropolitan centre is justified.

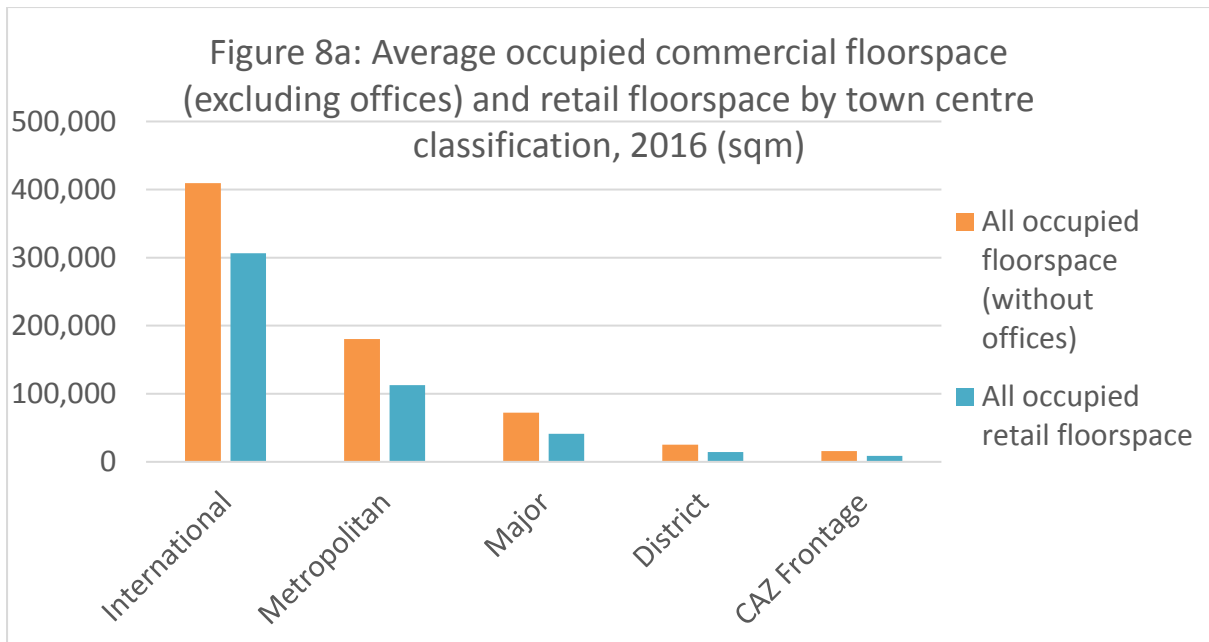
Figure 7: Change in total occupied floorspace (excluding offices) in Major centres, 2007-2016



Source: Experian / GLA

3.2 Retail

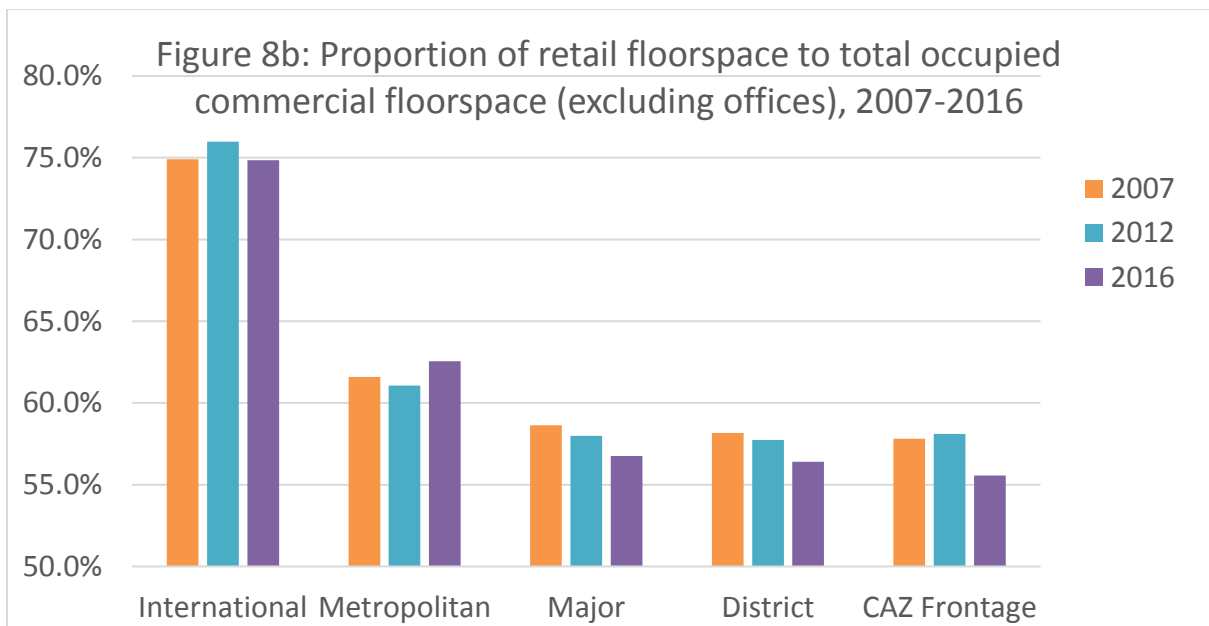
3.2.1 Retail remains at the heart of town centres, with retail floorspace on average constituting between 55 and 75 per cent of all floorspace (excluding offices) in town centres, as shown in Figure 8a.



Source: Experian / GLA

3.2.2 The proportion of retail floorspace as a ratio of the total commercial floorspace varies by town centre classification, with Metropolitan and International centres showing higher average percentages of retail floorspace than Majors, Districts and CAZ frontages.

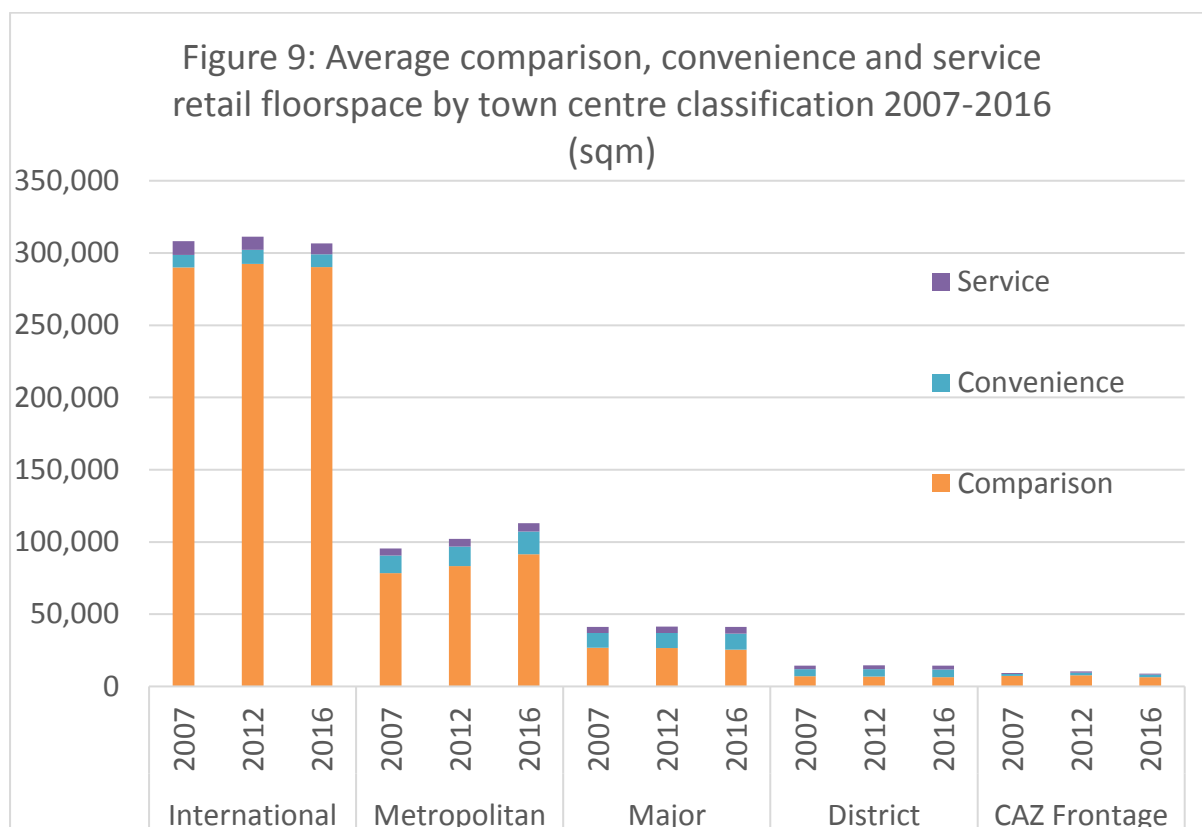
3.2.3 The proportion of retail floorspace to total commercial floorspace has, however, shown a slight downward trend in most classifications of town centre since 2007, except for Metropolitan centres which on average have seen a slight increase in the proportion of retail to all floorspace (see Figure 8b). This suggests that town centre demand – and related growth – is polarising, with the larger centres attracting relatively greater numbers of shoppers than smaller centres, and growing at a greater pace. This finding corresponds with those in the Consumer Expenditure and Comparison Goods Floorspace Need study⁸.



Source: Experian / GLA

⁸ Consumer Expenditure and Comparison Goods Floorspace Need in London, Experian 2017

3.2.4 All types of centres have comparison, convenience and service⁹ retail floorspace. Figure 9 shows the total retail floorspace in the different classifications of town centres, broken down into the three categories of retail floorspace. For all classifications of town centre, comparison retail makes up the largest proportion of retail floorspace. However, these proportions vary significantly, with comparison retail making up on average less than half of all retail floorspace in District centres, whereas International centres on average have around 95 per cent of retail floorspace as comparison retail.



Source: Experian / GLA

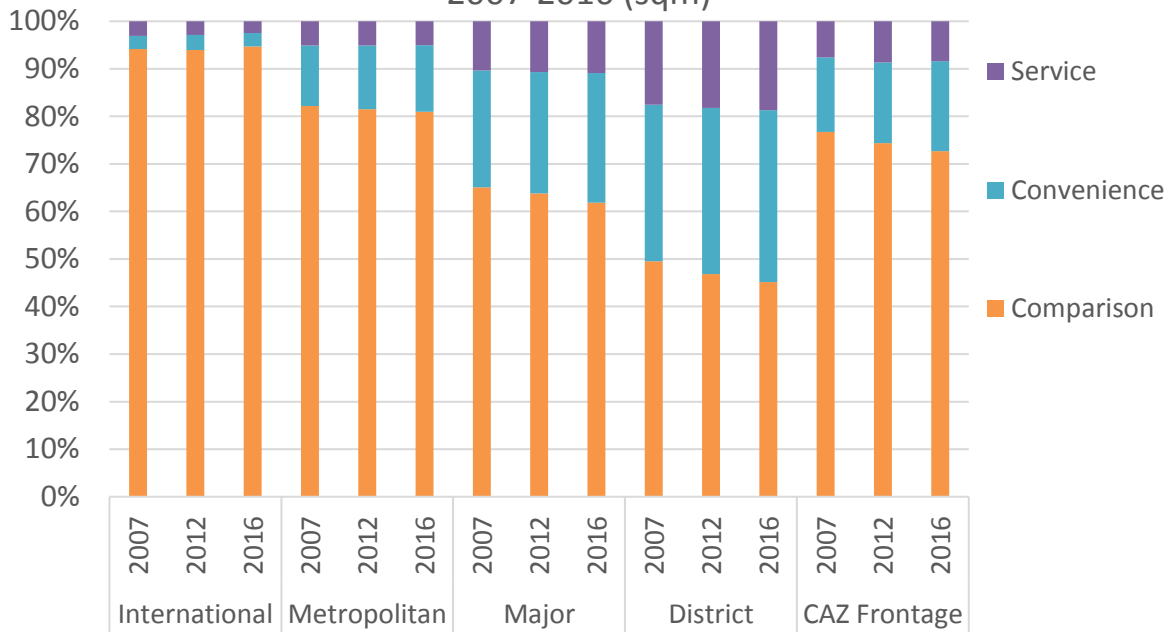
3.2.5 International and Metropolitan centres and CAZ frontages are dominated by comparison floorspace, and Major and District centres have greater proportions of convenience and service retail floorspace. Figure 10 shows that the average proportion of comparison floorspace remains relatively stable over the 2007-2016 period for the International and Metropolitan centres, with a slight downward trend for Major centres and a more pronounced downward trend for District centres and CAZ frontages. As noted above, retail centres appear to be polarising with larger centres attracting relatively greater demand than smaller ones – these shifts give further evidence of this polarisation trend.

⁹ **Comparison** retail refers to shopping for things like clothes, electrical items, household and leisure goods. Comparison goods are bought relatively infrequently, so consumers usually evaluate prices, features and quality before making a purchase.

Convenience retail refers to shopping for everyday items like food, drink, newspapers and confectionery.

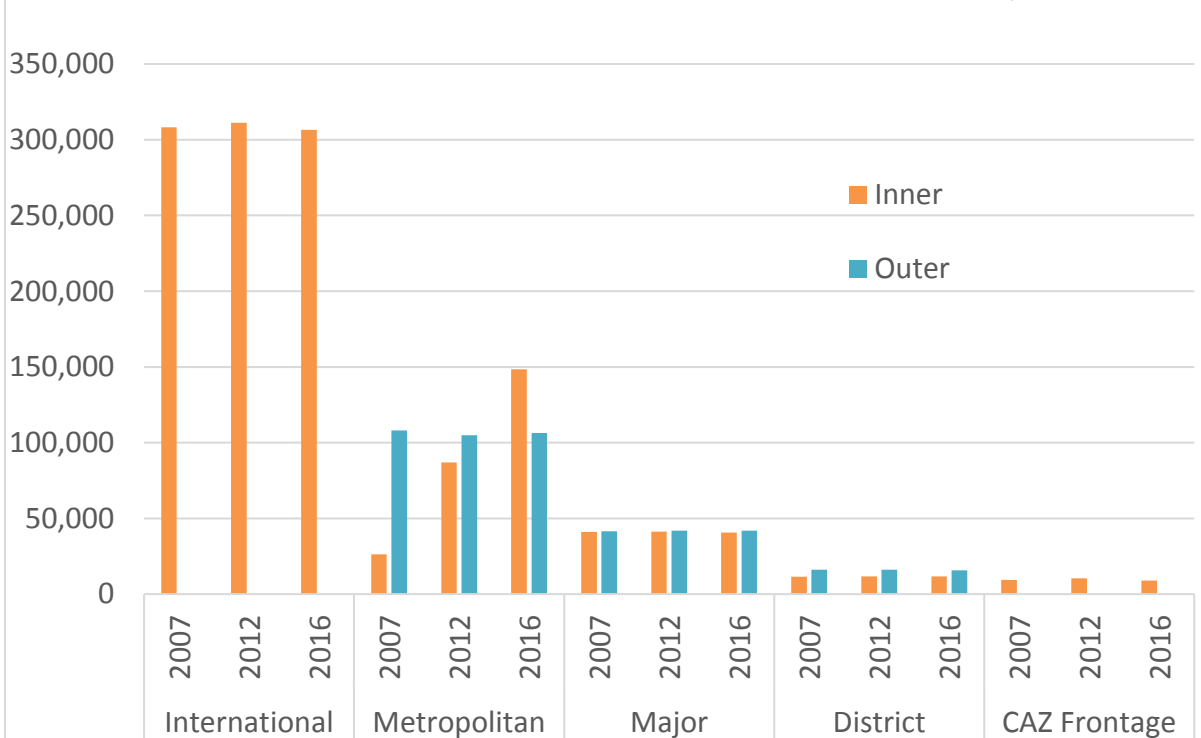
Service retail refers to the purchase of services rather than products, for example hairdressers, shoe repair or dry cleaning.

Figure 10: Proportion of average comparison, convenience and service retail floorspace by town centre classification 2007-2016 (sqm)



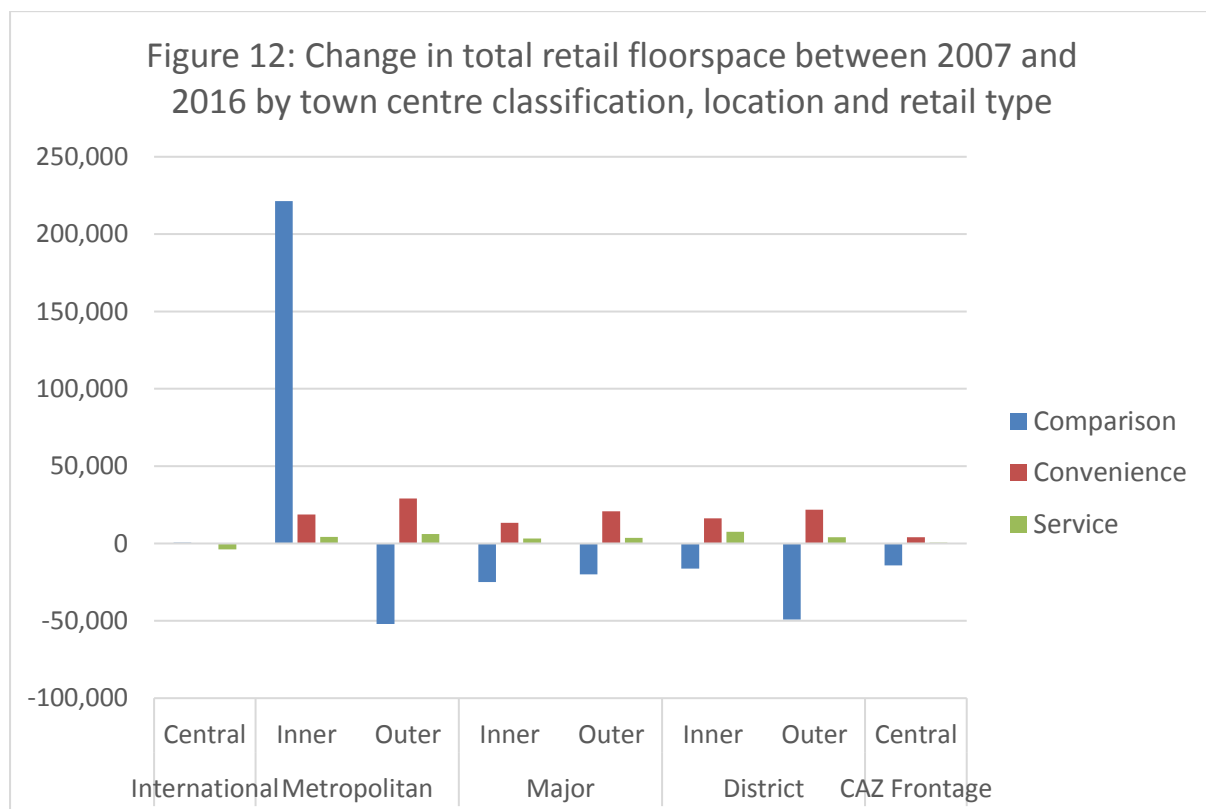
Source: Experian / GLA

Figure 11: Average retail floorspace by town centre classification for inner and outer London 2007-2016 (sqm)



Source: Experian / GLA

- 3.2.6 Average retail floorspace has been relatively consistent over the last decade for all types of centre, with the exception of inner London Metropolitan centres, which have seen step-changes in growth between 2007 and 2012, and 2012 and 2016¹⁰, as shown in Figure 9 and 11. This increase relates to two centres – Shepherds Bush and Stratford – which have seen the development in this period of substantial shopping centres, significantly increasing their retail floorspace capacity.
- 3.2.7 As Figure 12 shows, there have been losses in comparison retail floorspace across all centre types between 2007 and 2016 except for the International centres and inner London Metropolitan centres. This loss has been focused particularly in outer London, with outer London Metropolitan and District centres losing about 50,000 sqm of comparison retail floorspace over this time. Convenience retail floorspace has, however, increased across all centre types over the same time period.



Source: Experian / GLA

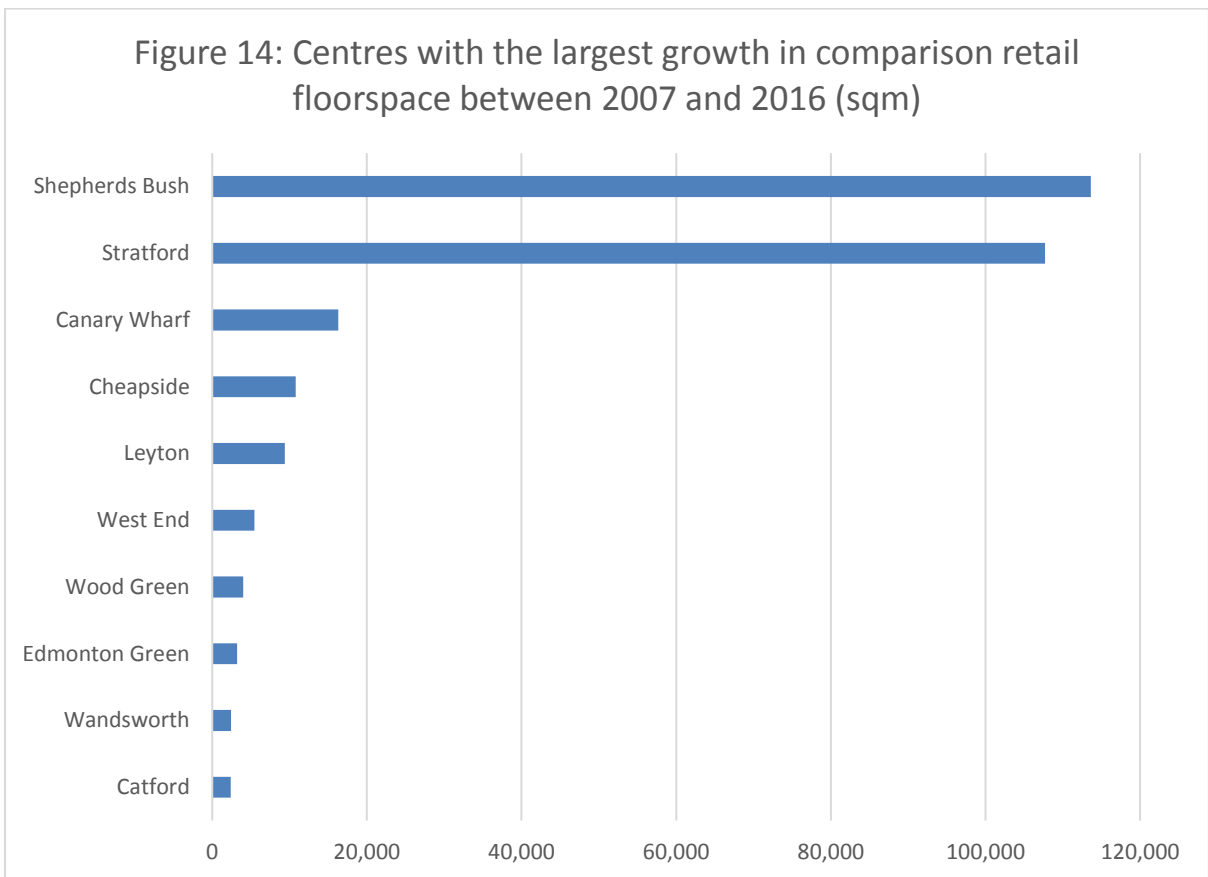
Change in retail floorspace

- 3.2.8 Looking across all centres, only 40 (18 per cent) have seen positive growth in comparison retail floorspace, with 63 (29 per cent) having no growth and 118 (53 per cent) having seen reduction in comparison retail floorspace between 2007 and 2016. Figure 13 shows the distribution of these changes, and it is notable that many centres have seen very little change in comparison retail floorspace. There are clear positive outliers at Shepherds Bush and Stratford, as shown in Figure 14, but also notable growth at Canary Wharf, which has seen over 16,000 sqm of additional comparison goods floorspace over this period.

¹⁰ Time series analyses such as this does not include all centres, as data is not available for some centres (usually District centres) for 2007 and 2012. The data sets published alongside this Town Centre Health Check report show where there is no data.



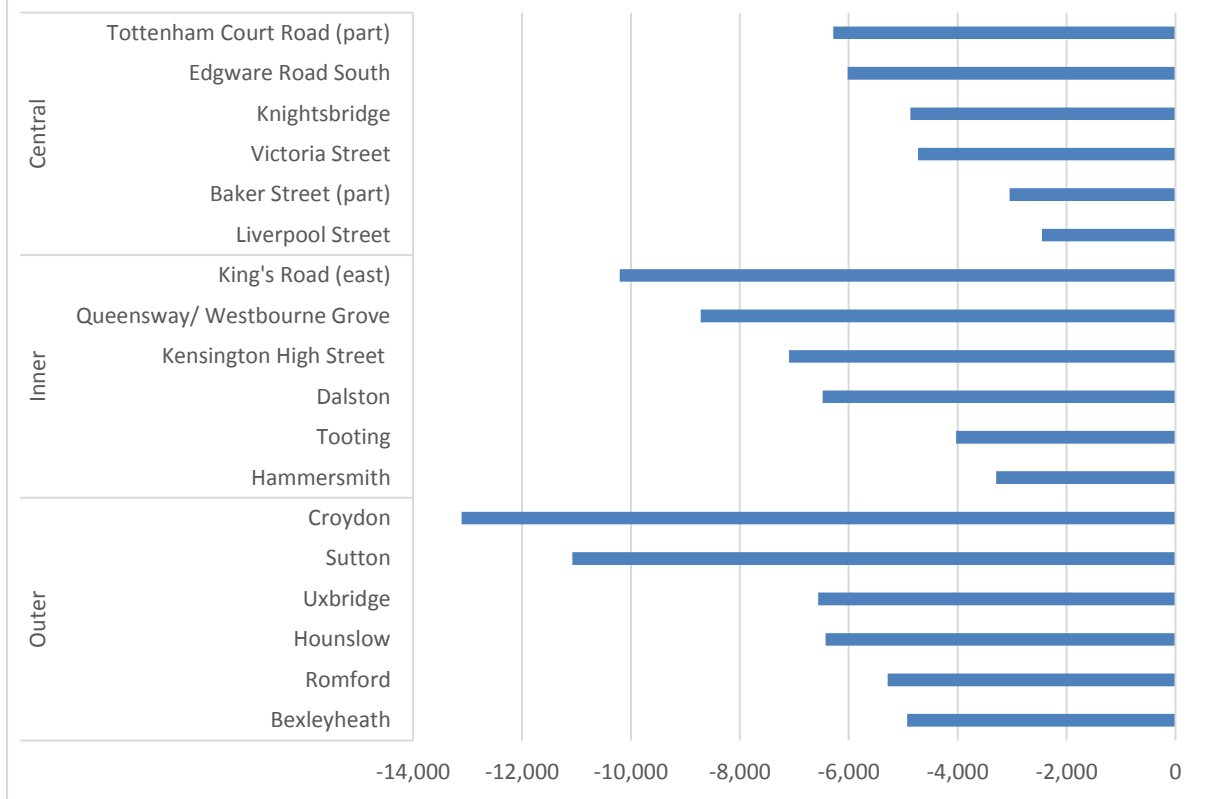
Source: Experian / GLA



Source: Experian / GLA

3.2.9 Most reductions in comparison floorspace at centre-level have been relatively modest, however some centres – notably Croydon and Sutton – have seen losses of over 10,000 sqm of comparison retail floorspace, as shown in Figure 15.

Figure 15: Centres with the greatest decrease in comparison retail floorspace between 2007 and 2016 (sqm)

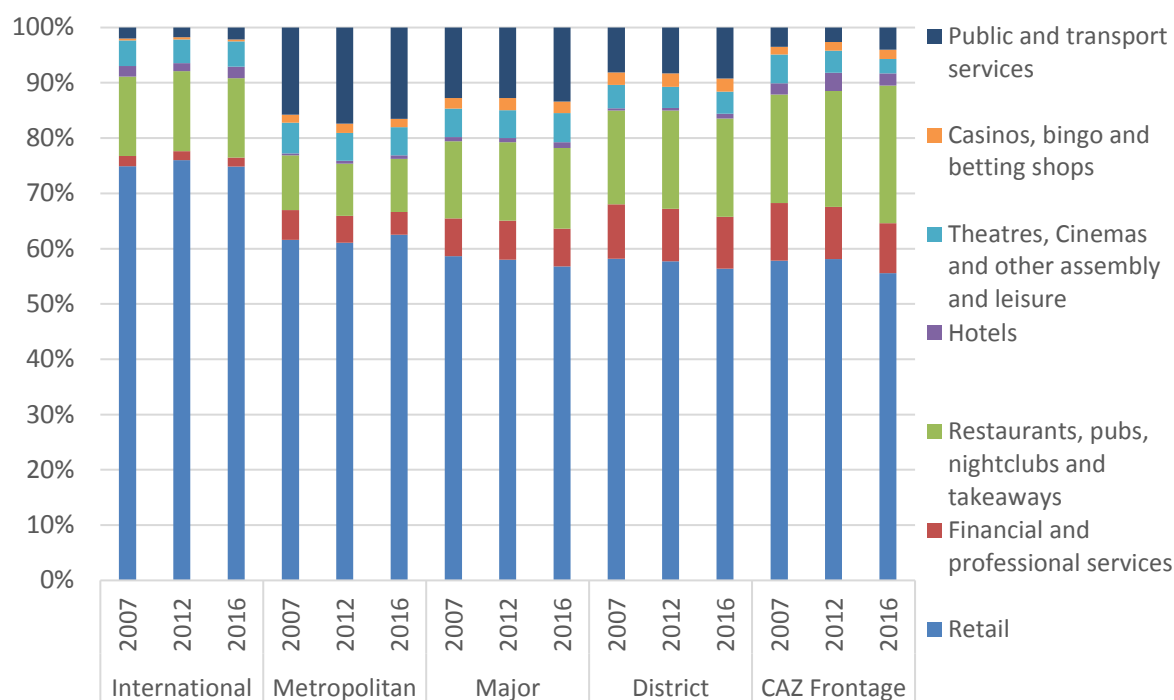


Source: Experian / GLA

3.3 Diversity of Uses

3.3.1 Looking at the breakdown of different types of town centre uses shows that different types of centres are diversifying in different ways. International and Metropolitan centres have a broadly stable proportion of retail and other uses over the 2007-2016 period. For Major and District centres, and CAZ frontages, there has been a slight decline in the proportion of retail to other uses, and in particular the proportion of restaurants, pubs, nightclubs and takeaways has grown over this time.

Figure 16: Proportion of average floorspace by use type and classification, 2007 - 2016 (sqm)



Source: Experian / GLA

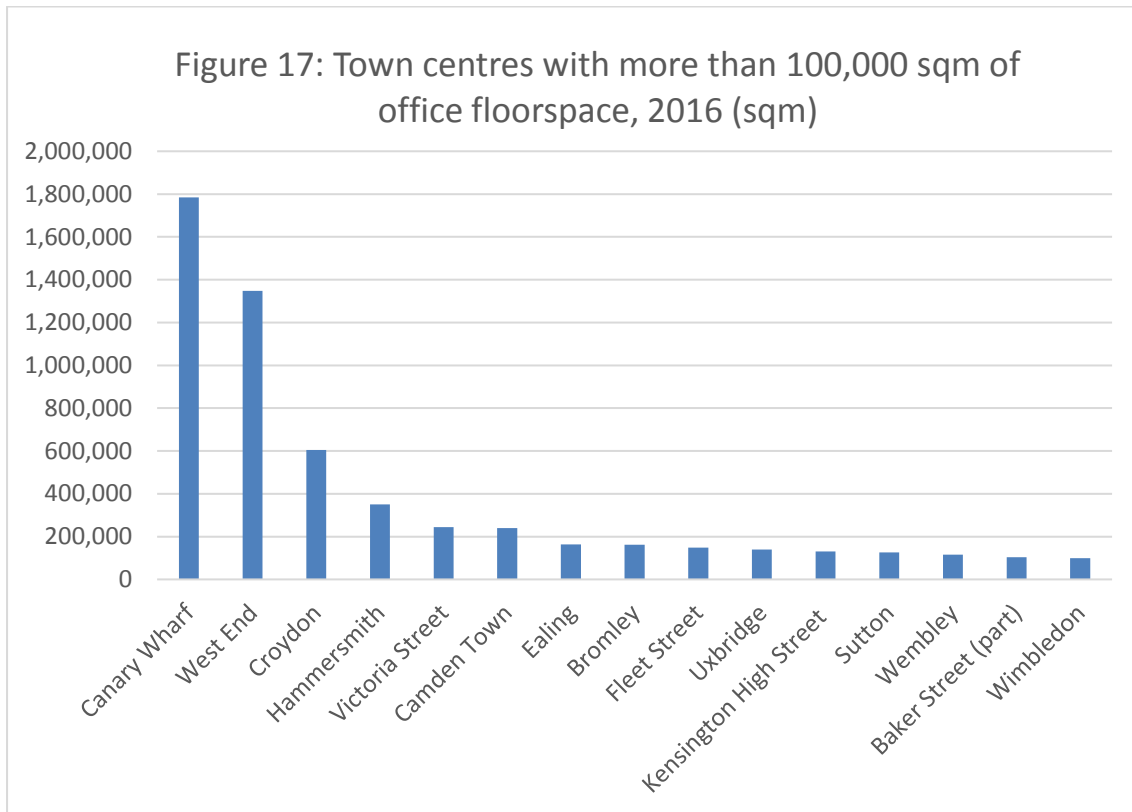
3.4 Offices

3.4.1 Offices play an important role in town centres, supporting their contribution to London's economy, providing employment as well as enhancing the vitality and viability of those centres. There are no reliable pan-London datasets on office floorspace at town centre level. Using the 2013 town centre health check data as a base, the GLA the updated office floorspace estimates for each town centre using development completions data from the London Development Database to 31 March 2016 which also incorporates conversions via office to residential permitted development rights (PDR). These estimates were then adjusted where a borough had more detailed local evidence on office floorspace.

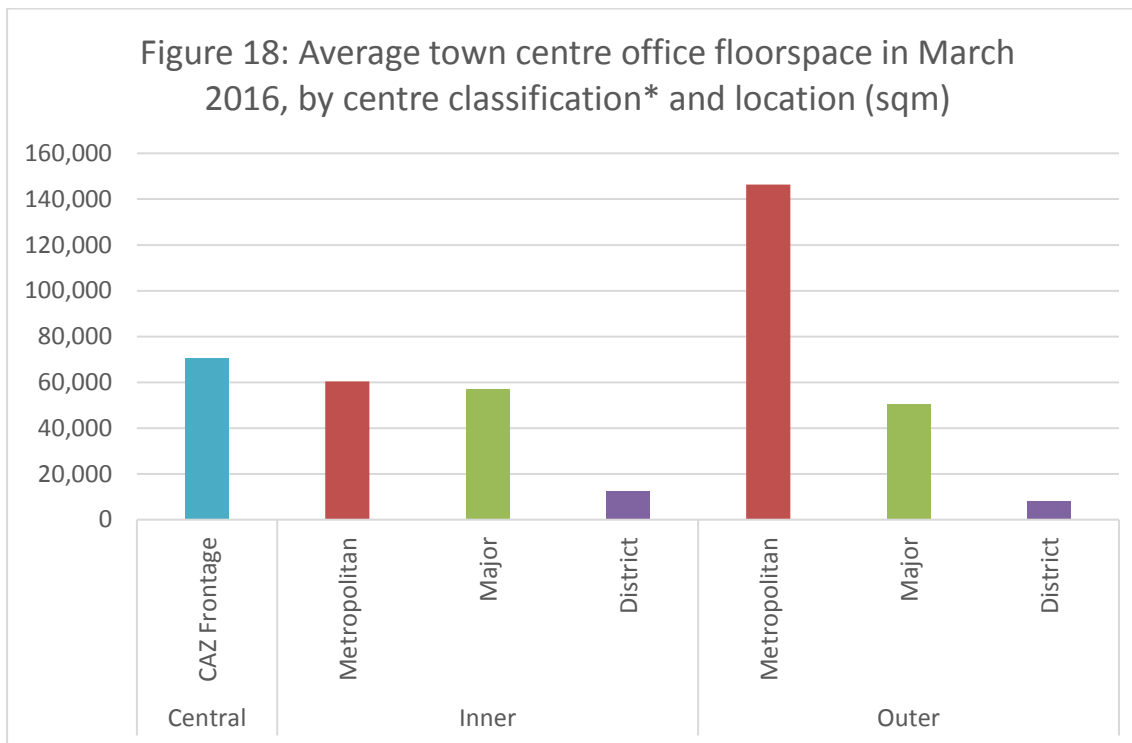
3.4.2 Canary Wharf and the West End contain a significant quantum of office floorspace (estimated at approximately 1.8 million sqm and 1.3 million sqm respectively (see Figure 17). The largest centre in outer London is Croydon with an estimated 600,000 sqm of offices.

3.4.3 Figure 18 shows that Metropolitan town centres in outer London typically contain significant levels of office floorspace (averaging almost 150,000 sqm) compared to their inner London counterparts (54,000 sqm) although the emergence of Stratford as a potential office centre in inner London could see the latter figure rise in future years. Major centres in outer and inner London contain on average 52,000 sqm and 57,000 sqm offices respectively¹¹, whereas District centres in outer and inner London average 9,000 sqm and 13,000 sqm respectively.

¹¹ Data for Canary Wharf (a Major centre in the adopted 2016 London Plan) has been excluded from these calculations



Source: VOA, GLA and boroughs



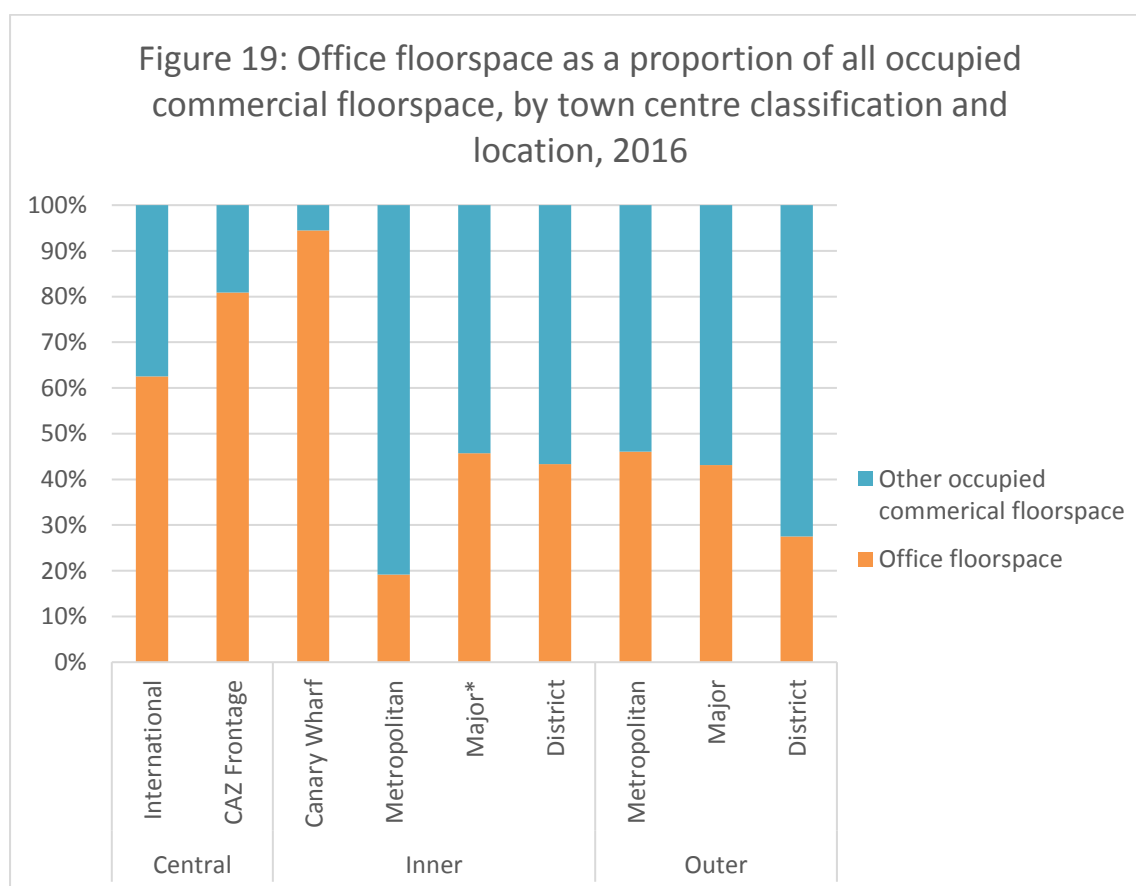
Source: VOA, GLA and boroughs

Includes data on the 150 town centres for which data on office floorspace is available.

* Data excludes the International centres and Canary Wharf (Major centre)

3.4.4 Figure 19 below shows the average proportion of office floorspace relative to all occupied commercial floorspace¹² in London's town centres. Offices make up a substantial proportion of total occupied commercial floorspace in the International centres and CAZ Frontages reflecting their role in the wider central London office market. At Canary Wharf offices account for 94 per cent of all occupied commercial floorspace. In contrast, offices make up a smaller proportion of total commercial space in the two inner London Metropolitan centres (Stratford and Shepherd's Bush) as these centres contain significant levels of retail and leisure floorspace. In inner London District and Major town centres (excluding Canary Wharf) and outer London Metropolitan and Major centres, offices account for just under half of all commercial floorspace on average. Offices in outer London District centres also make up an important component of overall commercial floorspace - on average just over a quarter.

3.4.5 Further details on trends in office development in town centres, including the impact of office to residential PDR, is provided in the commercial development trends section of this report.

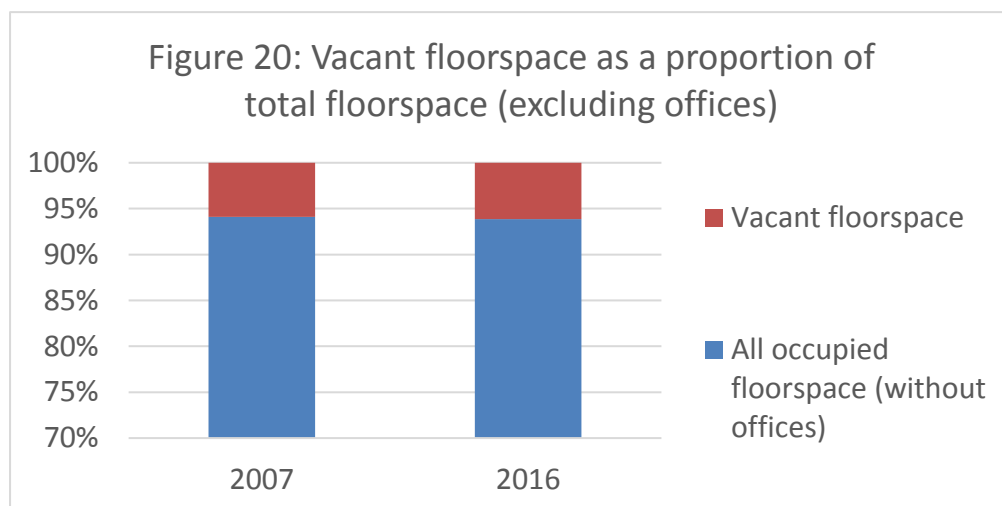


Source: VOA, GLA, boroughs, Experian
 Includes data on the 111 town centres for which data on all commercial floorspace is available.
 * Data for inner London Major centres excludes Canary Wharf.

¹² All occupied commercial floorspace includes retail, financial and professional services, leisure, culture, arts and public services, in addition to offices.

3.5 Vacancy¹³

3.5.1 The Overall London-wide vacancy rate¹⁴ in 2016 is broadly similar to that in 2007, as shown in Figure 20 and Table 2. However, the lack of consistent data for 2013 may disguise fluctuations, particularly following the economic downturn from 2008.



Source: Experian / GLA

Table 2: Average Vacancy Rate for London town centres

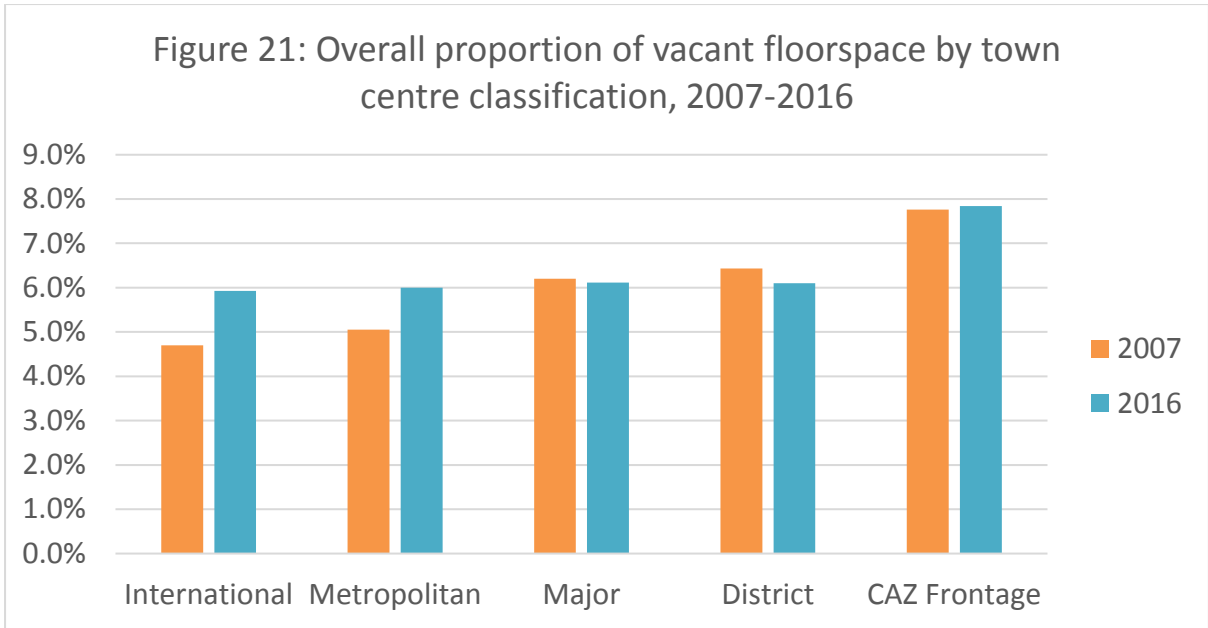
| Year | Vacancy rate |
|------|--------------|
| 2007 | 5.9 per cent |
| 2016 | 6.1 per cent |

Source: Experian / GLA

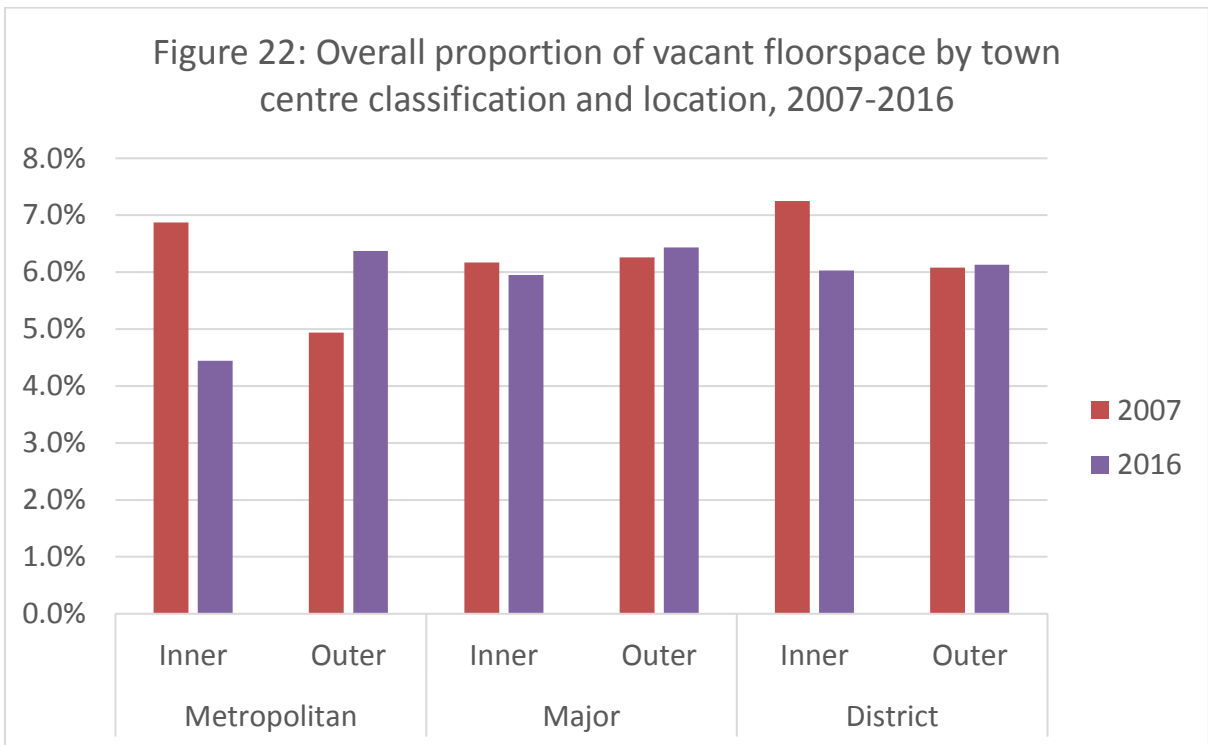
3.5.2 This, however, masks variations both by classification and location. Figure 21 shows that vacancy rates in the International centres have increased since 2007, and for CAZ Frontages the 2016 figure is similar to the high rate of 2007. Figure 22 shows that there are distinct vacancy rates between inner and outer London Metropolitan centres in particular, with inner London Metropolitan centres (Stratford and Shepherds Bush) showing a significant reduction in vacancy, most likely associated with the large-scale shopping centre developments in those centres. By contrast, average vacancy rates in outer London Metropolitan and, to a lesser extent, Major centres have increased.

¹³ Data relating to non-retail vacant floorspace for 2013 supplied by Experian has been published with the Town Centre Health Check, however this is inconsistent and 2013 data has therefore been excluded from this analysis.

¹⁴ The vacancy rate has been calculated as the total amount of vacant commercial floorspace in London's centres divided by the sum of the total amount of occupied and vacant commercial floorspace in London's centres.



Source: Experian / GLA

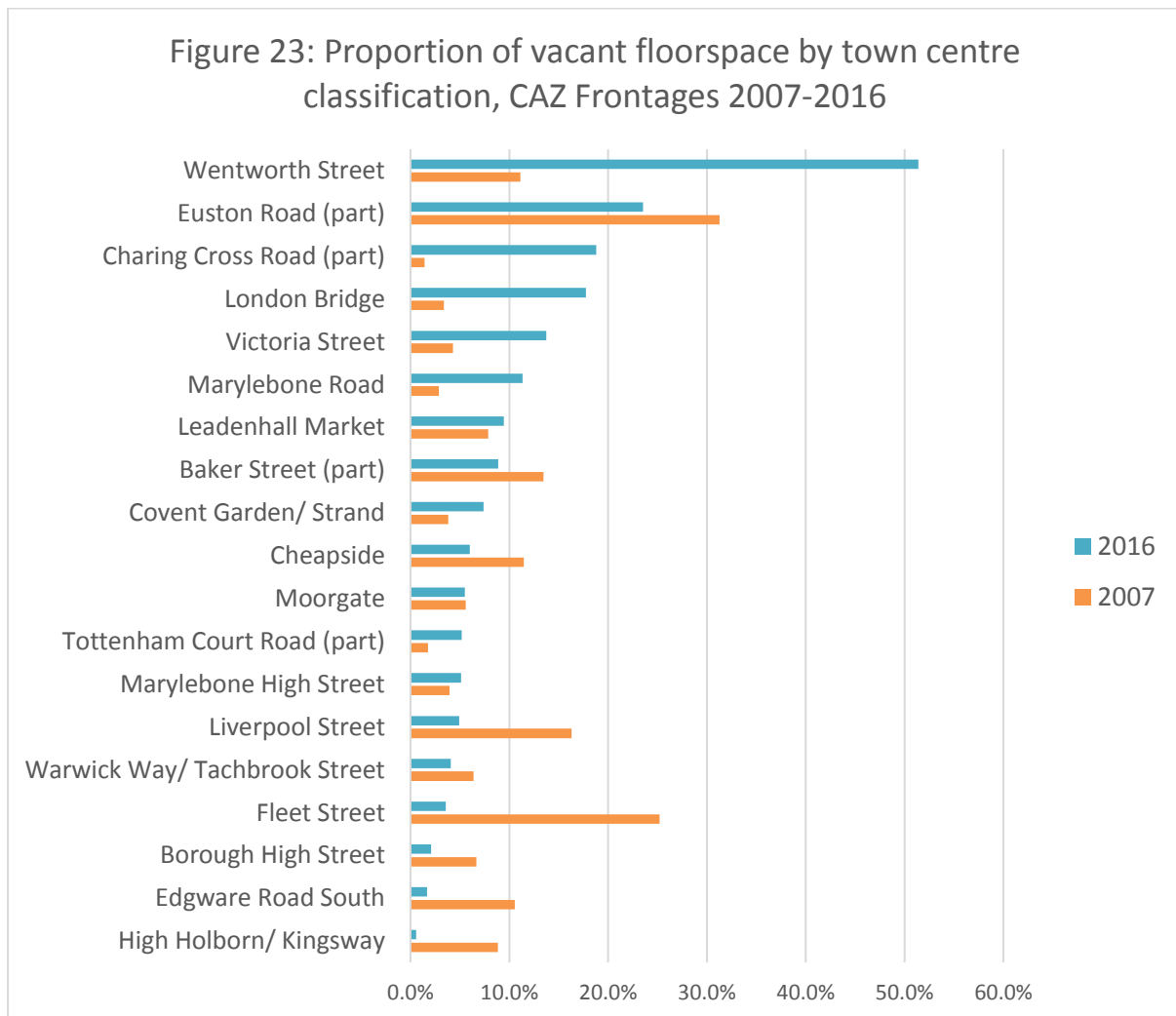


Source: Experian / GLA

3.5.3 Vacancy rates in the International and Metropolitan centres are higher in 2016 than in 2007, whereas vacancy rates in Major and District centres has dropped (by a lesser extent). This is perhaps counter-intuitive, as it might be expected that the larger centres would be performing more strongly. For Metropolitan centres, there may be a spatial aspect to this (discussed below) as all but two of the Metropolitan centres designated in the adopted London Plan are in outer London. For International centres the explanation is less clear; it may reflect the churn of premises in the West End, where there is competition for flagship store premises and large stores can take time to be redeveloped.

It may also be influenced by the snapshot nature of Experian’s surveys. It could also reflect a genuine increase in vacancy rates, with 2007 being a high point in terms of occupancy that has been undermined by and since the 2008 economic downturn. Overall, however, the change is fairly minimal, and a vacancy rate of 6 per cent is still well within a healthy range.

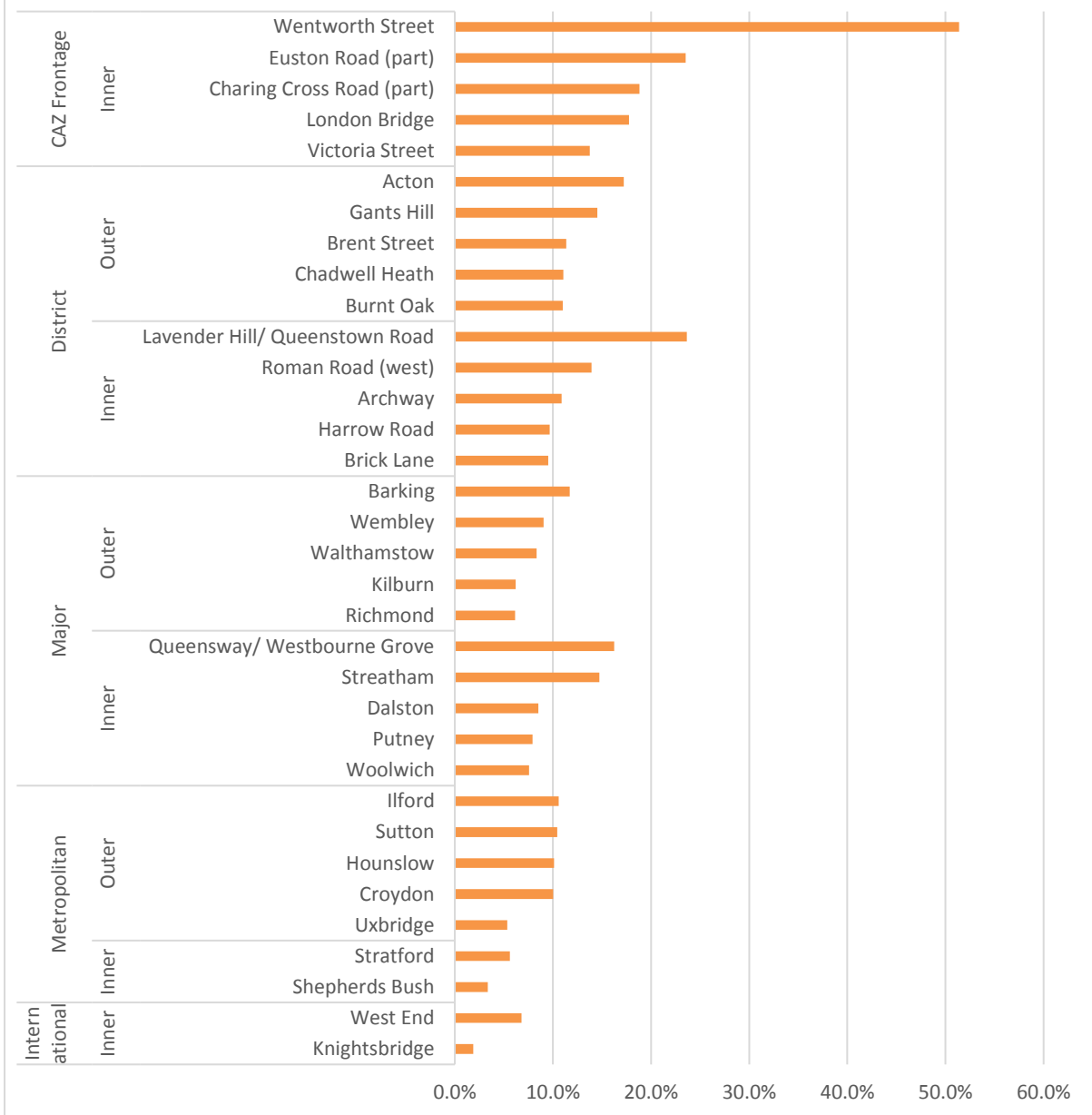
3.5.4 In the CAZ Frontages, the overall proportion of vacant floorspace is just below 8 per cent, and was a similar figure in 2007. This is higher than other classifications, but also disguises some significant shifts in vacancy in individual centres (see Figure 23). There are concerns that some of these high vacancy rates – particularly for Wentworth Street, Euston Road (part) and Charing Cross Road (part) – reflect inaccuracies in the data rather than the actual situation on the ground. Other high vacancy rates, such as at London Bridge and Victoria Street, may reflect on-going large-scale redevelopments in these areas, where there are significant sites under construction, rather than empty premises.



Source: Experian / GLA

3.5.5 Some centres have significantly higher vacancy rates, with three Major and four Metropolitan centres showing vacancy of 10 per cent or higher (see Figure 24).

Figure 24: Town centres with the highest overall vacancy rate, by location and classification, 2016



15

Source: Experian / GLA

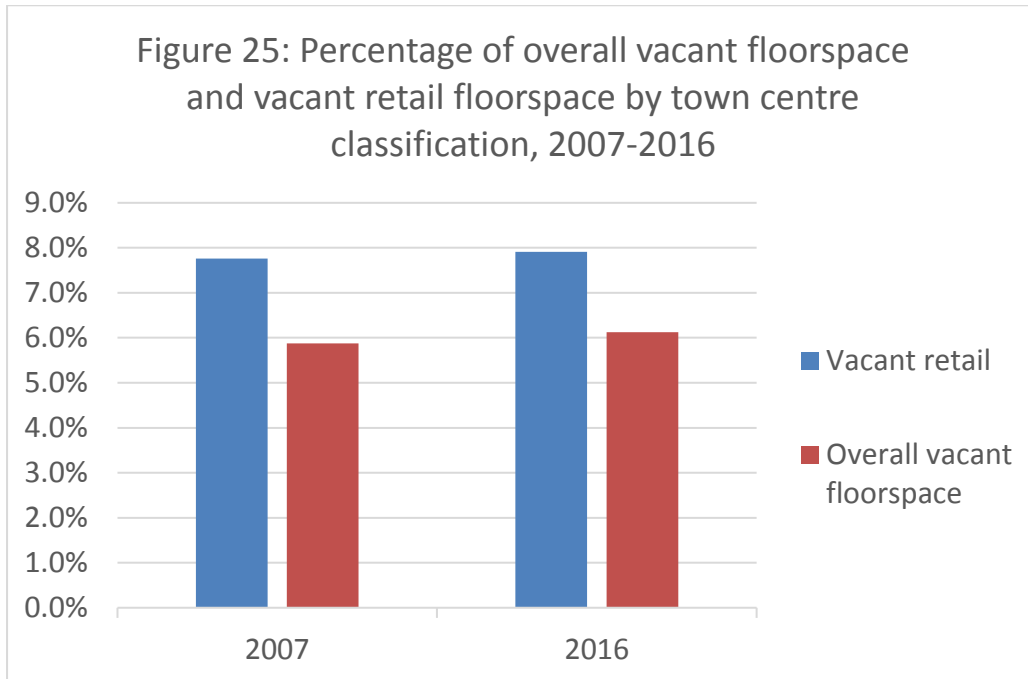
3.6 Vacant Retail

3.6.1 Looking at retail floorspace only, the vacancy rates¹⁶ tend to be higher than for overall floorspace. The pattern for different classifications of town centre over time is similar to that for overall floorspace vacancy, as shown in Figure 25. It is worth noting, however, that retail vacancy rates for Major and District centres – and particularly CAZ frontages – are higher on average than within International and Metropolitan centres. This may reflect

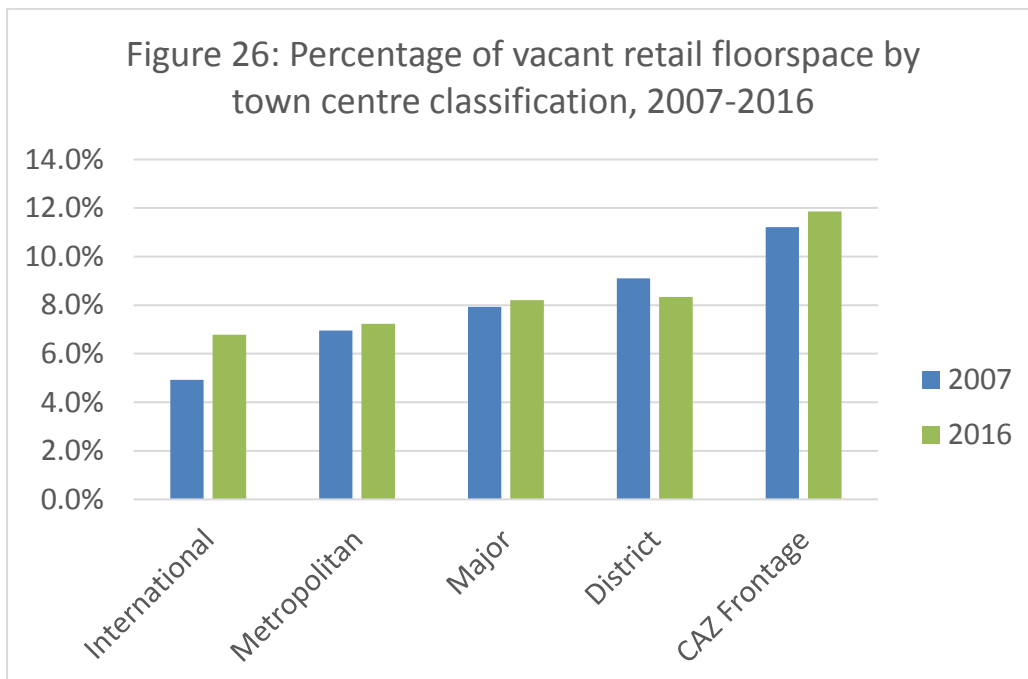
¹⁵ The very high vacancy rate at Wentworth Street may not be accurate, as discussed above.

¹⁶ The retail vacancy rate has been calculated as the total amount of vacant retail floorspace divided by the sum of the total amount of occupied retail floorspace and the total amount of vacant retail floorspace.

the polarisation of retail draw to town centres, whereby larger centres tend to be drawing in a more highly increasing proportion of retail demand than smaller centres.



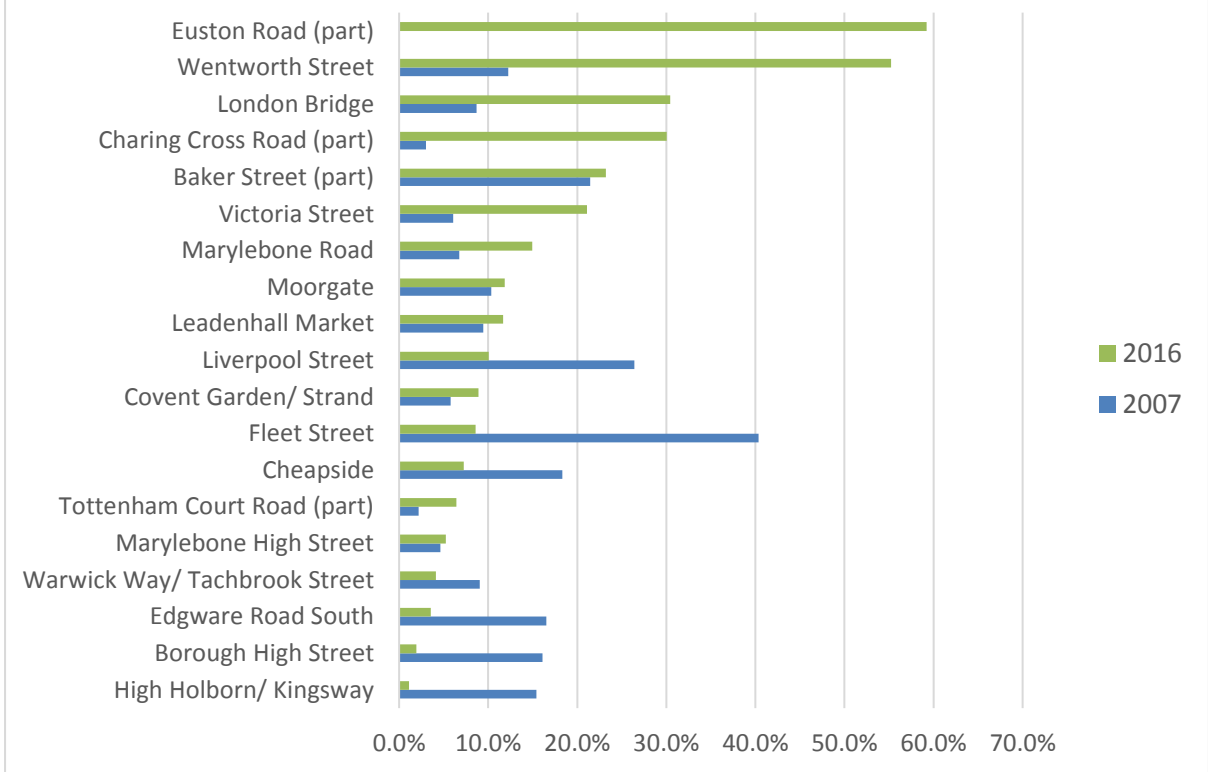
Source: Experian / GLA



Source: Experian / GLA

3.6.2 As discussed for the overall vacancy rates above, there are concerns regarding the accuracy of the retail vacancy figures for individual CAZ Frontages.

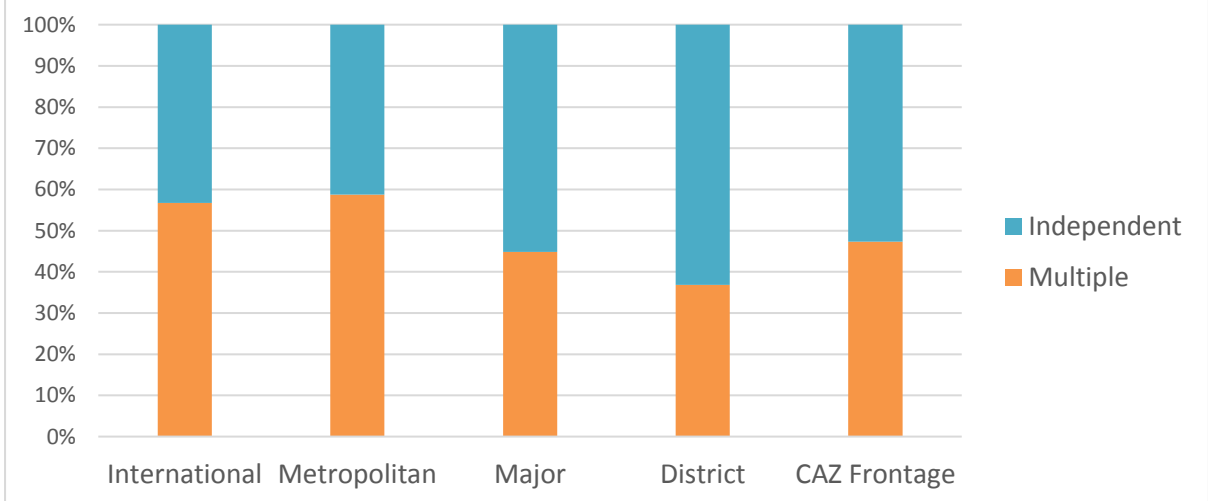
Figure 27: Percentage of vacant retail floorspace by town centre classification in CAZ Frontages, 2007-2016



3.7 Multiples and Independents

3.7.1 Experian Goad categorise all premises in town centres as to whether they are multiple or independent businesses.¹⁷

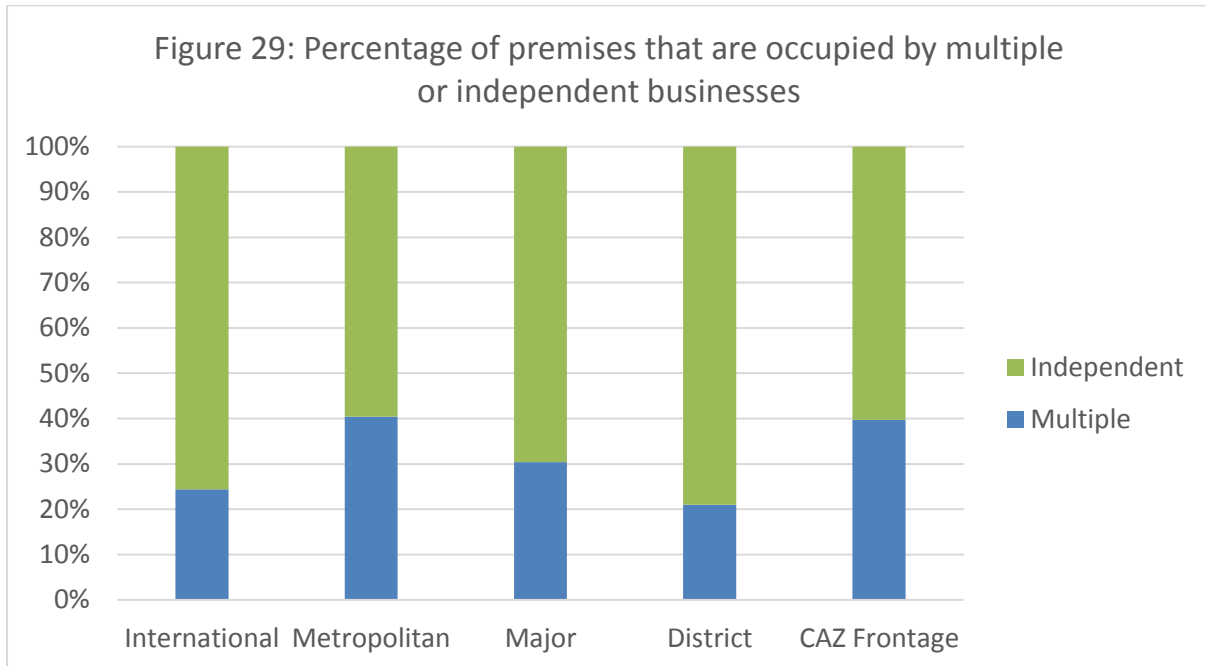
Figure 28: Percentage of floorspace occupied by multiple or independent businesses



¹⁷ Independent businesses are those with fewer than 10 outlets; multiple businesses are those with 10 outlets or more.

Source: Experian / GLA

3.7.2 Larger centres tend to have a greater proportion of multiple businesses, with the smaller District and Major centres featuring more independent businesses. Comparing the floorspace figures (see Figure 28) to the numbers of premises (see Figure 29) shows that overall there are many more independent businesses. This reflects a disparity in size; multiple businesses tend to occupy larger premises than independent businesses.

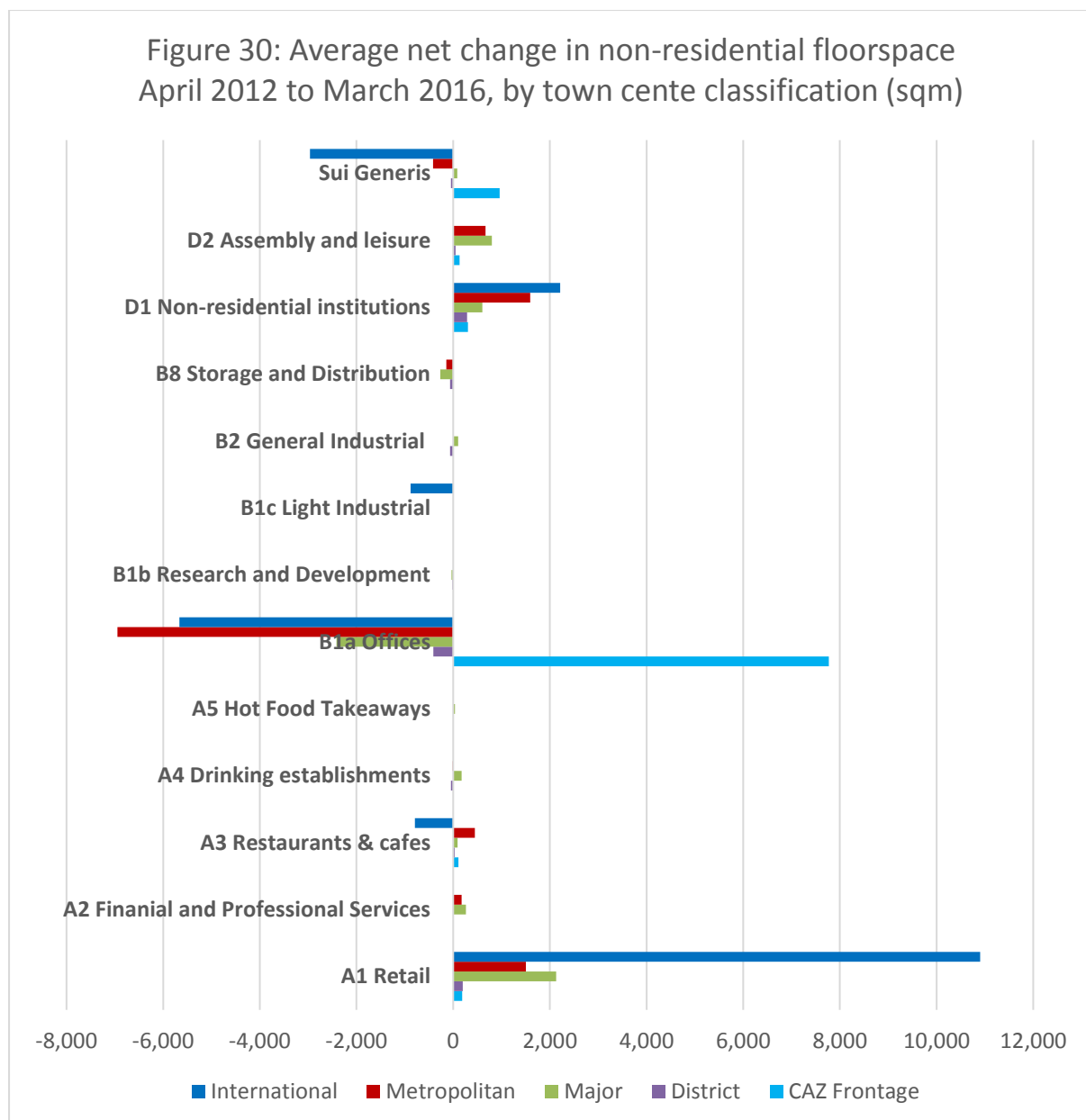


Source: Experian / GLA

4 DEVELOPMENT TRENDS

4.1 Commercial development trends

4.1.1 Over the period FY2012¹⁸ to FY2015 floorspace in completed¹⁹ non-residential floorspace in London's town centres increased in overall terms by 198,000 sqm. However, there were marked differences between the various non-residential use classes as illustrated in Figure 30 below. There were positive average net gains in A1 Retail (147,000 sqm) across all classifications of centre, and similar gains in D1 Non-residential institutions (96,000 sqm) and D2 Assembly and Leisure uses (46,000 sqm). Most of this growth was associated with the International, Metropolitan and Major centres. In contrast, there were significant overall losses associated with office development (-82,000 sqm) across all centre classifications on average except the CAZ Frontages.



Source: London Development Database/GLA

¹⁸ The prefix FY indicates "Financial Year" so FY2012 to FY2015 covers the period 1 April 2012 to 31 March 2016.

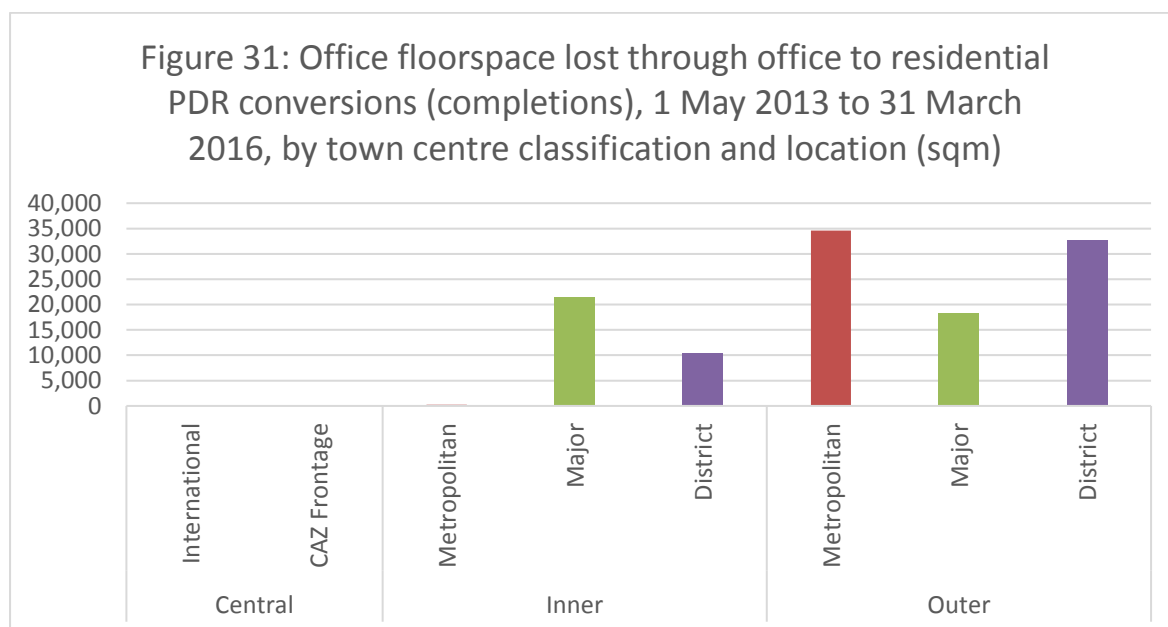
¹⁹ Floorspace recorded in developments with at least 1,000 sqm non-residential floorspace and in mixed-use residential / non-residential schemes.

4.1.2 The analysis in Figure 30 above masks significant variations at centre level. The growth in retail floorspace (in completed developments above the 1,000m threshold) occurred in only 32 town centres (less than 15 per cent of the total number of centres) with significant gains in the West End, Woolwich, Wandsworth and Wembley. Almost 80 per cent of the centres had no net change to retail floorspace in completed developments meeting the threshold. Fourteen centres experienced modest losses of A1 retail space in completed developments meeting the threshold.

4.1.3 Office floorspace in completed developments increased in 16 centres over the period FY2012 to FY2015 totalling 232,500 sqm. The most notable gains were in London Bridge, King’s Cross/St.Pancras, Hammersmith, Wembley Park, Victoria Street (Westminster) and Uxbridge. In contrast, 102 town centres had net losses of office floorspace in completed developments over the same period, totalling 313,000 sqm. Croydon lost over 24,500 sqm of office space in completed developments²⁰. Streatham lost just over 20,000 sqm and Harrow, Ilford, Bexleyheath, Sutton and Kingston all lost more than 10,000 sqm.

4.2 Office to residential permitted development rights

4.2.1 The impact of office to residential permitted development rights (PDR) introduced by central Government in May 2013 has been recorded. In overall terms a total of 117,568 sqm office floorspace was lost in town centres through completed permitted development office to residential conversions. Town centres in outer London appear to have been the most affected in terms of office space lost, and notably in the Metropolitan and District centres (see Figure 31). The International and CAZ frontages in Central London are currently exempt from office to residential PDR and so have lost no office space through such conversions.

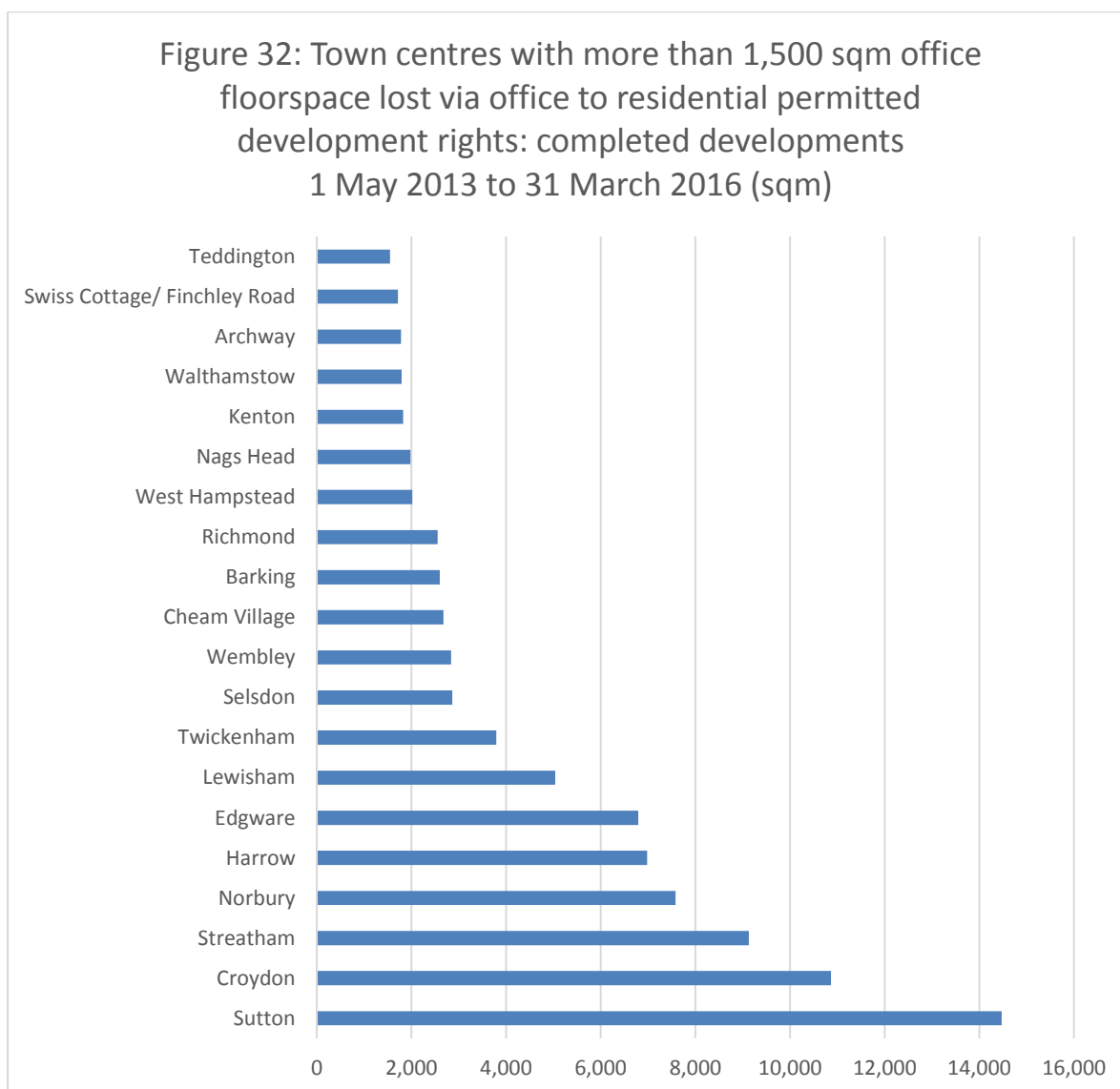


Source: London Development Database/GLA

4.2.2 Figure 32 below illustrates the town centres that have witnessed the most significant losses of office floorspace through completed PDR conversions. Sutton, Croydon and

²⁰ Completions data for offices includes conventional planning permissions and office to residential permitted development

Streatham town centres lost the most office space over the period 1 May 2013 to 31 March 2016.

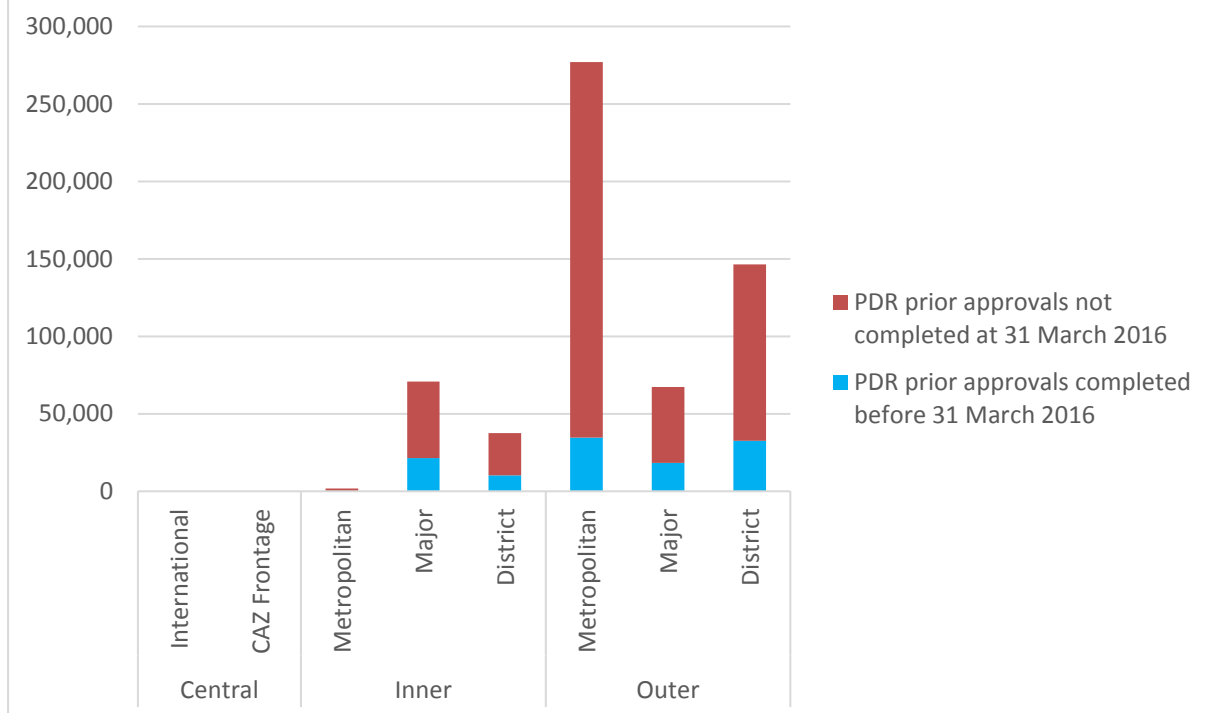


Source: London Development Database/GLA

4.2.3 The potential future impact of office to residential PDR prior approvals on London’s town centres (including completions and approvals not yet completed by 31 March 2016) is illustrated in Figure 33. An estimated total of 601,000 sqm of office floorspace could potentially change to residential, of which more than 117,000 sqm has been completed, an implementation rate²¹ of around 20 per cent. Across the whole of London, there was 1.6 million sqm of office floorspace with prior approval to change to residential at the end of March 2016. This suggests that town centres account for more than almost two-fifths of the London-wide office space that is potentially lost through PDR.

²¹ The implementation rate is calculated here as total office floorspace completed through office to residential PDR as a percentage of the total of all office space with office to residential PDR approval (completed and not completed).

Figure 33: Office floorspace potentially lost through office to residential PDR conversions (all prior approvals) at 31 March 2016, by town centre classification and location (sqm)



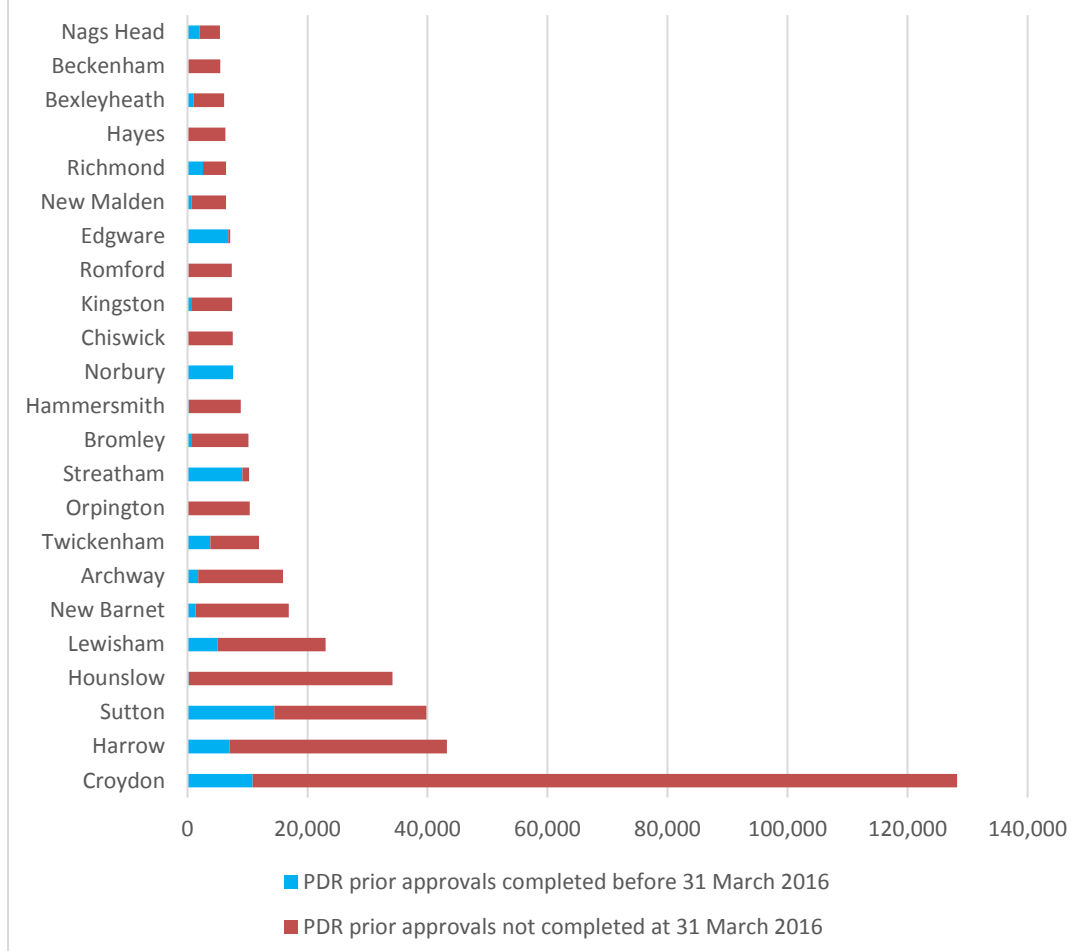
Source: London Development Database/GLA

4.2.4 More than 80 per cent of the office floorspace affected in town centres is in outer London, and almost half of the total is in outer Metropolitan town centres. Figure 34 shows that Croydon, Harrow, Sutton and Hounslow town centres have been particularly affected by office to residential permitted development rights. An estimated 128,000 sqm of office space could potentially change to residential in Croydon via PDR and this represents approximately a fifth of the centre's office stock²². Harrow and Hounslow could potentially lose almost half of their office stock if all prior approvals are implemented and Sutton almost a third.

4.2.5 Of the centres with the most office space potentially changing to residential through PDR, Norbury, Edgware and Streatham have the highest implementation rates (100, 95 and 89 per cent respectively). At the end of March 2016 Sutton had an implementation rate of 36 per cent, Harrow 16 per cent, Croydon 8 per cent and Hounslow just 1 per cent. Over time these implementation rates are expected to increase.

²² Based upon office stock estimates in this health check adjusted for PDR completions.

Figure 34: Town centres with the most office floorspace potentially lost through office to residential PDR conversions (all prior approvals) at 31 March 2016 (sqm)



Source: London Development Database/GLA

4.3 Housing development trends

Housing completions within town centres

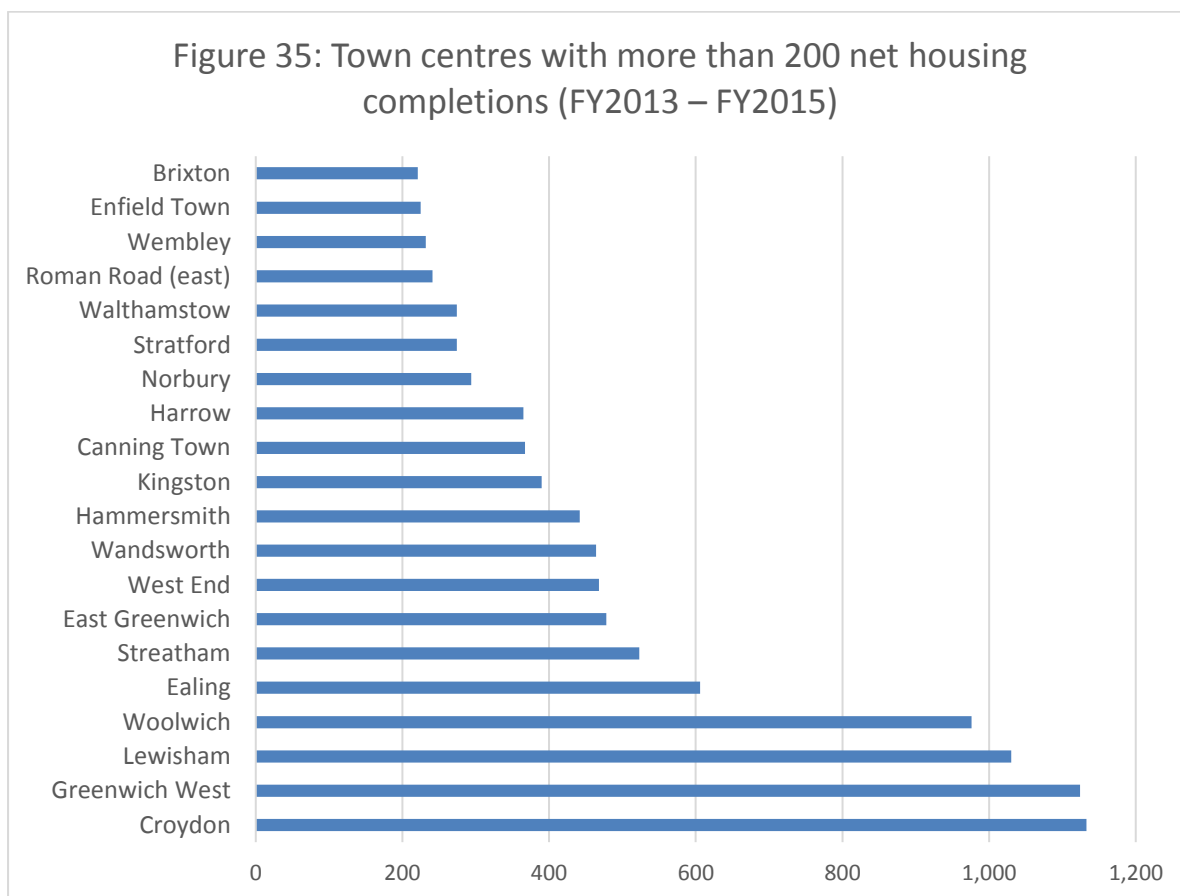
4.3.1 Over the period FY2013²³ to FY2015 there were 17,214 net housing completions within London’s town centres - over 5,700 per annum. This represents an increase in overall annual housing completions in town centres compared to the period FY2008 to FY2012 when the average was approximately 3,000 per annum²⁴. Almost two-fifths of net housing completions over the period FY2013 to FY2015 were in District town centres and more than a third in Major centres. The 13 Metropolitan town centres in the adopted London Plan contributed more than 3,600 net additional dwellings, just over a fifth of the London total. 2,096 of the net housing completions were via office to residential PDR, about 12 per cent of all net completions.

4.3.2 Figure 35 shows those town centres delivering more than 200 net housing completions in centres over the period FY2013 to FY2015. Croydon, Greenwich West and Lewisham

²³ The prefix FY indicates “Financial Year” so FY2013 to FY2015 covers the period 1 April 2013 to 31 March 2016.

²⁴ Source: 2013 London Town Centre Health Check, GLA

delivered more than 1,000 dwellings over this period followed by Woolwich with more than 900. The town centres in Figure 35 include a mix of Metropolitan, Major and District centres in both inner and outer London and the West End.

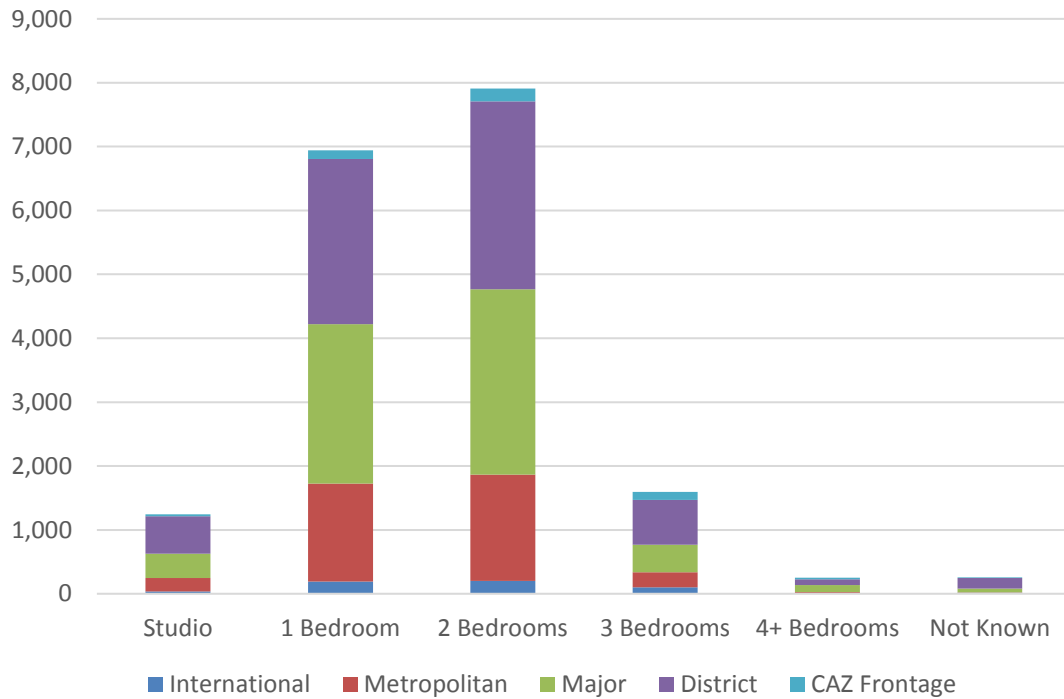


Source: London Development Database, GLA

Dwelling sizes in housing completions within town centres

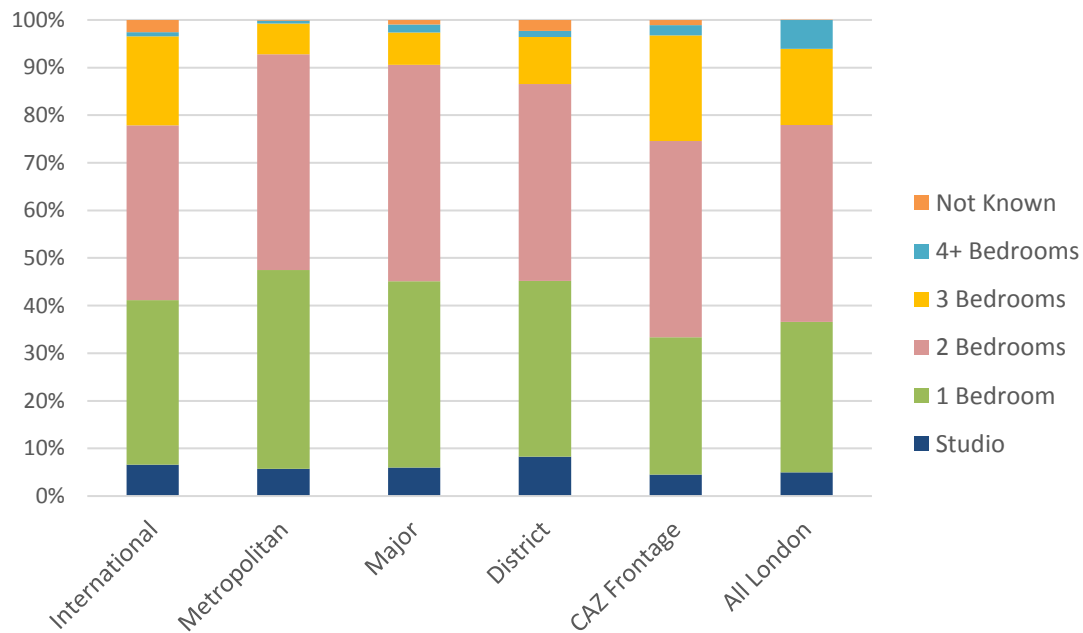
- 4.3.3 More than 80 per cent of gross housing completions in town centres comprised one and two bedroom dwellings over the period FY2013 – FY2015 (see Figure 36). Three bedroom dwellings accounted for nine per cent, studio flats 7 per cent and four-bedroom plus dwellings just 1 per cent. Across London as a whole, one and two bedrooms accounted for 73 per cent of all housing completions over the same period, and 5 per cent for studios, 16 per cent for three-bed and 6 per cent for four-bed plus (see Figure 37).
- 4.3.4 Figure 37 also shows the percentage of housing completions within town centres by dwelling size and centre classification (FY2013 – FY2015). Although one-bed and two-bed dwellings accounted for the largest shares across all centre classifications there were substantially higher percentages of 3-bed dwellings in the CAZ frontage centres (24 per cent) and the International centres (19 per cent) compared to centres outside the CAZ (8 per cent on average).

Figure 36: Number of gross housing completions within town centres by dwelling size and centre classification (FY2013 – FY2015)



Source: London Development Database, GLA

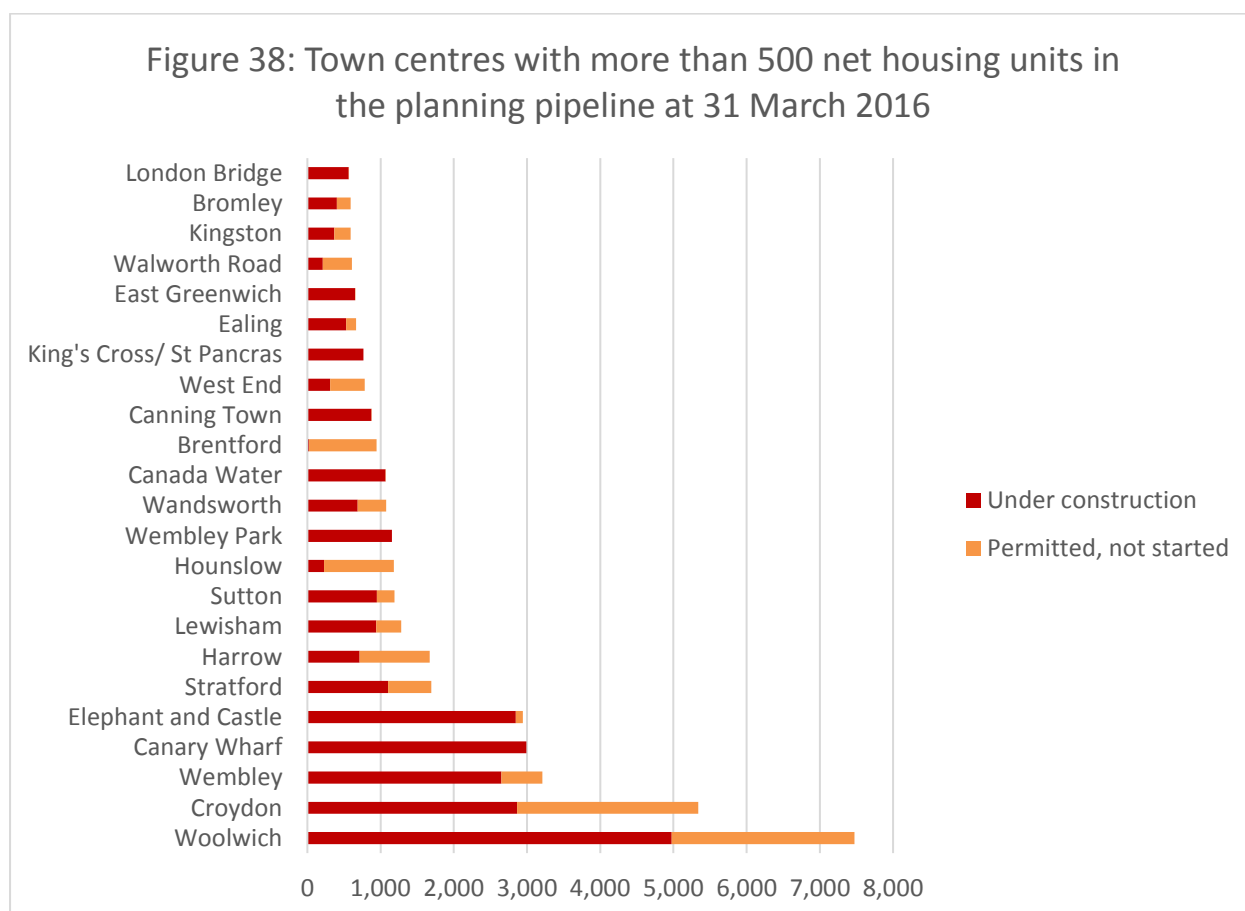
Figure 37: Percentage of housing completions by dwelling size and town centre classification, compared to the London average (FY2013 – FY2015)



Source: London Development Database, GLA

Housing pipeline within town centres

- 4.3.5 At the end of March 2016, a total of 34,834 net additional residential units were under construction within London’s town centres suggesting that recent rates of town centre housing completions are set to increase further. Around 42 per cent of those units are being brought forward in Major town centres, a further 31 per cent in District centres and 21 per cent in the Metropolitan centres. Woolwich had almost 5,000 units under construction at the end of March 2016, Canary Wharf, Croydon, Elephant and Castle and Wembley all had between 2,500 and 3,000, and Wembley Park, Stratford and Canada Water all had more than 1,000.
- 4.3.6 A further 19,486 net additional residential units with planning permission in town centres were recorded as ‘not started’ at the end of March 2016. Woolwich and Croydon both had almost 2,500 net additional dwellings with planning permission but not started at this date, with Harrow, Hounslow and Brentford all recording more than 900 net dwellings with this planning status. Of the total 19,486 units, 36 per cent were in Metropolitan centres, 32 per cent in Major centres and 28 per cent in Districts.
- 4.3.7 Combining the units under construction with those not started gives a total planning pipeline of 54,320 net additional dwellings in all town centres, of which 16 per cent are office to residential PDR conversions. Figure 38 shows the town centres with more than 500 dwellings in the planning pipeline at the end of March 2016. These 23 centres (representing around a tenth of London’s 221 town centres) are contributing more than 72 per cent of the total planning pipeline of net additional dwellings in all town centres. A further 70 town centres were each contributing between 50 and 500 net additional dwellings in the planning pipeline.

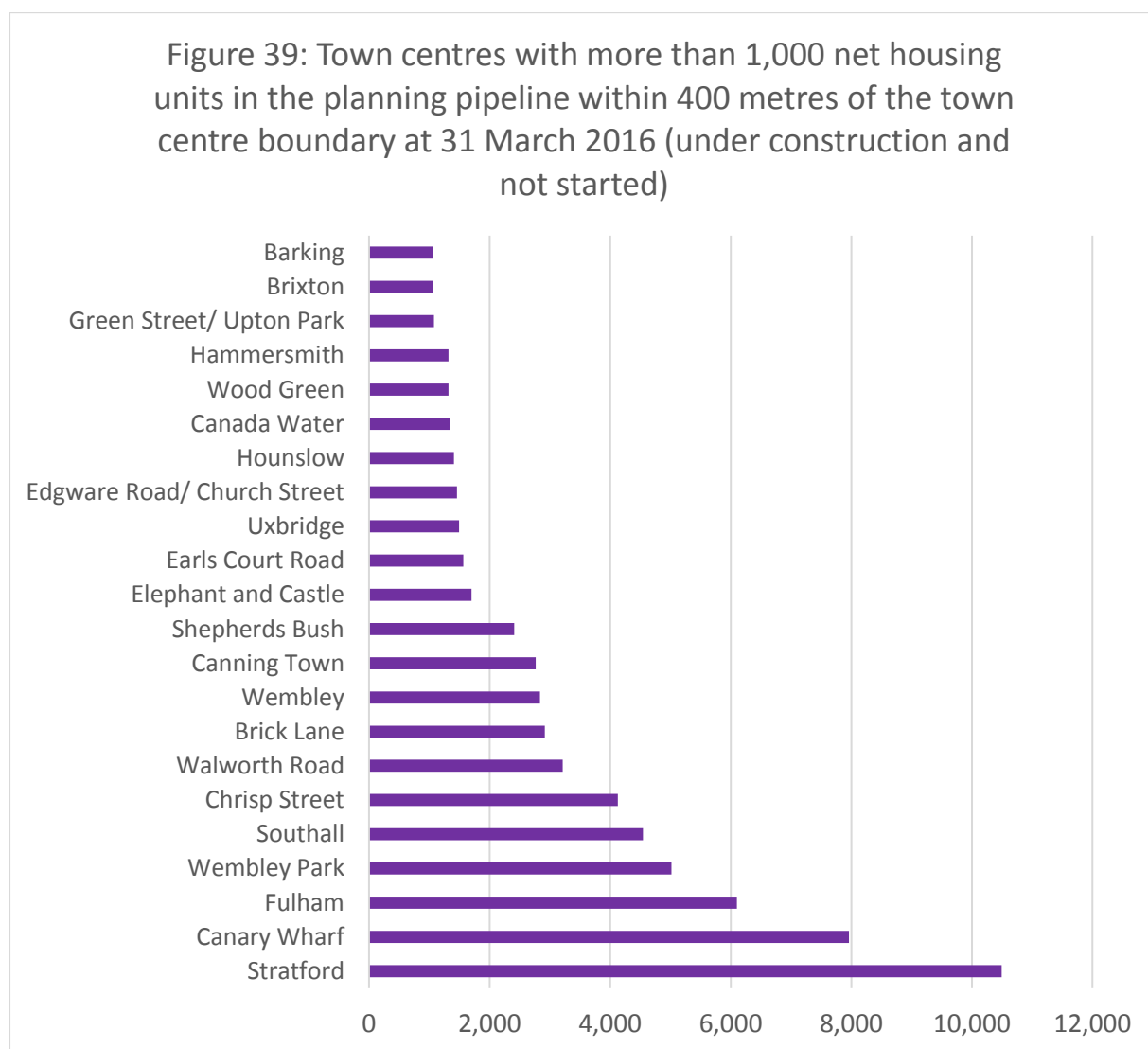


Source: London Development Database, GLA

Housing pipeline on the edges of town centres

4.3.8 Across London as a whole it is estimated that a total of 96,027 net additional dwellings were either under construction or with planning permission and not started in edge of centre²⁵ locations at 31 March 2016. Figure 39 shows those centres with more than 1,000 net additional dwellings in the pipeline within 400 metres of the town centre boundary. Stratford had almost 10,500 dwellings and Canary Wharf almost 8,000 dwellings in edge of centre locations and Fulham, Wembley Park, Southall and Chrisp Street each had between 4,000 and 6,000. Almost half (49 per cent) of London's town centres had at least 100 net additional dwellings in the pipeline in edge of centre locations at 31 March 2016.

4.3.9 The combined total housing pipeline from within and on the edges of centres is therefore estimated to be in the region of 150,000 dwellings at 31 March 2016.



Source: London Development Database, GLA

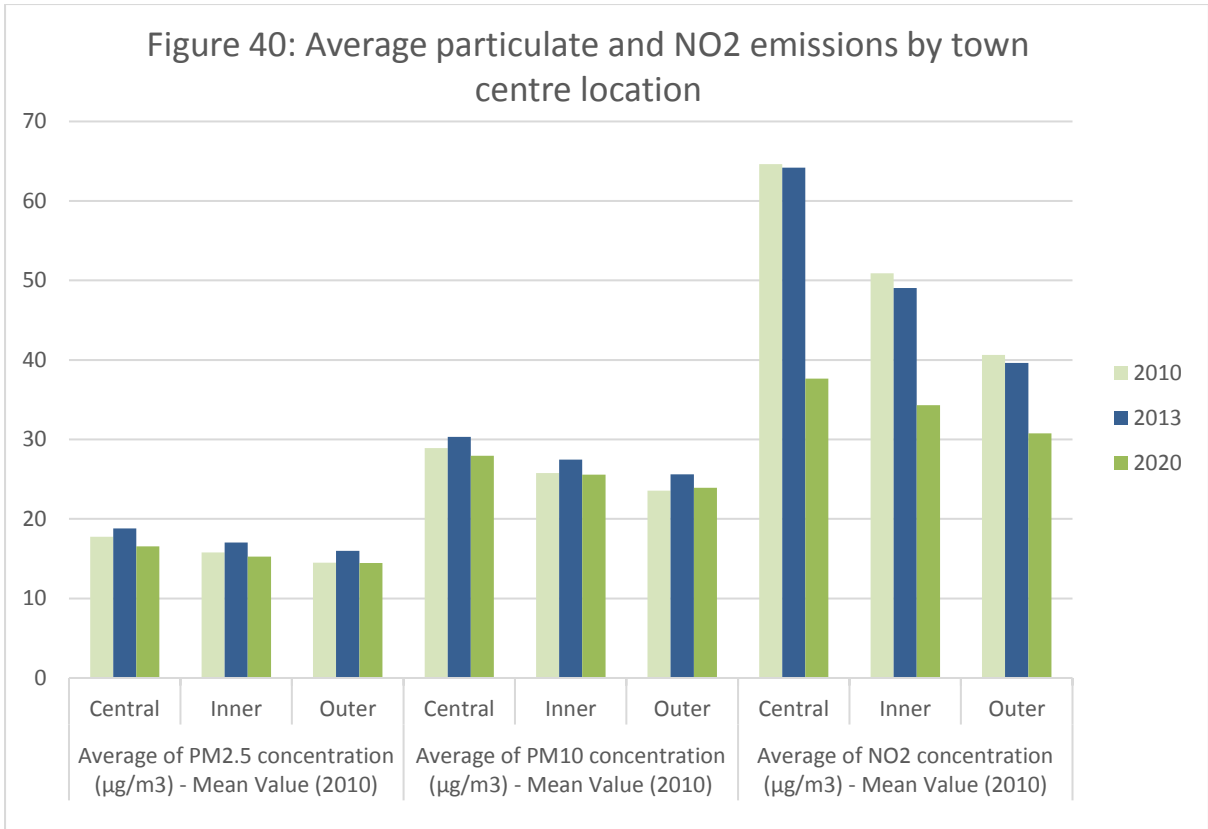
²⁵ Edge of centre locations are defined here as locations lying within 400 metres of London's town centre boundaries and excludes areas within the town centre boundary. The analysis excludes the International centres and CAZ Frontages. The methodology ensures that housing units in the planning pipeline that lie within 400 metres of more than one centre are not double counted. In such instances the housing units are assigned to the nearest centre.

5 ENVIRONMENT

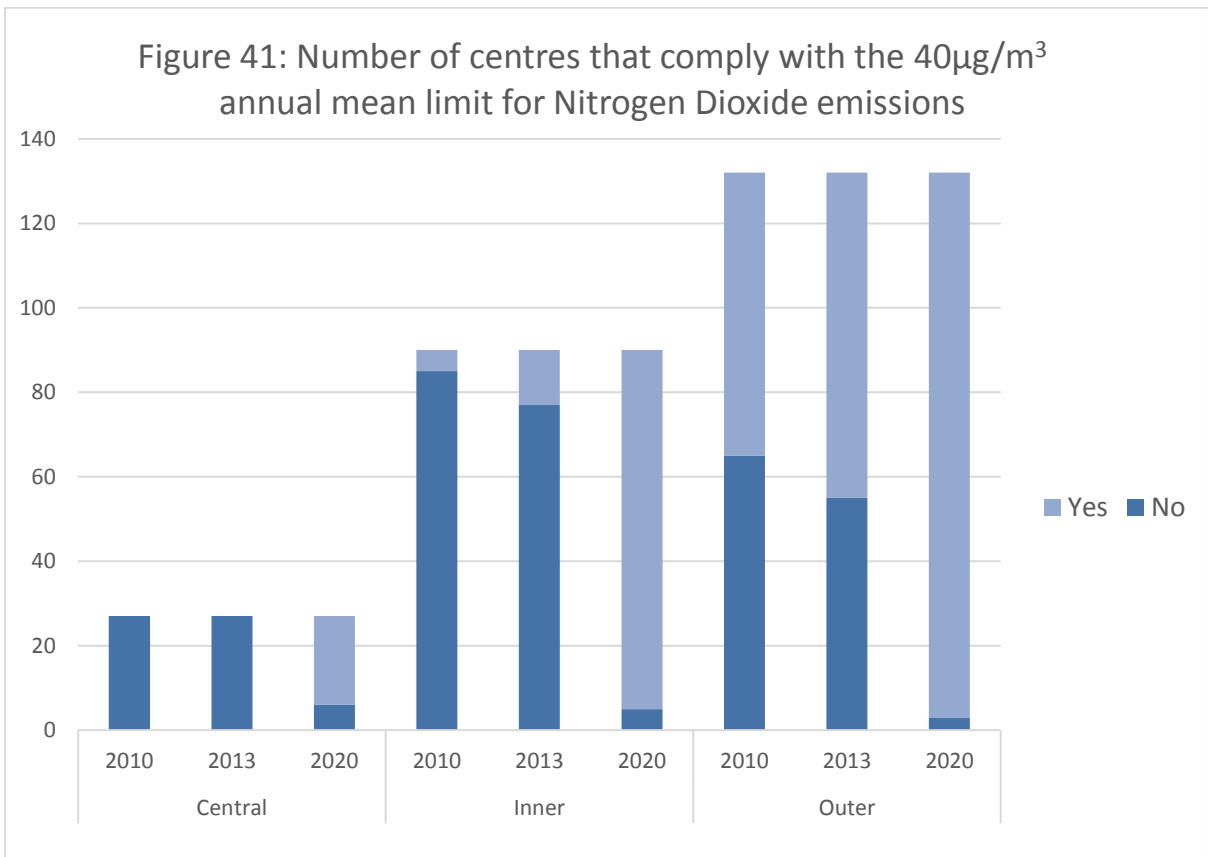
5.1 Air Quality

- 5.1.1 Air quality directly impacts on the health of people living in and visiting London's town centres. Poor air quality also makes town centres less attractive environments for people to spend time, and is a useful proxy for wider issues such as congestion, as motor vehicles will be a significant contributor to poor air quality. The measures of air quality consist of a mean annual average across the whole town centre. In reality, air quality will vary significantly in different parts of a town centre, as it is strongly influenced by the proximity to main roads and other sources of pollutants, and will vary at different times of day.
- 5.1.2 In this health check, projected figures are provided for 2020. This is a forecast based on the same modelling system as the 2010 and 2013 figures. The 2020 forecast does not take into account all the measures set out in the London Environment Strategy, which was published after the collection of the data.
- 5.1.3 The [National Air Quality Objectives](#) set the following target values for air quality:
- Nitrogen Dioxide (NO₂) 40µg/m³ annual mean
 - Particles (PM₁₀) 40µg/m³ annual mean
 - Particles (PM_{2.5}) 25µg/m³ annual mean
- 5.1.4 Further to this, the Draft London Environment Strategy²⁶ sets a target of reducing PM_{2.5} down to an annual mean of 10µg/m³, in accordance with the World Health Organisation Guidelines, by 2030.
- 5.1.5 The data in the Town Centre Health Check shows that all centres meet the National Air Quality Objective targets of 40µg/m³ for PM₁₀ and 25µg/m³ for PM_{2.5} (see Figure 40). The world Health Organisation Guidelines for PM_{2.5} are not currently met anywhere in London so consequently no centres meet the target either. All but five of the town centres exceed the target value of 10 µg/m³ by more than 50 per cent. Meeting this longer-term target and will depend on co-ordinated action with partners outside London.
- 5.1.6 For Nitrogen Dioxide (see Figures 40 and 41) the picture is more mixed, with nearly all centres in central and inner London exceeding the limit in 2013, and around half in outer London. Significant improvement to this is forecast for 2020, particularly in inner and central London.

²⁶ [Draft London Environment Strategy](#), GLA 2017

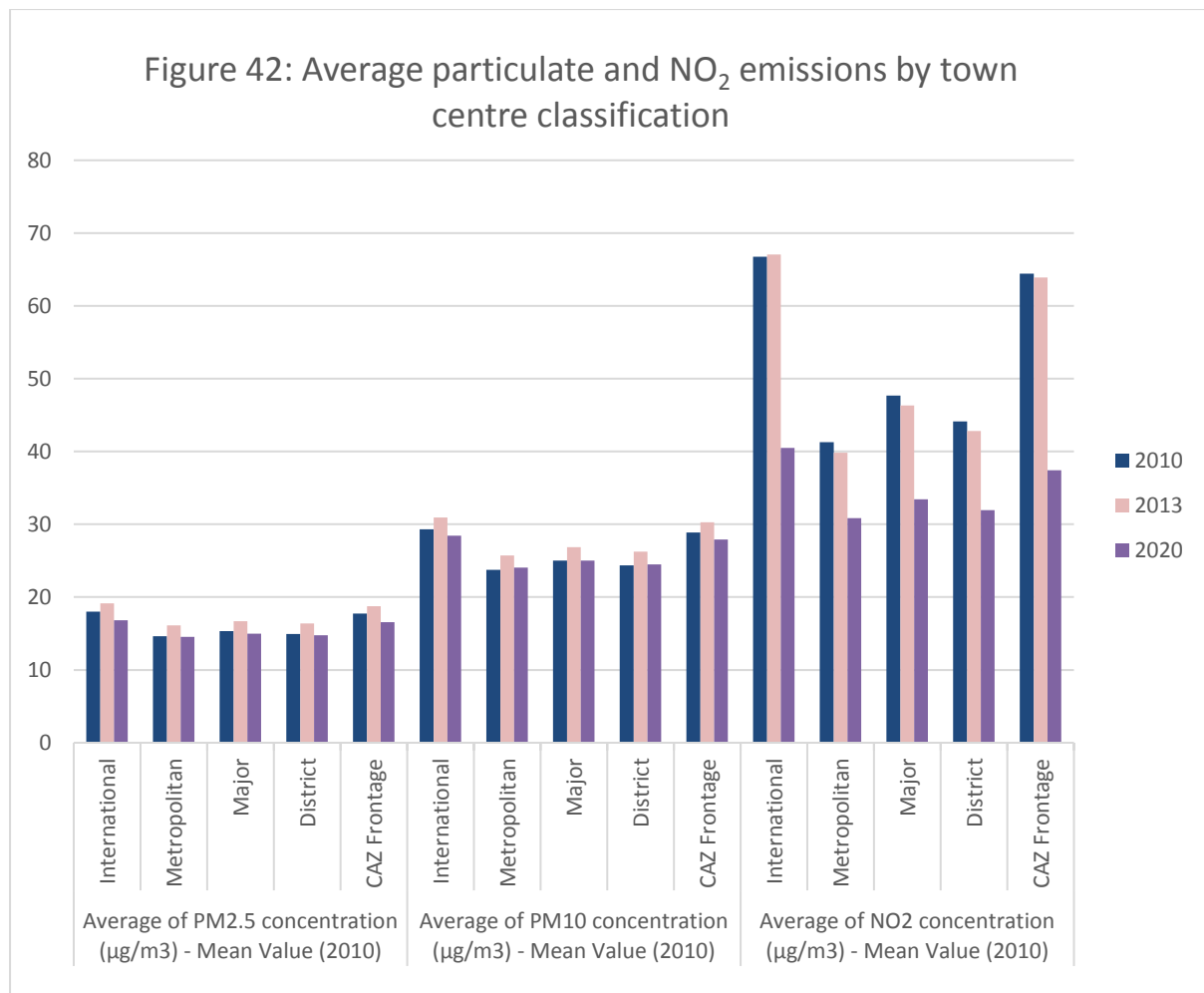


Source: TfL / GLA



Source: TfL / GLA

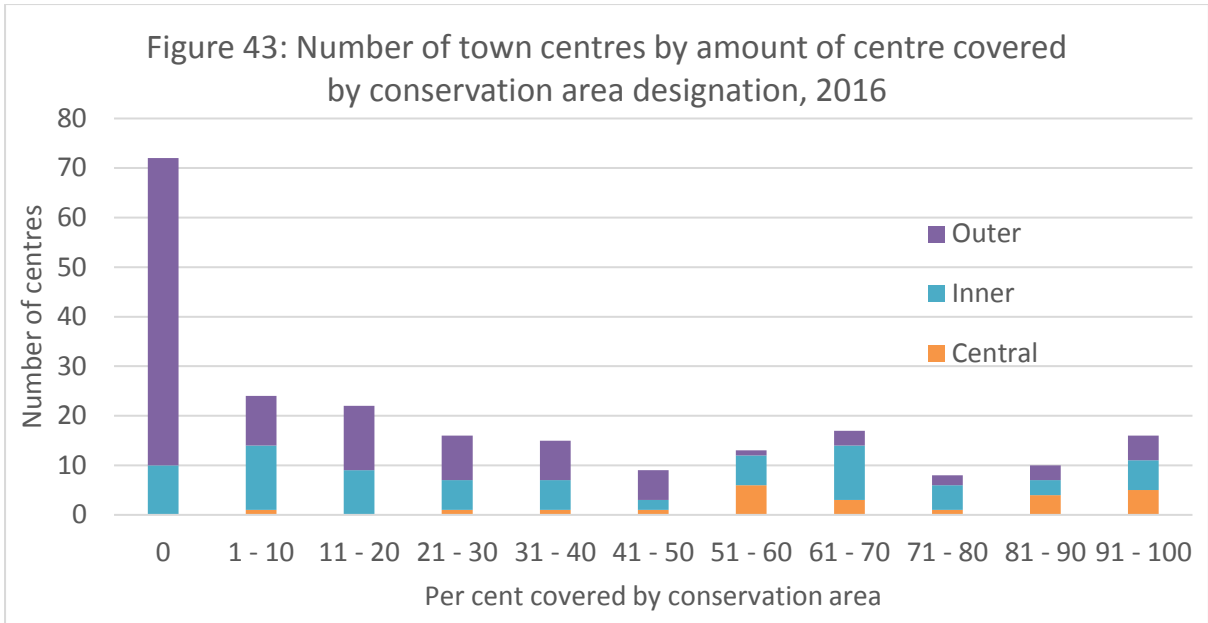
5.1.7 In London, there is a clear pattern of greater pollutant concentrations in central and inner London. This is reflected when looking at town centre classifications (see Figure 42), with the International centres and CAZ Frontages having greater concentration of pollutants, particularly for Nitrogen Dioxide.



Source: TfL / GLA

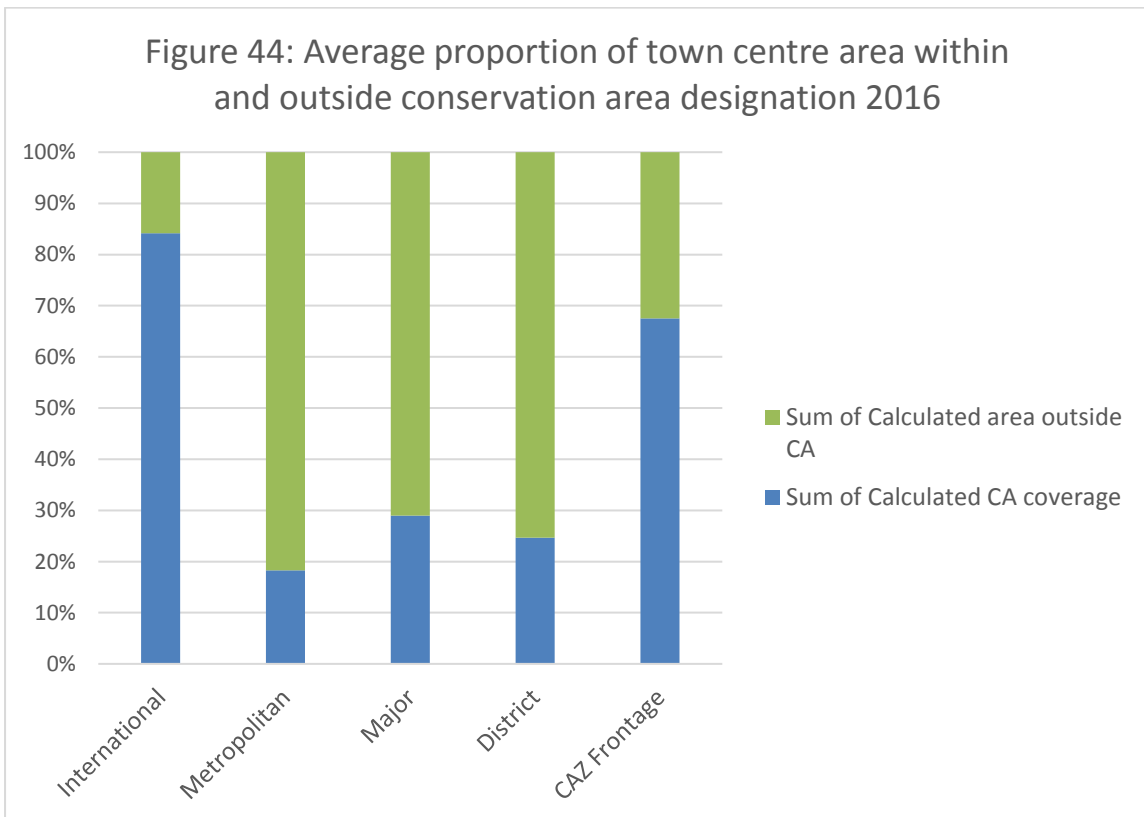
5.2 Heritage – Conservation Areas

5.2.1 Many town centres are the historic core of the wider area, or contain buildings and places of historic and architectural significance. 33 per cent of centres (72) do not overlap with any conservation areas, mostly in outer London. The remaining 67 per cent of centres contain some overlap with a conservation area, although for most centres the conservation area covers less than half of the designated town centre area (see Figure 43).



Source: GLA

5.2.2 Average conservation area coverage (see Figure 44) is much higher in the International centres and CAZ Frontages, reflecting the concentration of buildings and places of historic and architectural value in central London. Metropolitan centres tend to have the lowest coverage by conservation area designations, with Major centres about 29 per cent and Districts just under 25 per cent on average.



Source: GLA

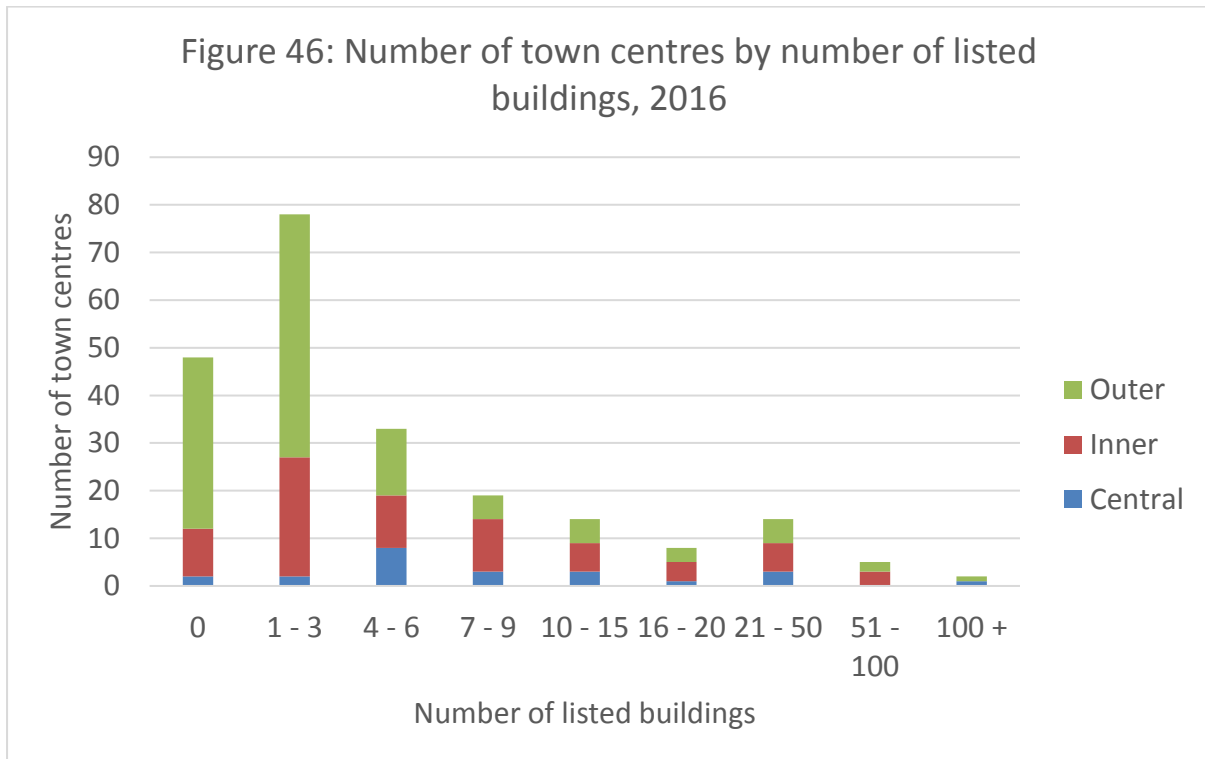
5.2.3 Some centres feature much greater proportions covered by a conservation area designation, as set out in Figure 45 below. As well as the CAZ Frontages, there are also a number of District and Major centres that are largely covered by a conservation area designation, including the historic town centres of Blackheath, Hampstead, Muswell Hill, Cheam Village and Richmond.



Source: GLA

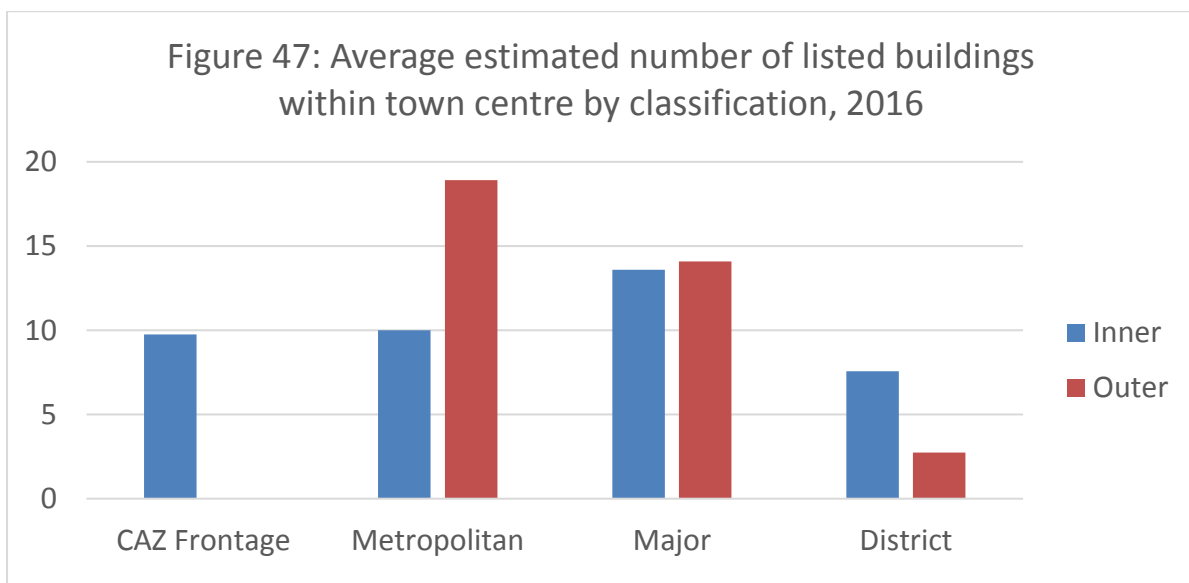
5.3 Heritage – Listed Buildings

5.3.1 Just over a fifth (48 or 22 per cent) of town centres contain no listed buildings (see Figure 46). Most town centres therefore have listed buildings, and 95 centres (43 per cent) have four or more listed buildings.



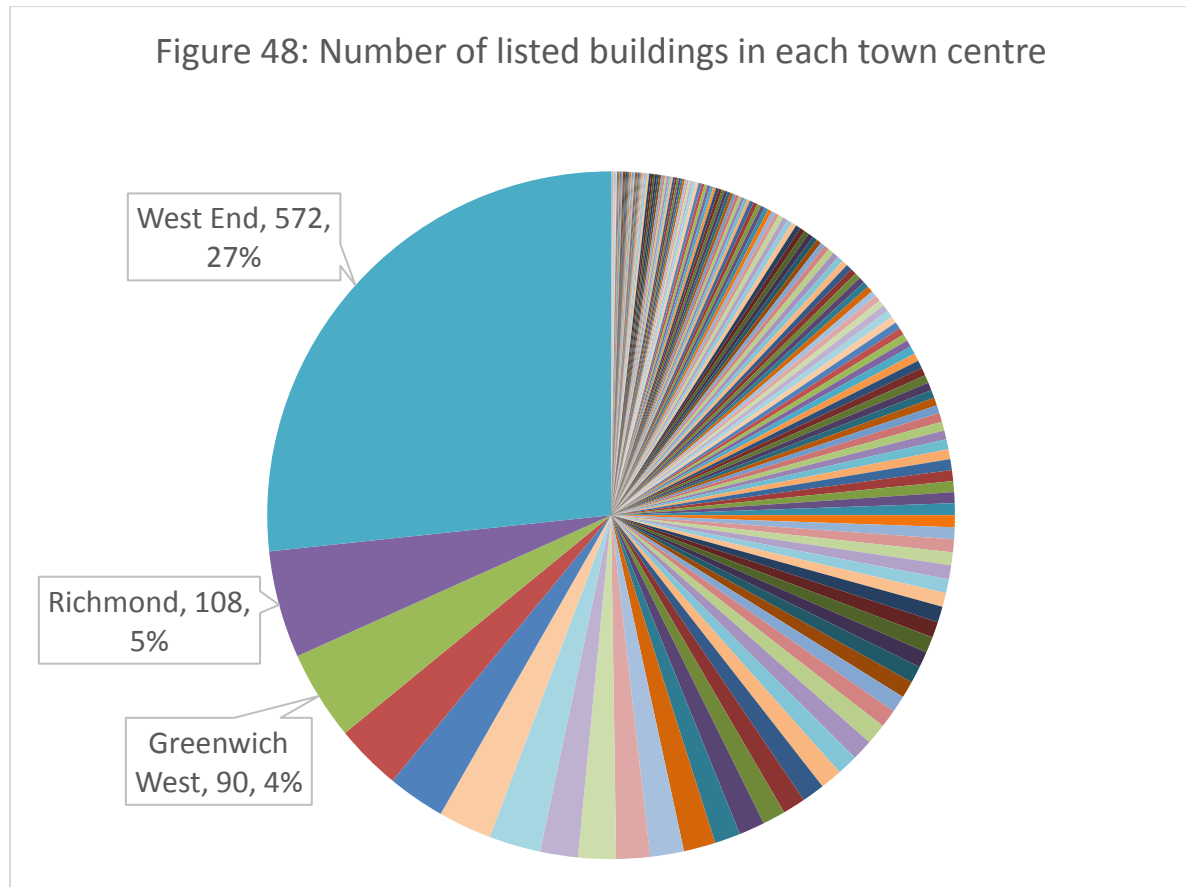
Source: Historic England/GLA

5.3.2 The average number of listed buildings in a centre tends to vary by classification and location (see Figure 47) with outer London District centres only having an average of 2.7 listed buildings, but outer London Metropolitan centres having just under 19 listed buildings on average. This will relate to the size of these centres, but also the historic patterns of development of town centres in London.



Source: Historic England/GLA

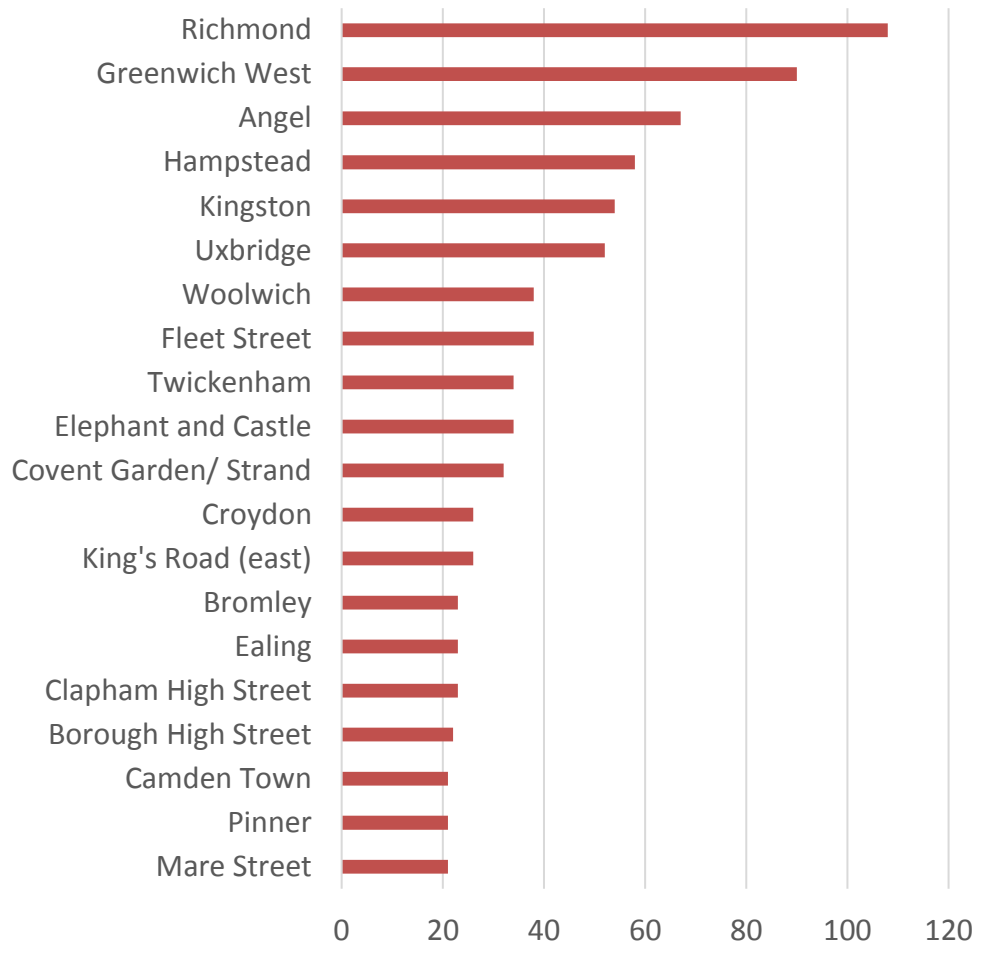
5.3.3 Unsurprisingly, the West End contains by far the largest number of listed buildings of any London town centres, with a total of 572, (8 Grade I, 35 Grade II* and 529 Grade II). This is a unique collection of historic buildings, and is over a quarter of all listed buildings in London’s town centres (see Figure 48). Given the commercial success of the West End, it also demonstrates that historic districts can be vibrant and vital town centres that support substantial economic growth.



Source: Historic England/GLA

5.3.4 Looking elsewhere, there is significant variety between the centres with the most listed buildings (see Figure 49). Richmond, Greenwich West, Kingston and Woolwich – all historic centres along the Thames – contain large numbers of listed buildings. Some large Metropolitan centres have significant numbers of listed buildings, including the historic market town of Uxbridge with 52 listed buildings. It is worth noting that some centres such as Elephant and Castle or Croydon, which are not necessarily renowned for their historic centres, nevertheless feature significant numbers of listed buildings that will make a notable contribution to local character.

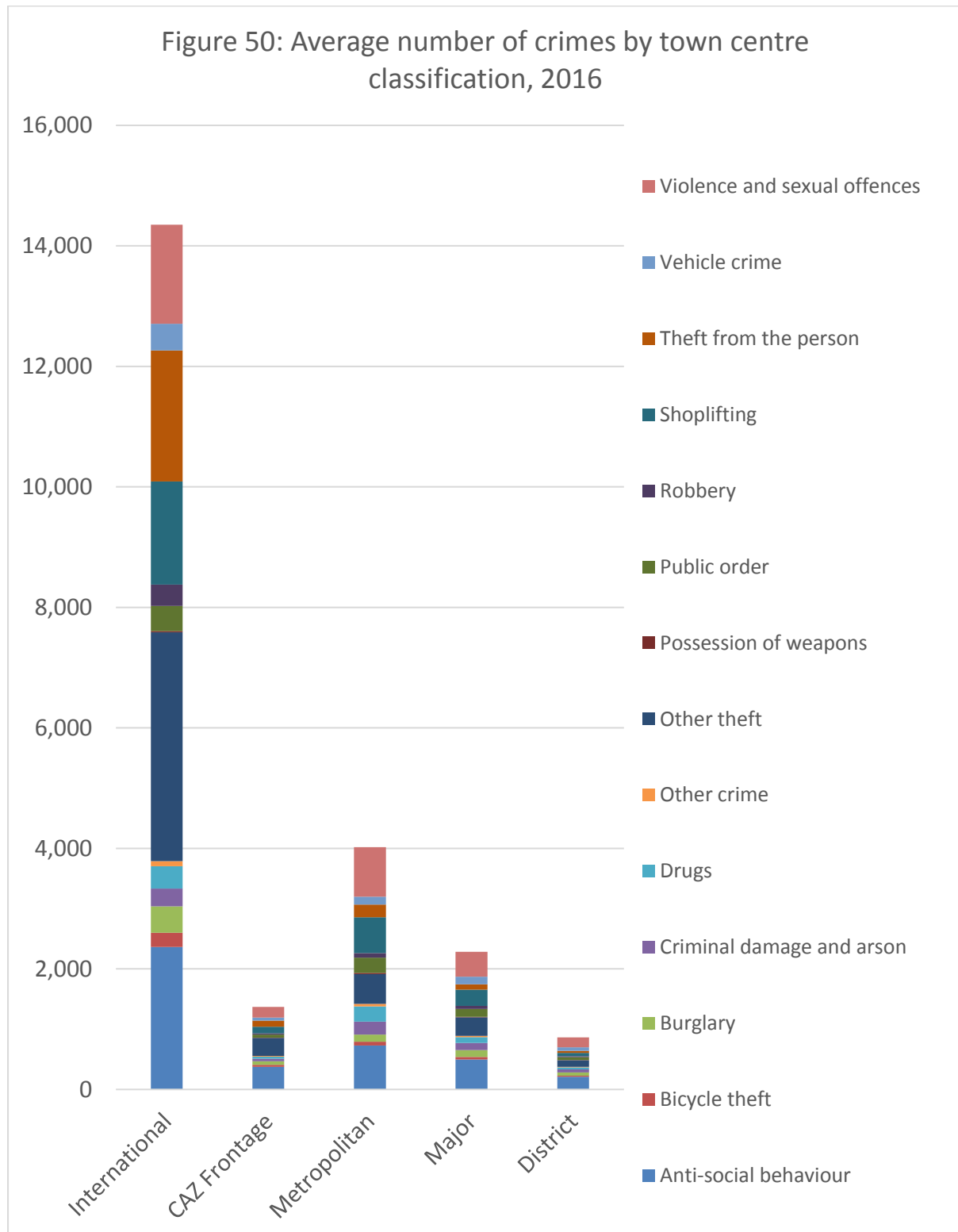
Figure 49: Town centres with the highest number of listed buildings, 2016 (excluding West End)



Source: Historic England/GLA

5.4 Crime

5.4.1 Unfortunately, London's International centres – particularly the West End – sees a significant concentration of criminal offences (see Figure 50). In particular there are significant numbers of theft and shoplifting, as well as anti-social behaviour and violence and sexual offences. Other classifications of centre see fewer criminal offences, largely in proportion to their relative size.

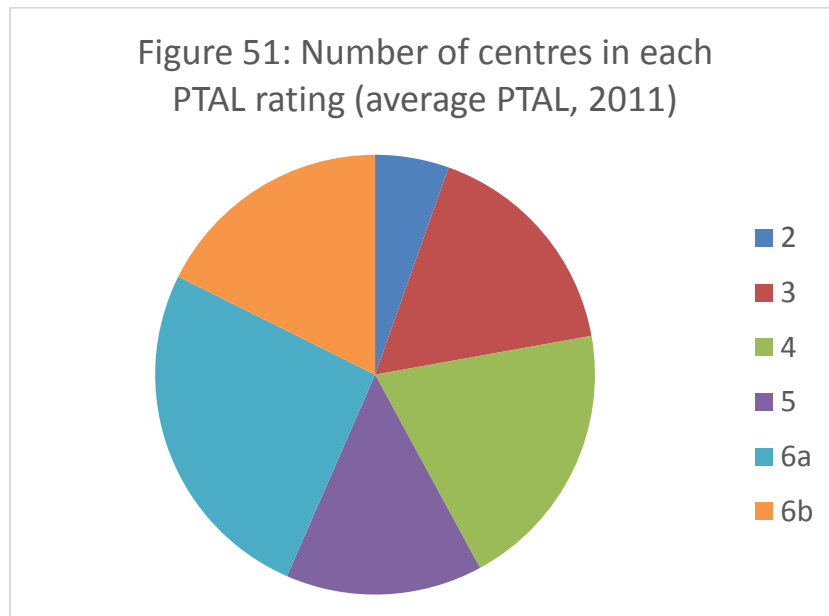


Source: police.uk / GLA

6 TRANSPORT AND CONNECTIVITY

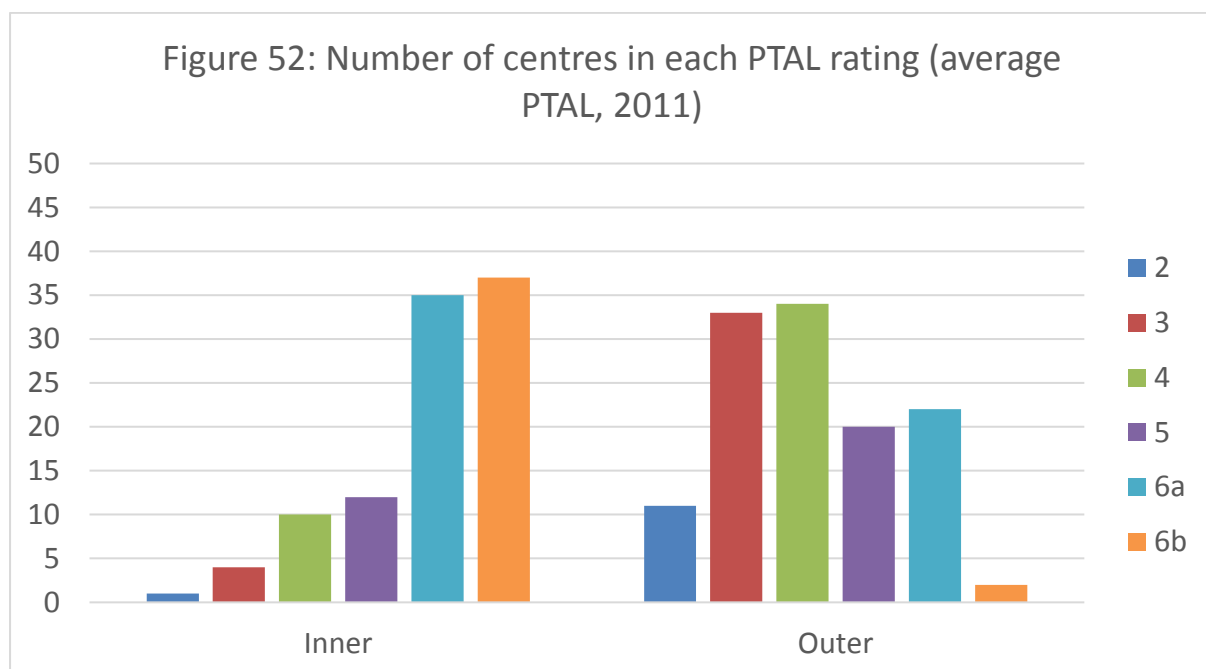
6.1 Public Transport Accessibility Levels

6.1.1 Town centres are generally well-connected, with only 12 centres having a PTAL lower than 3, and therefore nearly 95 per cent of centres having a PTAL of 3 or more.



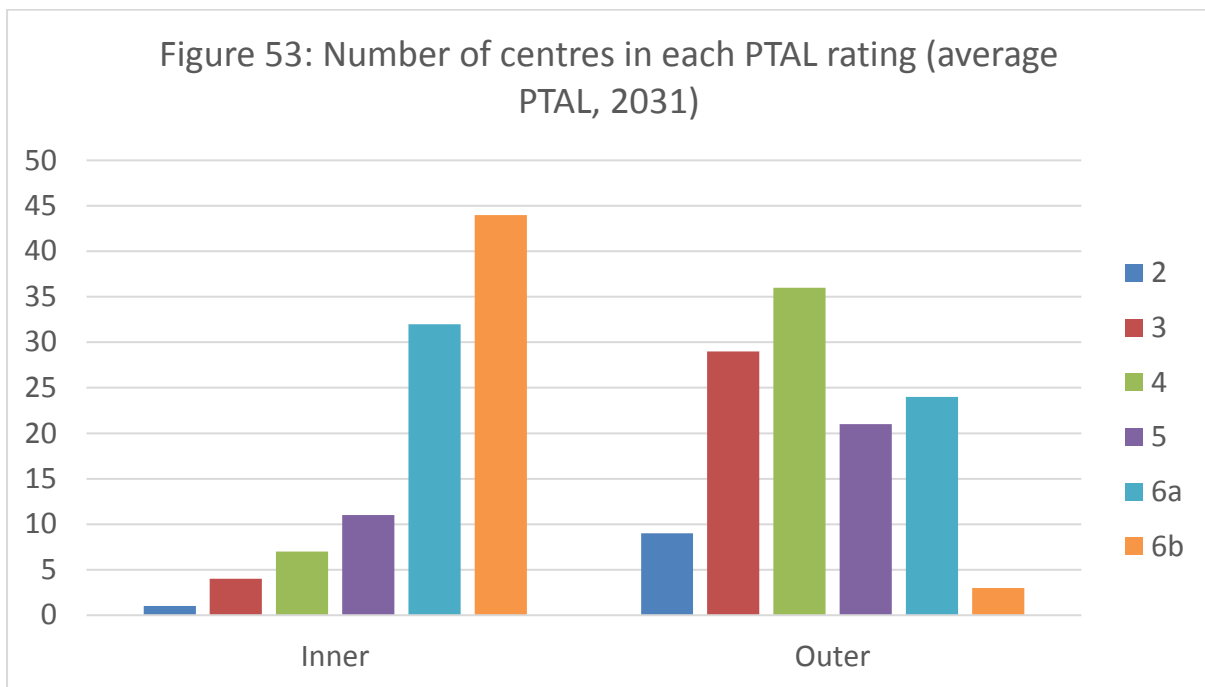
Source: TfL / GLA

6.1.2 In outer London, over half of all town centres currently have a PTAL level of 3 or 4 (see Figure 52). For Inner London, nearly three quarters have a PTAL of 6a or 6b, the highest accessibility levels.



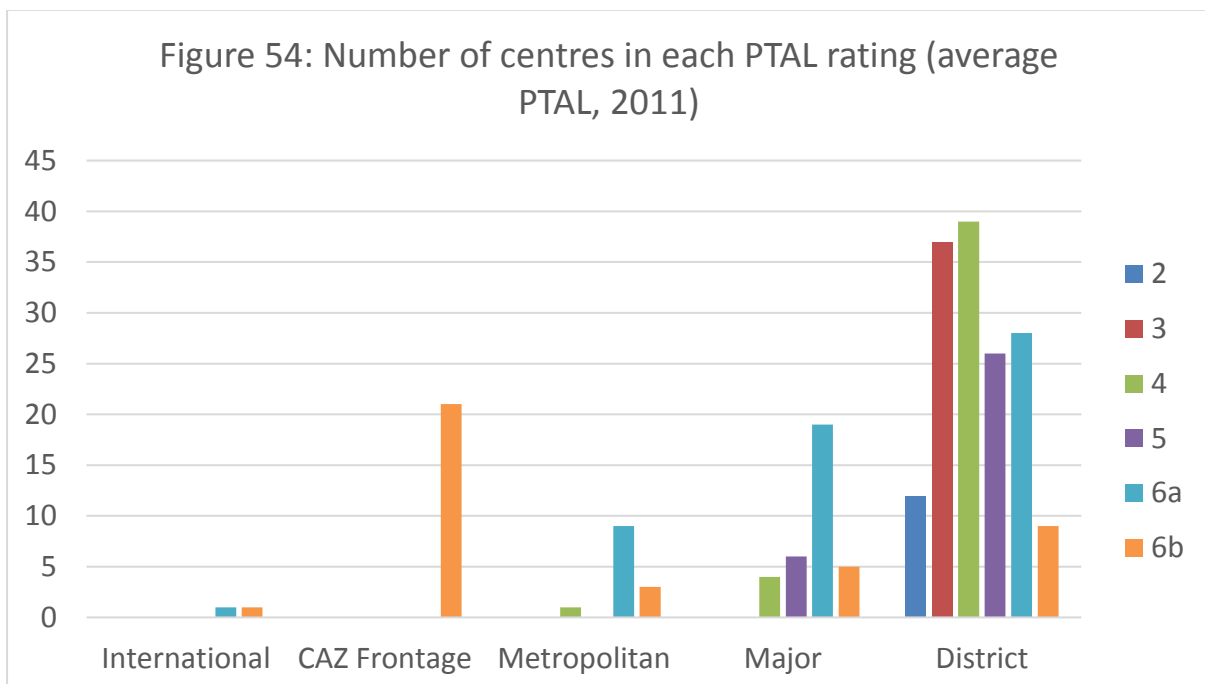
Source: TfL / GLA

6.1.3 By 2031, many town centres will have a higher PTAL level (see Figure 53), with a number of inner London centres increasing to 6b. The number of outer London centres with lower PTAL levels will decrease and more centres will have PTALs of 4 or higher.

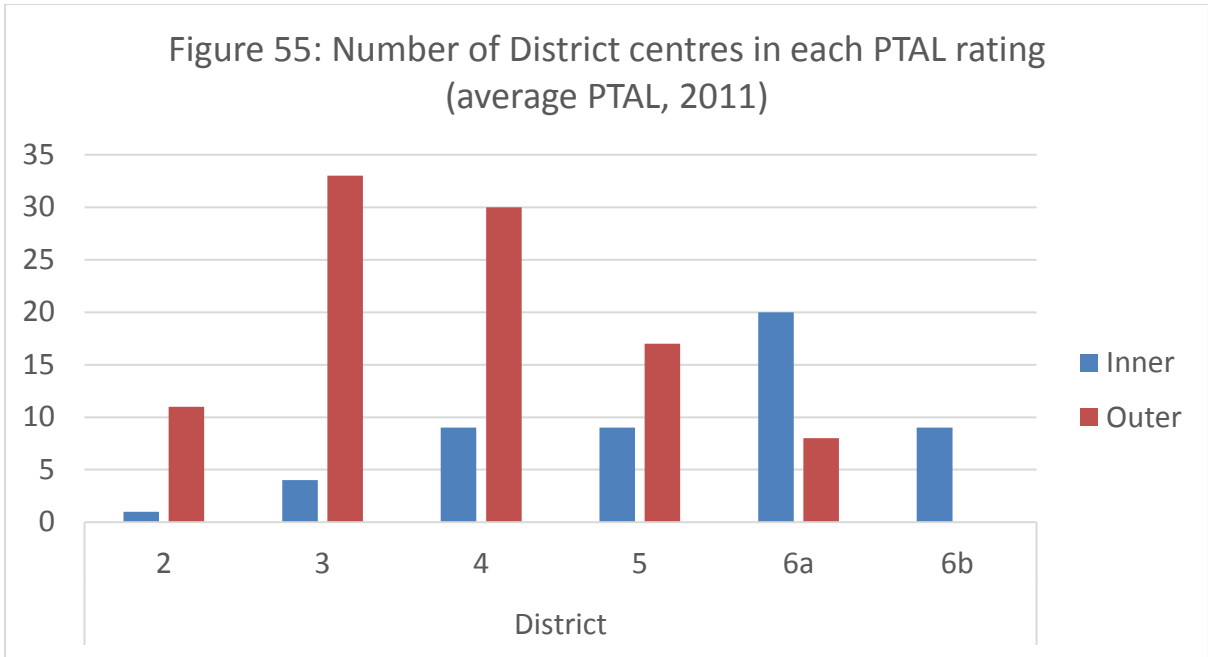


Source: TfL / GLA

6.1.4 Looking at different town centre classifications shows that only five of the International, Metropolitan or Major centres and CAZ Frontages have an average PTAL of 4. For District centres there is a much wider spread of accessibility levels, although 55 of the 99 outer London centres have a PTAL of 4 or higher (see Figures 54 and 55).



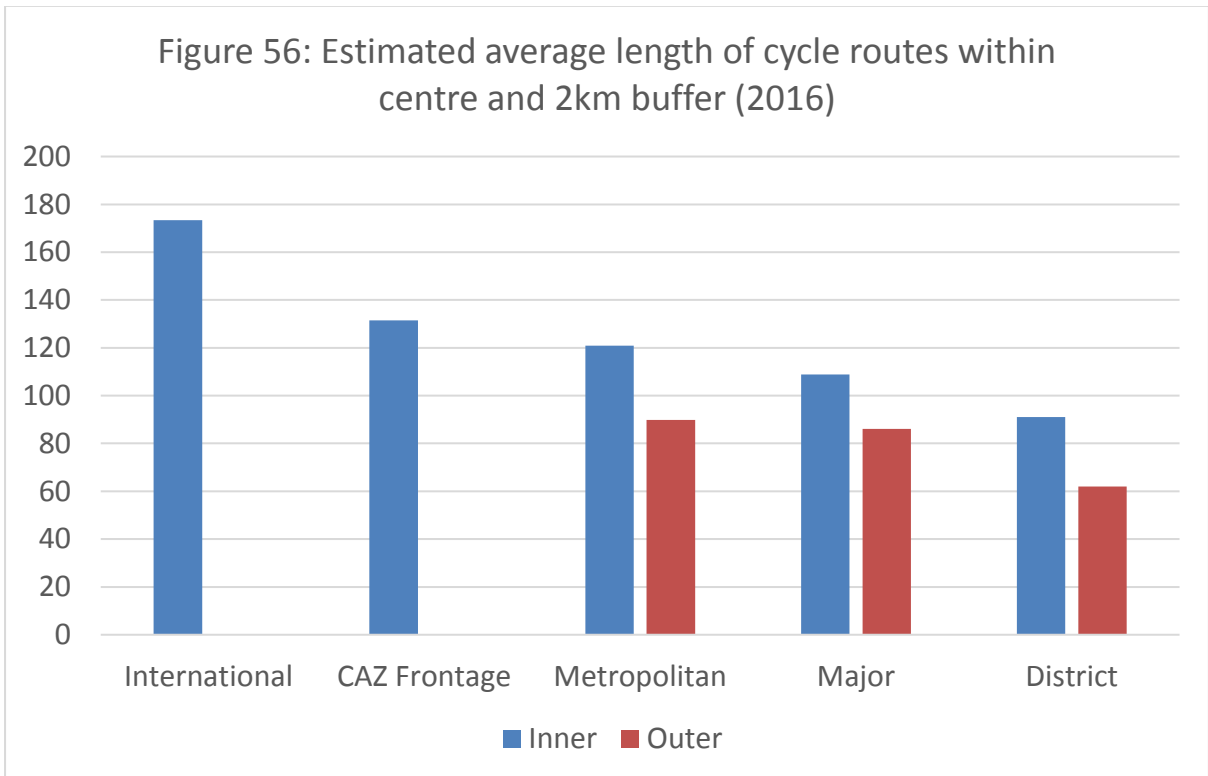
Source: TfL / GLA



Source: TfL / GLA

6.2 Cycle Routes

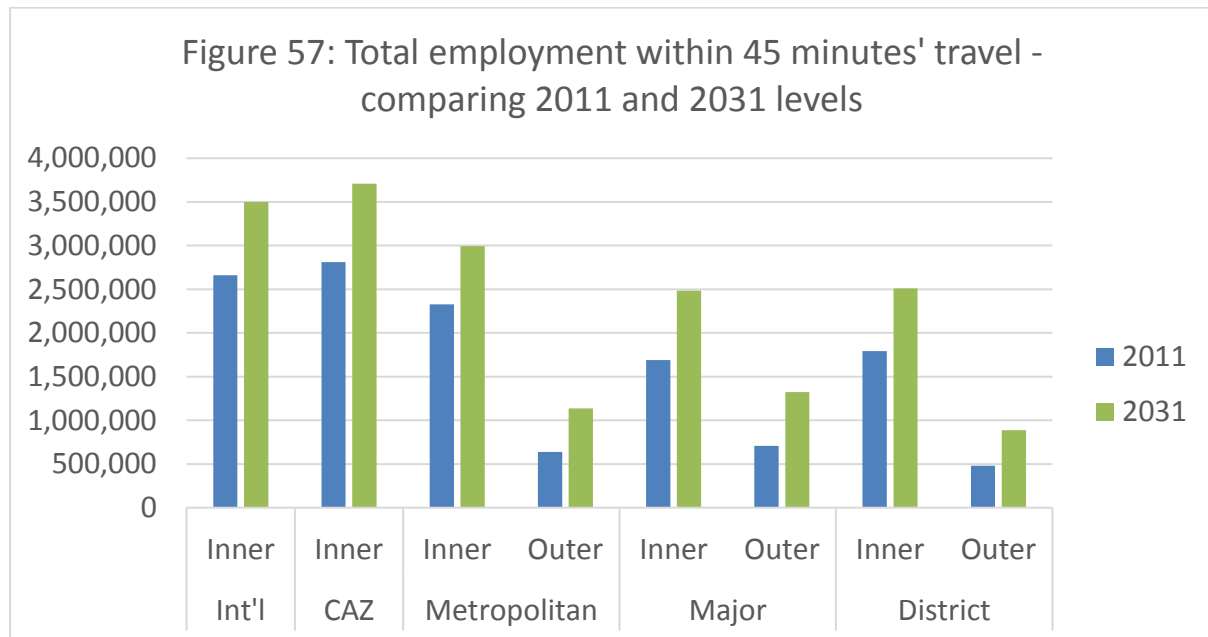
6.2.1 The average length of cycle routes within town centres plus a 2km buffer varies according to the size of centres and their location – generally central London centres tend to have more cycle routes, as shown in Figure 56.



Source: TfL / GLA

6.3 Employment Accessibility

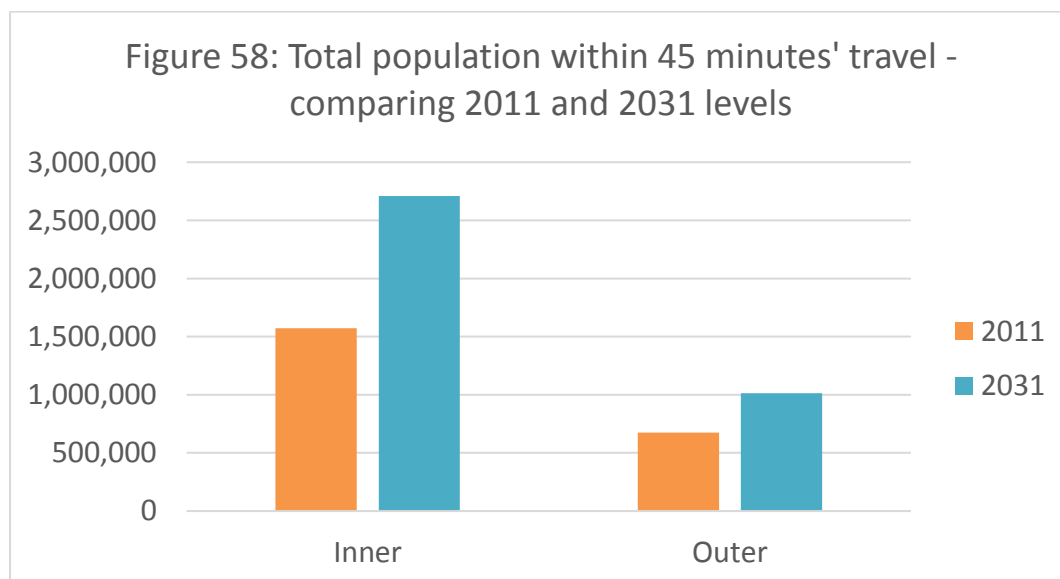
6.3.1 Over the lifetime of the London Plan, all classifications of town centre are projected to see an increase in the accessibility of employment, as shown in Figure 57, which compares the total number of jobs that are available at 2011 levels within 45 minutes' travel of the centre to the levels forecast for 2031. While outer London has notably lower levels of employment availability, the relative increases are set to be significant, with employment accessibility in the average outer London centre forecast to increase by 84 per cent. (The high levels for CAZ Frontages in this chart reflect that many of these contain or are immediately adjacent to major rail termini.)



Source: TfL / GLA

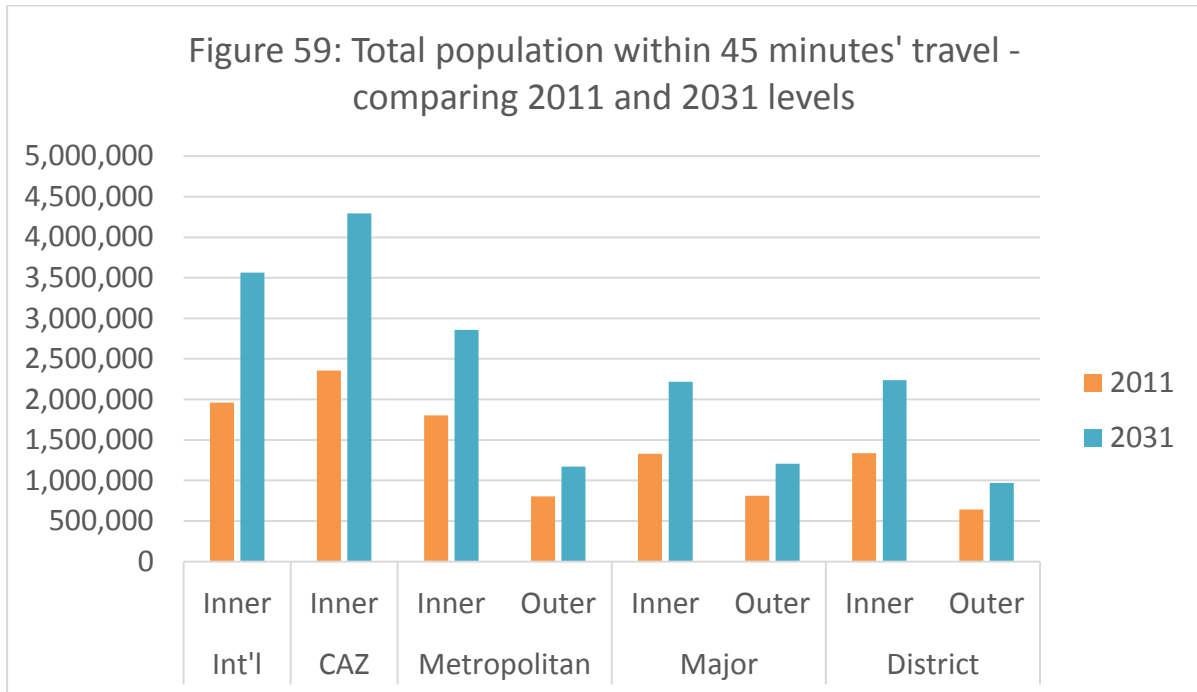
6.4 Population Accessibility

6.4.1 Town centres are also set to see significant increases in the residential population that is within 45 minutes' travel to the centre. On average, inner London centres are forecast to see an increase from 1.57m residents within 45 minutes' travel in 2011 to 2.71m by 2031.



Source: TfL / GLA

6.4.2 This increase in inner London is most notable in the International centres and CAZ frontages, but there are also significant increases forecast for inner London Metropolitan, Major and District centres (see Figure 59). Outer London centres is also projected to see increases in the total population within 45 minutes' travel, but to a lesser extent.

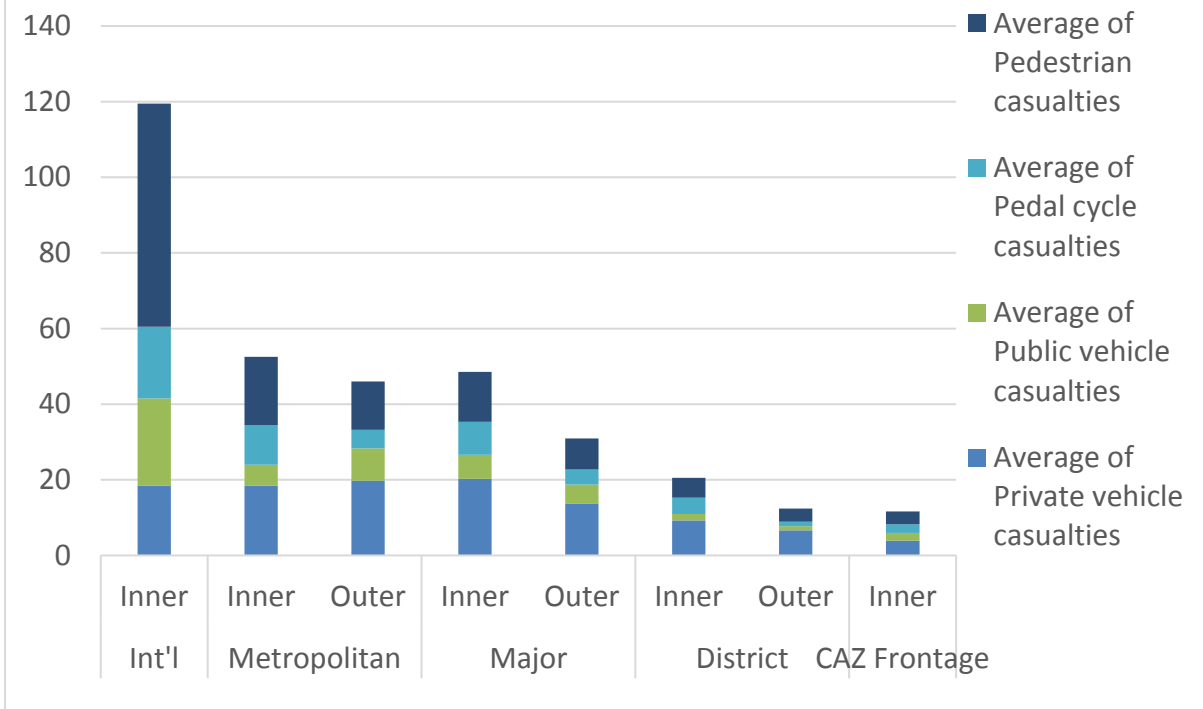


Source: TfL / GLA

6.5 Road Casualties

6.5.1 Figure 60 shows the average number of road casualties by their mode of transport. The International centres show the highest averages for all categories except private vehicles, and very significant numbers for pedestrian casualties. This will be influenced in part by the size of the West End, which covers a larger geographic area than other centres; but it also demonstrates the importance of targeted road safety schemes, and specific measures to increase pedestrian safety.

Figure 60: Average number of road casualties within town centres by classification and location, 2015

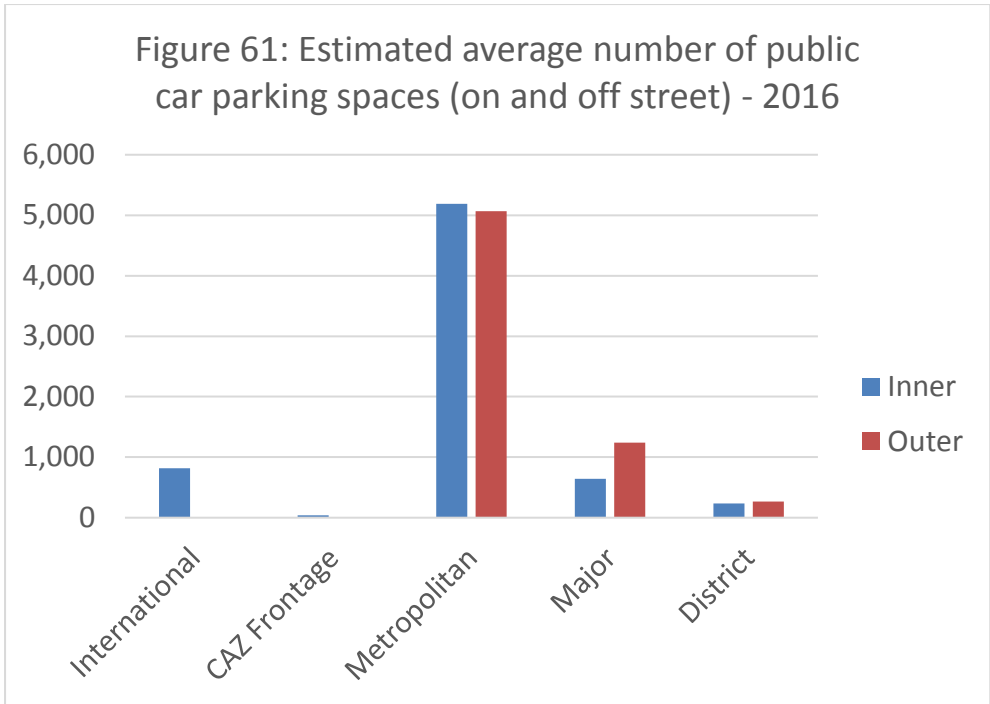


Source: TfL / GLA

6.6 Parking Spaces

6.6.1 Figure 61 shows the average number of public car parking spaces in different classifications of centre. This information is provided by boroughs, and is only available for roughly half of London's town centres.

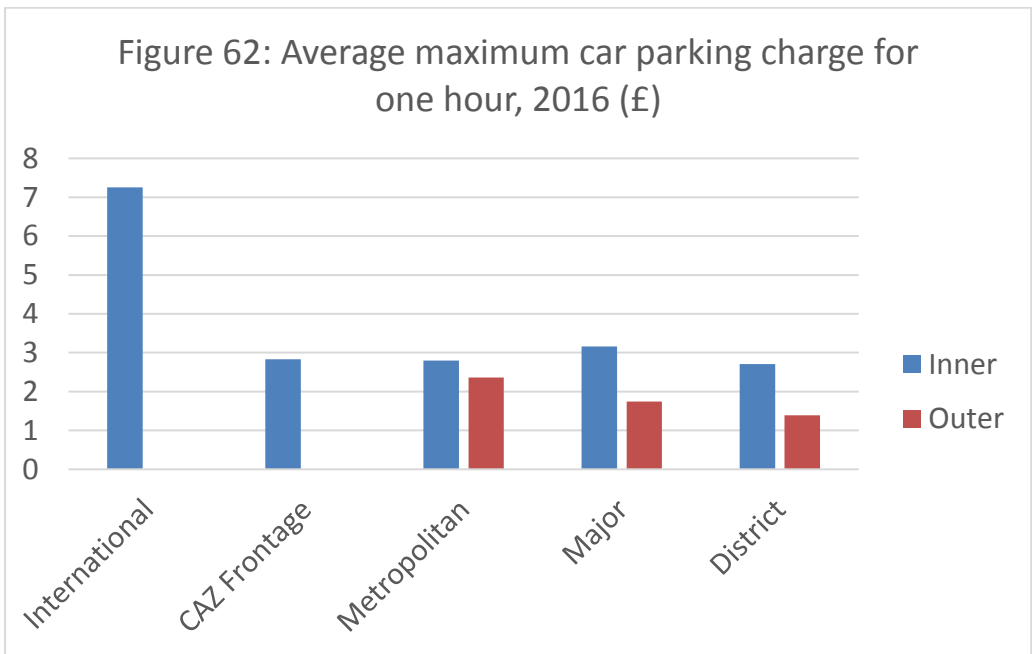
6.6.2 The variations are significant – International centres, which have significantly greater amounts of commercial floorspace than the largest Metropolitan centres – have less than a fifth of the amount of car parking spaces than the average Metropolitan centre. The International centres do have higher average public transport connectivity (most Metropolitan centres have a PTAL of 6a; the West End has a PTAL of 6b) and this will also be influenced by congestion charging. The disparity between Metropolitan centres and Major centres is also striking. Croydon (8,121), Kingston (6,874) and Shepherds Bush (5,187) have particularly high numbers of parking spaces. While these figures are only a partial picture, they suggest that there may be potential for Metropolitan centres to reduce reliance on trips by private cars. Further research looking into this disparity, and travel patterns by shoppers and others coming to different types of town centre, is recommended.



Source: Boroughs / GLA

6.7 Parking Charges

6.7.1 Parking charges information is supplied by boroughs, and is only available for roughly half of London's town centres. In inner London, average parking charges are broadly consistent around the £3 per hour mark, with the notable exception of the International centres. In outer London, there is more variation, with the larger centres charging more per hour on average than smaller ones.

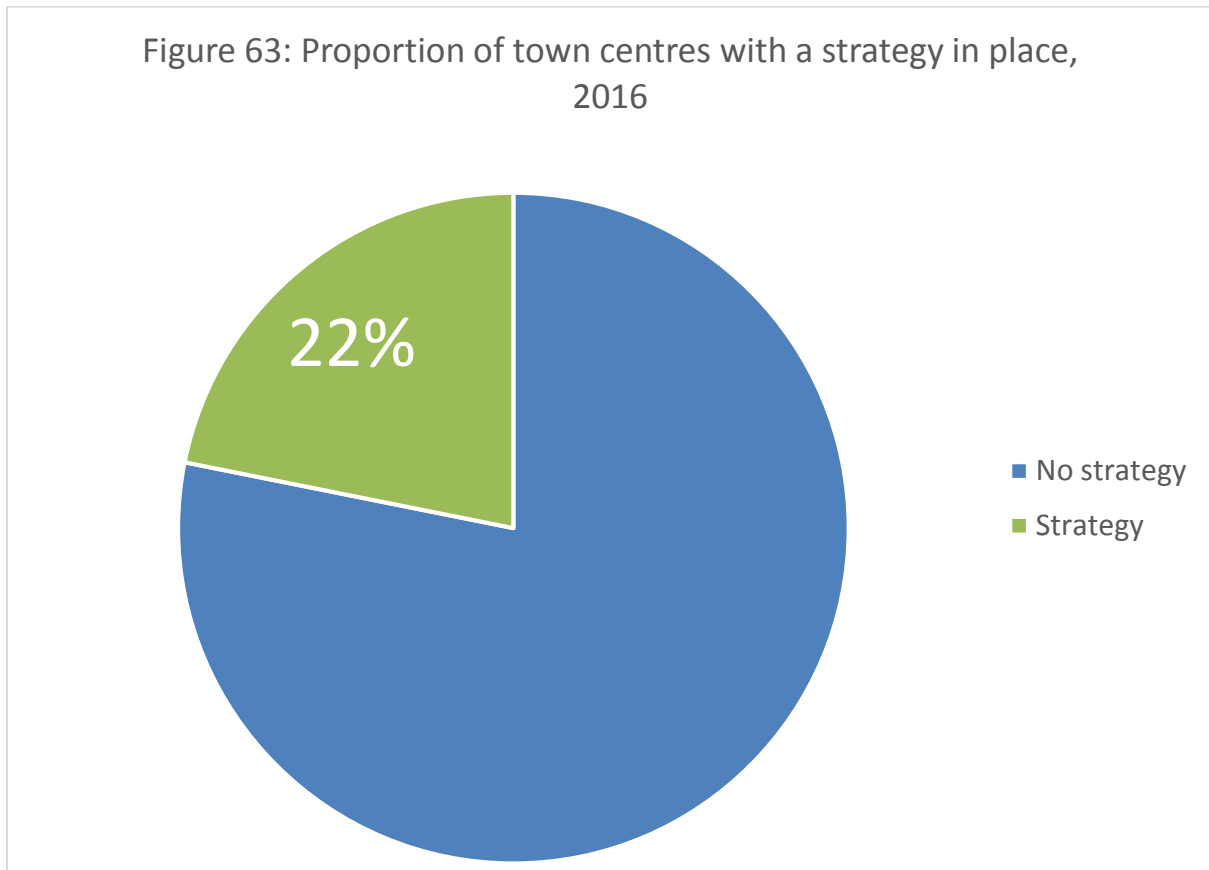


Source: Boroughs / GLA

7 TOWN CENTRE MANAGEMENT

7.1 Town Centre Strategies

7.1.1 Figure 63 shows that 22 per cent of London's town centres²⁷ have a town centre strategy in place. At borough level, Waltham Forest have the most town centre strategies in place, with all eight centres in the borough having a strategy (see Figure 64).

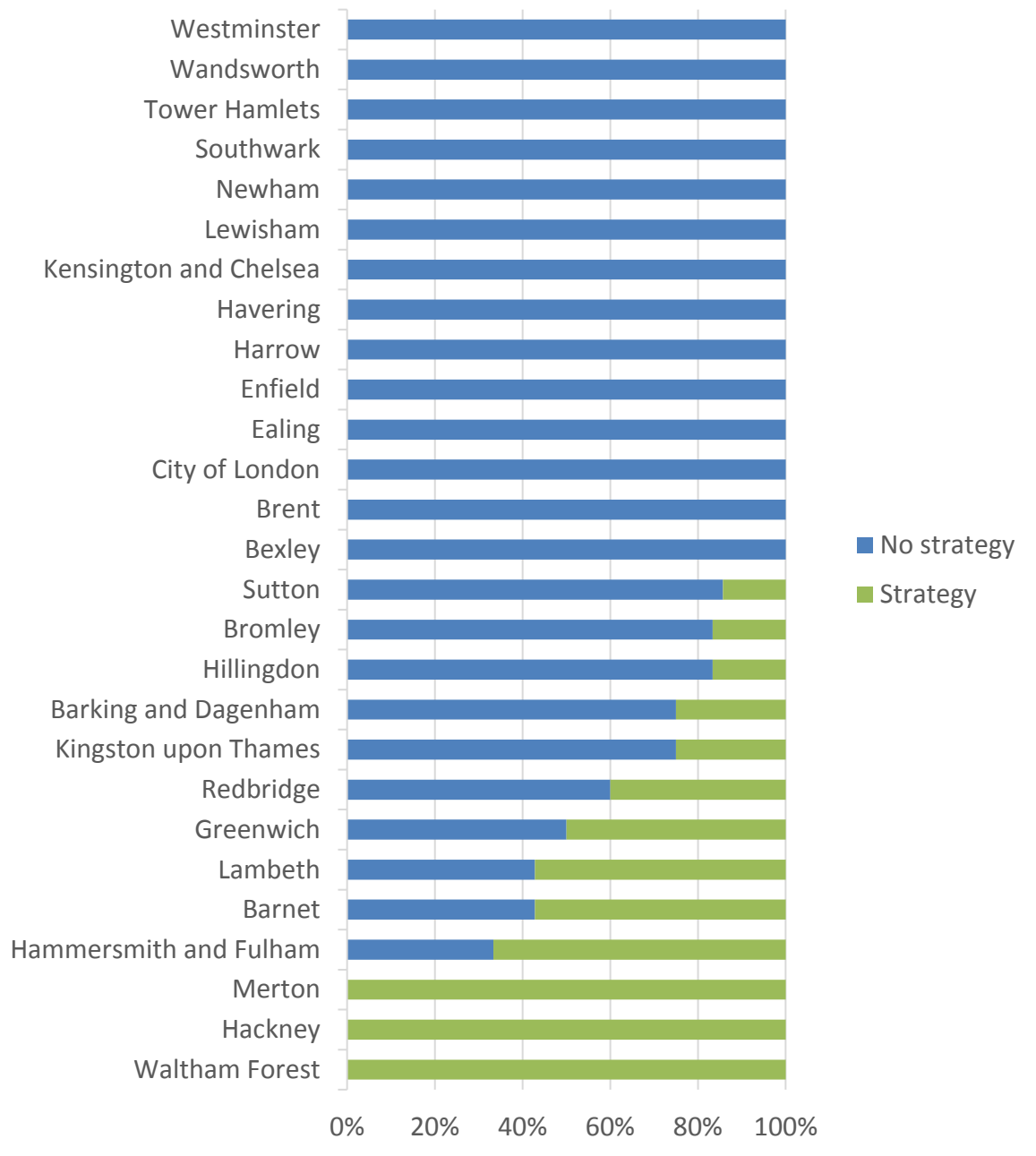


Source: Boroughs / GLA

7.1.2 There is clear scope for many more centres to have strategies, that set a vision for the future of the centre, set out how change will be managed and bring together a range of levers and mechanisms to secure investment in town centres and improve their vitality and vibrancy. It is recommended that there is a clear priority for having town centre strategies set out in the new London Plan.

²⁷ The percentage has been calculated based on 151 of the town centres in the adopted London Plan for which data is available.

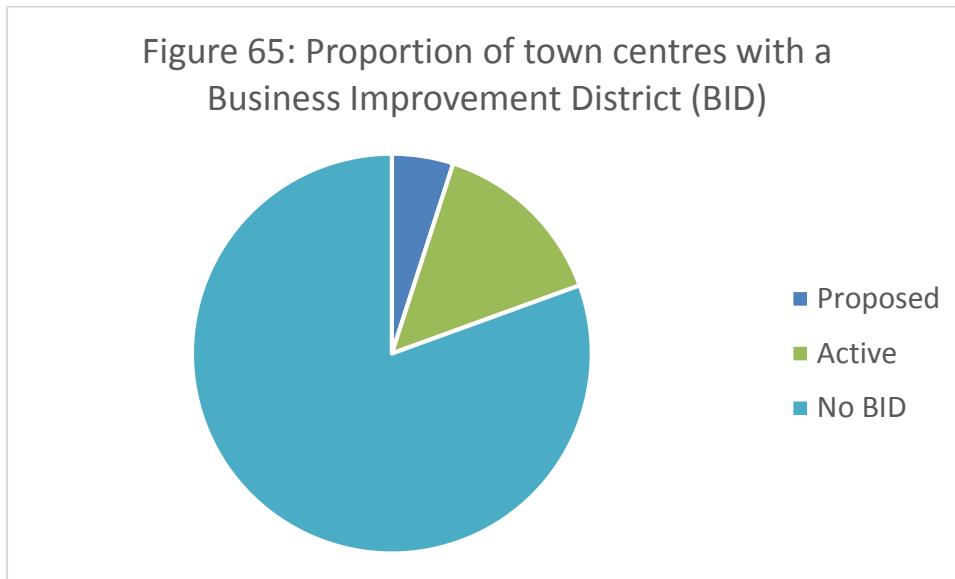
Figure 64: Proportion of town centres with a strategy, by borough



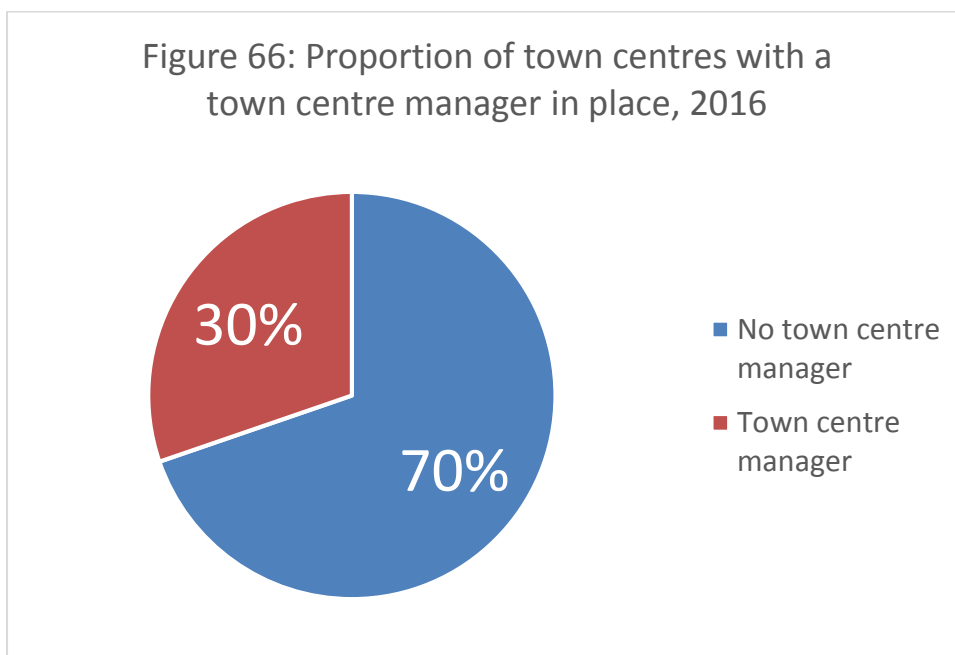
Source: Boroughs / GLA

7.2 Business Improvement Districts and Town Centre Managers

7.2.1 19 per cent of London's town centres have an existing or proposed Business Improvement District, and 30 per cent of town centres have a town centre manager, as shown in Figures 65 and 66.



Source: Boroughs / GLA



Source: Boroughs / GLA

8 EMPLOYMENT

8.1.1 Town centres are important places of work. Many Londoners work in town centres in a wide variety of professions. This reflects town centres' roles as both office locations and places where there is a significant amount of retail and service jobs.

Methodology

8.1.2 Town centre employee estimates derive from statistics on Workplace Zone (WZ) employee numbers for 2009 to 2015²⁸. This uses a geography developed by the Office for National Statistics which divides London into 8,154 areas²⁹. Data on workplace self-employment by borough is available on the London Datastore³⁰ – there is no data at a more disaggregated area level.

8.1.3 WZ data on employees does not map exactly onto town centre boundaries. Many town centres, for example, lie in more than one zone. Two approaches have been adopted to estimate the numbers of town centre employees, and both sets of figures have been published:

- Base estimates take the proportion of the town centre area for each WZ within which a town centre lies and applies this to the estimate of WZ employees, and takes the sum across zones.
- Workplace Zone estimates take the sum of employee numbers for each zone where a town centre lies. If more than one town centre lies in a Workplace Zone the employee estimates for the zone are divided equally between town centres

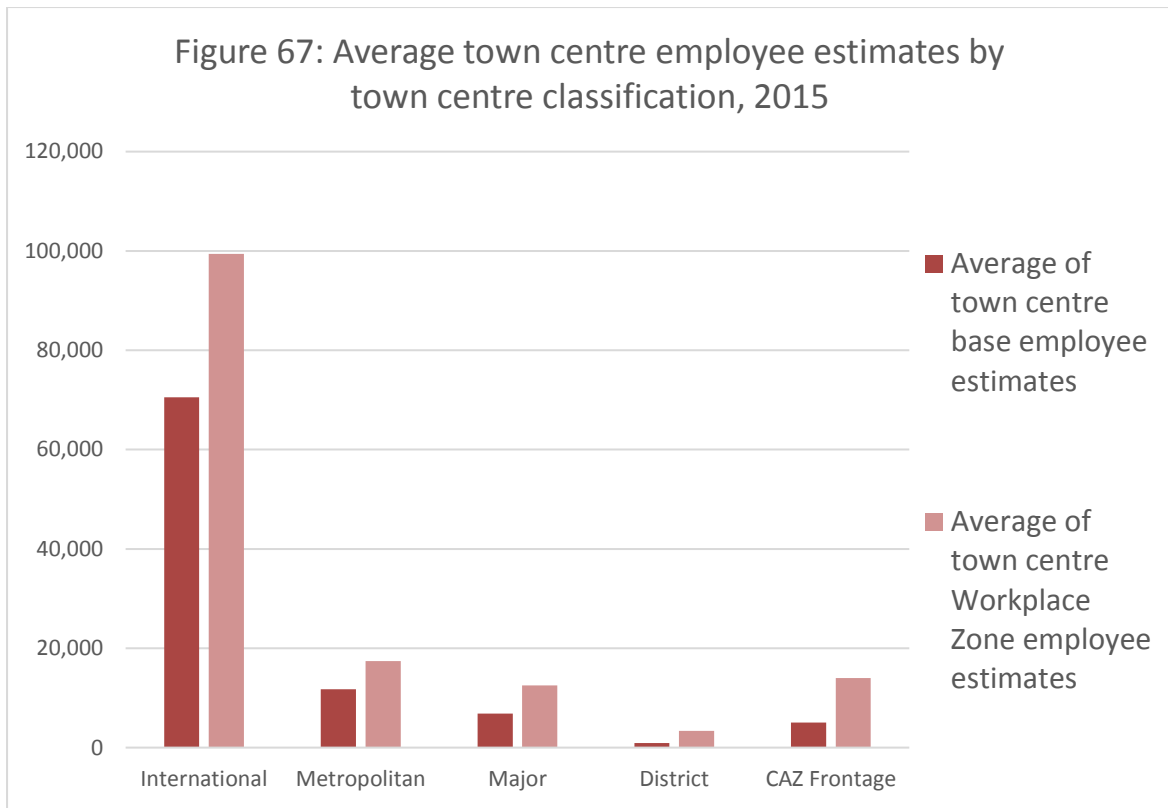
8.1.4 This provides an indicative range. It is not possible to produce a single definitive estimate of town centre employees as there is no public information on where within a Workplace Zone employees work. This report generally uses the Base estimate, as the Workplace Zone estimates tend to over-emphasise the number of employees in smaller centres. Both measures have informed the town centre network and future potential network classifications in the draft London Plan.

²⁸

<http://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/adhocs/005995numberofworkplacesandemployeesinworkplacezonesinlondon2015>

²⁹ <http://webarchive.nationalarchives.gov.uk/20160105160709/http://www.ons.gov.uk/ons/guide-method/geography/beginner-s-guide/census/workplace-zones--wzs-/index.html>

³⁰ <http://data.london.gov.uk/dataset/gla-employment-projections>

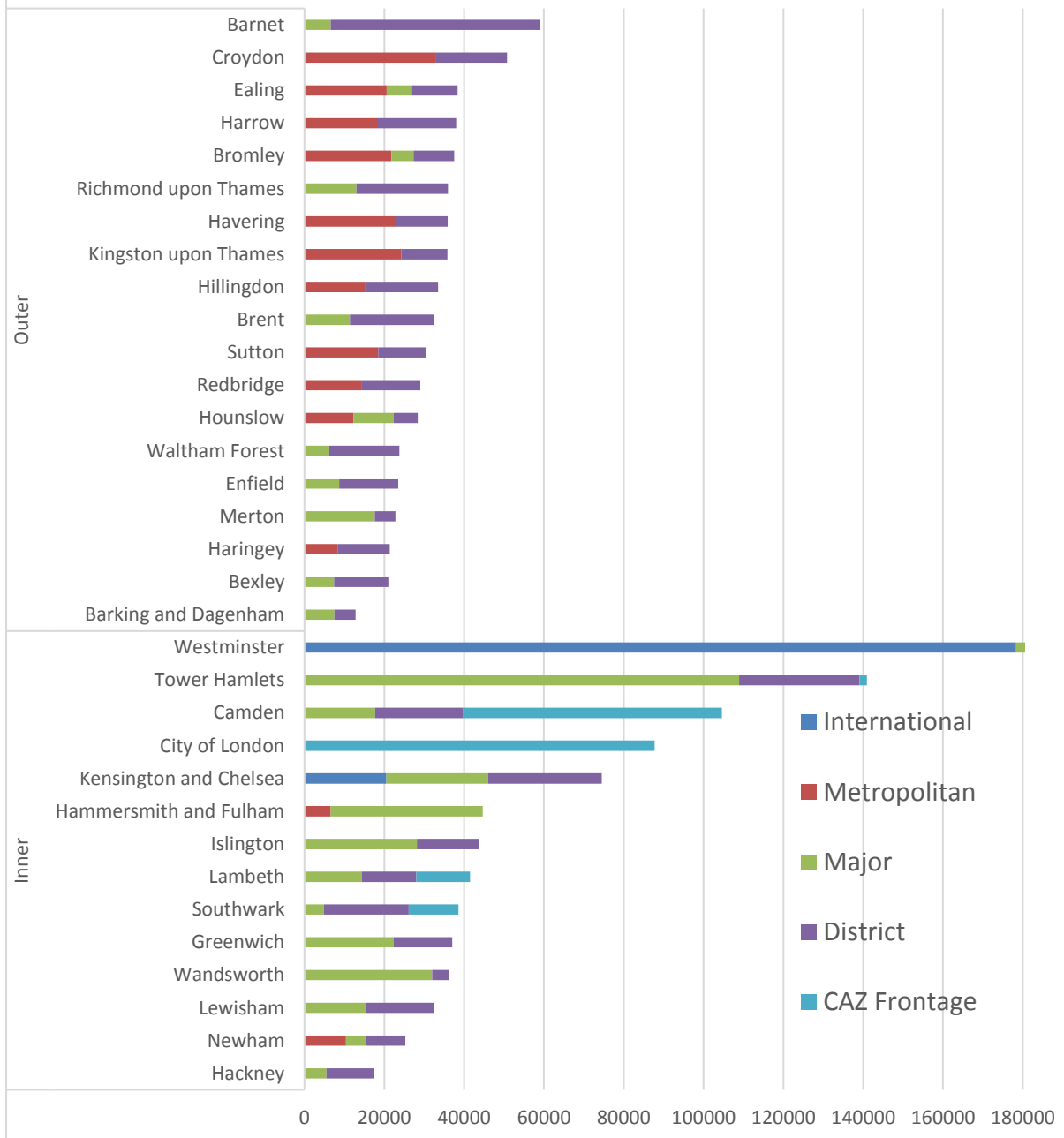


Source: Office for National Statistics / GLA

8.1.5 Average town centre employment follows the hierarchy in the current town centre classification for both base employee estimates and workplace zone employee estimates (Figure 67). CAZ frontages have larger workplace zone estimates on average, which reflects the concentration of offices and other workplaces in the CAZ generally, both within and around the CAZ frontages (which themselves generally cover a fairly small area).

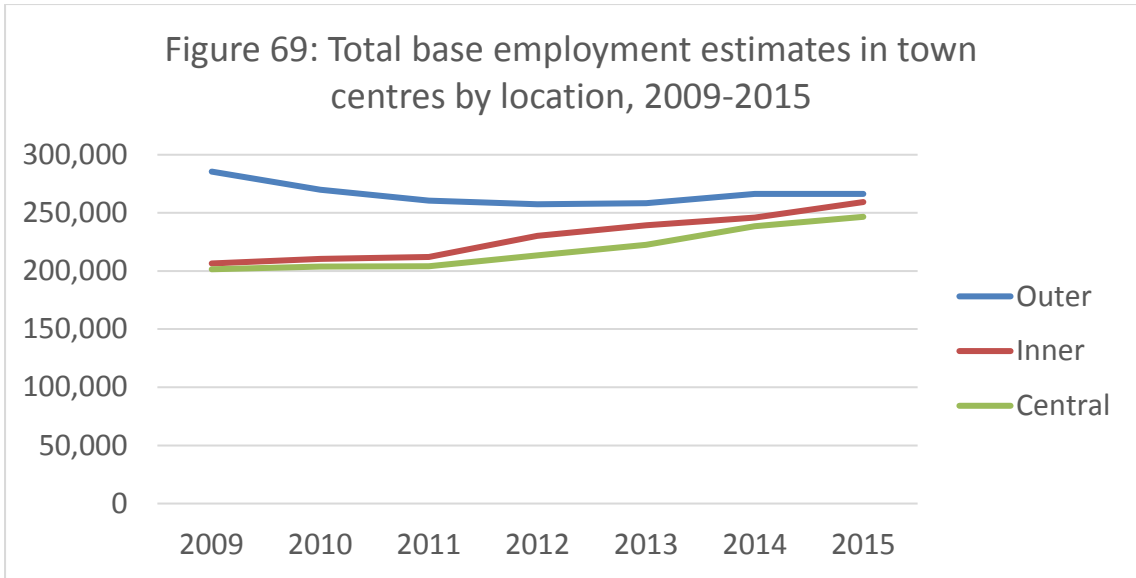
8.1.6 At borough level, the workplace zone estimates give an indication of employment in and around the boroughs' town centres, as shown in Figure 68.

Figure 68: Total workplace zone employment estimates in town centres by borough, 2015



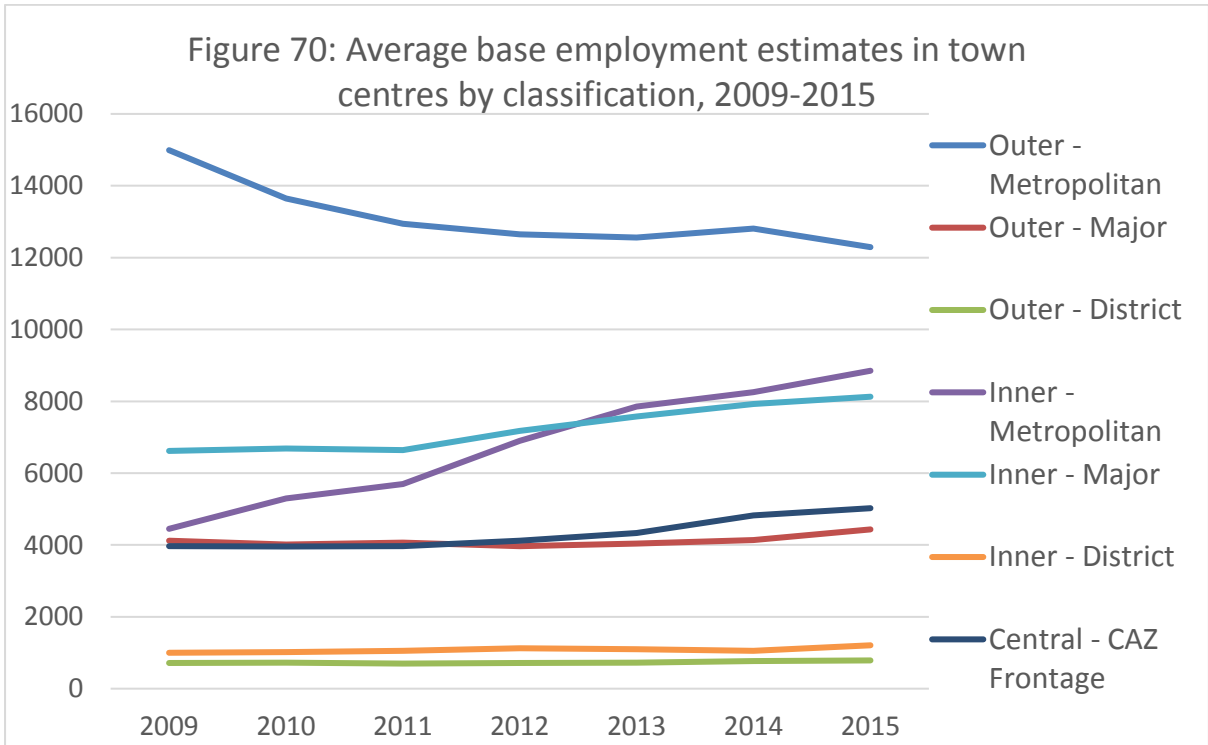
Source: Office for National Statistics / GLA

8.1.7 Employment in London’s town centres has varied in recent years, with growth in central and inner London (see Figure 69). Employment in outer London centres has reduced, particularly between 2009 and 2011, levelling off after 2012.

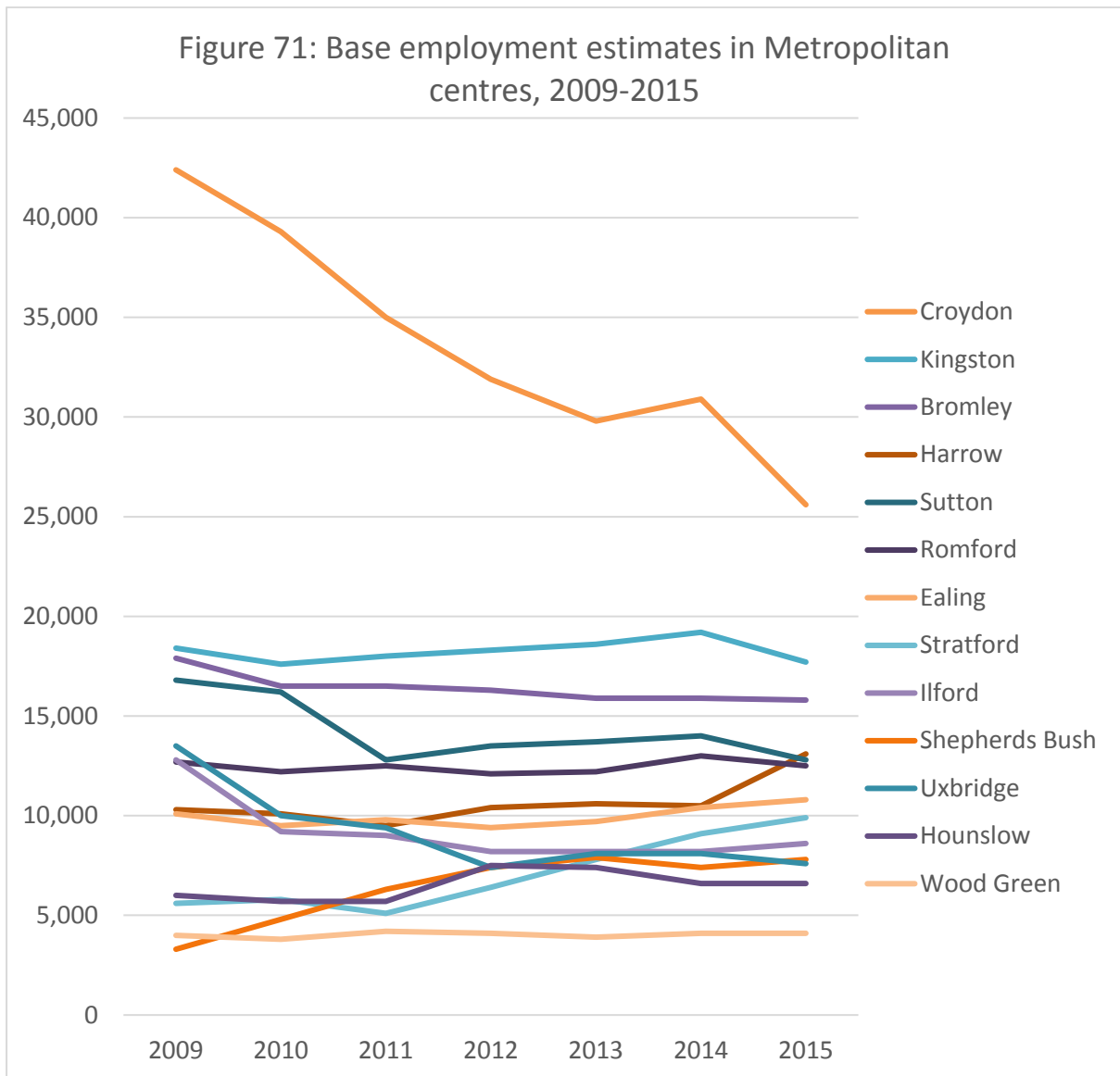


Source: Office for National Statistics / GLA

8.1.8 Employment also varies significantly by classification, and looking at average employment shows opposing trends between outer and inner town centres, as seen in Figure 70 (for clarity, this chart excludes the International centres). However, this trend is heavily influenced by the significant fall in employment in Croydon, and employment growth in two inner London metropolitan centres – Stratford and Shepherds Bush – reflecting the significant retail and other commercial development that has come forward in these areas (see Figure 71).



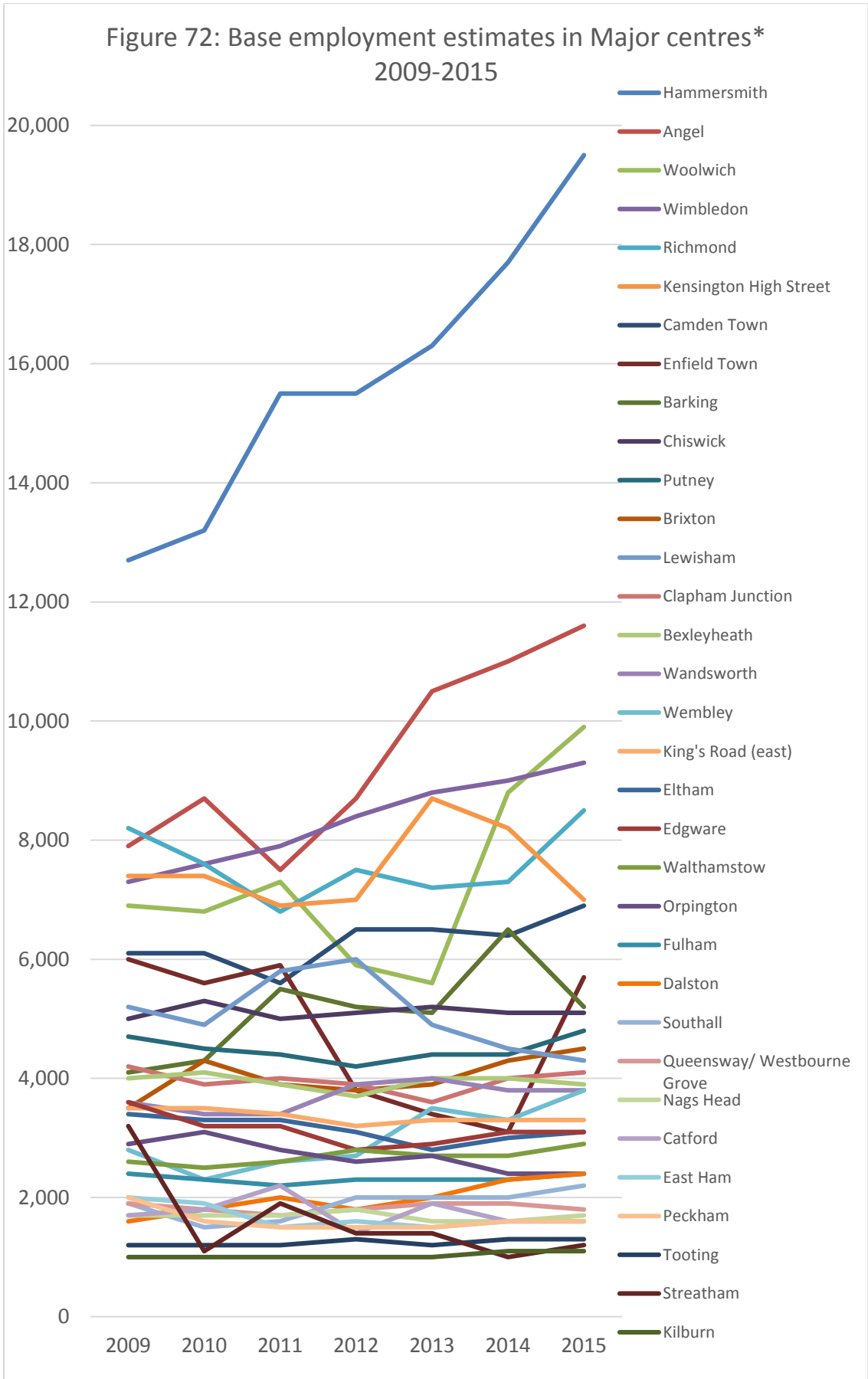
Source: Office for National Statistics / GLA



Source: Office for National Statistics / GLA

8.1.9 In Major centres, the broad pattern is one of growth (see Figure 72). Canary Wharf is a significant outlier, with an estimated 80,000 employees³¹ in 2015 – over four times more than Hammersmith which had 19,500, the second highest number of estimated employees. Inner London Major centres have performed strongly, with steady growth in Hammersmith, Angel and Wimbledon. Woolwich has seen particularly strong growth in employment in recent years, turning around a falling trend in the early years of the period monitored and growing from an estimated 6,900 employees in 2009 to 9,900 in 2015 – an increase of 43 per cent.

³¹ Base employment method. Workplace Zone estimate is 109,000 employees.

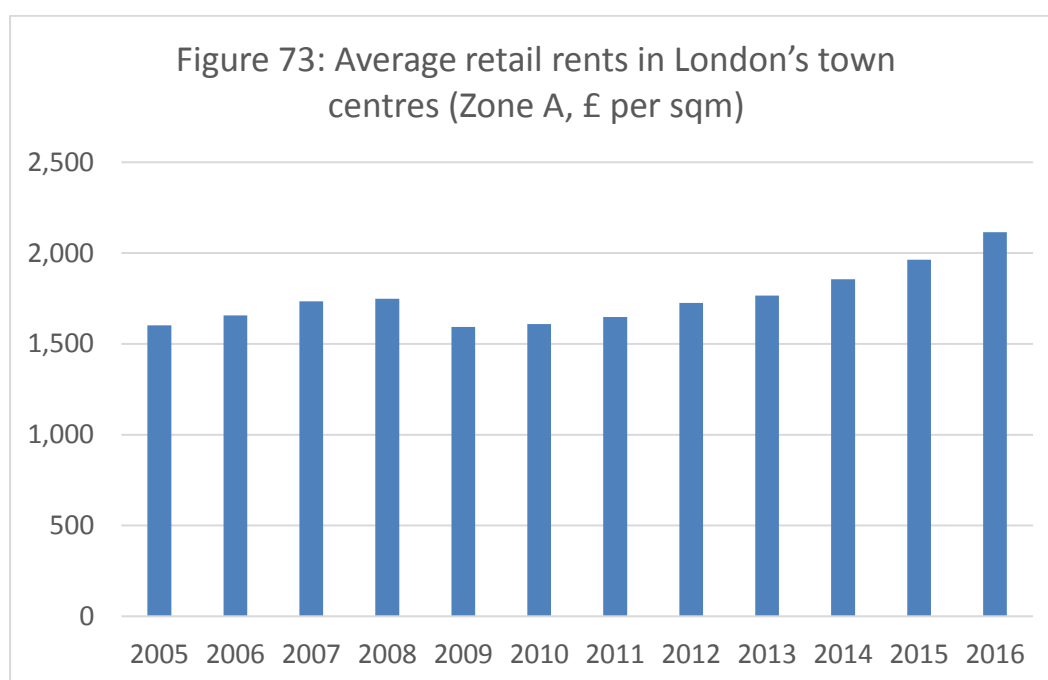


Source: Office for National Statistics / GLA
* Excluding Canary Wharf

9 RETAIL RENTS

9.1 Average retail rents

9.1.1 Retail rents data provides an indication of town centres' financial health and viability. Data on retail rents³² was available for 69 of the 221 town centres in the London Plan town centre network. Analysis of the data for these centres showed that average retail rents across all centres grew by 3 per cent per annum³³ over the period 2005 to 2016. Figure 73 below illustrates the impact of the financial downturn and subsequent recession with average rents falling by 9 cent between 2008 and 2009. However, since the downturn average rents have increased, growing at 4 per cent per annum over the period 2009 to 2016.



Source: Colliers International / GLA

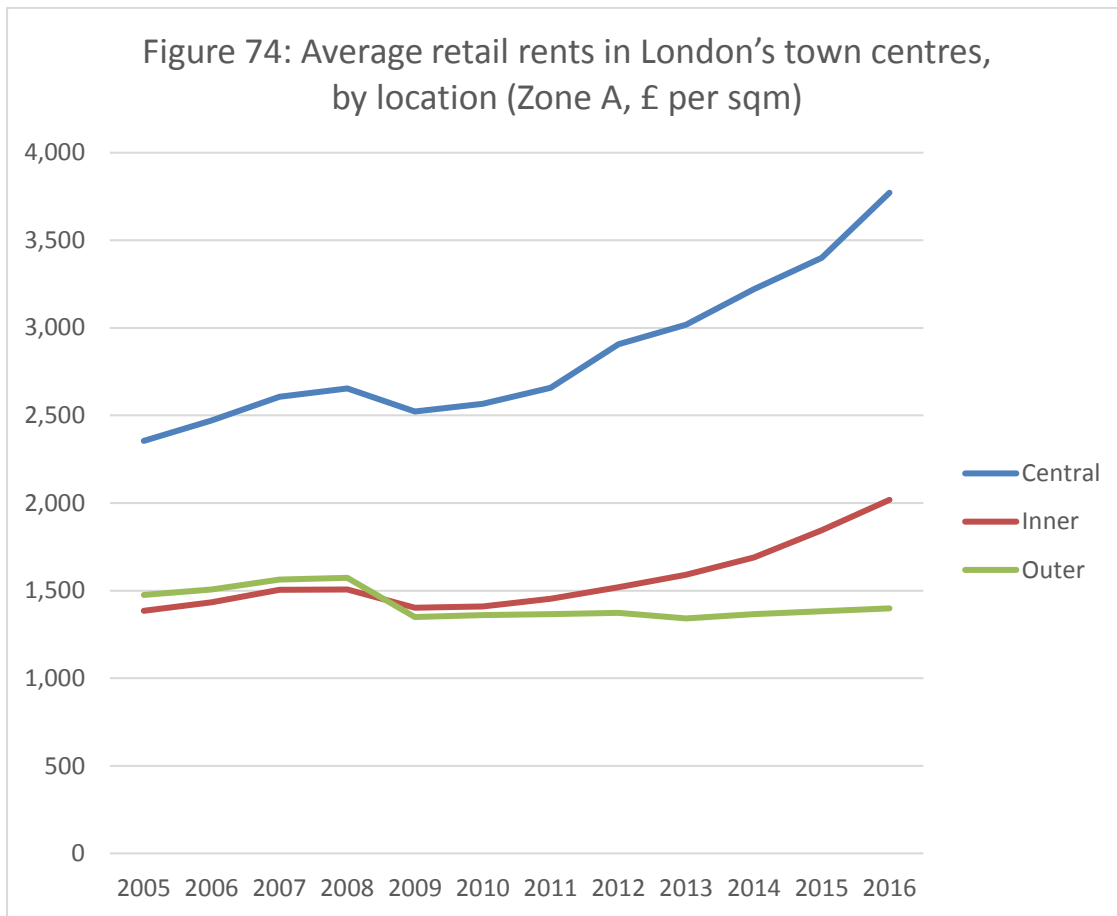
9.2 Retail rents by location

9.2.1 Further analysis of the average retail rent data presented above shows marked variations in the trends for centres according to their location and these results are shown in Figure 74 below. The average rents of centres in Central London (here defined as the CAZ) are greater than those on average in inner and outer London, although the Central London data here is heavily biased by the presence of the West End which commands the highest average rents of any London centre by a significant margin.

9.2.2 Rents in inner London were, on average, lower than those in outer London over the period 2005 to 2008. However, since 2008, average rents in the inner London centres appear to have grown strongly and now exceed average rents in outer London. The average data for town centres in outer London meanwhile, suggests that in many centres retail rents have not returned to the levels seen in the period prior to 2008.

³² Recorded as 'Zone A' retail rents in this health check (see Glossary for definition)

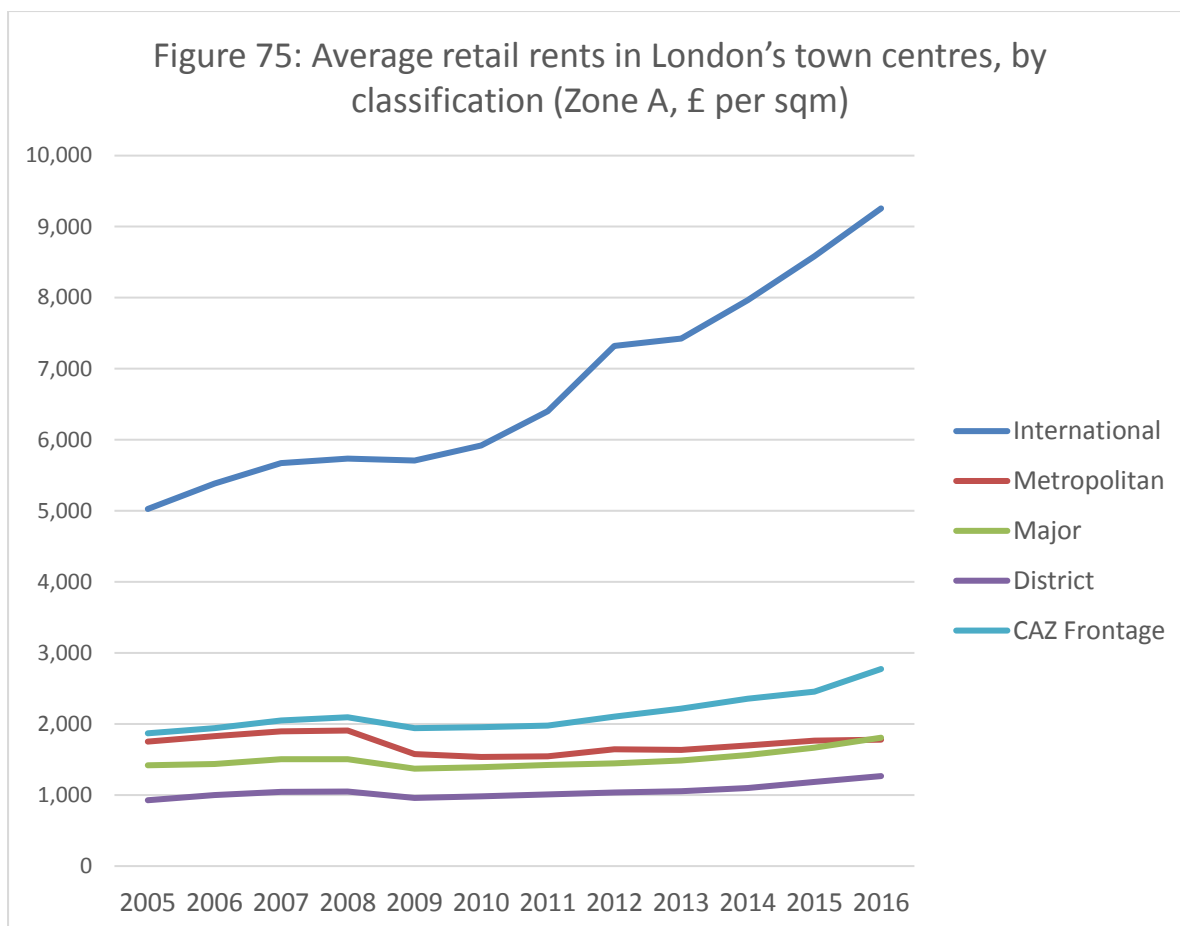
³³ Compound annual average growth rate (CAGR)



Source: Colliers International / GLA

9.3 Retail rents by classification

9.3.1 The International centres in central London recorded average rents far greater than the other town centre classifications (see Figure 75), followed by the CAZ Frontages, and both have seen strong growth since the downturn in 2008/9. The Metropolitan and Major town centre classifications recorded broadly similar levels of absolute average rents over the period 2005 to 2016 but the data suggests that the Metropolitan centres (on average) saw greater reductions in average rents between 2008 and 2009. The data suggests that average rents across the Metropolitan centres are lower in 2016 than they were prior to the down turn in 2008. The District town centres typically command much lower rents than the Metropolitan and Major centres and appear to have seen low levels of growth in average absolute rents since 2008.



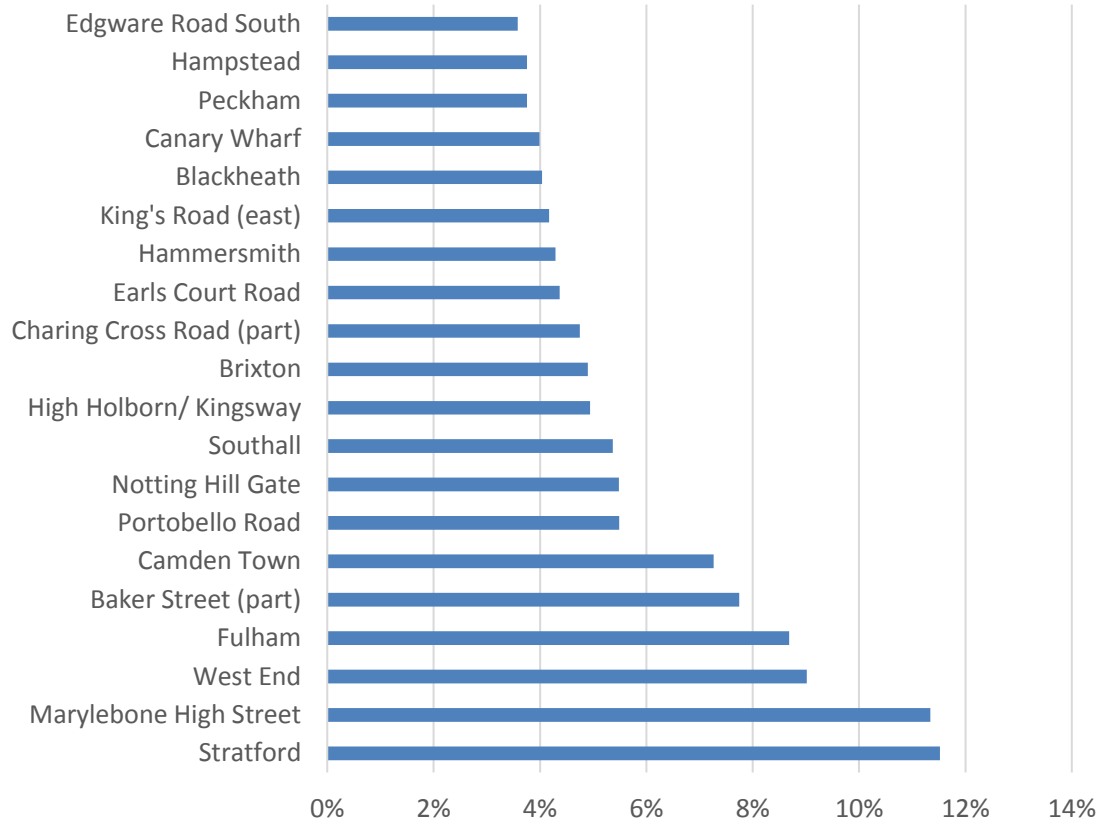
Source: Colliers International / GLA

9.4 Rental growth at centre level

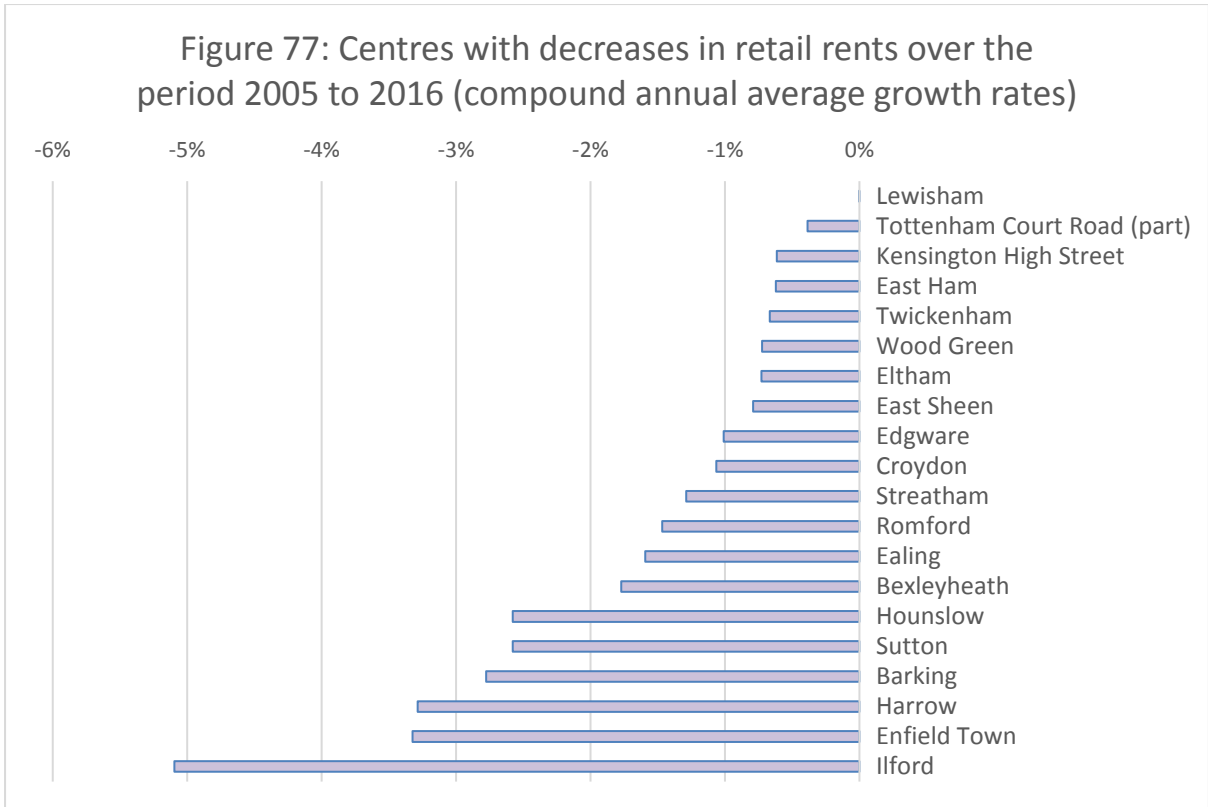
9.4.1 The analysis of average rent levels by location and classification above hides marked variations at individual town centre level. Figure 76 highlights those town centres with the strongest growth in retail rents over the period 2005 to 2016 including Stratford, Marylebone High Street, the West End, Fulham and Baker Street in the top five. Most of the centres in the top 20 are in central or inner London, the exception being Southall in outer London. Stratford experienced declining average rents over the period 2008 to 2011 but rents then doubled in 2011/2012 following the opening of Stratford City and have grown strongly since. Kingston was the only other Metropolitan centre with positive growth. Data was not available for Bromley, Shepherd's Bush and Uxbridge. Average rents in the West End were only marginally impacted by the economic downturn, declining by less than 1 per cent between 2008 and 2009, but have seen annual growth rates exceeding 10 per cent per annum in five of the seven years since 2009.

9.4.2 Figure 77 shows the 20 centres with the greatest decrease in retail rents over the period 2005 to 2016. The majority of these centres are located in outer London with Ilford, Harrow, Enfield and Barking seeing the largest reductions. Of the 13 Metropolitan centres, eight recorded reductions in rents over this period. The economic downturn had the greatest immediate impact on Ealing, Sutton and Harrow which saw the largest percentage falls in rents among the Metropolitan centres between 2008 and 2009. Figure 78 shows however that among the Metropolitan town centres Stratford, Ealing, Kingston, Croydon and Sutton have all seen positive rental growth since 2009, whereas Ilford, Harrow, Hounslow and Romford have witnessed decreases.

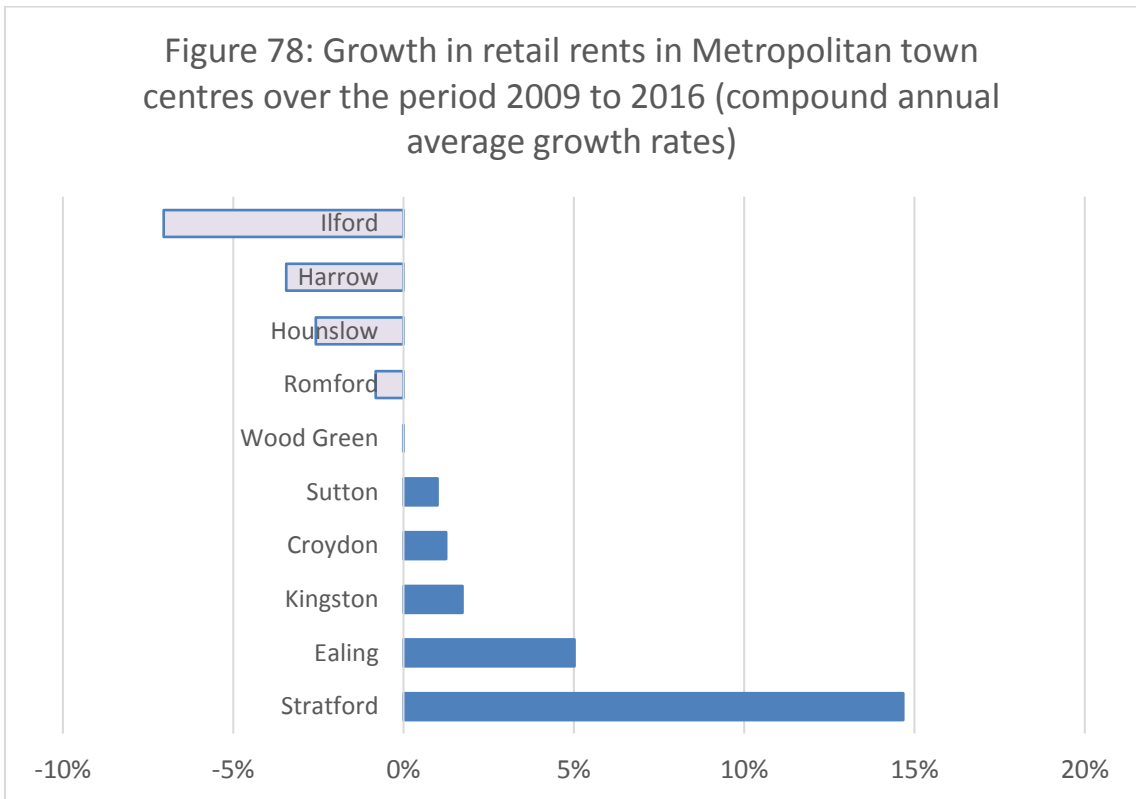
Figure 76: Centres with highest growth in retail rents over the period 2005 to 2016 (compound annual average growth rates)



Source: Colliers International / GLA



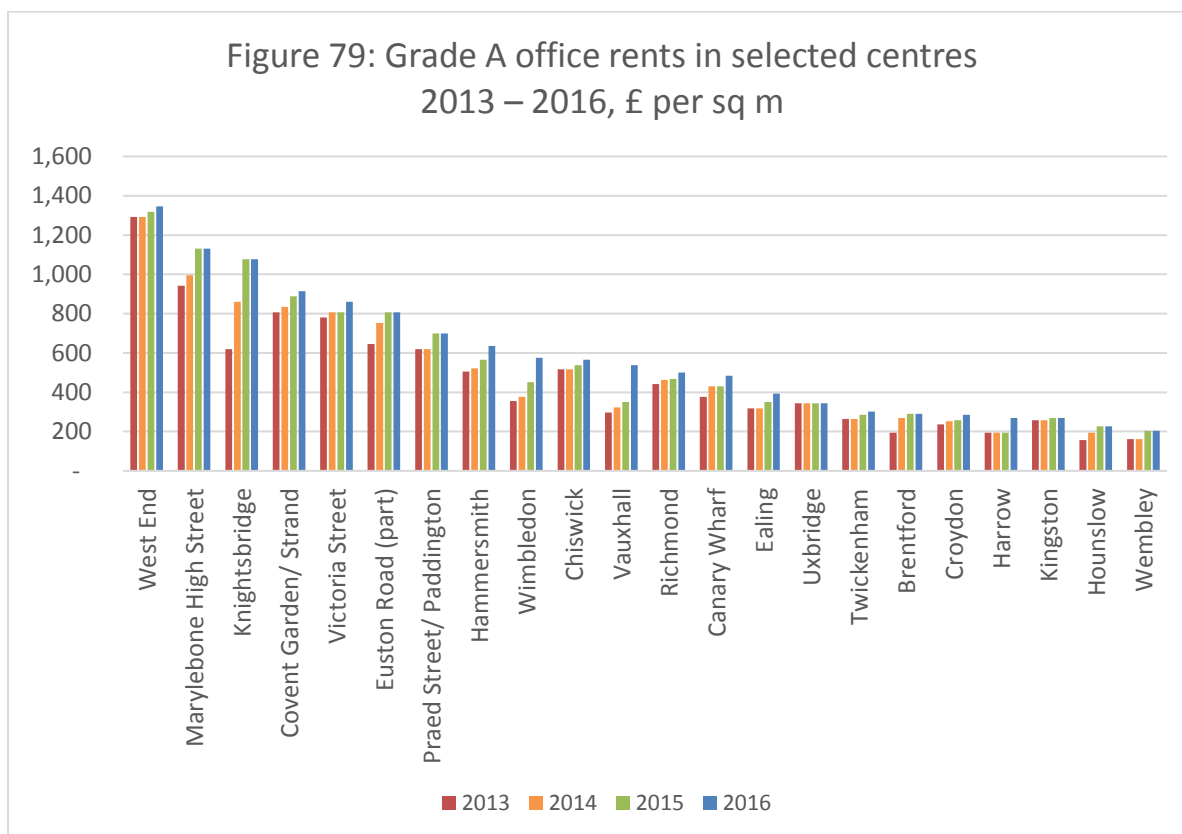
Source: Colliers International / GLA



Source: Colliers International / GLA

10 OFFICE RENTS

10.1.1 Office rent data over the period 2013 to 2016 is available for selected town centres in London. Figure 79 below illustrates a range of office rents in these centres for premium quality or Grade A space³⁴. The highest office rents are to be found in Central Activities Zone locations with the West End commanding the highest rates in London in excess of £1,300 per sqm. Some town centres in south and west London recorded Grade A office rents in the region of £500 to £650 per sqm including Hammersmith, Wimbledon, Chiswick and Richmond. Canary Wharf has the highest rents to the east of CAZ with Grade A office rents around £500 per sqm.



Source: Colliers International / GLA

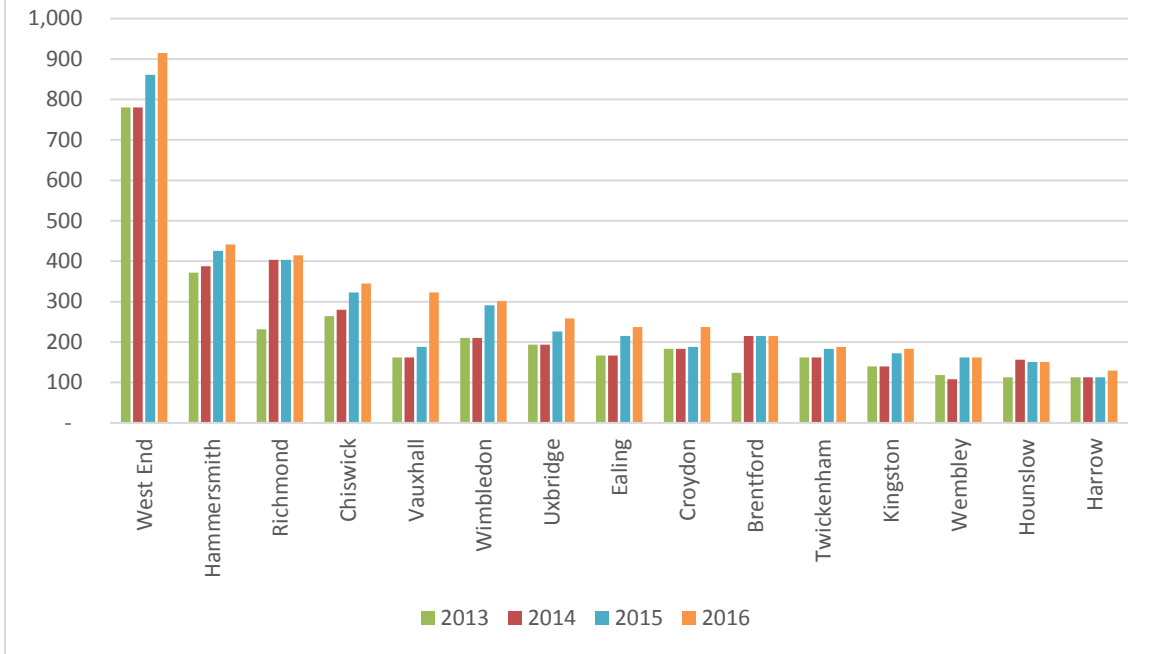
10.1.2 Grade B office³⁵ rental data was available for only 15 town centres and these are shown in Figure 80. Broadly mirroring the Grade A data, the highest Grade B rents are found in the West End, followed by centres in inner London. Those centres in the sample with the lowest Grade B rents were generally located in outer London.

10.1.3 Figure 81 presents compound annual average growth rates for Grade A and Grade B space (for centres where data is available). Growth in Grade A rents over the period 2013 to 2016 were strongest in Vauxhall at 22 per cent, Knightsbridge 20 per cent, and Wimbledon 17 per cent. Growth in Grade B rents over the period 2013 to 2016 were strongest in Vauxhall at 26 per cent, Richmond 21 per cent, and Brentford 17 per cent.

³⁴ Grade A offices include buildings of the highest quality and often in the most central locations of any given office market and with rents above the average for the area.

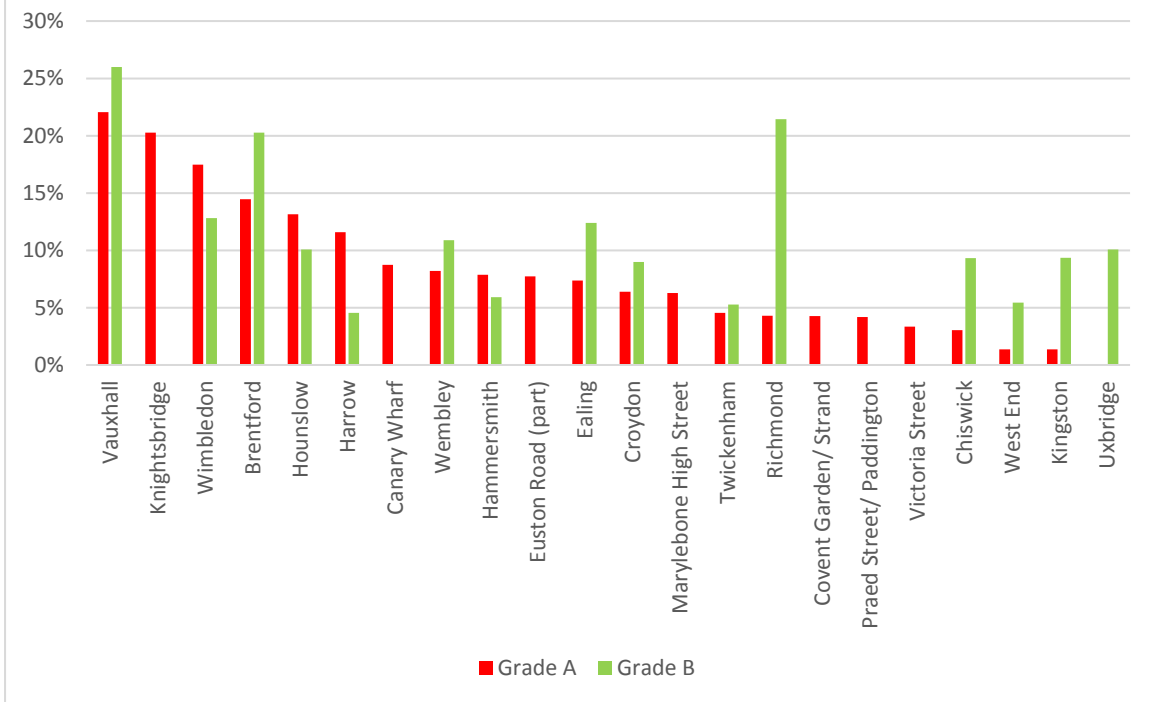
³⁵ Grade B offices include buildings with a lower quality or less central location compared to Grade A space.

Figure 80: Grade B office rents in selected centres 2013 – 2016, £ per sq m



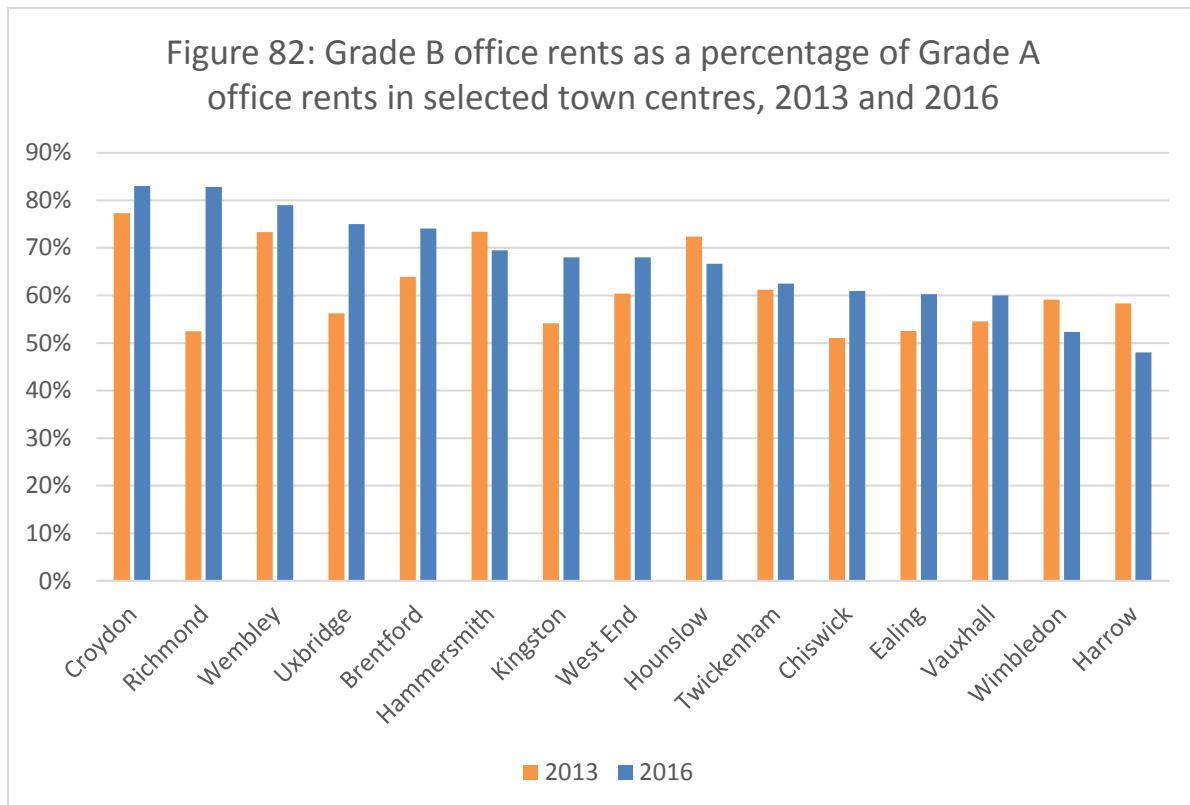
Source: Colliers International / GLA

Figure 81: Compound annual average growth rates in Grade A and Grade B office rents in selected centres 2013 – 2016



Source: Colliers International / GLA

10.1.4 Figure 82 illustrates the relationship between office rents in Grade B versus Grade A space in town centres where the data was available. It can provide an indication of the range of rents for different quality of space in different office locations and the relative cost of secondary (Grade B) space against prime property (Grade A space). In 2016, rents for Grade B space ranged from around 50 per cent of Grade A space (for example in Harrow and Wimbledon) up to around 80 per cent (in Croydon, Richmond and Wembley). Between 2013 and 2016 office rents in Grade B as a percentage of rents in Grade A space increased in 11 of the 15 centres for which data was available, most notably in Richmond and Uxbridge. There were corresponding decreases in the percentages in Hammersmith, Hounslow, Wimbledon and Harrow.



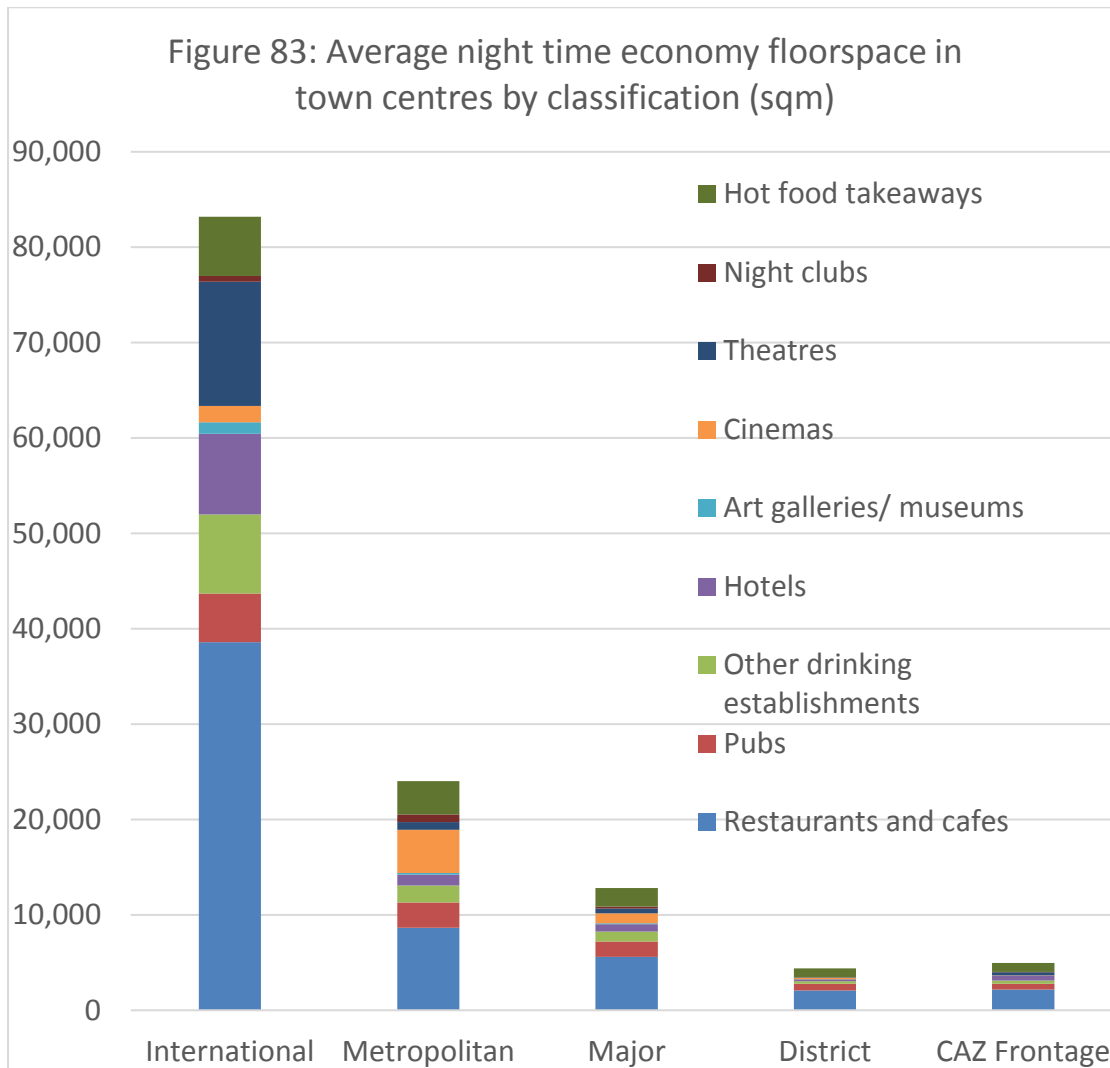
Source: Colliers International / GLA

11 NIGHT TIME ECONOMY

11.1 Night time uses

11.1.1 The night time economy plays an important part in the diverse role of town centres, extending commercial activity into the night and providing Londoners and visitors to the capital with access to entertainment, culture and other activities.

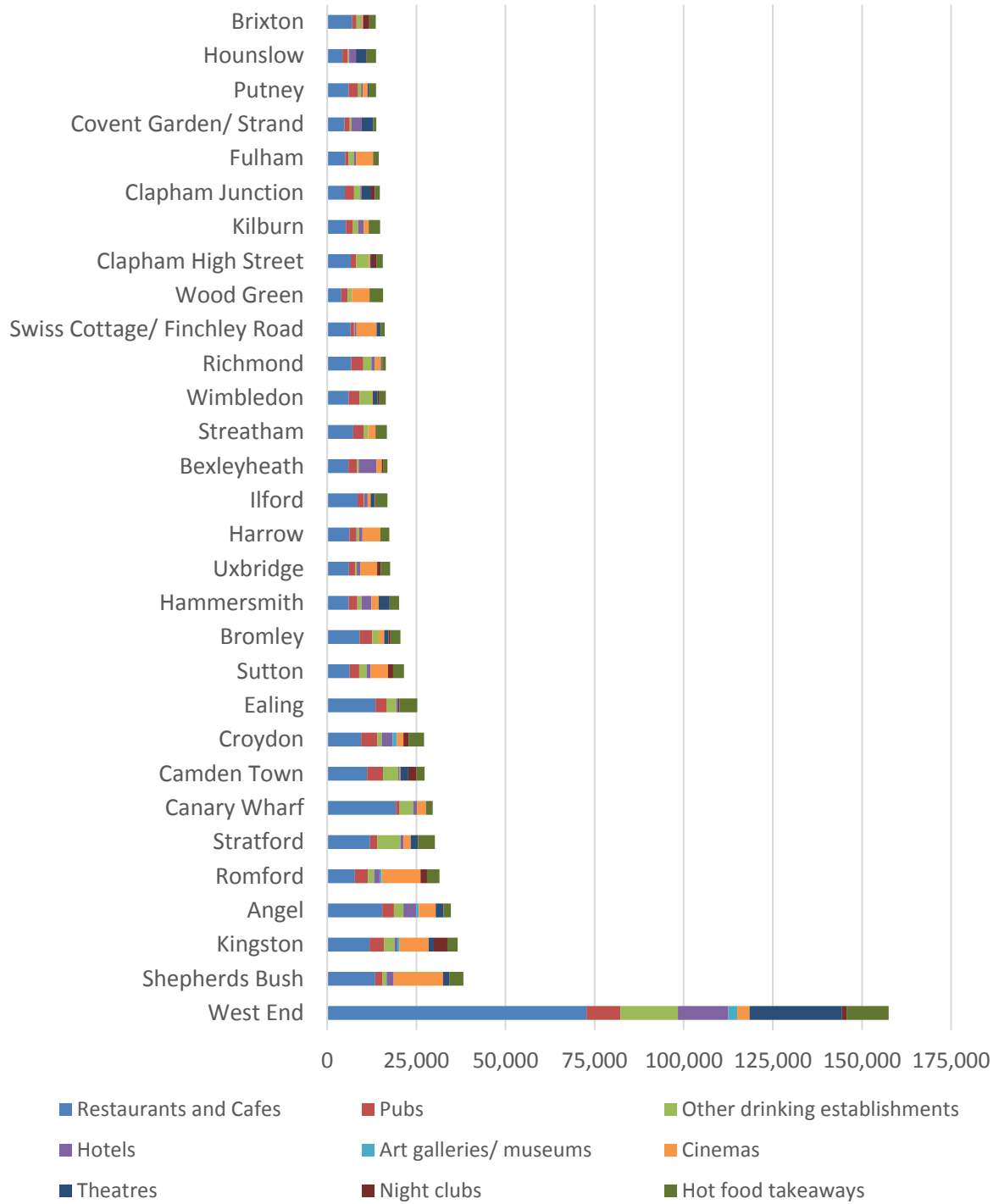
11.1.2 London’s night time activity varies significantly by town centre classification, with substantially larger averages of night time floorspace uses in the International and Metropolitan centres, as shown in Figure 83.



Source: Experian / GLA

11.1.3 Some centres have significantly greater quantities of night time floorspace, with 13 Major centres appearing in the 30 centres with the largest amount of night time economy floorspace (see Figure 84), notably Angel, Canary Wharf and Camden Town in the top 10. The distribution of London’s night time economy therefore doesn’t correlate precisely with the town centre classifications in the adopted London Plan, and it is therefore appropriate to assign alternative classifications for the night time economy role of town centres.

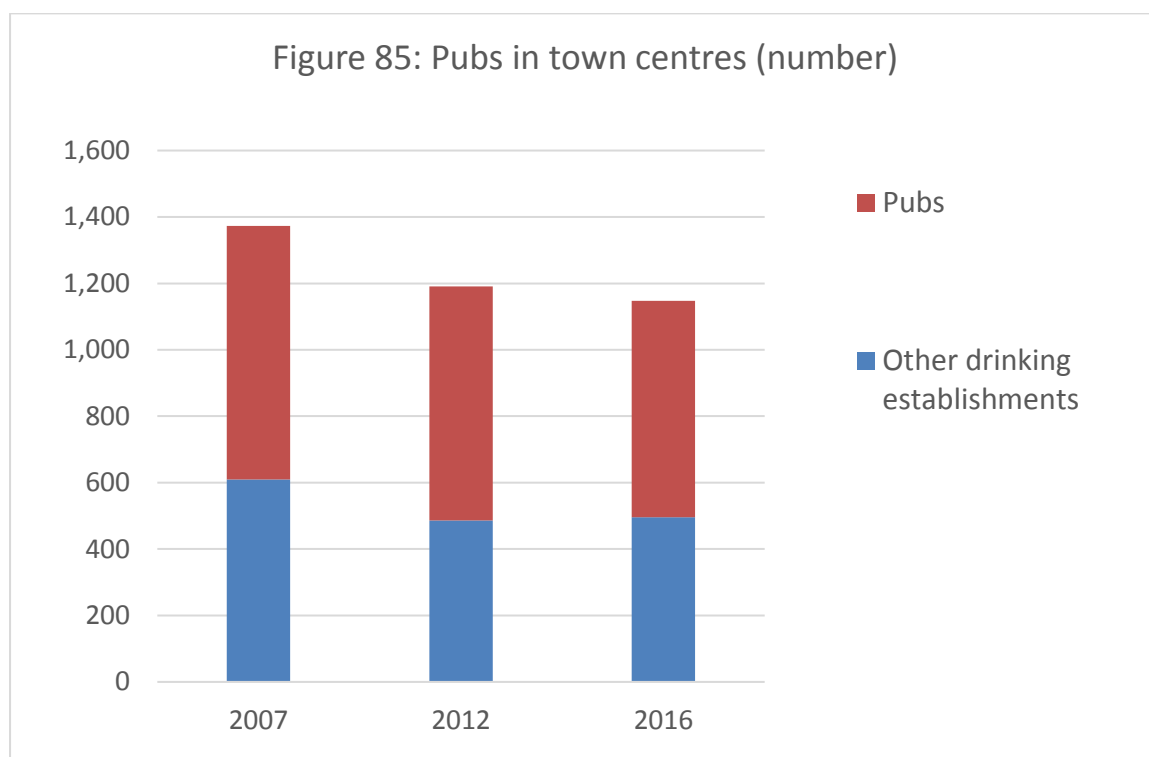
Figure 84: The 30 largest town centres by night time economy floorspace 2016 (sqm)



Source: Experian / GLA

11.2 Pubs

11.2.1 London's pubs are located right across the capital, and many are outside town centres. Other research has identified significant loss of pubs in recent years across London³⁶, showing a loss of 1,220 pubs since 2001, roughly 25 per cent over 15 years. This research finding is reflected in London's town centres, where there has been a reduction from 1,373 pubs and other drinking establishments in 2007 to 1,147 in 2016 – a loss of over 16 per cent in that time (see Figure 85). The rate of loss of other drinking establishments, which includes bars, appears to have diminished since 2012, potentially reflecting stronger macro-economic performance over this period, efforts to protect venues through the planning system, and the resurgent interest in brewing, particularly from craft and micro-breweries.



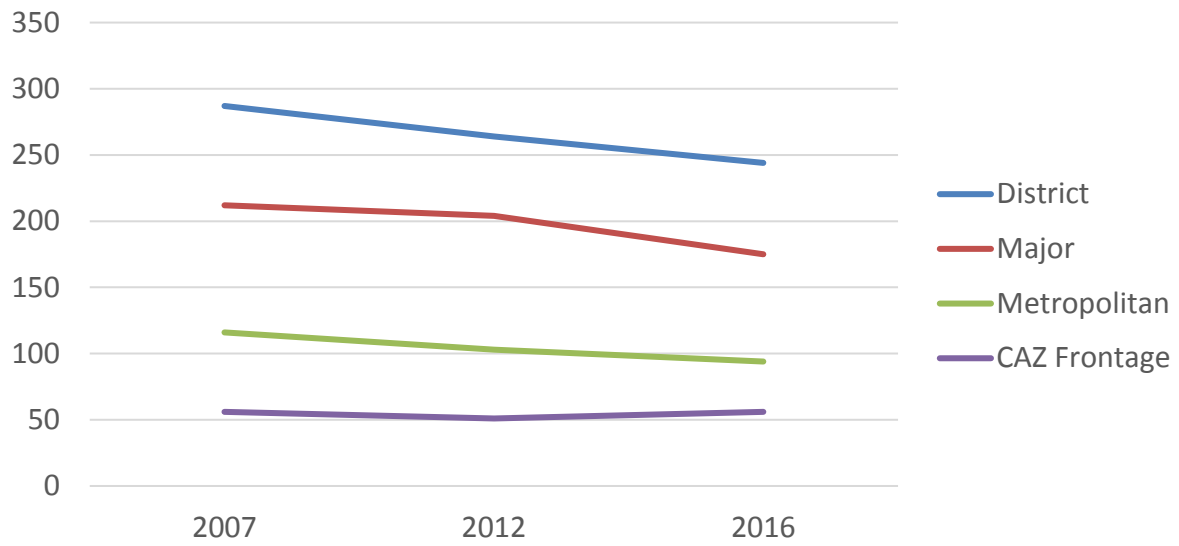
Source: Experian / GLA

11.2.2 Looking just at the number of pubs in town centres, there is a clear pattern of decline, with all classifications of centre except CAZ Frontages seeing loss of pubs over this time (see Figure 86).

11.2.3 The West End has seen the highest number of losses, with a net loss of 10 pubs over the 2007 to 2016 period (88 pubs in 2007 and 78 in 2016). Other centres have also seen losses, with Croydon losing a third of its pubs (21 in 2007 to 14 in 2016) and Kilburn, Barking and Lavender Hill/Queenstown Road all losing six pubs (see Figure 87). Pubs can play a variety of roles, as places for socialising, entertainment and access to food and drink, and some pubs have a social role providing community spaces. In town centres, they also add to the diversity of uses, and can provide places of respite from busy high streets. Given the significant loss of pubs in recent years, both in town centres and elsewhere, it is recommended that the new London Plan seeks to prevent loss of viable pubs.

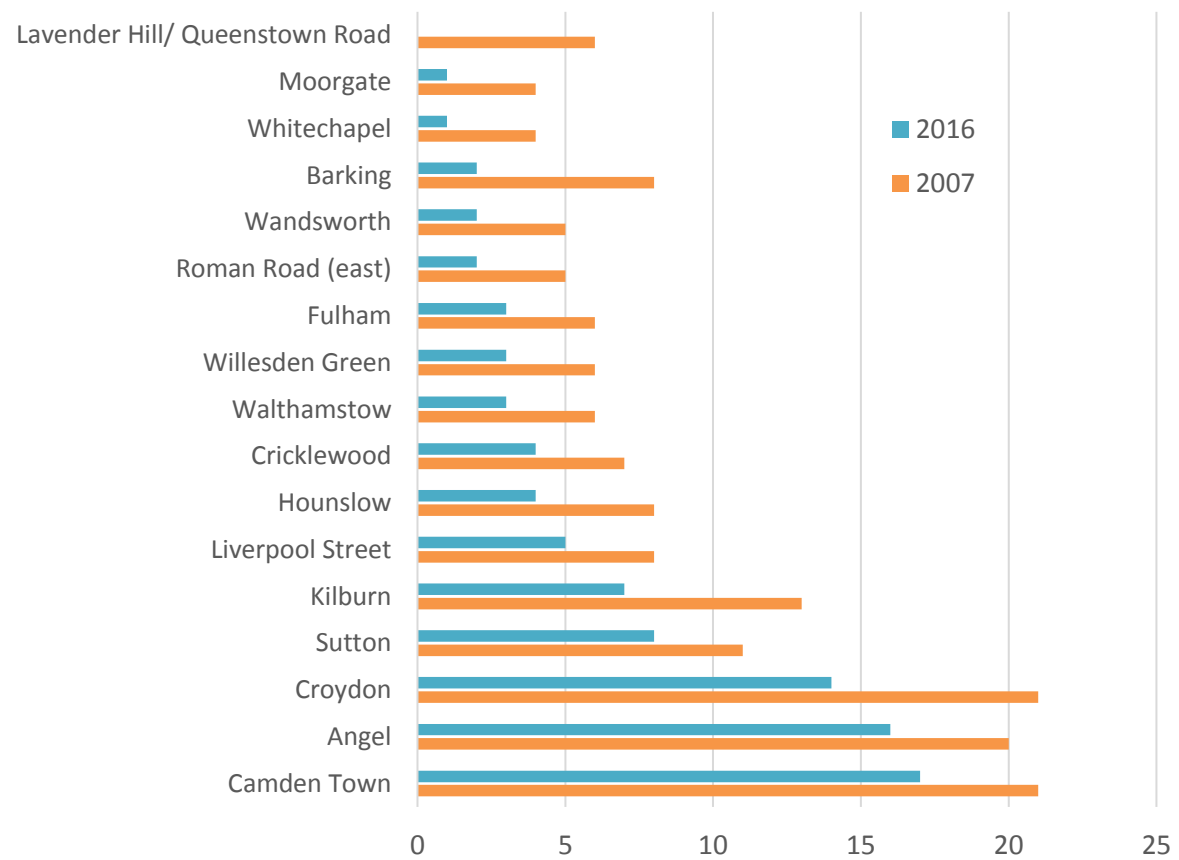
³⁶ <https://www.london.gov.uk/closingtime>

Figure 86: Total no. of pubs in town centres by classification (excluding International centres) 2007 - 2016



Source: Experian / GLA

Figure 87: Number of pubs in centres that have lost the highest number of pubs between 2007 and 2016

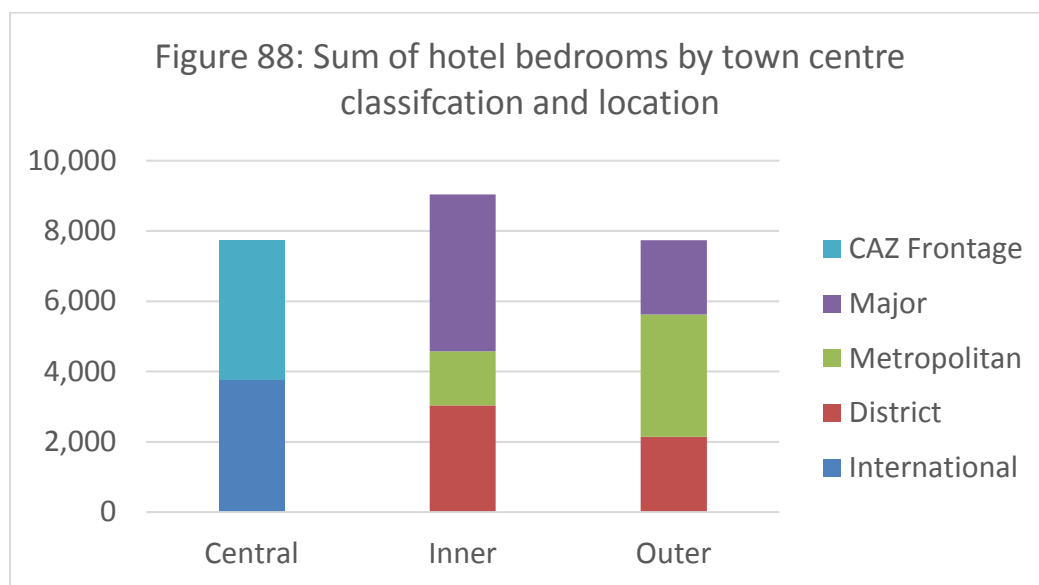


Source: Experian / GLA

11.3 Hotels

11.3.1 London's hotel provision is not only to be found in town centres. Particularly in the CAZ and around Heathrow there are substantial amounts of hotel bedrooms that do not fall within a town centre boundary.

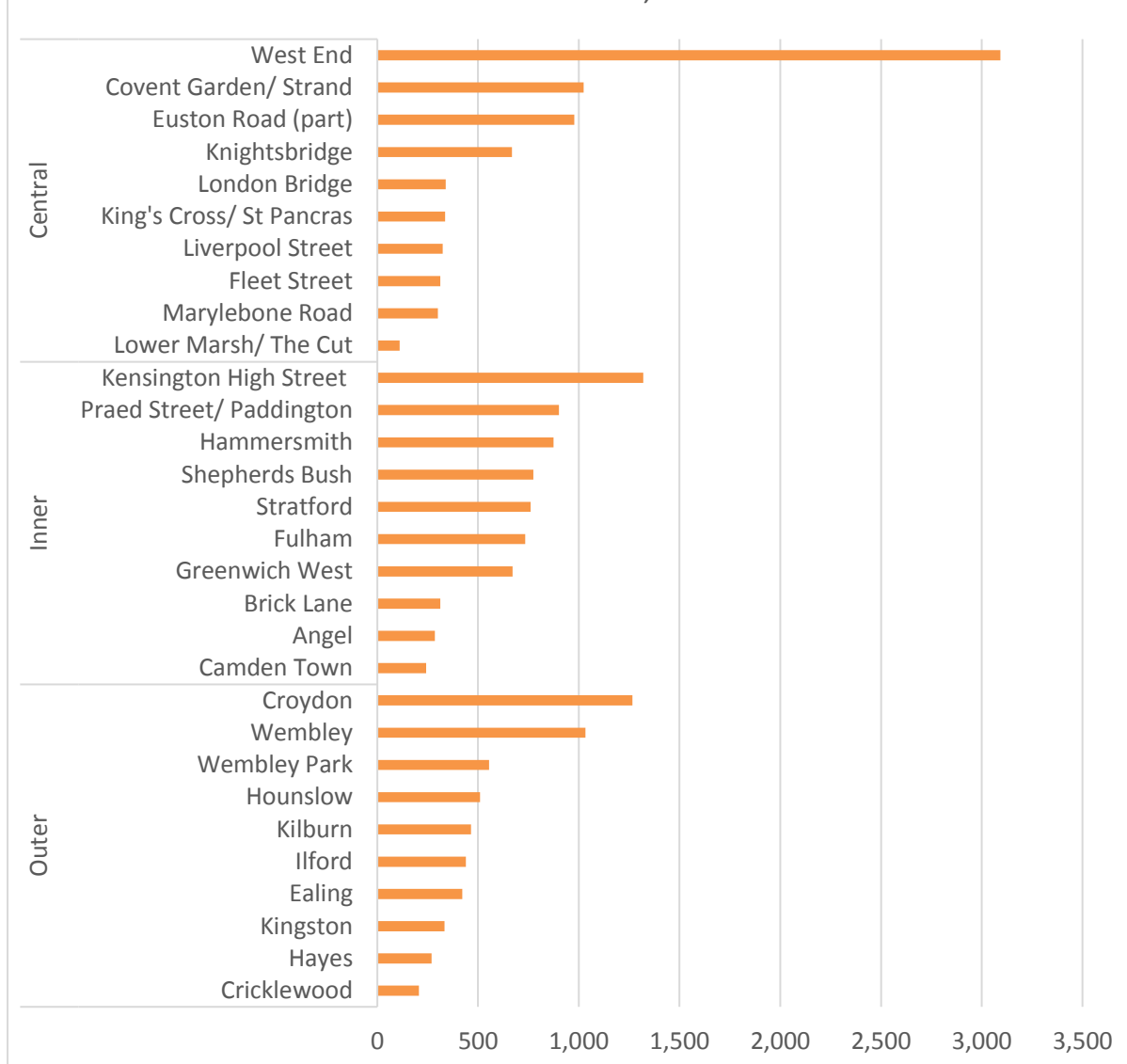
11.3.2 Looking at the hotels that are within town centres, there is a slightly greater number of hotel bedrooms in inner London centres compared to outer London centres, and generally more hotel bedrooms in Metropolitan and Major centres (see Figure 88).



Source: GLA

11.3.3 Hotels are, however, often focused in particular centres, with concentrations in outer and inner London Metropolitan centres such as Croydon, Stratford, Shepherds Bush and Hounslow, centres near major inter-city railway stations such as Euston Road, London Bridge, Paddington and King's Cross/St Pancras, and centres near tourist attractions and major cultural facilities like Wembley, Greenwich and the West End (see Figure 89).

Figure 89: Centres with the highest number of hotel bedrooms, 2016



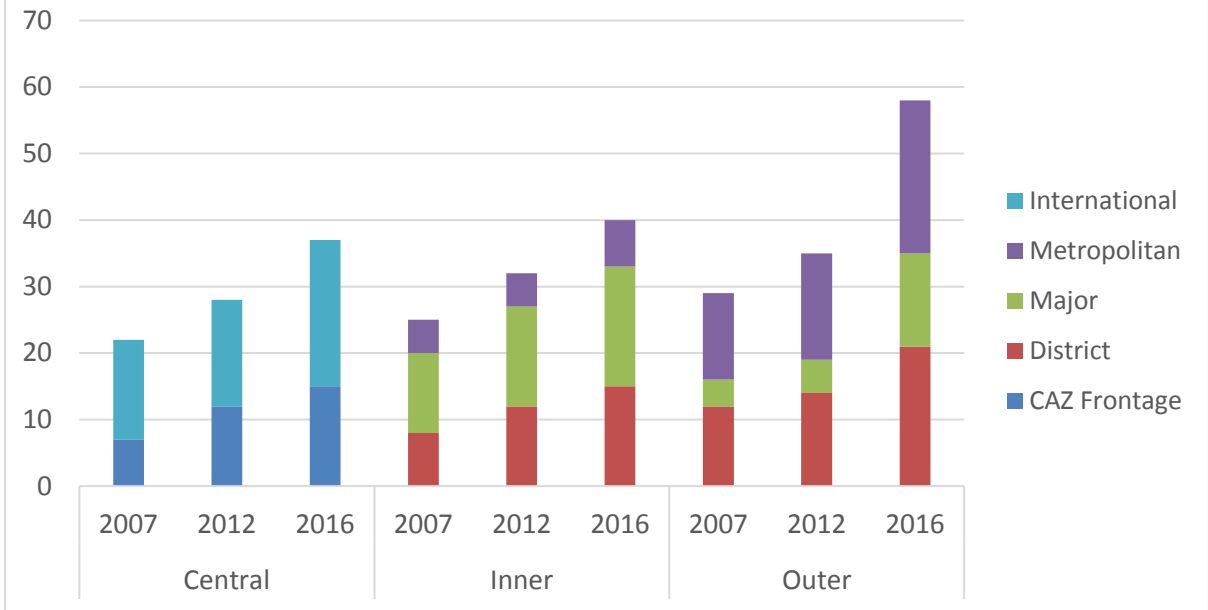
Source: GLA

11.3.4 Looking at the number of hotels³⁷, there has been growth in hotel provision throughout London's town centres, notably in outer London Major and District centres as shown in Figure 90. This, however, is far from evenly spread, with 68 per cent of London's centres³⁸ not having any hotel provision.

³⁷ Numbers of hotel *bedrooms* is not available for earlier years.

³⁸ Data is only available for 135 centres, 92 of which have no hotels.

Figure 90: Number of hotels by town centre classification and location, 2007-2016

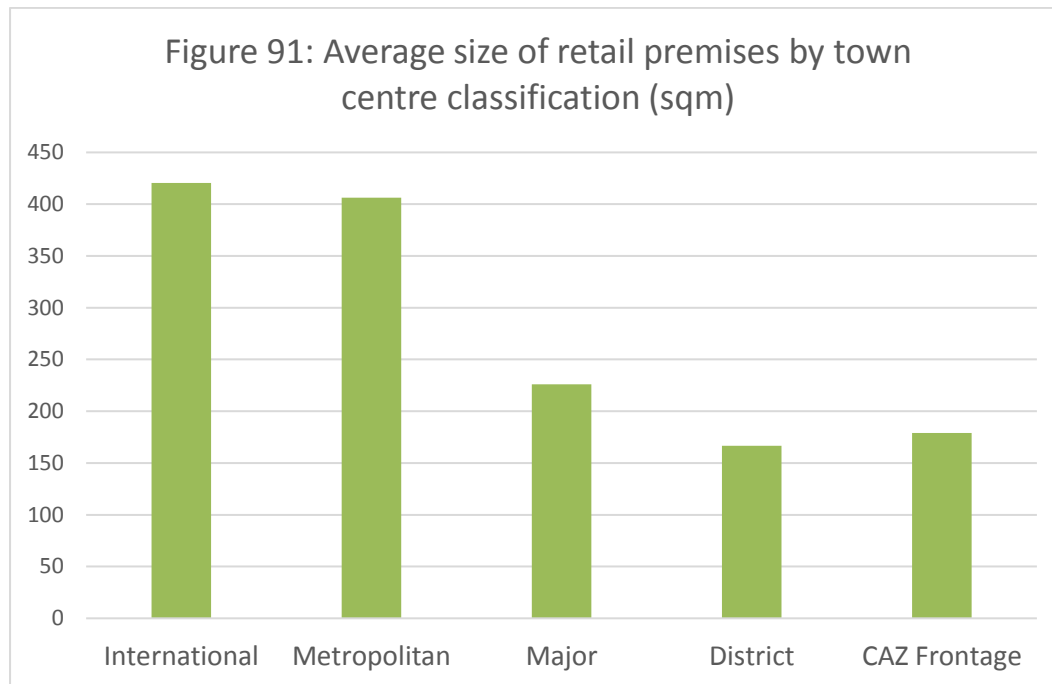


Source: Experian / GLA

12 SPATIAL CHARACTERISTICS

12.1 Premises Size

12.1.1 Dividing the total amount of retail floorspace by the total number of premises gives an average size of retail premises in town centres. This varies significantly by town centre classification, with International and Metropolitan centres having significantly larger premises on average than Major and District centres and CAZ Frontages. This is likely to reflect the presence of flagship stores and larger comparison retail outlets that tend to be focussed in the larger town centres.

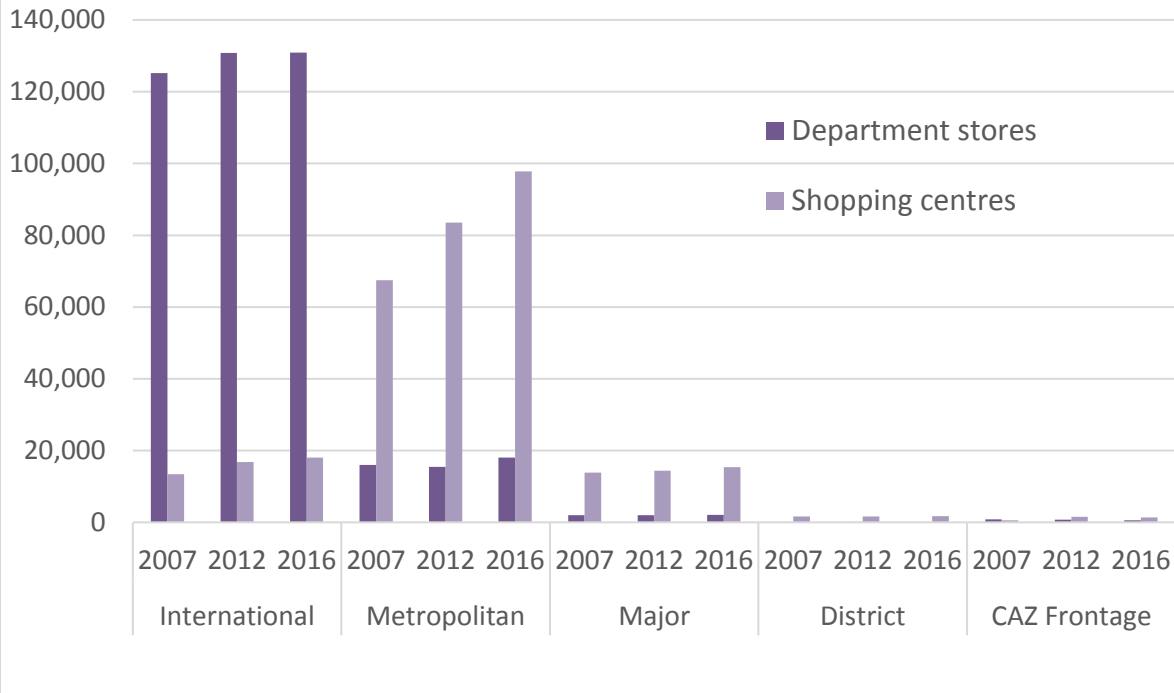


Source: Experian / GLA

12.2 Shopping Centres and Department Stores

12.2.1 Looking across all town centre uses, there are significant differences in the average amount of floorspace that is contained within shopping centres and department stores. London's International centres have significant concentrations of large department stores, with less department store floorspace in other classifications of town centre. London's Metropolitan centres are home to the largest shopping centres, and this has increased since 2007, reflecting the large shopping centre developments in Stratford and Shepherds Bush.

Figure 92: Average floorspace in department stores or shopping centres, by town centre classification (sqm)

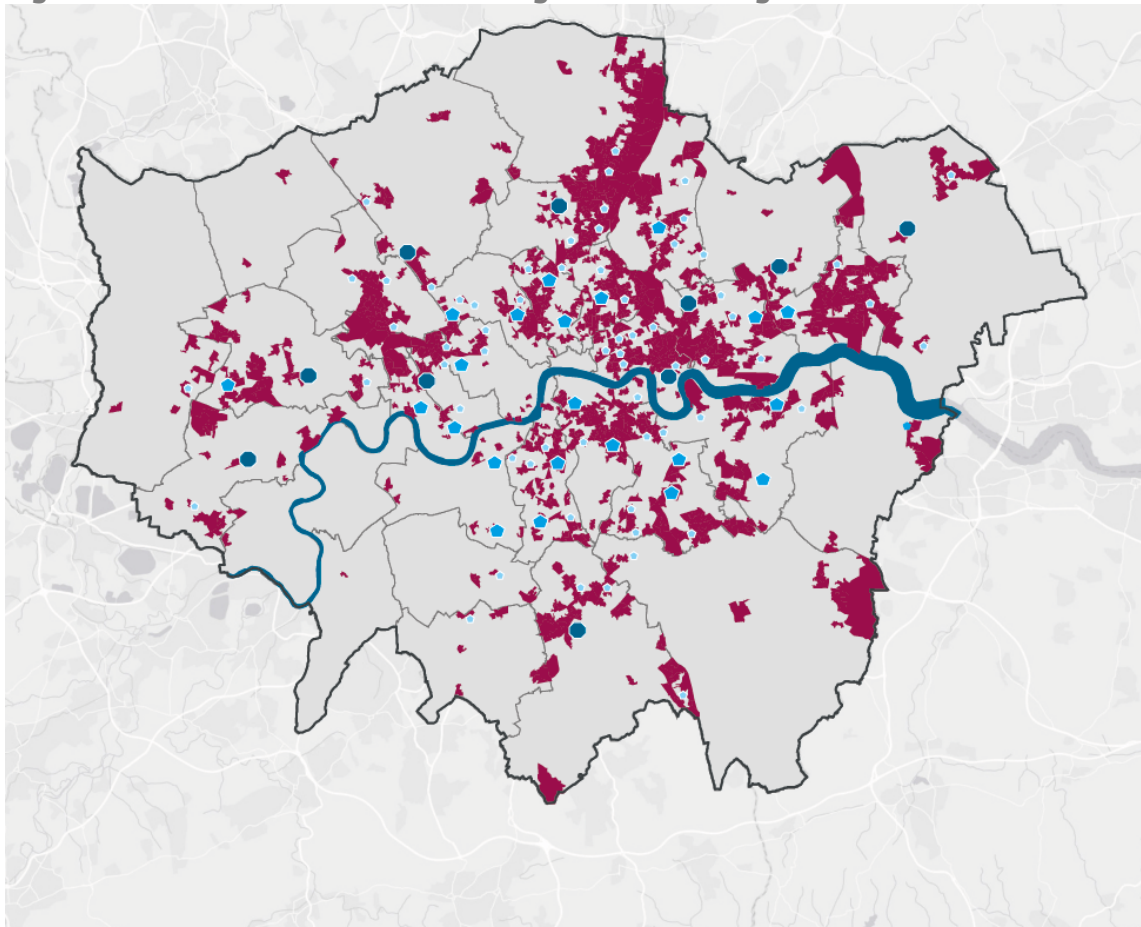


Source: Experian / GLA

13 CENTRES IN STRATEGIC AREAS FOR REGENERATION

13.1.1 In previous versions of the London Plan, some town centres were given a classification indicating that they needed regeneration. This was based on a range of indicators, including whether the centre was within an Area for Regeneration. The Areas for Regeneration were defined as the Lower Layer Super Output Areas (LSOA) that were in the bottom 20 per cent in the Indices of Multiple Deprivation (IMD) for London. It is intended in the new London Plan to amend the Areas for Regeneration definition to those Lower Layer Super Output Areas (LSOA) that are in the bottom 20 per cent in the Indices of Multiple Deprivation (IMD) for England as a whole.

Figure 93: Town centres within Strategic Areas for Regeneration



Strategic Areas for Regeneration

● Strategic areas for regeneration

Town Centres in Strategic Areas for Regeneration

- Metropolitan
- Major
- District

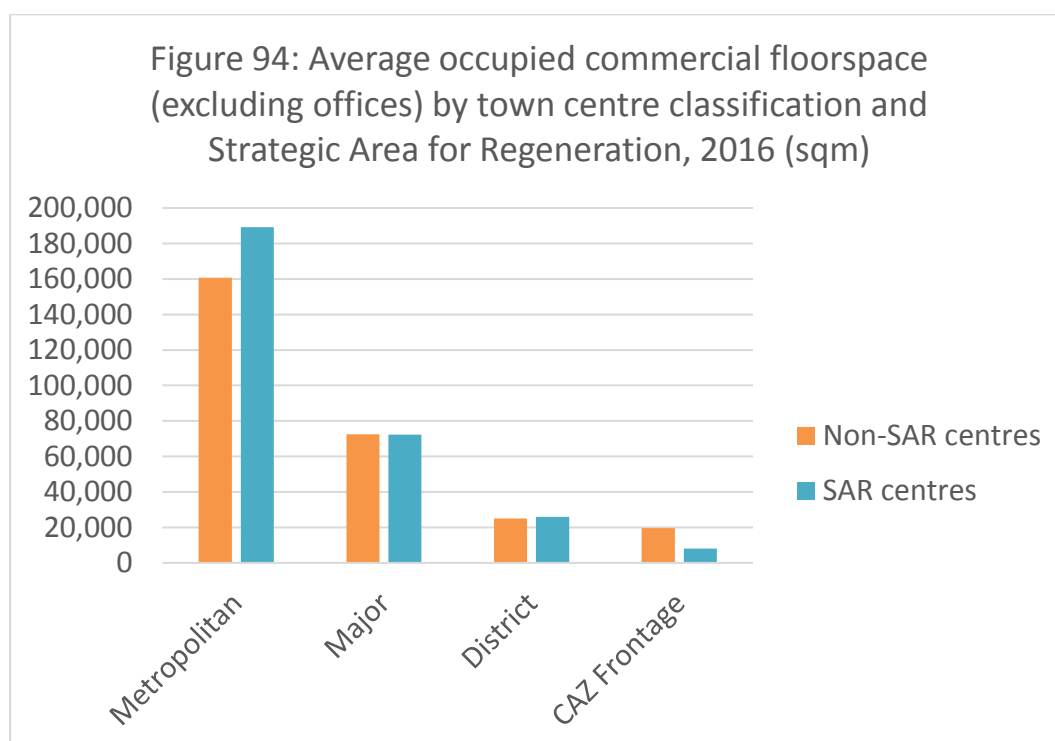
Source: GLA Planning and DCLG
Contains OS data © Crown copyright and database right (2017)

13.1.2 To simplify the regeneration classification for town centres in the new London Plan, and to align more closely with the Mayor’s priorities for tackling inequality and the causes of deprivation, this classification is now based only on whether the town centre is partly or wholly within a Strategic Area for Regeneration.

13.1.3 It is therefore possible to analyse the characteristics of town centres within Strategic Areas for Regeneration. There are no International centres in Strategic Areas for Regeneration, so these have been excluded from this analysis.

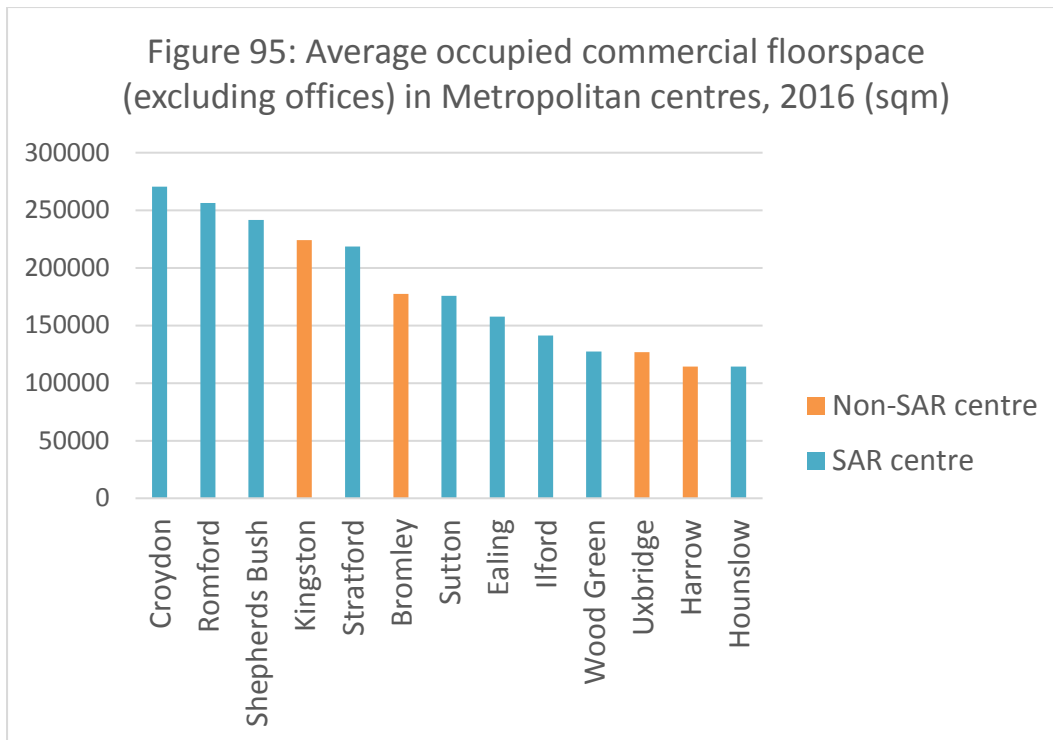
13.2 Total floorspace in Strategic Areas for Regeneration

13.2.1 Overall, the average amount of total floorspace (excluding offices) in town centres in Strategic Areas for Regeneration is broadly similar to that for centres of the same classification elsewhere – particularly for Major centres (Figure 94).



Source: Experian / GLA

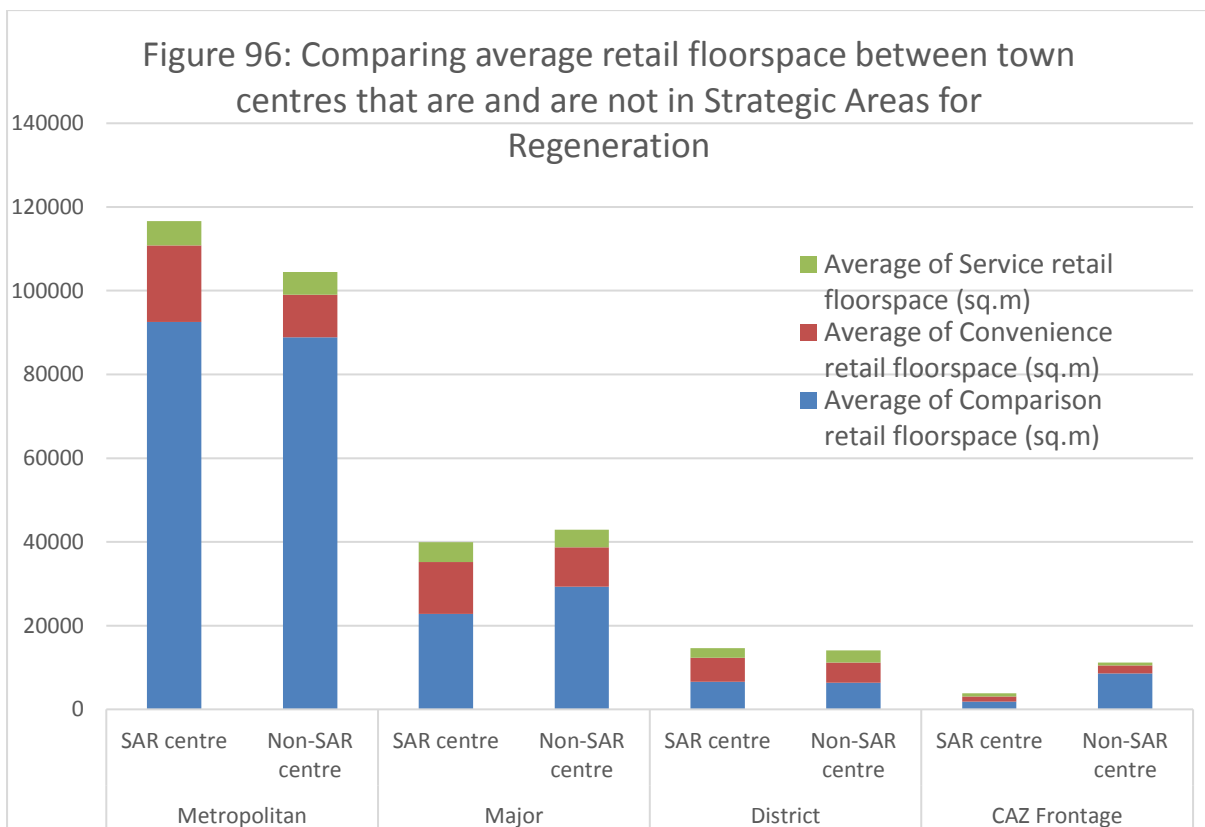
13.2.2 The average amount of total floorspace in Metropolitan centres varies slightly between those centres that are in Strategic Areas for Regeneration and elsewhere. Most Metropolitan centres are within Strategic Areas for Regeneration, including four of the five largest centres, as shown in Figure 95.



Source: Experian / GLA

13.3 Retail uses in Strategic Areas for Regeneration

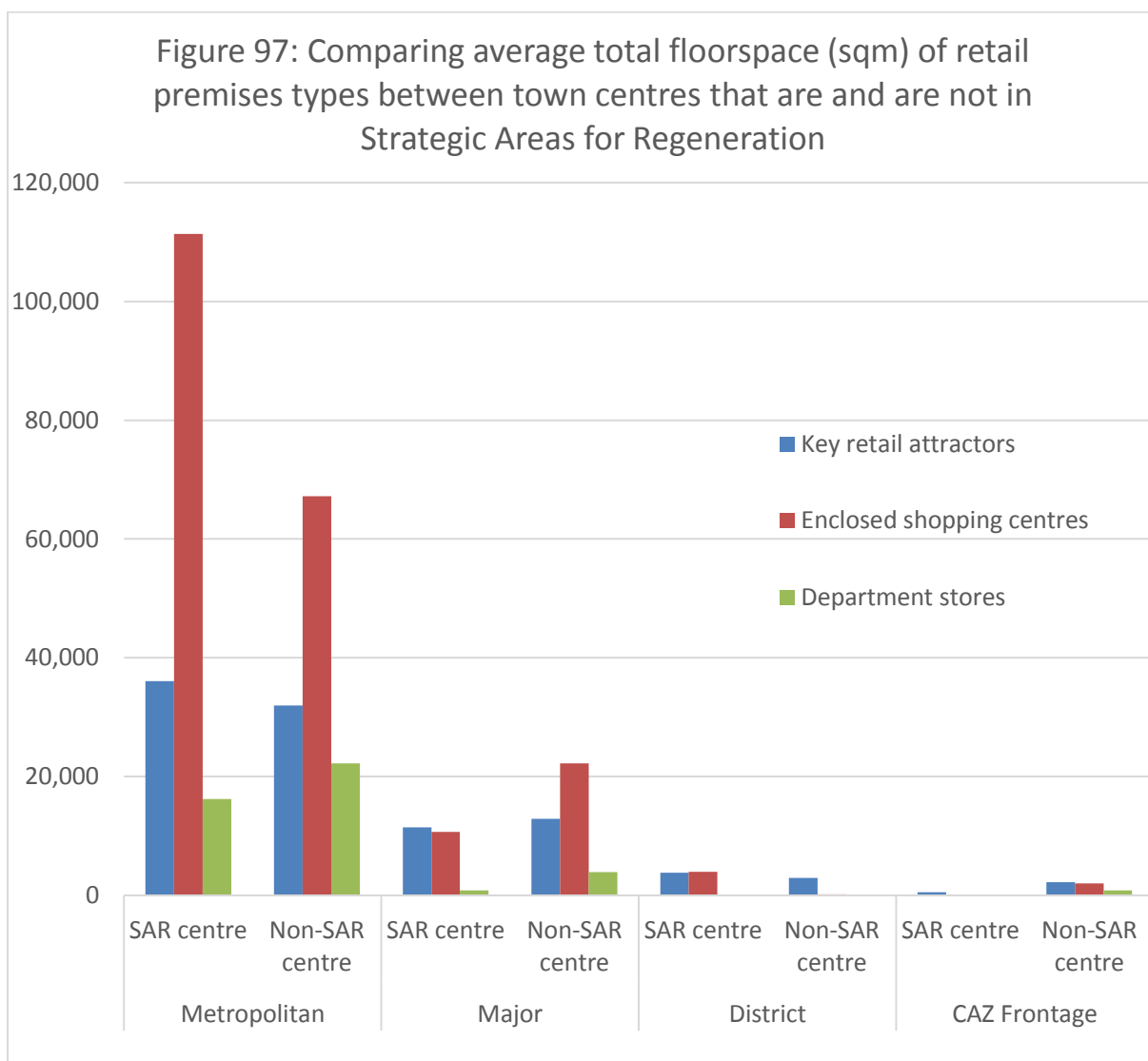
13.3.1 Retail floorspace overall does not show any definitive patterns, with broadly similar average quantities of floorspace for the different classifications, within and outside of Strategic Areas for Regeneration.



Source: Experian / GLA

13.3.2 Looking at the types of premises shows some differences, with Metropolitan town centres in Areas for Regeneration having much higher quantities of enclosed shopping centres. A significant amount of this is within Stratford and Shepherds Bush, which are both in Strategic Areas for Regeneration, however the number remains higher once these are excluded. The opposite is, however, true in Major centres, where there is on average almost twice as much enclosed shopping centre floorspace in town centres outside areas for regeneration. The explanation for this variety, and the impacts of it, are not immediately apparent, and warrant further research and more detailed analysis at centre-level.

13.3.3 Across all town centre classifications, there tends to be larger amounts of department store floorspace outside the Strategic Areas for Regeneration. The amount of Key retail attractors³⁹ floorspace does not vary significantly.



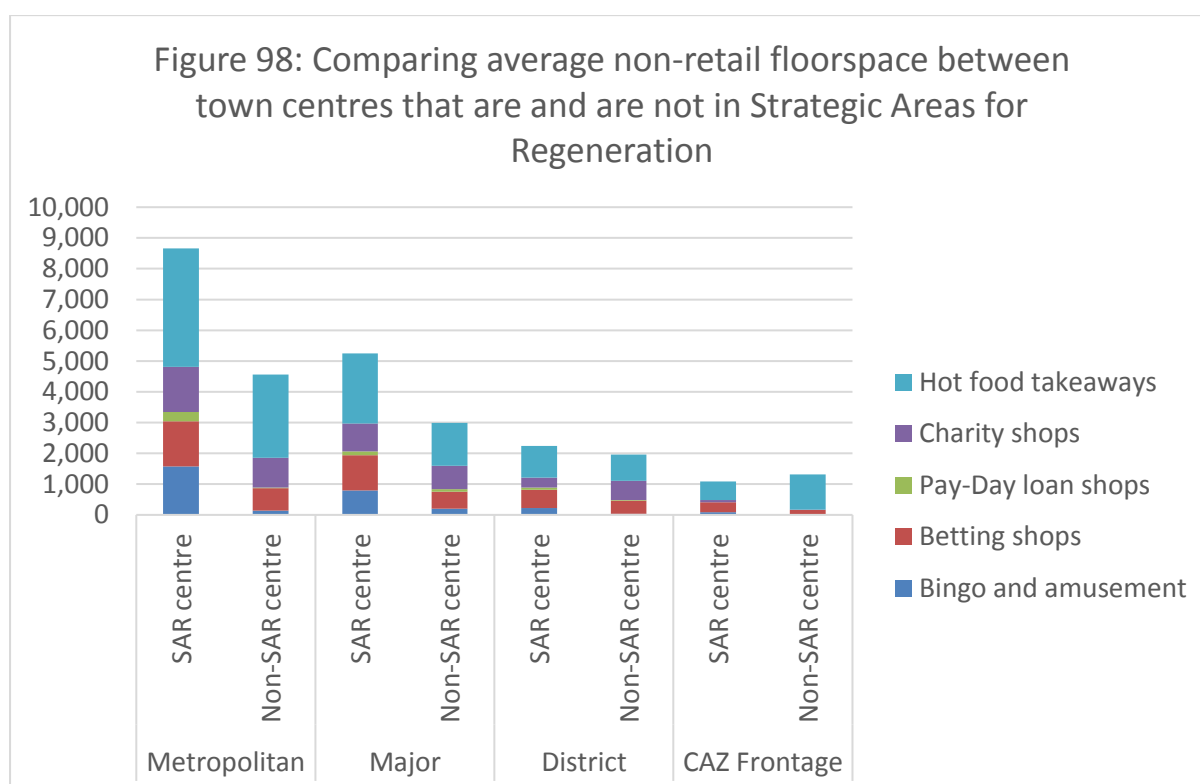
Source: Experian / GLA

³⁹ Key retail attractors are defined by Experian, based on the retail trading fascia of each shop. Certain trading fascias are deemed to be 'key attractors' as they will make the centre they are located in more attractive for shoppers to visit. This is inevitably subjective, based on Experian's expertise of the retail sector, and changes over time as brand and financial strengths vary.

13.4 Non-retail uses in Strategic Areas for Regeneration

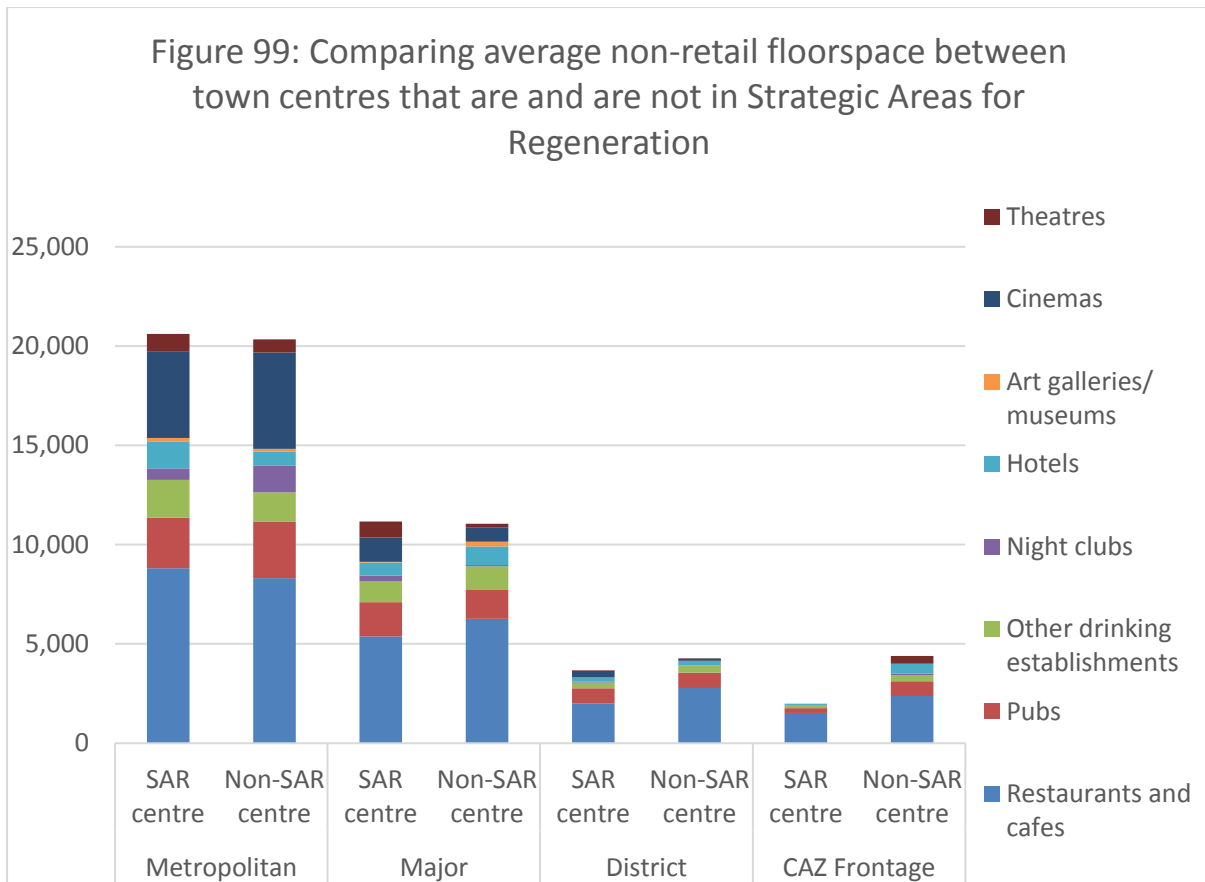
13.4.1 Non-retail uses show a clearer disparity between town centres in Strategic Areas for Regeneration and those outside these areas. For some uses in particular there is a clear pattern of higher amount of floorspace in town centres in Strategic Areas for Regeneration, notably hot food takeaways, charity shops, pay-day loan shops, betting shops and bingo and amusement premises. The only exceptions to this are for charity shop floorspace in District centres, which tends to be higher on average outside Strategic Areas for Regeneration, and hot food takeaway floorspace in CAZ frontages.

13.4.2 If they become over-concentrated or are not properly managed, some of these uses can be associated with anti-social behaviour, affecting the safety. There are also concerns that some of these uses can contribute to causes of poor health for individuals. These concerns and the over-representation of these uses in Strategic Areas for Regeneration suggest boroughs should be considering specific policies to restrict and manage some of these uses where appropriate, and that this should be reflected in town centre strategies.



Source: Experian / GLA

13.4.3 For other uses, patterns are less clear at a strategic level. Figure 99 demonstrates this for a range of uses. There is some indication that restaurants, cafes, cinemas and theatres tend to be under-represented in Strategic Areas for Regeneration for the smaller town centres (Majors and Districts), which may reflect lower amounts of disposable income in the catchment areas.

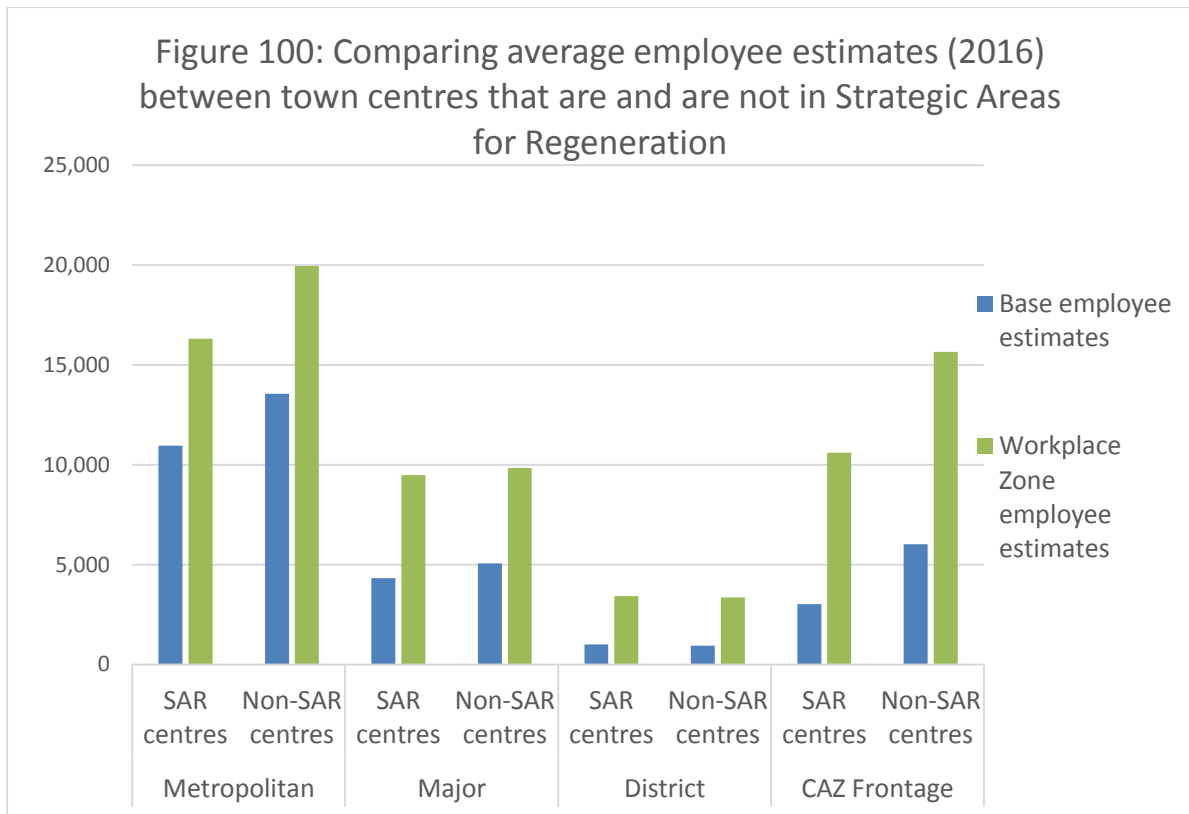


Source: Experian / GLA

13.5 Employment in Strategic Areas for Regeneration

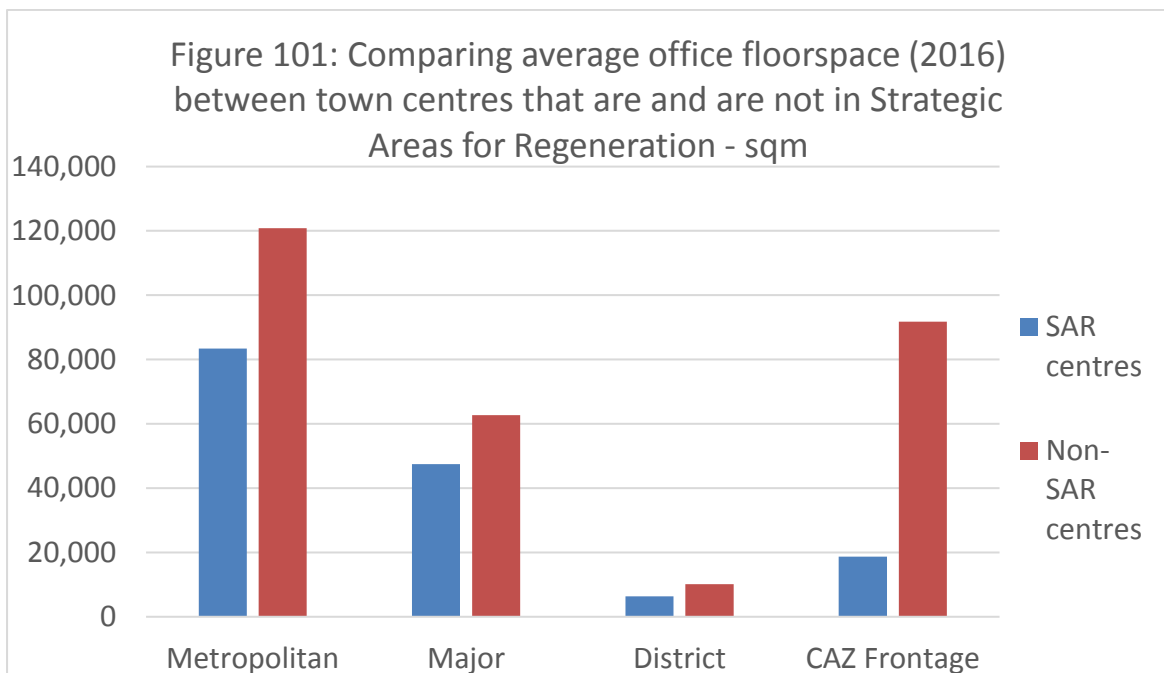
13.5.1 Strategic Areas for Regeneration also tend to have fewer employees working in the town centres across all classifications, most notably in Metropolitan centres (see Figure 100). For Major centres⁴⁰, there are slightly higher employment averages outside of Strategic Areas for Regeneration, and for District centres the figures are very similar. This suggests a need to support additional employment opportunities in town centres within Strategic Areas for Regeneration.

⁴⁰ Canary Wharf has been excluded from this analysis, as it has an uncharacteristically high quantity of employment floorspace, primarily in offices. Canary Wharf is not within a Strategic Area for Regeneration.



Source: Office for National Statistics / GLA

13.5.2 These employment trends are likely to reflect the amount of office floorspace, which also tends to be lower in Strategic Areas for Regeneration (see Figure 101) when both Croydon⁴¹ and Canary Wharf are excluded.

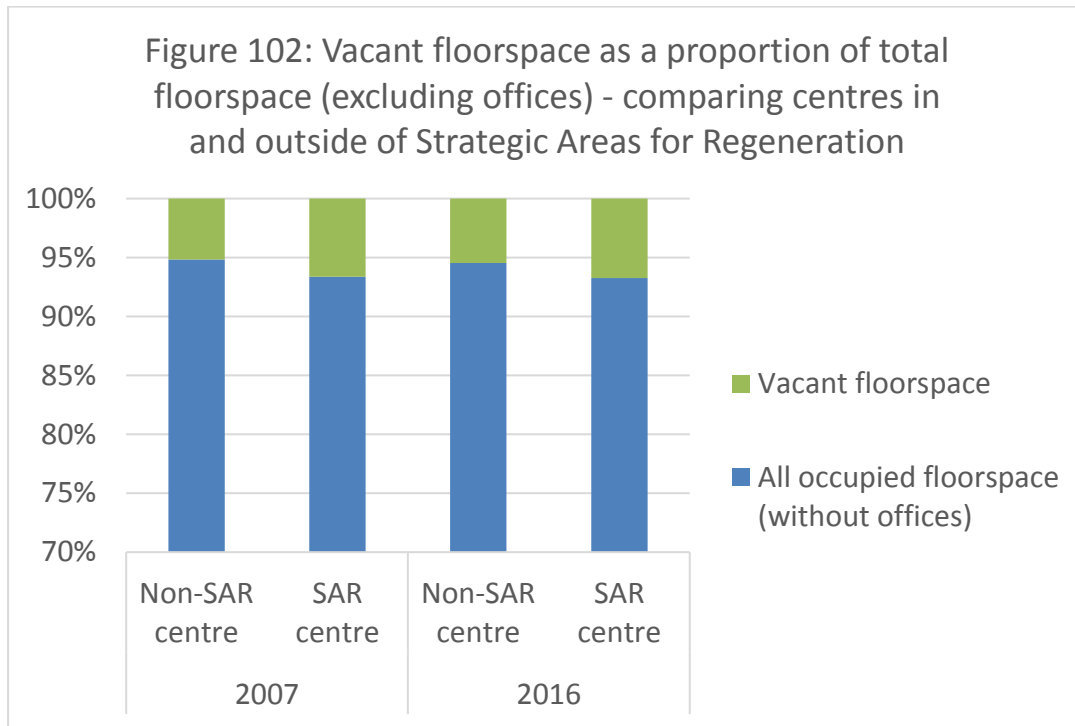


Source: GLA

⁴¹ Croydon is within a Strategic Area for Regeneration, and has much higher quantities of office floorspace than any other Metropolitan centre – just over 600,000sqm compared to Ealing – the next highest Metropolitan centre – which has 174,000sqm.

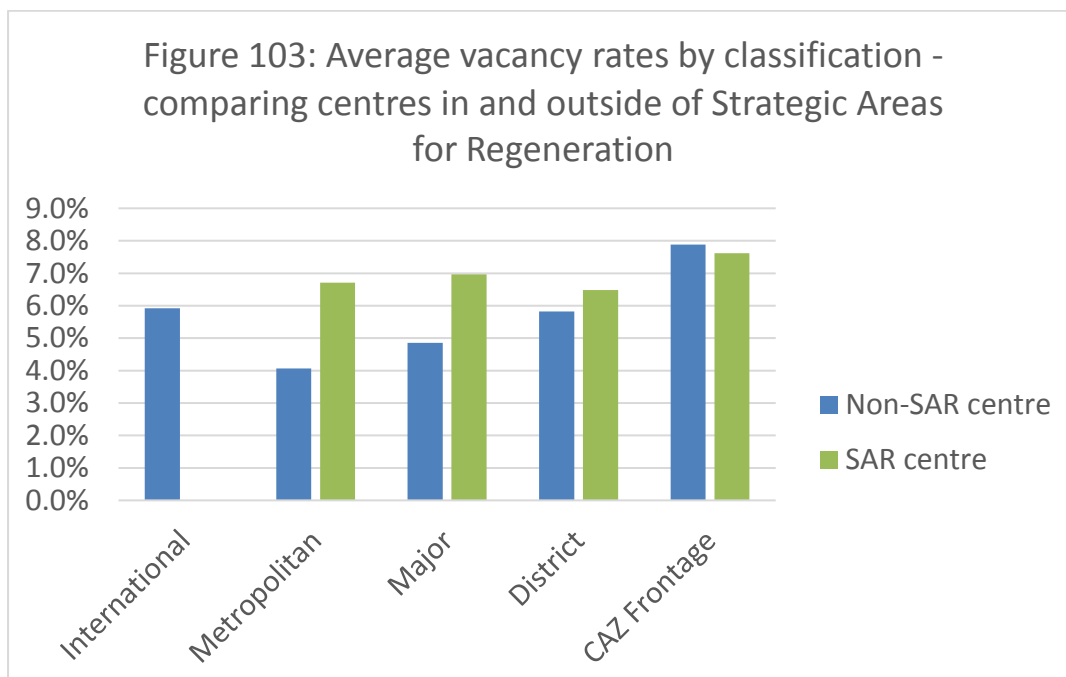
13.6 Vacancy rates in Strategic Areas for Regeneration

13.6.1 Centres in Strategic Areas for Regeneration tend to have higher total vacancy rates than other areas, as shown in Figure 102. This is a long-term issue; the proportions are similar for 2007 and 2016.



Source: Experian / GLA

13.6.2 The higher vacancy rates for centres in Strategic Areas for Regeneration is particularly noticeable in Major and Metropolitan centres, where on average town centres in Strategic Areas for Regeneration have vacancy rates over 2 per cent higher than centres elsewhere (Figure 103).



Source: Experian / GLA

14 TOWN CENTRE NETWORK REVIEW

- 14.1.1 This section of the report describes the processes undertaken in reviewing London's town centre network and the various town centre classifications and guidelines, informed by the data set out in the Town Centre Health Check, discussions with relevant stakeholders and input and analysis by GLA officers.
- 14.1.2 The starting point for this review is the town centre classifications of International, Metropolitan, Major, and District centres and CAZ Frontages as set out in the adopted London Plan. These are a recognised and clear set of classifications, and remain useful and relevant to planning for town centres in London.
- 14.1.3 The analysis of town centres has taken into account a variety of indicators, with thresholds set for each indicator. These thresholds use as their starting point the thresholds used in the previous Town Centre Health Check analysis. Where appropriate, the thresholds have been adjusted to reflect changes such as overall town centre growth and through an iterative process of refinements aiming toward an appropriate spread of town centres within each classification. Some indicators have been weighted, to reflect their importance in supporting the vibrancy and vitality of town centres.
- 14.1.4 Each town centre has been assessed against the thresholds for each indicator. Generally for each type of classification, the approach has been to score each town centres against how many of the relevant indicators for that classification it meets. Following this quantitative analysis, town centres have also been considered qualitatively, based on officer knowledge, input from boroughs, and information in Local Plans and supporting evidence.
- 14.1.5 Full details of the indicators and thresholds are set out in Appendix 2 of this report, and the data sources are given for each indicator in the technical appendix (Appendix 4). The outcomes of these assessments are set out in Appendix 3.

14.2 Town Centre Network Classifications

- 14.2.1 To inform the new London Plan, analysis of the Town Centre Health Check data sets for the 221 designated centres in the adopted London Plan has been carried out. In addition to these centres, this analysis has included the 9 unclassified centres⁴² that are identified in the adopted London Plan as potentially becoming an adopted centre. There has also been analysis of 19 further test centres. These are a variety of centres that were suggested by boroughs or GLA officers, and they broadly fit within one of four categories:
1. **Proposed additional centres**, either established Local centres or out-of-town retail parks, or new centres proposed as part of an opportunity area;
 2. **Proposed combined centres**, where these may be acting effectively as one centre at a higher order in the hierarchy;
 3. **Alternative centre boundaries**, for specific individual town centres;
 4. **Partial centres**, where there is a large enclosed shopping centre that has a significant impact on the wider centre's economy.

⁴² Including Brent Cross, classified in the adopted London Plan as a Regional Shopping Centre.

14.2.2 In addition, four potential centres⁴³ have been considered for classification as they are within opportunity areas. These have not been analysed in the same way as the above centres as they are proposed new centres and data was not available for them. Finally, four centres⁴⁴ have been considered for classification due primarily to their significant contribution to London's night time economy and culture.

14.2.3 The full list of centres assessed, their town centre network classification in the adopted London Plan, and the recommended outcomes of the assessment are set out in Appendix 3 of this report.

14.2.4 The indicators assessed to inform the town centre network classifications were:

- All occupied floorspace (sqm) without offices
- All occupied retail floorspace (sqm)
- All occupied comparison floorspace (sqm)
- Comparison goods retail as a per cent of total retail floorspace
- Convenience goods retail as a per cent of total retail floorspace
- All occupied leisure floorspace (sqm)
- Office floorspace (SqM) - total (B1a) stock at 31.03.2016
- Multiple retailers as a per cent of total retail floorspace (Multiple + Independent)
- Town centre base employee estimates (No.)
- Town centre Workplace Zone employee estimates (No.)
- Absolute 2016 Zone A Retail Rents (£/sqm)
- Rents Growth per cent rates 2009-16
- Public Transport Accessibility Level (PTAL)

14.3 Future Potential Network Changes

14.3.1 The 221 classified town centres in the adopted London Plan have all been assessed against the thresholds for the classification above their adopted classification, to see whether they are performing at a higher level in the town centre network. Town centres that are not performing strongly against their adopted classification have also been assessed individually against lower classifications.

14.3.2 In addition to the indicators above for the town centre network classifications, for four floorspace indicators, the pipeline in the London Development Database has been added to existing floorspace figures, to assess whether centres may soon be performing against higher town centre network classifications, if this pipeline is built out. These are:

- All occupied floorspace (sqm) without offices + LDD Pipeline
- All occupied retail floorspace (sqm) + LDD Pipeline
- All occupied leisure floorspace (sqm) + LDD Pipeline
- Office floorspace (SqM): total (B1a) stock at 31.03.2016 + LDD Pipeline

14.4 Growth Potential – Commercial

14.4.1 Commercial growth potential has taken into account the following indicators:

⁴³ Old Kent Road/East Street, Old Kent Road/Peckham Park Road, Gallions Reach, and Old Oak High Street

⁴⁴ Shoreditch, Farringdon, Barbican, and Southbank

- Pipeline (under construction/not started) floorspace (sqm) for all commercial (A, B, D and SG)
- Net comparison goods retail floorspace need (sqm) 2015-2041 (Pipeline Scenario)⁴⁵
- Indicative employment capacity – London Employment Sites Database⁴⁶
- Town centre transport infrastructure upgrade⁴⁷
- London Office Policy Review Office Guidelines⁴⁸

14.5 Growth Potential – Residential

14.5.1 Residential growth potential has taken account of a wide variety of indicators:

- Pipeline (under construction/not started) residential units (No.) for use class C3
- Future maximum Public Transport Accessibility Levels (PTAL) at 2031
- Vacant floorspace (sqm as per cent of total above 5 per cent residual vacancy rate)
- Per cent of non-residential buildings in town centre containing less than 4 storeys
- Per cent of the town centre (by area) within a Conservation Area
- Listed and Locally Listed buildings as a per cent of total buildings
- Per cent of the town centre (by area) within an Opportunity Area, emerging Opportunity Area or Intensification Area
- Town centre transport infrastructure upgrade
- Pipeline (under construction/not started) residential units (No.) for use class C3 (400m buffer)
- SHLAA phases 1 to 5 total housing units (No.) in town centre
- SHLAA phases 1 to 5 total housing units (No.) in 400m buffer

14.5.2 This gives a broad range of indicators, and factors in heritage issues alongside indicators of potential. There have also been discussions with Historic England to inform this work, and careful analysis of centres to allow for individual characteristics.

14.6 Night Time Economy Classifications

14.6.1 The night time economy classifications are based on a weighted analysis of the amount of floorspace of uses that predominantly contribute to the evening and night time economy and the cultural and entertainment activities that are central to this:

- Total leisure floorspace (sqm – occupied, excluding cafes)
- Total cinemas floorspace (sqm – occupied)
- Total theatres floorspace (sqm – occupied)
- Total restaurants floorspace (sqm – occupied)
- Total pubs and bars floorspace (sqm – occupied)
- Total nightclubs floorspace (sqm – occupied)
- Total hotel bedrooms (no.)

⁴⁵ As set out in Consumer Expenditure and Comparison Goods Floorspace Need in London, Experian 2017

⁴⁶ GLA Economics, London Employment Sites Database, GLA 2017

⁴⁷ Information on significant planned transport infrastructure upgrades affecting town centres was supplied by Transport for London

⁴⁸ Ramidus Consulting, London Office Policy Review, GLA 2017

- Total hot food takeaway floorspace (sqm – occupied)

14.6.2 This is a relatively narrow set of quantitative indicators, and experience of the night time economy and the relative draw of different centres at night is based on a wider variety of qualitative and experiential factors, such as the individual character of pubs or restaurants, or the quality of productions at theatres. People will often travel further for specific events or performances, compared to their willingness to travel to shop or access day-to-day services. Some centres also benefit from having an agglomeration of venues that cater for a particular use, such as music venues in Camden Town, or for a particular community, such as the LGBT+ venues in Soho and Vauxhall. These wider qualitative indicators have been taken into account and discussions with officers from the GLA’s Culture Team, the Night Czar and the chair of the Mayor’s Night Time Commission have also informed the night time economy classifications.

14.6.3 Centres with significant night time economy and culture have been classified as follows:

- NT1 – areas of international or national significance
- NT2 – areas of regional or sub-regional significance
- NT3 – areas with more than local significance

14.6.4 Many other centres across London will play an important local role in the night time economy.

14.7 Town Centre Office Guidelines

14.7.1 These have been taken directly from the London Office Policy Review 2017⁴⁹.

14.8 Town Centres within Areas for Regeneration

14.8.1 It is intended in the new London Plan to amend the Areas for Regeneration definition to those Lower Layer Super Output Areas (LSOA) that are in the bottom 20 per cent in the Indices of Multiple Deprivation (IMD) for England as a whole.

14.8.2 To simplify the regeneration classification for town centres in the new London Plan, and to align more closely with the Mayor’s priorities for tackling inequality and the causes of deprivation, this classification is now based only on whether the town centre is partly or wholly within a Strategic Area for Regeneration (according to the new London Plan definition).

⁴⁹ Ramidus Consulting, London Office Policy Review, GLA 2017

15 CONCLUSIONS AND RECOMMENDATIONS

15.1 Town Centre Network

15.1.1 Overall, London's town centre network is performing consistently in comparison to previous years. The hierarchy of classifications continues to reflect the reality of town centres in London, with the most dramatic changes seen in the growth of Shepherds Bush and Stratford as new retail and other commercial development has transformed these centres into Metropolitan centres of significant scale and draw. The West End has maintained a clear position as London's largest centre, providing access to a wide range of comparison retail, mixed with many other commercial uses. This is complemented by Knightsbridge, which is dominated by comparison retail floorspace and, due to the qualitative aspects of goods and services available, retains its international draw. Canary Wharf continues its growth at significant pace, with further development under construction and planned to come forward. By the time of adoption of the new London Plan, it will effectively be operating as a Metropolitan centre, albeit one with different characteristics to other Metropolitan centres due to the high concentration of office floorspace in the northern Isle of Dogs.

15.1.2 Town centres are enduring – many of London's town centres have been commercial centres throughout London's history, and have played similar roles and functions over time. Town centre development is often incremental rather than transformational, due to multiple land and premises ownerships and individual business needs. Consistency in the classification and long-term planning for the town centre network therefore helps to give certainty to investors and reflects the enduring nature of town centres.

Recommendation 1: The overall approach to classifying London's town centre network set out in previous iterations of the London Plan should be retained in the new London Plan.

15.1.3 Retail development in the CAZ (outside the International centres) tends to serve a variety of functions. For some centres there is an emphasis on convenience retail and services for people working in the area as well as those living in and around the CAZ. Other CAZ centres have more comparison goods floorspace, or feature covered or street markets. Some retail areas in the CAZ cover a broad area rather than linear frontages. The classification of 'CAZ Frontages' that has been used in previous iterations of the London Plan doesn't fully reflect the diverse character of retail-led centres in the CAZ.

Recommendation 2: Rename the 'CAZ Frontages' classification to 'CAZ Retail Clusters' in the new London Plan.

15.2 Reclassifications

15.2.1 Recommended new centres and reclassifications are set out in Table 3 below.

Table 3: Recommended reclassifications of town centres

| Centre | Current classification (adopted London Plan) | Recommended classification |
|----------------------------|-----------------------------------------------------|-------------------------------------------|
| Canary Wharf | Major | Metropolitan |
| Elephant and Castle | District | Major (combined with Walworth Road) |
| Walworth Road | District | Major (combined with Elephant and Castle) |
| New Cross | District | District (combined with New Cross Gate) |
| Southfields | Unclassified | District |
| Shoreditch | Unclassified | CAZ Retail Cluster |
| Farringdon | Unclassified | CAZ Retail Cluster |

15.2.2 **Canary Wharf** has shown significant growth in total floorspace (excluding offices) which has increased from around 68,000 sqm in 2007 to around 105,000 sqm in 2016, making it the largest Major centre. In addition to this, the centre has over 37,000 sqm of additional retail floorspace in the pipeline, and further permissions for a substantial amount of other (non-office) commercial uses, much of which is under construction. The centre will see significant improvements to public transport connectivity with the opening of the Elizabeth Line, and has strong retail rents and retail rent growth. Canary Wharf's unique position as a centre of office-based businesses also provides substantial commercial activity.

Recommendation 3: Reclassify Canary Wharf as a Metropolitan centre in the new London Plan.

15.2.3 **Elephant and Castle** and **Walworth Road** are adjacent District centres, which have historically performed separately due to the spatial separation of the railway line. The local authority considers them to constitute one centre, and the on-going redevelopment of the former Heygate estate into Elephant Park and wider improvements to the public realm will see changes to the permeability of the area and support the approach of the local authority. When combined as one centre, most of the indicators for Elephant and Castle/Walworth Road perform within the thresholds for a Major centre.

Recommendation 4: Reclassify Elephant and Castle/Walworth Road as a single Major centre in the new London Plan.

15.2.4 **New Cross** is a District centre in the adopted London Plan, and has a Local centre – **New Cross Gate** – adjacent to it. These two centres perform spatially as a single linear centre, and the local authority have consistently promoted the combination of these centres to be classified and planned for as one larger centre. There is significant planned residential and commercial growth for the area, and the potential for a new Underground station to serve the proposed Bakerloo Line Extension in the area. When considered against the indicators for town centre classifications, the combined centre remains within the range for a District centre.

Recommendation 5: Reclassify New Cross/New Cross Gate as a single District centre in the new London Plan.

15.2.5 **Southfields** in the borough of Wandsworth is unclassified in the adopted London Plan. When assessed against the indicators for town centre classifications, Southfields performs within the thresholds for a District centre. Unlike many other potential centres in the adopted London Plan, Southfields has the spatial characteristics of a town centre, with a mix of unit sizes, integrated into its surrounding neighbourhood, and a mix of convenience and comparison retail as well as other uses. It is well connected with bus routes and served by the District Line.

Recommendation 6: Classify Southfields as a District centre in the new London Plan.

15.2.6 **Shoreditch** and **Farringdon** both contain particular concentrations of commercial activity, over a wide range of uses including employment space (primarily offices), retail, restaurants and pubs and other uses. Shoreditch is particularly known for its nightlife, with numerous bars and nightclubs serving the area. While their diversity of uses is important, it is also useful to recognise the retail aspects of these areas in serving local businesses and residents. It is therefore recommended to designate them as CAZ Retail Clusters.

Recommendation 7: Classify Shoreditch and Farringdon as CAZ Retail Clusters in the new London Plan.

15.3 Future Potential Network Classifications

15.3.1 Table 4 shows the centres with a future potential classification in the adopted London Plan.

Table 4: Recommended future potential classifications of town centres

| Centre | Future potential classification, adopted London Plan | Recommended future potential classification | Recommended classification |
|------------------------|-------------------------------------------------------------|----------------------------------------------------|-----------------------------------|
| Shepherds Bush | International | International | Metropolitan |
| Stratford | International | International | Metropolitan |
| Canary Wharf | Metropolitan | | Metropolitan |
| Woolwich | Metropolitan | Metropolitan | Major |
| Brent Cross | Metropolitan | Metropolitan | |
| Canada Water | Major | Major | District |
| North Greenwich | District | District | |
| Tottenham Hale | District | District | |
| Colliers Wood | District | District | |
| Hackbridge | District | District | |
| Bromley-by-Bow | District | District | |
| Crossharbour | District | District | |
| Vauxhall | CAZ Frontage | CAZ retail cluster | |
| Battersea | CAZ Frontage | CAZ retail cluster | |

15.3.2 Other than Canary Wharf, as discussed above, it is not recommended to reclassify any of the centres that have a future potential classification in the adopted London Plan. These centres have been assessed against the relevant thresholds, and their spatial character has been considered.

15.3.3 **Shepherds Bush** and **Stratford** have seen significant growth in recent years, making them two of the larger Metropolitan centres. However, they remain similar in overall size to other large Metropolitan centres, and both centres may have capacity for significant additional future development (subject to impact and demand). This suggests that neither centre has made a further step change that warrants reclassification now as an International centre. There remains the possibility of this step change, given their strong connectivity and the projected demand for these centres that is forecast by Experian’s Consumer Expenditure and Comparison Goods Floorspace Need study, and it is therefore appropriate to retain the future potential classification of both as International centres.

15.3.4 **Woolwich** has seen significant amounts of housing and other development in recent years, particularly along the riverfront as part of the redevelopment of the former Royal Arsenal site. This has yet to be completed, and the eventual role of the centre may therefore shift, depending on demand and impact on other centres. Given the scale of development planned and underway, it is appropriate to retain the future potential classification of Woolwich as a Metropolitan centre. However, the data in this town centre health check shows significant losses of commercial floorspace in the centre. This may be related to redevelopment, with the data not accounting properly for sites that are under construction.

Recommendation 8: Further investigation at borough level should be undertaken into the amount of commercial floorspace in Woolwich and the apparent losses in recent years, and the classification as a

future potential Metropolitan centre should be reviewed in future iterations of local and strategic evidence.

15.3.5 **Brent Cross** is a large out-of-centre retail park, adjacent to the North Circular. It is the largest concentration of retail and other commercial uses in London outside of the CAZ and the classified town centres. It is identified as a Regional Shopping Centre in the adopted London Plan. Given its size, Brent Cross has significant retail draw, comparable to that of a Metropolitan centre, however its current spatial form and over-reliance on travel by car prevents Brent Cross from fulfilling its potential role in the town centre network.

15.3.6 There is outline planning permission for a master-planned approach to redeveloping the Brent Cross and Cricklewood area, including an extended shopping centre, a new high street unlocking land for offices, homes, commercial development and community facilities, new and improved parks, a new Thameslink station, and other infrastructure to improve transport connectivity and encourage trips by walking and cycling.

Recommendation 9: Retain the classification of Brent Cross as a future potential Metropolitan centre in the new London Plan.

15.3.7 **Canada Water** is a designated District centre in the adopted London Plan, with a future potential classification as a Major centre. The area is undergoing substantial redevelopment, with significant amounts of further development planned. Canada Water is toward the larger end of District centres in total floorspace, and performs particularly strongly in the amount of retail floorspace, although almost all Major centres have more retail floorspace than Canada Water. The town centre has potential for significant spatial improvements, including enabling more integration of the main shopping centre and leisure park with the surrounding area, as well as greater diversity in the types and sizes of commercial units. The centre has the potential to operate as a Major centre, with substantial capacity for development, but until this comes forward it remains appropriate to retain the current designation as a District centre.

Recommendation 10: Retain the current classification of Canada Water as a District centre, and the future potential classification of Canada Water as a Major centre in the new London Plan. Review these classifications further in collaboration with the local authority as plans for the area progress and development comes forward.

15.3.8 **North Greenwich** is dominated by the O2 indoor arena (formerly the Millennium Dome), which contains a mixture of primarily leisure and entertainment uses, including restaurants, bars, nightclubs and a major music venue. The wider area of Greenwich Peninsula is undergoing major redevelopment, with substantial further schemes planned that will significantly alter the amount of commercial and leisure uses in the area, as well as residential development. Given the current focus of the centre on leisure and

entertainment uses rather than retail, and the spatial improvements to the area that are still planned, it is appropriate to retain the future potential classification as a District centre but not to reclassify the centre at this time.

Recommendation 11: Retain the classification of North Greenwich as a future potential District centre in the new London Plan.

15.3.9 **Tottenham Hale, Colliers Wood, Hackbridge, Bromley-by-Bow and Crossharbour** are all identified as future potential District centres in the adopted London Plan. None of these centres have seen significant redevelopment in recent years, but retain the potential to become District centres, subject to appropriate demand and impact assessment and significant improvements to the spatial characteristics of the area (see section 15.5 below).

Recommendation 12: Retain the classification of Tottenham Hale, Colliers Wood, Hackbridge, Bromley-by-Bow and Crossharbour as future potential District centres in the new London Plan.

15.3.10 **Vauxhall** and **Battersea** are identified in the adopted London Plan as future potential CAZ Frontages. Both areas have seen substantial development in recent years as part of the Vauxhall Nine Elms Battersea Opportunity Area, with further development planned. Given this pending development, it is not appropriate to classify either area as a CAZ Retail Cluster in the new London Plan, but both should retain their classification as a future potential CAZ Retail Cluster.

Recommendation 13: Classify Vauxhall and Battersea as future potential CAZ Retail Cluster in the new London Plan.

Table 5: Recommended additional future potential classifications

| Centre | Recommended future potential classification |
|----------------------------------------|----------------------------------------------------|
| Camden Town | Metropolitan |
| Lewisham | Metropolitan |
| Old Oak High Street | Major |
| Gallions Reach | Major |
| Barking Riverside | District |
| Merrilands Crescent | District |
| Old Kent Road/East Street | District |
| Old Kent Road/Peckham Park Road | District |

15.3.11 In addition to those centres discussed above, **Camden Town** and **Lewisham** are performing strongly as Major centres against the thresholds for the various indicators. Lewisham has been a focus for significant additional development, primarily residential-led, and should see further improvements to connectivity with the planned Bakerloo Line extension. The local authority are forecasting demand for significant additional retail in Camden Town, and its vibrant mix of markets, venues, restaurants and pubs give the centre an advantage that may stimulate further growth.

Recommendation 14: Classify Camden Town and Lewisham as future potential Metropolitan centres in the new London Plan.

15.3.12 **Old Oak High Street** is a planned new thoroughfare for the Old Oak area, linking Willesden Junction Station, Old Oak Common Station and Wormwood Scrubs, set out in the Old Oak and Park Royal Opportunity Area Planning Framework (OAPF). The Old Oak and Park Royal OA has potential for around 25,500 additional homes and 65,000 additional jobs, and the proposed centre at Old Oak High Street may be able to accommodate significant amounts of both. The revised draft ODPC Local Plan sets out a vision for Old Oak High Street as a major new town centre, with the wider Old Oak South area becoming a mix of high density residential, employment, cultural and community uses. The area is close to Shepherds Bush and will have very good connections to central London, so the scale of the proposed centre and the type and mix of uses planned for will need to consider the likely demand for commercial uses in this location. The impact on the wider town centre network will also need to be considered, in particular on Harlesden to the north and Acton to the south west.

Recommendation 15: Classify Old Oak High Street as a future potential Major centre in the new London Plan.

15.3.13 **Gallions Reach** is a large shopping park in the borough of Newham, surrounded by large infrastructure sites. It lies within the Royal Docks Opportunity Area, and subject to demand and impact assessments, and a clear strategy for development of the town centre, has the potential to become a Major centre, serving existing and new communities.

Recommendation 16: Classify Gallions Reach as a future potential Major centre in the new London Plan.

15.3.14 As part of the London Riverside Opportunity Area, there may be potential for two future District centres, at **Barking Riverside** and **Merrielands Crescent**. The same is the case for the **Old Kent Road** Opportunity Area, which may also have potential for two new District centres. In each case, these should be subject to appropriate demand and impact assessments, and a clear strategy developed alongside the opportunity area

projects for how these town centres will develop and become an integral part of the wider area.

Recommendation 17: Classify Barking Riverside, Merriellands Crescent, Old Kent Road/East Street and Old Kent Road/Peckham Park Road as future potential District centres.

Recommendation 18: These additional future potential centres should be included in all future strategic London town centre health checks.

15.4 Night Time Economy Classifications

15.4.1 London's night time economy is intertwined with cultural activity, and the most significant cultural draws are often due to the qualitative nature of the cultural experience. Justification for classifying certain centres in the highest category (NT1 – areas of international or national significance) has therefore been set out below.

15.4.2 Particularly in central London areas, the night time economy does not always follow the same spatial pattern as other commercial activity. Some centres have significantly greater evening and night time activity than daytime commercial and cultural activity, and in particular parts of central London that are renowned for their night time and cultural role there is very little retail activity during the day. This is particularly the case for the Barbican and the Southbank, which are home to two of London's largest visual and performing arts centres, both of which programme performance and present art of the highest international calibre. Neither of these areas have significant amounts of retail or other commercial activity in the immediate vicinity, and are not therefore appropriate to be classified as part of the main town centre network.

Recommendation 19: Classify Barbican and Southbank as NT1 (areas of international or national significance), but exclude from the main town centre network.

15.4.3 Wembley and North Greenwich are home to two of the largest performing arts venues in London, which regularly host international performing artists and draw audiences from across London and beyond. The Royal Albert Hall plays a similar role and is located close to South Kensington, as are numerous museums of national importance, which play an important role in cultural experiences and education.

15.4.4 The West End, Covent Garden/Strand, and Tottenham Court Road together are home to a unique concentration of theatres – indeed, 'the West End' is synonymous with the London stage. These areas also contain a substantial number of restaurants, bars, night clubs, and other venues.

15.4.5 Camden Town is a hub for live music, with a wide variety of performance spaces, from small pubs and bars to purpose-built music venues. These spaces host well-known bands,

but also provide important venues for performers in the early stages of their career, or those operating in more experimental and niche genres. This music scene is complemented by night clubs and restaurants.

15.4.6 Shoreditch has emerged in recent years as an important location for London's nightlife, with a wide variety of bars, nightclubs, hotels, restaurants and other night time and cultural uses.

15.4.7 Bankside and The Borough is an important cultural location, with Shakespeare's Globe theatre and Tate Modern playing important roles in the cultural life of Londoners and attracting visitors from overseas. These are complemented by other venues such as the Menier Chocolate Factory as well as restaurants and pubs.

Recommendation 20: Classify Wembley, North Greenwich, South Kensington, the West End, Covent Garden/Strand, Tottenham Court Road (part), Camden Town, Shoreditch, and Bankside and The Borough as NT1 (areas of international or national significance).

15.5 Approach to (re)classifying town centres

15.5.1 A number of potential town centres that have been assessed for classification as a town centre, or re-classification at a different level in the town centre hierarchy, meet some of the thresholds of the main indicators, but have the form of out-of-centre retail parks. Generally, these areas are dominated by large format stores with substantial surface car parking, are overly-reliant on travel by private car, and focus on a limited range of uses. For such areas to be considered for classification as a town centre, it is important that a clear strategy is implemented that secures:

- A broader mix of store sizes and formats;
- A variety of town centre uses including retail, leisure, culture, employment, night time economy uses, and social infrastructure and civic functions;
- Reduction in reliance on car travel;
- Creation of attractive and welcoming places;
- Walking, cycling and the use of public transport;
- Integration into the surrounding area.

15.5.2 Designation as a town centre should also be subject to demand, capacity and impact. The strategy for developing the town centre should inform the development of a strategy for the management of the town centre as it emerges and continues to grow. A diagrammatical depiction of the different typical characteristics of town centres within each classification would assist in communicating the expected roles of different centres.

Recommendation 21: This approach to planning for future potential town centres should be specified in the new London Plan, along with a requirement for a strategy setting out how the new town centre would fulfil its potential.

Recommendation 22: Future Health Checks should investigate including measures that reflect the criteria above.

Recommendation 23: A town centre infographic diagram, setting out the typical characteristics of different town centre classifications, should be produced for the new London Plan.

15.6 Policy Recommendations

15.6.1 A number of boroughs have put in place town centre strategies, often working with Business Improvement Districts, town centre managers and other stakeholders. However, many town centres – around 78 per cent – in London do not have a strategy.

Recommendation 24: Set out a policy requirement in the new London Plan for each town centre to have a strategy, produced in partnership with local stakeholders.

15.6.2 The loss of pubs across London in recent years has been dramatic, and this has been reflected in the loss of pubs in London's town centres. Pubs in town centres play an important role in offering a diverse mix of uses as well as a place for people to socialise, relax and be entertained, which the loss of pubs undermines.

Recommendation 25: There should be a policy protecting pubs in the new London Plan.

15.6.3 The proportion of comparison retail floorspace has generally been decreasing across different classifications of town centre, and is becoming a less significant part of the role of many town centres. Outer London District centres in particular have seen significant loss of comparison retail floorspace in recent years. A range of indicators have been used to inform the town centre commercial growth potential classifications set out in Appendix 1, which should inform the policy approach for individual centres set out in Local Plans.

Recommendation 26: Local Plans should set proportionate policies with regards to the protection of shopping frontages and should set appropriate town centre boundaries, in order to promote a diverse range of uses in their town centres and support their vitality and vibrancy. Local Plan policy should have regard to

the commercial growth potential classifications in the new London Plan.

15.6.4 Town centres in Strategic Areas for Regeneration show patterns of having less employment opportunities, and greater concentrations of particular uses including hot food takeaways, charity shops, pay-day loan shops, betting shops and bingo and amusement premises.

Recommendation 27: In Local Plans, OAPFs and town centre strategies, local authorities and other stakeholders should consider how these town centres could provide greater access to employment opportunities, and how over-concentration of specific uses should be managed in order to mitigate impacts on public health and improve the vitality and vibrancy of the town centre.

15.6.5 Some town centres have seen significant loss of offices through change of use secured via permitted development, and there is the potential for further dramatic loss of office floorspace in many centres.

Recommendation 28: Boroughs should consult upon and introduce Article 4 Directions to ensure that the CAZ, Northern Isle of Dogs, Tech City, the Royal Docks Enterprise Zones, Kensington & Chelsea and geographically-defined parts of other existing and viable strategic and local office clusters (including town centres) are not undermined by office to residential permitted development rights. Boroughs should also ensure that the need to retain sufficient industrial and logistics capacity in town centres is not undermined by permitted development rights by introducing Article 4 Directions where appropriate.

15.7 Future Research

15.7.1 There is a large disparity between the average number of parking spaces in Metropolitan town centres compared with Major and International centres. This is based on relatively limited data.

Recommendation 29: Further research should be undertaken to see whether Metropolitan town centres are over-providing car parking and encouraging over-reliance on private car travel, compared to other town centres. This should be informed by more comprehensive data.

15.7.2 There are particularly high vacancy rates in some CAZ Frontages, and in some cases the data does not appear to reflect the actual situation on-the-ground.

Recommendation 30: Further research should be undertaken into the accuracy of the vacancy data relating to specific CAZ Frontages.

APPENDIX 1 – TOWN CENTRE NETWORK REVIEW INDICATORS

Table A1 – Town Centre Network Review Indicators

| Classification type | Indicator | Notes | PPG Indicators* |
|------------------------------------------------|--------------------------------------------------------------------------------------|------------------------|-----------------|
| Town Centre Network Classification | All occupied floorspace (Sqm) without offices | | a |
| | All occupied retail floorspace (Sqm) | | a |
| | All occupied comparison floorspace (Sqm) | | a |
| | Comparison goods retail as a per cent of total retail floorspace | | a |
| | Convenience goods retail as a per cent of total retail floorspace | | a |
| | All occupied leisure floorspace (Sqm) | | a |
| | Office floorspace (Sqm) - total (B1a) stock at 31.03.2016 | | a |
| | Multiple retailers as a per cent of total retail floorspace (Multiple + Independent) | | a |
| | Town centre base employee estimates (No.) | | |
| | Town centre Workplace Zone employee estimates (No.) | | |
| | Absolute 2016 Zone A Retail Rents (£/Sqm) | Data set not published | f |
| | Rents Growth per cent rates 2009-16 | | f |
| | Public Transport Accessibility Level (PTAL) | | h |
| Future Potential Network Classification | All occupied floorspace (sqm) without offices + LDD Pipeline | | |
| | All occupied retail floorspace (sqm) + LDD Pipeline | | |
| | All occupied leisure floorspace (sqm) + LDD Pipeline | | |
| | Office floorspace (SqM): total (B1a) stock at 31.03.2016 + LDD Pipeline | | |

| Classification type | Indicator | Notes | PPG Indicators* |
|------------------------------------|------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|------------------------|
| Night Time Economy | Total leisure floorspace (sqm – occupied, excluding cafes) | | a |
| | Total cinemas floorspace (sqm – occupied) | Given additional weight to reflect importance to night time economy and culture | a |
| | Total theatres floorspace (sqm – occupied) | Given additional weight to reflect importance to night time economy and culture | a |
| | Total restaurants floorspace (sqm – occupied) | Given additional weight to reflect importance to night time economy and culture | a |
| | Total pubs and bars floorspace (sqm – occupied) | Given additional weight to reflect importance to night time economy and culture | a |
| | Total nightclubs floorspace (sqm – occupied) | Given additional weight to reflect importance to night time economy and culture | a |
| | Total hotel bedrooms (no.) | | a |
| | Total hot food takeaway floorspace (sqm – occupied) | | a |
| Commercial Growth Potential | Pipeline (under construction/not started) floorspace (sqm) for all commercial (A, B, D and SG) | | |
| | Net comparison goods retail floorspace need (sqm) 2015-2041 (Pipeline Scenario) | Data set published separately. See: Experian, Consumer Expenditure and Comparison Goods Floorspace Need, GLA 2017 | |
| | Indicative employment capacity – London Employment Sites Database, GLA 2016 | Data set not published | |

| Classification type | Indicator | Notes | PPG Indicators* |
|--------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|------------------------|
| | Town centre transport infrastructure upgrade | Data set not published | h |
| | London Office Policy Review Office Guidelines | Data set published separately. See: Ramidus Consulting, London Office Policy Review, GLA 2017 | |
| Residential Growth Potential | Pipeline (under construction/not started) residential units (No.) for use class C3 | | |
| | Future maximum Public Transport Accessibility Levels (PTAL) at 2031 | | h |
| | Vacant floorspace (sqm as per cent of total above 5 per cent residual vacancy rate) | | B |
| | Per cent of non-residential buildings in town centre containing less than 4 storeys | Data set not published | |
| | Per cent of the town centre (by area) within a Conservation Area | | j |
| | Listed and Locally Listed buildings as a per cent of total buildings | | j |
| | Per cent of the town centre (by area) within an Opportunity Area, emerging Opportunity Area or Intensification Area | Data set not published | |
| | Town centre transport infrastructure upgrade | Data set not published | h |
| | Pipeline (under construction/not started) residential units (No.) for use class C3 (400m buffer) | | |
| | SHLAA phases 1 to 5 total housing units (No.) in town centre | Data set not published | |
| SHLAA phases 1 to 5 total housing units (No.) in 400m buffer | Data set not published | | |

*Planning Practice Guidance Indicators:

- a) Diversity of uses
- b) Proportion of vacant street level property
- c) Commercial yields on non-domestic property
- d) Customers' views and behaviour
- e) Retailer representation and intentions to change
- f) Commercial rents
- g) Pedestrian flows
- h) Accessibility
- i) Perception of safety and occurrence of crime
- j) State of town centre environmental quality

APPENDIX 2 – TOWN CENTRE CLASSIFICATION THRESHOLDS

Table A2 – Town centre network and future potential network classification thresholds

| | International | | Metropolitan | | Major | | District | | CAZ | |
|----------------------------------------------------------------------|---------------|-----------|--------------|---------|---------|--------|----------|-------|---------|--------|
| | Upper | Lower | Upper | Lower | Upper | Lower | Upper | Lower | Upper | Lower |
| All occupied floorspace (sqm) without offices | | 240,000 | | 100,000 | 100,000 | 50,000 | 50,000 | 5,000 | 100,000 | 5,000 |
| All occupied retail floorspace (sqm) | | 200,000 | | 65,000 | 65,000 | 25,000 | 25,000 | 2,500 | 65,000 | 2,500 |
| All occupied comparison floorspace (sqm) | | 180,000 | | 50,000 | 50,000 | 15,000 | 15,000 | 1,000 | 50,000 | 1,000 |
| Comparison goods retail as a per cent of total retail floorspace | 100 | 90 | 100 | 75 | 75 | 50 | 65 | 15 | 100 | 15 |
| Convenience goods retail as a per cent of total retail floorspace | 0 | 10 | 5 | 25 | 15 | 45 | 20 | 75 | 0 | 60 |
| All occupied leisure floorspace (sqm) | | 100,000 | | 25,000 | | 10,000 | | 1,000 | | 2,500 |
| Office floorspace (sqm) - total (B1a) stock at 31.03.2016 | | 1,000,000 | | 65,000 | | 30,000 | | 500 | | 30,000 |
| Multiples as a per cent of total floorspace (Multiple + Independent) | 90 | 50 | 80 | 50 | 80 | 30 | 80 | 5 | 80 | 25 |
| Town centre base employee estimates (no.) | | 9,000 | | 5,000 | | 1,500 | | 100 | | 500 |
| Town centre Workplace Zone employee estimates (no.) | | 20,000 | | 10,000 | | 4,500 | | 700 | | 4,000 |
| Absolute 2016 Zone A Retail Rents (£/sqm) | | 5,000 | | 1,500 | | 1,000 | | 500 | | 1,500 |
| Rents Growth per cent rates 2009-16 | | 50 | | 5 | | 5 | | 5 | | 5 |
| Public Transport Accessibility Level (PTAL) | 6b | 6a | 6b | 6a | 6b | 5 | 6b | 3 | 6b | 6a |

Table A3 – Commercial growth potential classification thresholds

| | High | Medium | Low |
|------------------------------------------------------------------------------------------------|----------------------------|---------------|---------------------|
| Pipeline (under construction/not started) floorspace (sqm) for ALL commercial (A, B, D and SG) | 5,000 and above | 0 - 4,999 | Less than 0 |
| Net Comparison Goods Retail Floorspace (sqm) Need 2015-2041 (Pipeline Scenario) | 10,000 and above | 1,000 - 9,999 | Less than 1,000 |
| Indicative employment capacity – London Employment Sites Database | 500 and above | 100 - 499 | Less than 100 |
| London Office Policy Review Office Guidelines | A, A/B, CAZ, CAZ Satellite | B | Protect small units |
| Town centre transport infrastructure upgrade | Yes | | |

Table A4 – Residential growth potential classification thresholds

| | High | Medium | Incremental |
|---------------------------------------------------------------------------------------------------------------------|-------------|---------------|--------------------|
| Pipeline (under construction/not started) residential units (no.) for use class C3 | 500 or more | 50 - 499 | Less than 50 |
| Future Maximum Public Transport Accessibility Levels (PTAL) at 2031 | 4 or higher | 2 or 3 | Less than 2 |
| Per cent of vacant floorspace | 10 or more | 5 - 9.9 | Less than 5 |
| Per cent of non-residential buildings in town centre containing less than 4 storeys | 50 or more | 10 - 49 | Less than 10 |
| Per cent of the Town Centre (by area) within a Conservation Area | 50 or less | 51 - 80 | More than 80 |
| Listed and Locally Listed buildings as a per cent of total buildings | 10 or less | 11 - 25 | More than 25 |
| Per cent of the Town Centre (by area) within an Opportunity Area, Emerging Opportunity Area or Intensification Area | 25 or more | Less than 25 | N/A |

| | High | Medium | Incremental |
|--------------------------------------------------------------------------------------------------|-------------|---------------|--------------------|
| Town centre transport infrastructure upgrade | Yes | | |
| Pipeline (under construction/not started) residential units (no.) for use class C3 (400m buffer) | 500 or more | 50 - 499 | Less than 50 |
| SHLAA phases 1 to 5 total housing units (No.) in town centre | 500 or more | 50 - 499 | Less than 50 |
| SHLAA phases 1 to 5 total housing units (No.) in 400m buffer | 500 or more | 50 - 499 | Less than 50 |

Table A5 – Night time economy classification thresholds

| | International (NT1) | Regional (NT2) | More than local (NT3) |
|------------------------------------|----------------------------|-----------------------|------------------------------|
| Total Leisure floorspace (sqm) | 100,000 or more | 14,000 - 99,999 | 3,000 - 13,999 |
| Cinema floorspace (sqm) | 8,000 or more | 1,500 - 7,999 | 500 - 1,499 |
| Theatre floorspace (sqm) | 10,000 or more | 1,500 - 9,999 | 0 - 1,499 |
| Restaurant floorspace (sqm) | 50,000 or more | 3,500 - 49,999 | 1,000 - 3,499 |
| Pubs and bars floorspace (sqm) | 10,000 or more | 2,500 - 9,999 | 1,000 - 2,499 |
| Night clubs floorspace (sqm) | 1,500 or more | 1,000 - 1,499 | 100 - 999 |
| Hotel Bedrooms (no.) | 2,500 or more | 400 - 2,499 | 100 - 399 |
| Hot food takeaway floorspace (sqm) | 10,000 or more | 2,500 - 9,999 | 1,000 - 2,499 |

APPENDIX 3 – RECOMMENDED CLASSIFICATIONS FOR LONDON CENTRES IN THE NEW LONDON PLAN

See accompanying spreadsheet: *London Town Centre Health Check 2017 Appendix 3 - recommended classifications.xls*

APPENDIX 4 – TECHNICAL APPENDIX

See accompanying spreadsheet: *2017 London Town Centre Health Check Analysis Report Appendix 4 - technical appendix.xls*

Available on the GLA London Datastore: <https://data.london.gov.uk/>

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Chinese

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Vietnamese

Nếu bạn muốn có văn bản tài liệu này bằng ngôn ngữ của mình, hãy liên hệ theo số điện thoại hoặc địa chỉ dưới đây.

Greek

Αν θέλετε να αποκτήσετε αντίγραφο του παρόντος εγγράφου στη δική σας γλώσσα, παρακαλείστε να επικοινωνήσετε τηλεφωνικά στον αριθμό αυτό ή ταχυδρομικά στην παρακάτω διεύθυνση.

Turkish

Bu belgenin kendi dilinizde hazırlanmış bir nüshasını edinmek için, lütfen aşağıdaki telefon numarasını arayınız veya adrese başvurunuz.

Punjabi

ਜੇ ਤੁਹਾਨੂੰ ਇਸ ਦਸਤਾਵੇਜ਼ ਦੀ ਕਾਪੀ ਤੁਹਾਡੀ ਆਪਣੀ ਭਾਸ਼ਾ ਵਿਚ ਚਾਹੀਦੀ ਹੈ, ਤਾਂ ਹੇਠ ਲਿਖੇ ਨੰਬਰ 'ਤੇ ਫ਼ੋਨ ਕਰੋ ਜਾਂ ਹੇਠ ਲਿਖੇ ਪਤੇ 'ਤੇ ਰਾਬਤਾ ਕਰੋ:

Hindi

यदि आप इस दस्तावेज की प्रति अपनी भाषा में चाहते हैं, तो कृपया निम्नलिखित नंबर पर फोन करें अथवा नीचे दिये गये पते पर संपर्क करें

Bengali

আপনি যদি আপনার ভাষায় এই দলিলের প্রতিলিপি (কপি) চান, তা হলে নীচের ফোন নম্বরে বা ঠিকানায় অনুগ্রহ করে যোগাযোগ করুন।

Urdu

اگر آپ اس دستاویز کی نقل اپنی زبان میں چاہتے ہیں، تو براہ کرم نیچے دئے گئے نمبر پر فون کریں یا دیئے گئے پتے پر رابطہ کریں

Arabic

إذا أردت نسخة من هذه الوثيقة بلغتك، يرجى الاتصال برقم الهاتف أو مراسلة العنوان أدناه

Gujarati

જો તમને આ દસ્તાવેજની નકલ તમારી ભાષામાં જોઈતી હોય તો, કૃપા કરી આપેલ નંબર ઉપર ફોન કરો અથવા નીચેના સરનામે સંપર્ક સાધો.

GREATER**LONDON**AUTHORITY