City of Westminster

Shopping Centre Health Check Survey 2014

Local Centre 21: Seymour Place

Contents

(i) Purpose of the Study

Former government guidance on Town Centres advised that 'health checks' be undertaken every five years to allow accurate and reasonable temporal analysis of the performance of town centres. This requirement has been superseded by more recent national and regional policy frameworks and guidance.

The National Planning Policy Framework (NPPF) (DCLG, 2012), states that when setting out requirements for Plan Making and using a proportionate evidence base, '*Local Planning Authorities should have a clear understanding of business needs within the economic markets operating in and across their area. To achieve this they should... assess... the role and function of town centres and the relationship between them, including any trends in the performance of centres, and the capacity of existing centres to accommodate new town centre development* (paragraphs 160, 161).'

The London Plan (2011) sets out strategic retail policy for Town Centres in London, as set out in more detail below. Paragraph 2.74 of the London Plan (July 2011) states that "*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 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.*"

This then forms the current national and regional planning policy framework for undertaking town centre health checks. The City Council is currently follow the former guidance and updating health checks every five years, as this is deemed to be a sensible and manageable time period for monitoring the viability and vitality of centres, given the extent of Westminster's town centre network.

(ii) Westminster's Local Centres and Planning Policy

Westminster's Local Centre Health Checks were last carried out in 2007, updating 2002 and 1997 surveys, and includes detailed analysis of Westminster's 39 Local Shopping Centres.

Local Centres normally have a purely local function and most are mainly comprised of convenience goods retailers with some food and drink and local service uses, mainly providing facilities for people living or working nearby (which the City Council wishes to safeguard in accordance with national guidance). However in Westminster some are also speciality centres which attract shoppers from a wider area.

Westminster's current local plan consists of the City Plan: Strategic Polices (adopted November 2013), and saved development management policies from the Unitary Development Plan (adopted January 2007). The local plan seek to protect and enhance the designated Local Shopping Centres for the service they provide to residents, visitors and workers, and because they reduce the need to travel.

Strategic policy CS21 is the general policy for retail across Westminster, seeking to protect existing A1 uses, direct new retail floor space to designated shopping centres, and to protect non-A1 retail and town centre uses in designated shopping centres from changes to uses that do not serve visiting members of the public and that do not have active shop fronts.

Saved UDP policy SS7 (Shopping and Services policy 7) is the detailed development management policy for local shopping centres. The policy covers the protection of shops and circumstances where changes of use away from shops may be permitted, taking into consideration the viability of units and the overall balance of uses in the centre.

(iii) Westminster's Retail Hierarchy

The City of Westminster is broadly divided into two zones in terms of retail policy, the Core Central Activities Zone (CAZ) and CAZ Frontages, and areas outside of this. The Core CAZ contains the two international shopping centres in London, the West End and Knightsbridge in addition to distinctive retail areas such as Covent Garden, Soho, Mayfair and St James's, as well as numerous small parades and individual shops. Outside the Core CAZ and CAZ Frontages there is one Major Shopping Centre, 4 District Centres (where previously there had been 7, 3 have subsequently been reclassified as CAZ Frontages and 1 as a Major Centre) and the 39 Local Centres which are designated to safeguard shopping facilities for local residents, and the retail character of local shopping areas.

In 2007, the District and Local Centres health check reports were all updated, as were 17 shopping areas inside the CAZ. More recently, reports for Westminster's high street shopping centres were updated in 2013.

(iv) Health Checks Methodology

As set out in the NPPF (DCLG, 2012) local planning authorities should recognise town centres as the heart of their communities and pursue policies to support their viability and vitality. Planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive.

Accessibility by public transport is considered to be excellent for all Westminster's larger shopping areas, and its Local Centres are accessible for people to walk to. The City Council wants to retain shops in Local Centres, in order to maintain a range of local convenience shops and protect the character and function of the centres. Local shops and services limit car trips, encourage walking, and make city life more practical and attractive.

The **National Planning Practice Guidance** was published in March 2014 by DCLG, several months after the field work for this project had commenced. It states that existing centres should be audited to assess their role, vitality, viability and their potential to accommodate new development and different types of development. It also sets out a series of indicators to determine the health of town centres, including:

- Diversity of use
- Vacant property
- Commercial yields on non-domestic property
- Customer views and behaviour
- Retailer representations
- Commercial rents
- Pedestrian flows and accessibility
- Perception of safety and crime
- State of environmental quality

Most of the above indicators will be assessed as part of this study, where data collection is available and reasonable. All of the above were included as part of the 2013 health checks for the larger high street type centres, where it is more appropriate to carry out consumer surveys, and where commercial data is more readily available. Given the size of this project, the indicators below are considered to be appropriate and comprehensive.

Land Use

(1) Diversity of town centre uses

This section considers the range of A1 uses, and compares the current diversity of land uses to previous Local Centre Health Check Surveys dated 1997, 2002 and 2007. It also includes the proportion of vacant street level property and the amount of space used for different functions such as shopping, leisure, cultural and entertainment activities, pubs, cafes, and restaurants.

Accessibility

(2) **Pedestrian flows (footfall):**
Visual assessments were undertaken to measure pedestrian flows which contribute towards the vitality of the Local Centres. These were conducted on comparable days of the week and compared to the average for all of the Local Centres;

(3) **Accessibility:**
The whole of Westminster has a Public Transport Accessibility Level (PTAL) score of 6, the highest level achievable. This section therefore concentrates on ease and convenience of access;

Environment

(4) **State of the town centre environmental quality assessment:**
Includes a subjective assessment of indicators such as security, air pollution, noise, clutter, litter and graffiti, as well as positive factors such as trees, landscaping and open spaces. Each centre is assessed as per the Attractions Table 4, and the Daytime Amenity Table 5 in the 2007 Health Check Survey. A comparison is made between the 1997, 2002, 2007 and 2013 surveys.

(5) **Daytime amenity:**
A qualitative assessment of the amenity within the local centre, assessing its cleanliness, security, and identity.

(6) **Relative performance of the centre:**
Measures the performance of the centre compared to the Westminster Local Centre average in terms of land use, attractiveness, and daytime amenity, with graphs comparing the performance of centres relative to one another. The centre's strengths, weaknesses, opportunities and threats are highlighted in a SWOT analysis diagram at the end of this section.

(7) **The potential capacity for growth or change of centres in the network:** opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development is considered here. Based on levels of demand, assessments are made to ascertain how much capacity each Local Centre has to accommodate retail growth, looking at retail related planning applications in and around the Local Centres. Consideration is given to whether the current Local Centre boundaries and Core and Secondary Frontage designations are still valid. Consideration is also given to ways in which the vitality and viability of the centres could be enhanced.

(8) **Summary of health check:**
This section contains a comparison of the relative performance of this centre, and summary of land use assessment as per the 2007 Health Check reports. General comments and analysis of the centre are included, along with a summary of any problems/issues. A classification as 'in decline', 'neutral', or 'healthy' is included, plus comment on whether things have improved, deteriorated, or remained the same since 2007 (see 2007 Health Checks, Tables 6 and 7). Where a Local Centre is considered to be "in decline" or "neutral", consideration is made on ways to improve the vitality and viability of the Centre.

The results of this study will be used to inform planning policy development and the inception of other relevant interventions, and will be used to assess the success of previous initiatives such as any investment in public realm.

Local Centre **21: Seymour Place**

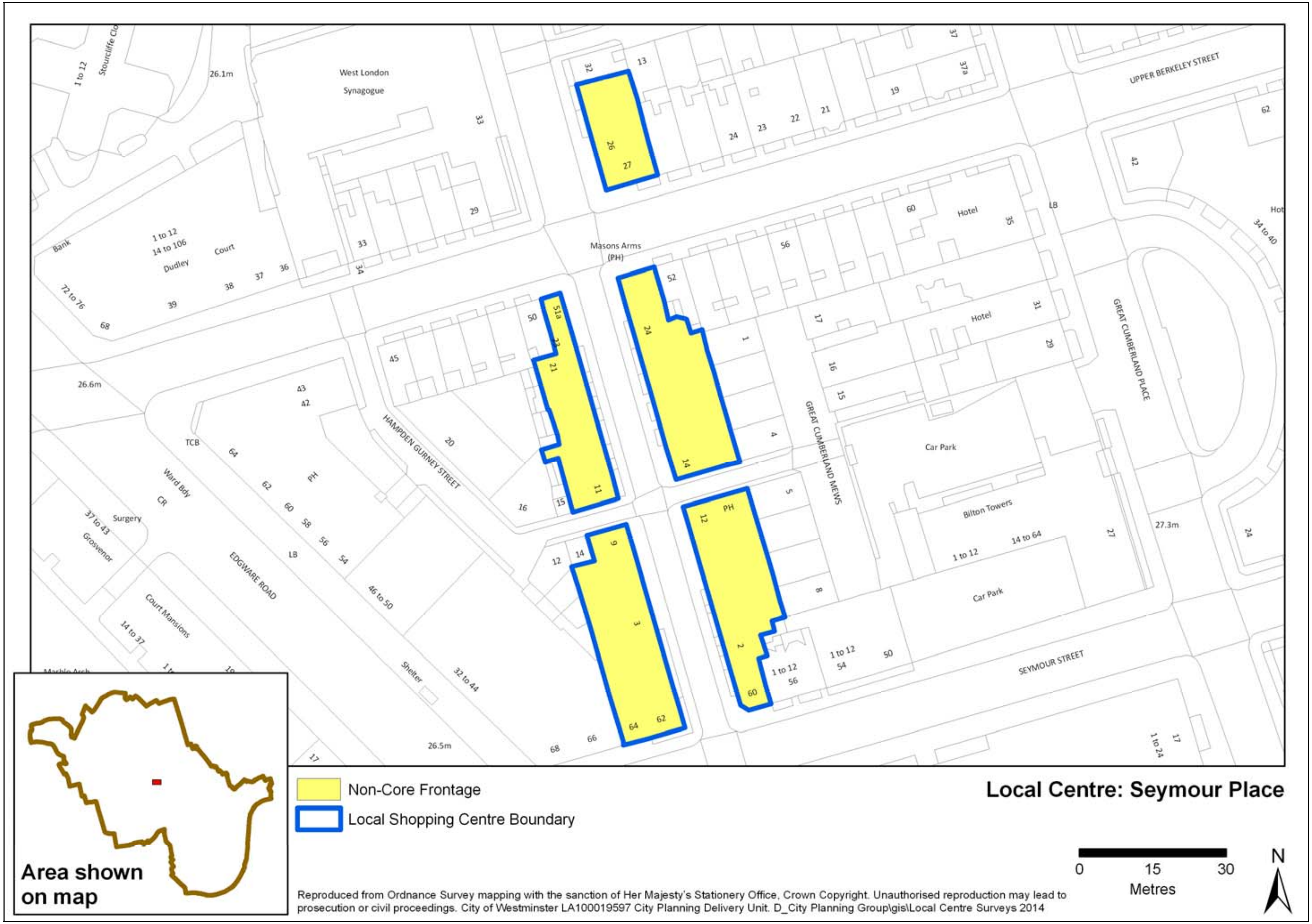
1. Introduction

1.1 Location

Seymour Place is a small linear local centre located in the centre of Westminster, near to Marble Arch and Edgware Road. The centre is located in the Marylebone part of the Central Activities Zone, and is accessible due to its proximity to Edgware Road London Underground Station to the north, Marble Arch station to the south and many bus routes running along Edgware Road to the west. The centre is also in the vicinity to both Marylebone and Paddington national rail stations.

The centre serves mainly workers, local residents and tourists around the area, however the centre's catchment area is limited by its proximity to New Quebec Street local centre to the east, and by the proximity to Oxford Street to the south and Edgware Road to the west. It is also in the vicinity (and almost an extension of) the larger Crawford Street/ Seymour Street/ York Street local centre in this part of Marylebone.

Figure 1: Local Centre Boundary 2013



2 Land Use

2.1 Range of Uses

This centre comprises a range of shopping and other town centre uses. The diversity of uses represented in the centre is summarised in Table 1 below.

Table 1: Range of Town Centre Uses (1997-2013)

Use Class		No. of Units	No. of Units	No. of Units
		2002	**2007**	**2013**
Class A1 Retail		7	10	10
	Department/principle stores	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*
	National retailers	*0*	*0*	*0*
	Specialist Independent	*0*	*4*	*2*
	Independent	*5*	*5*	*7*
	Convenience	*2*	*1*	*1*
Class A2	Financial & Professional	1	2	4
Food & Drink		9	7	10
Class A3	*Restaurant/Café*	*7*	*5*	*6*
Class A4	*Pubs/Bars*	*2*	*2*	*4*
Class A5	*Takeaway*	*0*	*0*	*0*
	Takeaway/Restaurant			*0*
Sui Generis		1	1	1
Vacant Units		5	8	5
Arts/Culture		0	0	0
Health uses		0	0	0
Hotels		0	0	0
TOTAL		**23**	**28**	**30**

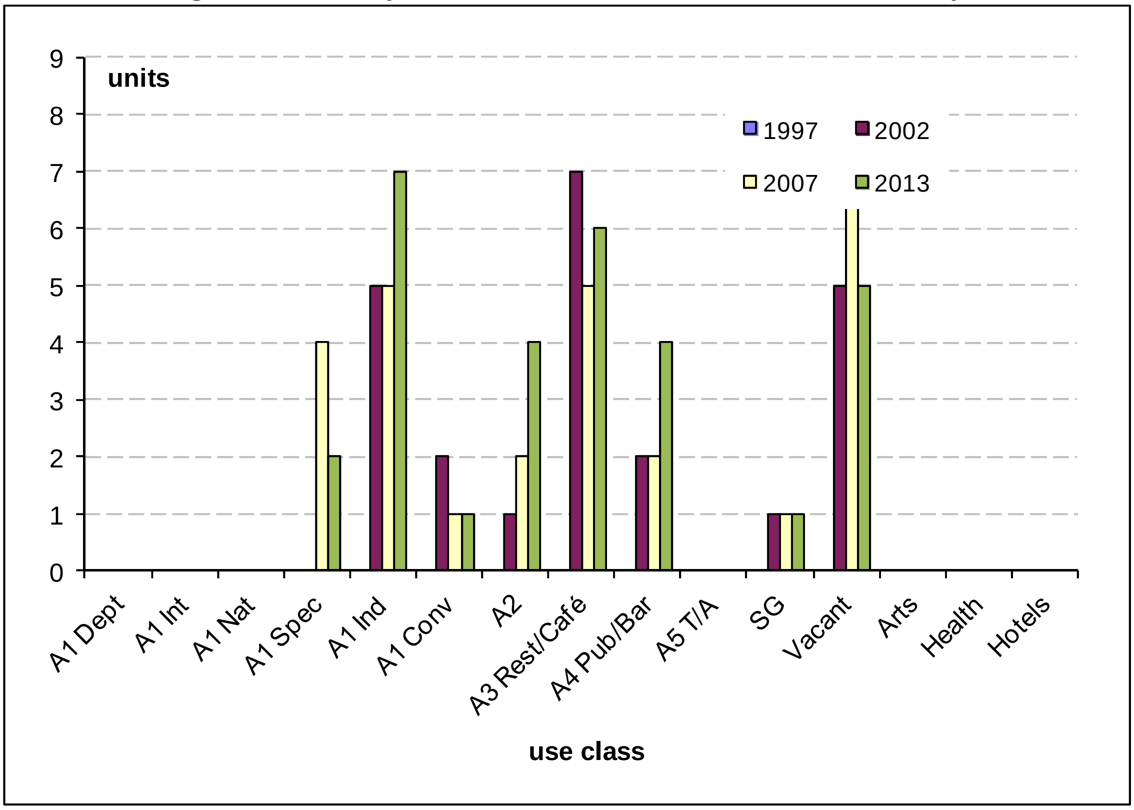
Source: WCC Land Use Survey December 2013

In total there are 30 units, which is an increase of two units from the previous survey in 2007.

The number of A1 retail uses has remained constant since 2007, accounting for a third of units in the centre. The A1 uses structure has changed slightly with the loss of two specialist units changing to independent retailers. The number of Class A2 uses has increased by two units and the number of Class A3 uses has increased by 3 units, with food and drink units as a whole accounting for a third of units.

The centre has no hotels, health or arts uses. The vacant units have decreased by three units, however there are still five vacant units in what is a relatively small centre.

Figure 2: Units by use class within the local centre boundary



2.2 Range of A1 Uses

Seymour Place has no international or national retailers, and no department stores. The centre has 10 Class A1 retail units consisting of 1 convenience store, 2 specialist retailers and 7 independent retailers. The specialist retailers are a perfumery and a eyebrow and eyelash boutique. The independent stores include a clothing store and two hairdressers. The high proportion of comparison shops and no multiple retailers suggests that Seymour Place serves local residents with a mix of convenience and comparison shopping facilities, and the reasonably high vacancy levels indicate the effect of the centre's proximity to Oxford Street for comparison shopping, and Edgware Road and other local shopping centres for convenience and some comparison shopping.

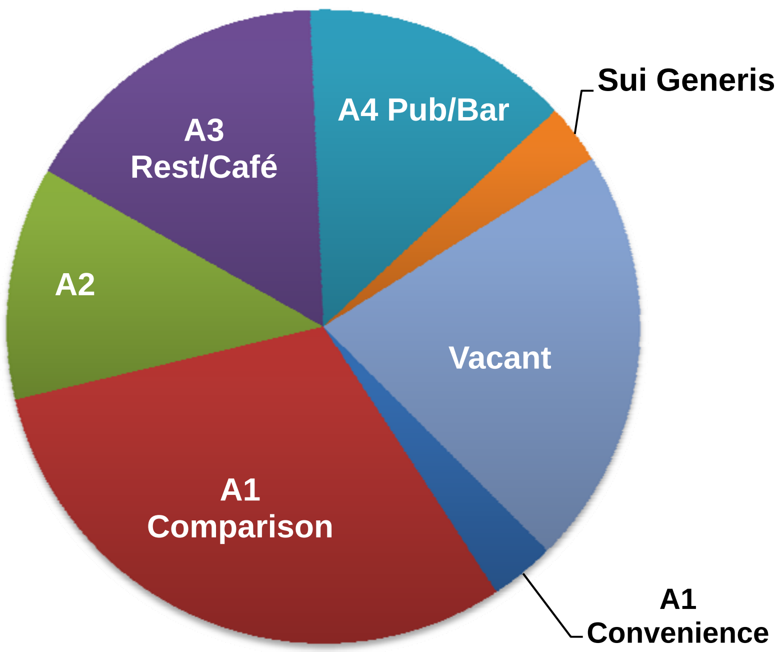
2.3 Total Retail Floor space

Total retail floor space is broken down in Table 2. In total, Seymour Place has 1,944 sqm of retail floor space, which is below the average of 3,188 sqm for the 39 Local Centres in the City. Seymour Place has a large proportion of vacant floor space, which accounts for more than 20% of the total, the only higher use being A1 comparison, which accounts for nearly a third of total floor space. The centre has four A4 pubs/bars with floor space higher than the local centre average, but no A5 takeaways. It also has a much lower than average proportion of A1 convenience floor space.

Table 2: Total Retail Floor space 2013

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2013)
A1 Convenience	64	3.29%	14.9%
A1 Comparison	593	30.50%	35.2%
A2	231	11.88%	11.2%
A3 Rest/Café/TA	314	16.15%	17.4%
A4 Pub/Bar	267	13.73%	5.1%
Sui Generis	59	3.03%	3.9%
Vacant	416	21.40%	8.6%
Health	0	0.00%	2.0%
Hotels	0	0.00%	0.5%
Art	0	0.00%	1.3%
Leisure	0	0.00%	0.1%
Total	**1,944**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



Source: City of Westminster GIS System and site survey December 2013

Seymour Place is a Local Centre with a selection of local services and food shops. There are no banks or building societies, with the four Class A2 uses being an accountants, a Spa and two estate agents. The Local Centre does not provide the same range and selection found in large Local Centres or District Centres.

2.4 Proportion of Vacant Street Level Property

The unit vacancy rate is higher the average rate for Local Centres in the City, as shown in Table 3. The vacancy rate has decreased since 2007. The five ground floor vacant units are spread throughout the centre. The national average vacancy rate for shopping centres is over 14.1%.

Table 3: Level of Vacant Street Level Property 2013

% Vacant Units				% Local Centre Average
1997	2002	2007	2013	2013
N/A	21.74% (5) units	28.57% (8) units	16.67% (5) units	8% (2 units)

Source: City of Westminster GIS System and site survey December 2013

3. Accessibility

3.1 Pedestrian Flows (footfall)

The centre was found to be low in terms of pedestrian vibrancy when the Health Check Survey was carried out on a weekday morning in December 2013.

3.2 Accessibility on foot and by public transport

The nearest London Underground station to the local centre is Marble Arch (Central Line). Although no bus routes pass through the centre itself, many pass very close to the centre, such as Edgware Road, which is served by over ten different routes, and Oxford Street, which is served by around fifteen routes. Edgware Road (A5) and Oxford Street (A40) are two main roads for traffic, running through the centre of the city. Both Marylebone and Paddington mainline rail stations are also in the vicinity of the centre, roughly ten minutes walk away.

4. Environmental Quality

4.1 State of the Centre’s Attractions and Environmental Quality / Attractions

The attitudinal assessment of the attractions and amenity of the centre is summarised in Table 4 below. The centre’s overall score for attractions is 27%, meaning that this centre has limited attractions. The rating is much higher than the Local Centre average of 31%, and means the centre is ranked =24th out of the 39 Local Centres in the City. The centre has poor provision of multiple retailers and poor cultural/community events, sport and leisure facilities and bank/building society provision. The centre’s main strength is its good provision of restaurants and independent shops.

4.2 Daytime Amenity

Seymour Place is a relatively attractive Local Centre, with a day time amenity rating of 72% compared with the average for all Local Centres of 68%, and is ranked 17th out of the 39 Local Centres in the City. The centre’s rating is good in terms of the absence of litter, street fouling, the quality of buildings, and evidence of drunkenness, rough sleepers, illegal trading and the general safety perception. The centre has an average ‘feel good factor’. Only two categories are rated as poor the lack of promotional events and the lack of features that identify the centre. The remaining categories are all rated as average

Table 4: Attractions within the Local Centre 2013

ATTRACTIONS	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Retail Provision									
Prominence of multiple retailers			X			X			X
Prominence of independent shops		X			X			X	
Availability of food shopping		X			X			X	
Prominence of specialist shops			X		X			X	
Quality of market (frequency, variety etc)	-	-	-	-	-	-	-	-	-
Quality of retail environment		X			X			X	
Art/Culture									
Quality of restaurants (availability, number etc)	X			X			X		
Quality of pub/club/bars		X			X			X	
Range of cultural/ community events (theatre, concerts)			X			X			X
Availability of sports and leisure facilities			X			X			X
Service Provision									
Local services (information, library etc)			X			X			X
Employment/ office space		X				X			X
Bank/ building society provision			X			X			X
Total	7/26			7/26			7/26		
Percentage	26.92%			26.92%			26.92%		

Source: City of Westminster site survey December 2013

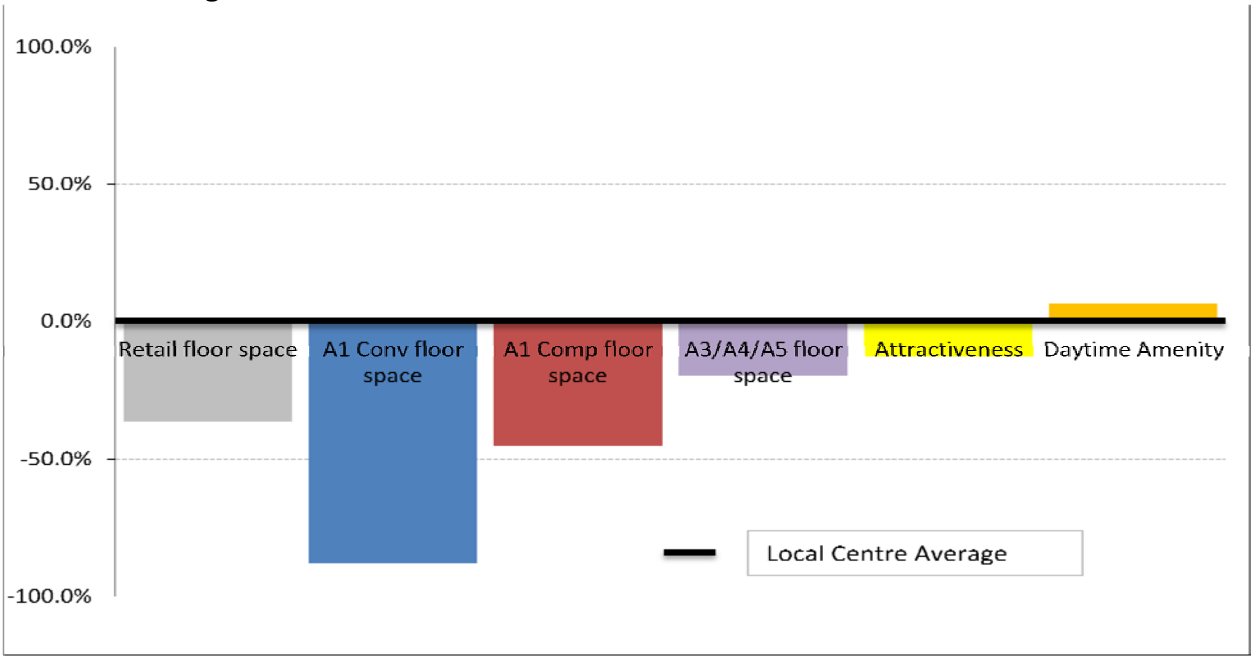
Table 5: Day Time Amenity within the Local Centre 2013

AMENITY – DAYTIME	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Overall environment of public areas in the centre									
General Cleanliness in Shopping Hours:									
Presence of litter	X			X			X		
Presence of refuse bags on the street		X			X		X		
Evidence of street fouling	X			X			X		
Presence of glass/glasses/other debris incl. Food and food containers/wrapping	X				X		X		
Condition		X			X			X	
Quality of buildings	X			X				X	
Special features (pedestrianisation, Street furniture, etc)			X			X		X	
Impact of vacant sites			X			X	X		
Security									
Evidence of Vandalism and Graffiti (incl. on street furniture)	X				X			X	
Security during shopping hours (availability, access, security etc)		X			X			X	
Ease of passage for pedestrians (incl. presence of obstacles eg illegally parked vehicles)		X				X		X	
Evidence of drunkenness, anti-social Behaviour, rowdiness	X			X			X		
Presence of rough sleepers	X			X			X		
Presence of beggars	X			X			X		
Presence of street drinkers	X				X		X		
Evidence of touting (e.g. mini cabs, ricksaws, Prostitution, drug dealing etc.)	X			X			X		
Presence of illegal street traders e.g counterfeit goods, hot dogs, peanuts etc.	X			X			X		
Effectiveness of any deterrent measures (CCTV, police patrols, door security etc)		X			X			X	
Quality of street lighting		X			X			X	
Safety perception in shopping hours	X			X			X		
Identity of town centre									
Features which identify the centre (eg flagship stores, buildings etc)			X			X			X
Promotion/ Street events			X			X			X
'Feel good' factor of town centre		X			X			X	
Total	31/46			27/46			33/46		
Percentage	67.4%			58.7%			71.7%		

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2013

Figure 4: Deviation of centre from the mean for Local Centres 2013



Seymour Place is a reasonably small Local Centre that has a lower than average amount of retail floor space when compared to the overall average for the 39 local centres. This is also true for A1 convenience and comparison floor space figures which are both considerably lower than the overall local centre average due to the size of the centre and size of units. Food and drink floor space figures (A3/A4/A5) are closer to the average, but are still slightly under. In terms of the rating of the physical environment, the attractiveness is slightly under the average while the daytime amenity rating is slightly above.

5.2 Strengths, Weaknesses, Opportunities and Threats

Figure 5 SWOT analysis

6. Future capacity

6.1 Potential Capacity for Growth

Between 2007 and 2013, there were two permitted planning applications within the local boundary both involved increasing the existing A1 floor space

7. Health of the Centre

Table 6: Summary of Health Check Assessment 2013

Subject	Subject Matter	Data	Number	Sqm
RETAILING	**Floor space**	**Total Floor space**		**1,944**
		Total Convenience (A1)		**64**
		Total Comparison (A1)		**593**
		Total Service (A2)		**231**
		Total A3		**314**
		Total A4		**267**
		Total A5		**0**
		Total Sui Generis		**59**
		Total Vacant		**416**
	Retail Offer	**Total Number of Shop Units**	**30**	
		Total Number of A1 Units	**10**	
		a) Convenience shops	**1**	
		b) Department/principal stores	**0**	
		c) Prestige international shops	**0**	
		d) National comparison retailers	**0**	
		e) Specialist Independent shops	**2**	
		f) Independent shops	**7**	
		Total Comparison Multiples	**9**	
		Total Number of A2 Units	**4**	
		Total Number of A3 Units	**6**	
		Total Number of A4 Units	**4**	
		Total Number of A5 Units	**0**	
		Total Number of Sui Generis	**1**	
		Total Number of Vacant	**5**	
	Market	**Days of operation**	**0**	
		Number of stalls	**0**	
	Proposals	**Changes of use A1 to A2**	**0**	
		Changes of use A1 to A3	**0**	
		Changes of use A1 to A4	**0**	
		Changes of use A1 to A5	**0**	
ARTS/CULTURE		**(cinemas, galleries, theatres etc.)**	**0**	
HEALTH USES		**(clinics, surgeries etc.)**	**0**	
HOTELS			**0**	

In terms of its vitality and viability, and general economic health this centre is considered to be 'less healthy' than it was when last surveyed in 2007.

Appendices

Appendix 1: Views of Local Centre

Appendix 2: Land Use Table (Westminster land use survey 2013)

Appendix 3: Land Use Map (GOAD 2012 retail data and Westminster land use survey 2013)

Appendix 4: Planning permissions Map (Westminster land use survey 2013)

Appendix 5: Location map of all local centres

Appendix 6: Glossary of Terms

Views of Seymour Place local centre

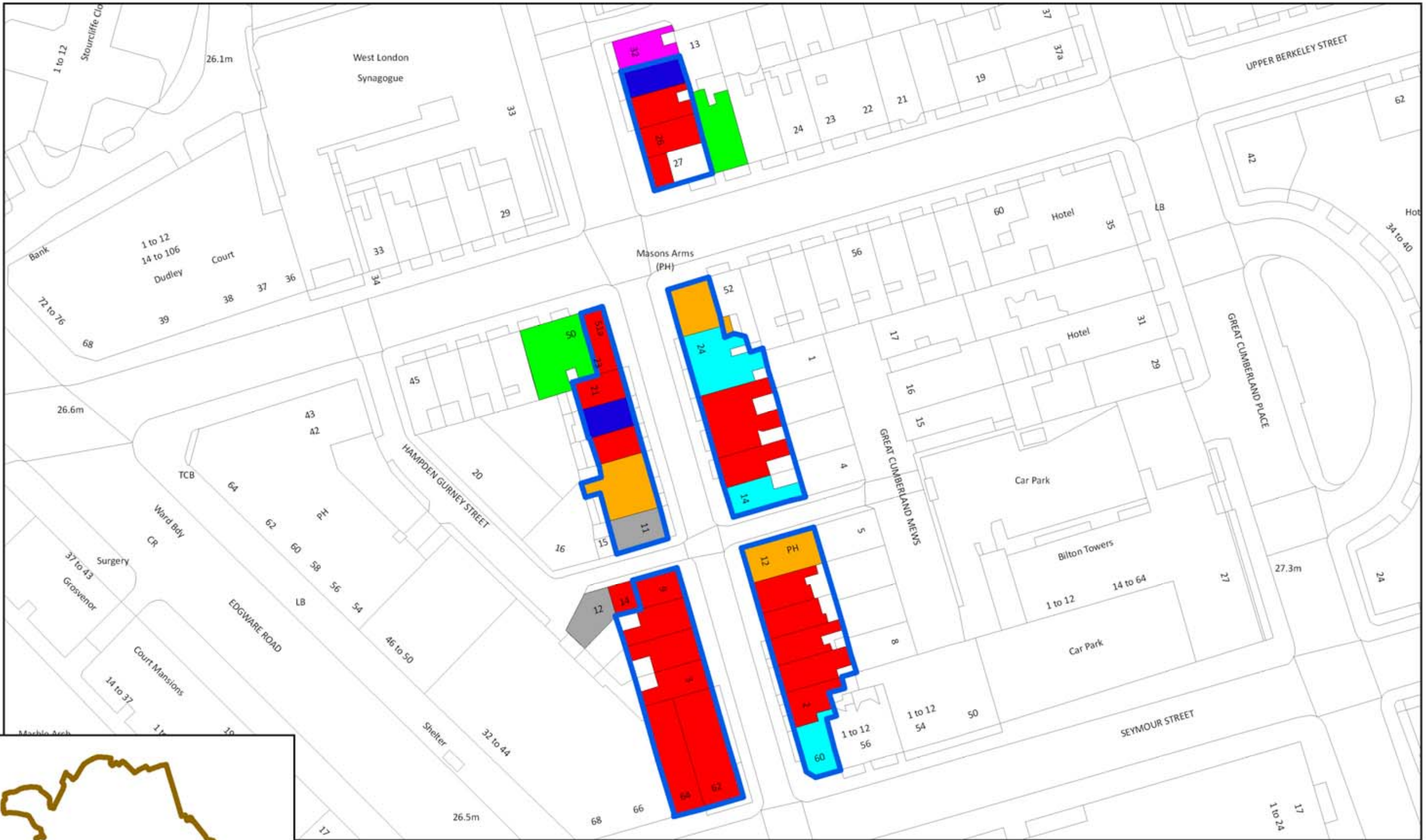
Attractive and well maintained shop fronts at the top of Seymour Place.

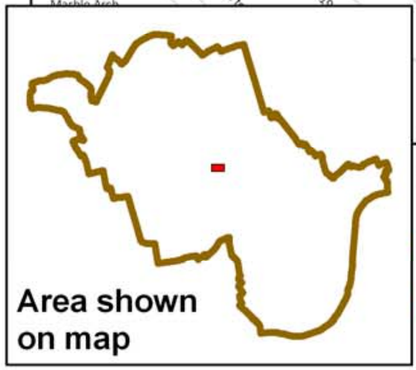
Vacant shop units in the local centre, which make up over 25% of all units in the centre.

The west side of the local centre, including valuable local services such as the DIY store pictured.

Table 7 Land Use Table (Westminster land use survey 2013)

ADDRESS	FASCIA	DESCRIPTION	USE	SQM	A1 Conv.	A1 Spec.	A1 Ind	A2	A3 Res/Caf	A4 Pub/Bar	S G	Vacant	2007 Use
27UPPER BERKELEY STREET	SIGNORA	Mobile Phones	A1 Ind	66			1						A1 Ind
51AUPPER BERKELEY STREET	M A Paints	DIY Store	A1 Ind	48			1						A1 Ind
51UPPER BERKELEY STREET	THE PORTMAN	Public House	A3 Pub/Bar	70						1			A3 Pub/Bar
2SEYMOUR PLACE	LES SENTEURS	PERFUMERY	A1 Spec	54		1							A1 Spec
3SEYMOUR PLACE	Zoki Couture	Ladieswear	A1 Ind	69			1						A1 Ind
4SEYMOUR PLACE	Vacant	Vacant	Vacant	69								1	Vacant
5SEYMOUR PLACE	Vacant	Vacant	Vacant	76								1	Vacant
6SEYMOUR PLACE		Dwellings		69									
7SEYMOUR PLACE	Vacant	Vacant	Vacant	75								1	A1 Ind
8SEYMOUR PLACE	LEMONGRASS	Spa	A2	67				1					Vacant
9SEYMOUR PLACE	Vacant	Vacant	Vacant	45								1	A3 Rest/Café
10SEYMOUR PLACE	DNOSTIA	Boutique Kitchen	A1 Ind	79			1						Vacant
11SEYMOUR PLACE	City of London Group	Launderette	SG	59							1		SG
12SEYMOUR PLACE	Carpenters Arms	Public House	A3 Pub/Bar	92						1			A3 Pub/Bar
13SEYMOUR PLACE	VINOTECA	WINE BAR / SHOP	A3 Pub/Bar	52						1			Vacant
14SEYMOUR PLACE	SANDYS PIZZA	RESTAURANT	A3 Rest/Café	73					1				Vacant
15SEYMOUR PLACE	VINOTECA	WINE BAR / SHOP	A3 Pub/Bar	53						1			Vacant
16SEYMOUR PLACE	IBROWS	BROW / LASH BOUTIQUE	A1 Spec	76		1							Vacant
17SEYMOUR PLACE	BUY MY WARDROBE	CLOTHING	A1 Ind	44			1						A1 Spec
18SEYMOUR PLACE	GREAT HAIR	HAIRDRESSERS	A1 Ind	75			1						
19SEYMOUR PLACE	Copperfields	Accountants	A2	48				1					A2
20SEYMOUR PLACE	PERFEC TRESS	HAIRDRESSERS	A1 Ind	82			1						
21SEYMOUR PLACE	HOMEMADE	WORKSHOP / CAFÉ	A3 Rest/Café	48					1				A1 Spec
22SEYMOUR PLACE	THE LOCKHEART	Restaurant	A3 Rest/Café	73					1				A1 Spec
24SEYMOUR PLACE	THE LOCKHEART	Restaurant	A3 Rest/Café	57					1				A3 Rest/Café
26SEYMOUR PLACE	OBT	Estate Agents	A2	60				1					A1 Ind
28SEYMOUR PLACE	Toto's Newsagent	Newsagents	A1 Conv	64	1								A1 Conv
30SEYMOUR PLACE	Home Full Stop	Estate Agents	A2	56				1					A2
60SEYMOUR STREET	BOROUGH BARRISTA	CAFÉ	A3 Rest/Café	63					1				A3 Rest/Café
62SEYMOUR STREET	Vacant	Vacant	Vacant	151								1	A3 Rest/Café
64SEYMOUR STREET		Dwellings							1				A3 Rest/Café





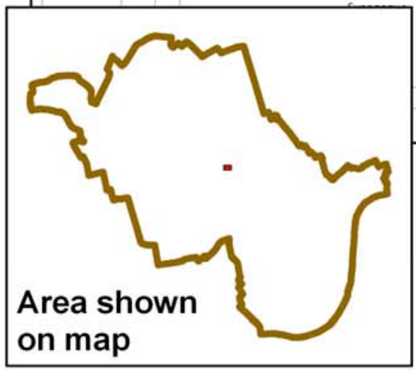
Source: GOAD Retail Survey 2013

Local Centre: Seymour Place

- Local Shopping Centre Boundary
- A1: Retail
- A2: Financial & Professional
- A3: Restaurant/Café
- A4: Pub/Bar
- ASG: Sui Generis
- B1: Office
- C1: Hotels
- UC: Unclassified

0 15 30
Metres

N



Source: GOAD Retail Survey 2013

Local Centre: Seymour Place

Completed 2007-2013

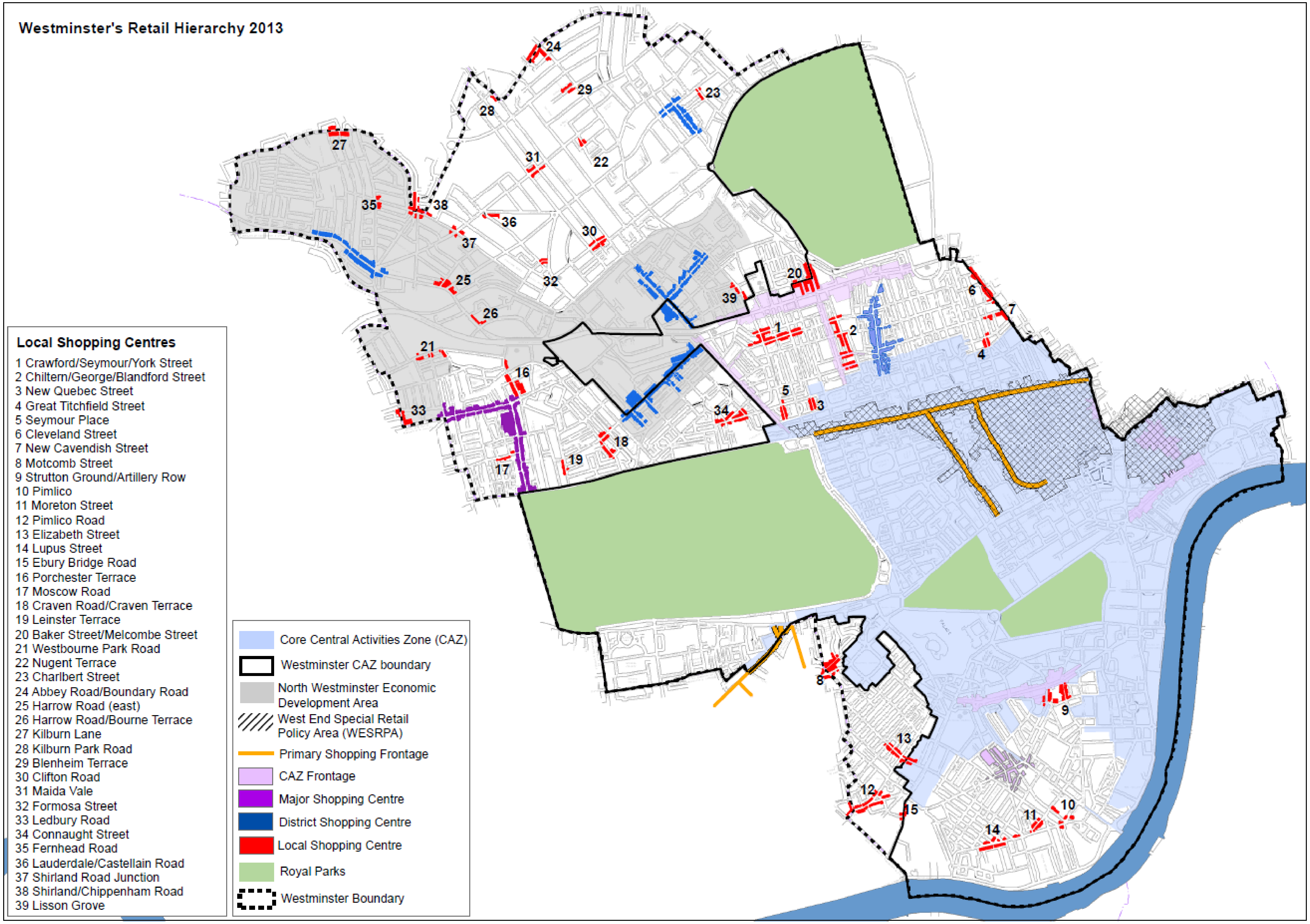
Local Shopping Centre Boundary

Vacant

0 5 10
Metres

N

Figure 1 Westminster wide shopping centre boundaries plan



Health Checks - Glossary of terms

A1	**Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, dry cleaners, pet shops, sandwich bars, retail showrooms, and domestic hire shops.**
A1 café type uses	**Shops such as sandwich bars or coffee shops selling food and drinks to be consumed mainly off the premises, but not hot food takeaways. Examples include certain Pret a Manger shops, Costa Coffee and the Seattle Coffee Co. shops.**
A2	**Banks, building societies, bureau de change, estate and employment agencies, professional and financial services, telephone bureaux, betting offices and beauty salons (excluding hair).**
A3	**Food and drink uses such as restaurants, pubs, snack bars, cafés, wine bars and shops for the sale of hot food (hot food take-aways).**
A4	**Drinking Establishments: Premises where the primary purpose is the sale and consumption of alcoholic drinks on the premises.**
A5	**Hot Food Take-away: Premises where the primary purpose is the sale of hot food to take away.**
B1	**Business uses such as offices, research and development and industrial uses.**
CAZ	**Central Activities Zone (CAZ). The CAZ is an area of mixed uses, many of which contribute directly to the national, regional and local economy. It is this mix of activities and their supporting resources which underpins the success of London's economy.**
CAZ Frontages	**Mixed use areas usually with a predominant retail function. Appropriate areas for retail growth.**
Comparison	**A1 floor space selling predominantly durable items and not in convenience use.**
Convenience	**This is based on the classification provided by the unit for Retail Planning Information (URPI) set out in URPI brief 99/2. The classifications are: food, alcoholic drink, tobacco and other goods (newspapers and magazines, cleaning materials and matches). For the purposes of this assessment, convenience includes shops selling food or drink (excluding A1 café-type uses), newsagents, (including specialist tobacco stores), chemists (including Boots the Chemist stores) and post offices.**
Department/ principle store	**This includes the main department stores such as John Lewis, Liberty, and Selfridges, as well as variety stores such as Marks & Spencer and Virgin Mega-stores.**
District Centre	**Distributed more widely than Metropolitan and Major centres, they provide convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000-50,000 sqm of retail floor space. Some district centres have developed specialist shopping functions.**
Experian GOAD	**An independent retail data consultancy who provide maps of ground floor uses in shopping centres.**
F&B	**Food and beverage offer, covered by parts A3 (cafe's/restaurants), A4 (drinking establishments) and A5 (take aways) of the use classes order.**
Gross Floorspace	**Floorspace of buildings on all floors including external walls, half the thickness of parting walls and circulation areas.**
Independent store	**This includes non-convenience stores (see definition above) irrespective of size, that are not considered to be specialist retailers (see definition overleaf), that are operated by retailers that are not included within national retail chains or groups.**
Major Centre	**Typically found in inner and some parts of outer London with a borough-wide catchment. They generally contain over 50,000sqm of retail floor space and a relatively high proportion of comparison goods relative to convenience goods. They may also have significant employment, leisure, service and civic functions.**
NPPF	**National Planning Policy Framework. Central Government's key, revised guidance document driving planning policy in England, which compressed the**

	previous PPS documents and other guidance into a single document. It includes key guidance on town centres and health checks.
National retailers	**This includes all retailers (Class A1 only) that operate within the context of a national retail chain or group, such as Next. A schedule of all national retail multiples can be found in Retail Directory of the UK 2002 (Hemming Information). Specialist shops that are part of a retail chain or group, such as Whittards and Thorntons, are classified as national retailers. Although there are national chains of food and drink uses and betting shops, such as Ladbrokes, these are classified based on the use class (e.g. betting shops as A2 uses) and not as national retailers.**
Prestige international retailers	**This includes prestigious retailers that operate in more than one country, such as Gucci, Gianni Versace, and Giorgio Armani. It also includes flagship stores that are only found in select town centres in Britain. National airline shops, such as British Airways, have also been classified as international retailers.**
Primary Frontages	**Internationally recognised shopping destinations. The Primary Frontages defined in Westminster's City Plan - Strategic Policies document are Oxford Street, Regent Street, Bond Street and Knightsbridge/Brompton Road.**
Retail floorspace	**This is all A1, A2, A3, A4, A5 and sui generis floorspace, and vacant floorspace of any of the aforementioned categories.**
Shisha	**Flavoured tobacco smoked through a water pipe or hookah. Smoke free legislation means that it cannot be smoked indoors in public places, and is often smoked at tables and chairs on the footway and in garden areas. There has been a rapid rise in shisha uses over the past five years, and there is concern over issues of health, residential amenity and other issues.**
Specialist independent	**Similar to an independent store, but this category reflects the quality and specialisation of the retailer so that a shopper may make a specific shopping trip to that shop. For example, The Pen Shop on Regent Street or antique shops.**
Sui generis	**Sui Generis is a term that refers to a use on its own. Any planning use not falling within a specific class within the Use Class Order falls within this category. Examples of sui generis uses in shopping centres are launderettes, mini cab offices, amusement centres and car showrooms.**
UDP	**Unitary Development Plan produced by Westminster City Council, with saved policies forming part of the statutory development plan for Westminster.**
Vacancy	**This category includes vacant street level units, as well as units that are under alteration. However, if at any time the survey was completed it was evident who the unit would be occupied by, the unit was treated as being occupied.**
Zone A Rent	**The rental level per square metre achieved on the first six metres of a shop unit.**

Information Sources

Westminster's City Plan - Strategic Policies (adopted November 2013)
https://www.westminster.gov.uk/westminsters-city-plan-strategic-policies

Westminster's Unitary Development Plan (UDP, adopted January 2007)
https://www.westminster.gov.uk/unitary-development-plan-udp

The Mayor's London Plan (GLA, July 2011 as amended)
http://www.london.gov.uk/priorities/planning/london-plan

The National Planning Policy Framework (NPPF, DCLG 2012)
https://www.gov.uk/government/publications/national-planning-policy-framework--2

National Planning Practice Guidance (NPPG, March 2014)
http://planningguidance.planningportal.gov.uk/

Westminster High Street Health Checks 2013
https://www.westminster.gov.uk/high-street-health-checks

Westminster Health Check Archive
https://www.westminster.gov.uk/shopping-centre-health-checks

City of Westminster

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Email: ldf@westminster.gov.uk
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City of Westminster

Shopping Centre Health Check Survey 2014

Local Centre 22: Connaught Street

Contents

(i) Purpose of the Study

Former government guidance on Town Centres advised that 'health checks' be undertaken every five years to allow accurate and reasonable temporal analysis of the performance of town centres. This requirement has been superseded by more recent national and regional policy frameworks and guidance.

The National Planning Policy Framework (NPPF) (DCLG, 2012), states that when setting out requirements for Plan Making and using a proportionate evidence base, '*Local Planning Authorities should have a clear understanding of business needs within the economic markets operating in and across their area. To achieve this they should... assess... the role and function of town centres and the relationship between them, including any trends in the performance of centres, and the capacity of existing centres to accommodate new town centre development* (paragraphs 160, 161).'

The London Plan (2011) sets out strategic retail policy for Town Centres in London, as set out in more detail below. Paragraph 2.74 of the London Plan (July 2011) states that "*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 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.*"

This then forms the current national and regional planning policy framework for undertaking town centre health checks. The City Council is currently follow the former guidance and updating health checks every five years, as this is deemed to be a sensible and manageable time period for monitoring the viability and vitality of centres, given the extent of Westminster's town centre network.

(ii) Westminster's Local Centres and Planning Policy

Westminster's Local Centre Health Checks were last carried out in 2007, updating 2002 and 1997 surveys, and includes detailed analysis of Westminster's 39 Local Shopping Centres.

Local Centres normally have a purely local function and most are mainly comprised of convenience goods retailers with some food and drink and local service uses, mainly providing facilities for people living or working nearby (which the City Council wishes to safeguard in accordance with national guidance). However in Westminster some are also speciality centres which attract shoppers from a wider area.

Westminster's current local plan consists of the City Plan: Strategic Polices (adopted November 2013), and saved development management policies from the Unitary Development Plan (adopted January 2007). The local plan seek to protect and enhance the designated Local Shopping Centres for the service they provide to residents, visitors and workers, and because they reduce the need to travel.

Strategic policy CS21 is the general policy for retail across Westminster, seeking to protect existing A1 uses, direct new retail floor space to designated shopping centres, and to protect non-A1 retail and town centre uses in designated shopping centres from changes to uses that do not serve visiting members of the public and that do not have active shop fronts.

Saved UDP policy SS7 (Shopping and Services policy 7) is the detailed development management policy for local shopping centres. The policy covers the protection of shops and circumstances where changes of use away from shops may be permitted, taking into consideration the viability of units and the overall balance of uses in the centre.

(iii) Westminster's Retail Hierarchy

The City of Westminster is broadly divided into two zones in terms of retail policy, the Core Central Activities Zone (CAZ) and CAZ Frontages, and areas outside of this. The Core CAZ contains the two international shopping centres in London, the West End and Knightsbridge in addition to distinctive retail areas such as Covent Garden, Soho, Mayfair and St James's, as well as numerous small parades and individual shops. Outside the Core CAZ and CAZ Frontages there is one Major Shopping Centre, 4 District Centres (where previously there had been 7, 3 have subsequently been reclassified as CAZ Frontages and 1 as a Major Centre) and the 39 Local Centres which are designated to safeguard shopping facilities for local residents, and the retail character of local shopping areas.

In 2007, the District and Local Centres health check reports were all updated, as were 17 shopping areas inside the CAZ. More recently, reports for Westminster's high street shopping centres were updated in 2013.

(iv) Health Checks Methodology

As set out in the NPPF (DCLG, 2012) local planning authorities should recognise town centres as the heart of their communities and pursue policies to support their viability and vitality. Planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive.

Accessibility by public transport is considered to be excellent for all Westminster's larger shopping areas, and its Local Centres are accessible for people to walk to. The City Council wants to retain shops in Local Centres, in order to maintain a range of local convenience shops and protect the character and function of the centres. Local shops and services limit car trips, encourage walking, and make city life more practical and attractive.

The **National Planning Practice Guidance** was published in March 2014 by DCLG, several months after the field work for this project had commenced. It states that existing centres should be audited to assess their role, vitality, viability and their potential to accommodate new development and different types of development. It also sets out a series of indicators to determine the health of town centres, including:

- Diversity of use
- Vacant property
- Commercial yields on non-domestic property
- Customer views and behaviour
- Retailer representations
- Commercial rents
- Pedestrian flows and accessibility
- Perception of safety and crime
- State of environmental quality

Most of the above indicators will be assessed as part of this study, where data collection is available and reasonable. All of the above were included as part of the 2013 health checks for the larger high street type centres, where it is more appropriate to carry out consumer surveys, and where commercial data is more readily available. Given the size of this project, the indicators below are considered to be appropriate and comprehensive.

Land Use

(1) Diversity of town centre uses

This section considers the range of A1 uses, and compares the current diversity of land uses to previous Local Centre Health Check Surveys dated 1997, 2002 and 2007. It also includes the proportion of vacant street level property and the amount of space used for different functions such as shopping, leisure, cultural and entertainment activities, pubs, cafes, and restaurants.

Accessibility

(2) **Pedestrian flows (footfall):**
Visual assessments were undertaken to measure pedestrian flows which contribute towards the vitality of the Local Centres. These were conducted on comparable days of the week and compared to the average for all of the Local Centres;

(3) **Accessibility:**
The whole of Westminster has a Public Transport Accessibility Level (PTAL) score of 6, the highest level achievable. This section therefore concentrates on ease and convenience of access;

Environment

(4) **State of the town centre environmental quality assessment:**
Includes a subjective assessment of indicators such as security, air pollution, noise, clutter, litter and graffiti, as well as positive factors such as trees, landscaping and open spaces. Each centre is assessed as per the Attractions Table 4, and the Daytime Amenity Table 5 in the 2007 Health Check Survey. A comparison is made between the 1997, 2002, 2007 and 2013 surveys.

(5) **Daytime amenity:**
A qualitative assessment of the amenity within the local centre, assessing its cleanliness, security, and identity.

(6) **Relative performance of the centre:**
Measures the performance of the centre compared to the Westminster Local Centre average in terms of land use, attractiveness, and daytime amenity, with graphs comparing the performance of centres relative to one another. The centre's strengths, weaknesses, opportunities and threats are highlighted in a SWOT analysis diagram at the end of this section.

(7) **The potential capacity for growth or change of centres in the network:** opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development is considered here. Based on levels of demand, assessments are made to ascertain how much capacity each Local Centre has to accommodate retail growth, looking at retail related planning applications in and around the Local Centres. Consideration is given to whether the current Local Centre boundaries and Core and Secondary Frontage designations are still valid. Consideration is also given to ways in which the vitality and viability of the centres could be enhanced.

(8) **Summary of health check:**
This section contains a comparison of the relative performance of this centre, and summary of land use assessment as per the 2007 Health Check reports. General comments and analysis of the centre are included, along with a summary of any problems/issues. A classification as 'in decline', 'neutral', or 'healthy' is included, plus comment on whether things have improved, deteriorated, or remained the same since 2007 (see 2007 Health Checks, Tables 6 and 7). Where a Local Centre is considered to be "in decline" or "neutral", consideration is made on ways to improve the vitality and viability of the Centre.

The results of this study will be used to inform planning policy development and the inception of other relevant interventions, and will be used to assess the success of previous initiatives such as any investment in public realm.

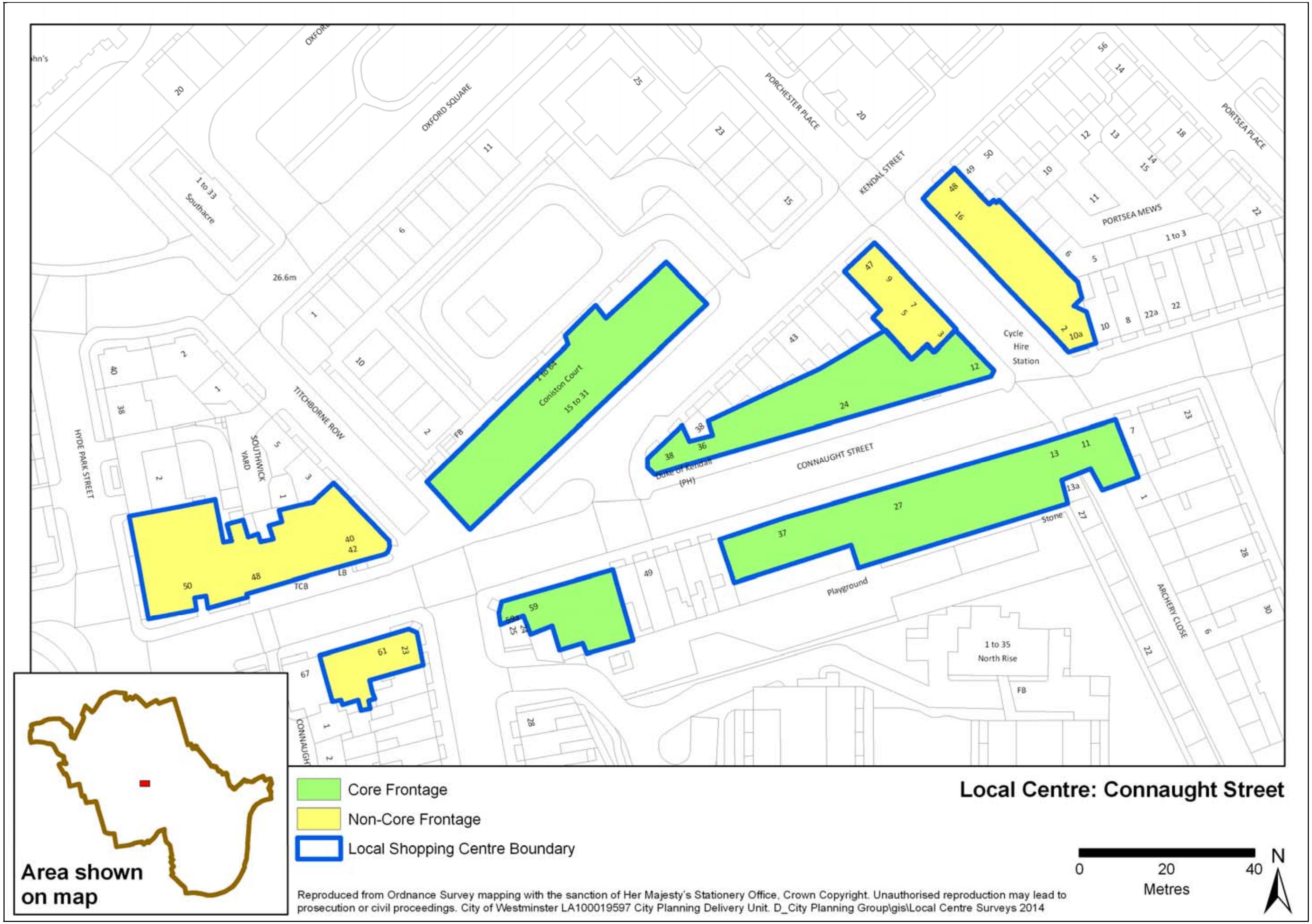
Local Centre **22: Connaught Street**

1. Introduction

1.1 Location

Connaught Street is a large linear local centre located in the centre of Westminster in the south Paddington area. The centre is in close proximity to Paddington railway station, Hyde Park and Marble Arch. The centre serves local residents in the south Paddington area, however the catchment area of the centre is restricted by its proximity to Edgware Road to the east and Hyde Park to the south.

Figure 1: Local Centre Boundary 2013



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2 Land Use

2.1 Range of Uses

This centre comprises a range of shopping and other town centre uses. The diversity of uses represented in the centre is summarised in Table 1 below.

Table 1: Range of Town Centre Uses (1997-2013)

Use Class		No. of Units 1997	No. of Units 2002	No. of Units 2007	No. of Units 2013
Class A1 Retail		44	49	42	41
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*0*
	National retailers	*0*	*1*	*1*	*1*
	Specialist Independent	*18*	*19*	*18*	*17*
	Independent	*17*	*21*	*16*	*17*
	Convenience	*9*	*8*	*7*	*6*
Class A2	Financial & Professional	1	2	3	5
Food & Drink		0	8	8	9
Class A3	*Restaurant/Café*	*0*	*7*	*7*	*8*
Class A4	*Pubs/Bars*	*0*	*1*	*1*	*1*
Class A5	*Takeaway*	*0*	*0*	*0*	*0*
	Takeaway/Restaurant				*0*
Sui Generis		1	2	4	4
Vacant Units		5	4	9	5
Arts/Culture		1	0	0	0
Health uses		1	0	0	1
Hotels		0	0	0	0
TOTAL		**53**	**65**	**66**	**65**

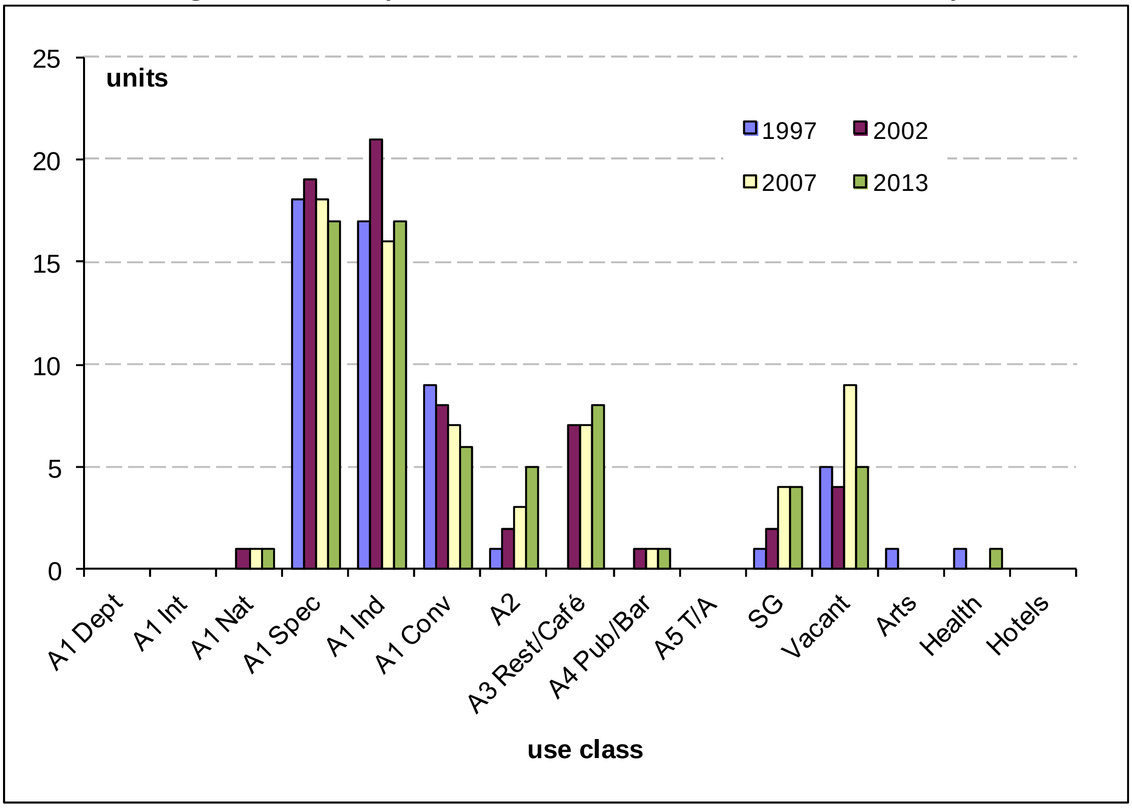
Source: WCC Land Use Survey December 2013

In total there are 65 units, which is a decrease of one unit from the previous survey in 2007.

The number of A1 retail uses has decreased by one unit since 2007, however A1 accounts for nearly two thirds of the units in the centre. The number of Class A2 uses has increased by two to five in total, and the number of food and drink uses has increased by one unit to nine, with A3 uses accounting for eight of these. The A1 uses structure has changed slightly with the loss of one specialist independent retailer and one convenience unit, but a gain of one independent unit.

The centre has no hotels or arts uses but a Dentist has opened. The vacant units have decreased by four from a reasonably high level in 2007, illustrating recent improvements in the centre, with there being only five vacant units now present in the centre.

Figure 2: Units by use class within the local centre boundary



2.2 Range of A1 Uses

Connaught Street has no department stores or international retailers, and one national retailer. The centre has 41 Class A1 retail units consisting of 6 convenience stores, 17 specialist retailers and 17 independent retailers in addition to the single national retailer. The specialist retailers include clothing, art and furnishing shops. The independent stores include several hairdressers, sandwich bars, and other uses such as a florist and travel agency. The high proportion of comparison shops and lack of multiple retailers suggests that Connaught Street serves local residents and specialist shoppers with a mix of convenience and comparison shopping facilities.

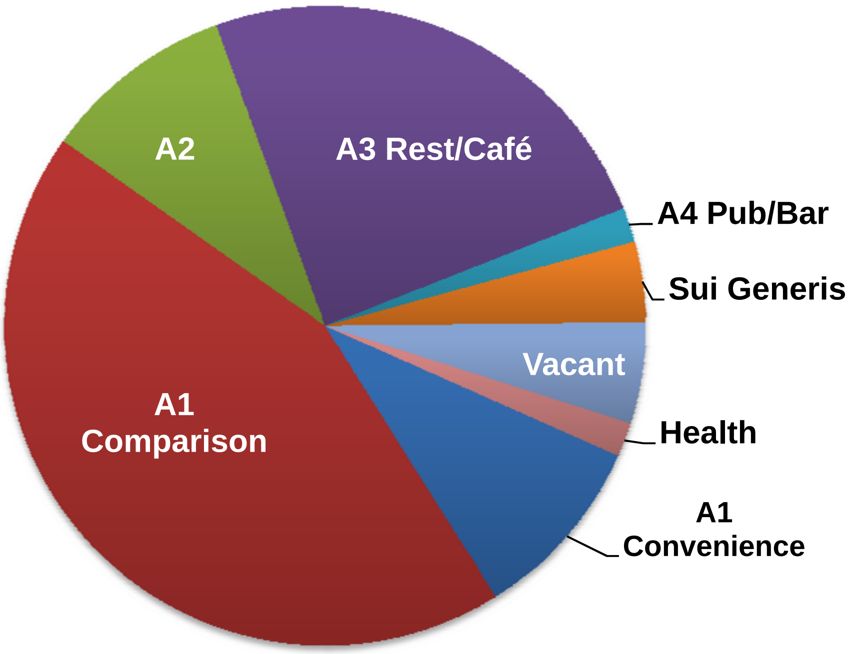
2.3 Total Retail Floor space

Total retail floor space in Connaught Street is broken down in Table 2. In total, Connaught Street has 5,385 sqm of retail floor space, which is above the average of 3,188 sqm for the 39 Local Centres in the City. A1 accounts for 53% of all floor space in the centre, with the vast majority of this being comparison retail floor space. There is also a reasonably significant proportion of A3 floor space, accounting for a quarter of all floor space in the centre. The centre contains only one pub/bar with floor space below the local centre average, and does not contain any takeaways.

Table 2: Total Retail Floor space 2013

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2013)
A1 Convenience	507	9.42%	14.9%
A1 Comparison	2355	43.73%	35.2%
A2	521	9.68%	11.2%
A3 Rest/Café/TA	1320	24.51%	17.4%
A4 Pub/Bar	94	1.75%	5.1%
Sui Generis	219	4.07%	3.9%
Vacant	276	5.13%	8.6%
Health	93	1.73%	2.0%
Hotels	0	0.00%	0.5%
Art	0	0.00%	1.3%
Leisure	0	0.00%	0.1%
Total	**5,385**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



Source: City of Westminster GIS System and site survey December 2013

Connaught Street is a Local Centre with a selection of local services and food and comparison retailers. There are no banks or building societies, and almost all of the Class A2 uses are estate agents. The Local Centre provides a reasonable range and selection of shops and services compared to other local centres.

2.4 Proportion of Vacant Street Level Property

The unit vacancy rate is under the average rate for Local Centres in the City, as shown in Table 3. The vacancy rate has decreased since 2007 when nine units were vacant. The four ground floor vacant units are spread throughout the centre. The national average vacancy rate for shopping centres is over 14.1%.

Table 3: Level of Vacant Street Level Property 2013

% Vacant Units				% Local Centre Average
1997	2002	2007	2013	2013
9.43% (5) units	6.15% (4) units	13.64% (9) units	7.69% (5) units	8% (5 units)

Source: City of Westminster GIS System and site survey December 2013

3. Accessibility

3.1 Pedestrian Flows (footfall)

The centre was found to be low in terms of pedestrian vibrancy when the Health Check Survey was carried out on a weekday morning in December 2013.

3.2 Accessibility on foot and by public transport

The nearest London Underground station to the local centre is Marble Arch (Central Line), which is located roughly 10 minutes walk from the local centre. The centre is well served by its proximity to Edgware Road (A5) to the east and Bayswater Road (A40) to the south. Many bus routes serve both of these roads, with roughly ten routes serving Edgware Road and five serving Bayswater Road. The centre is also reasonably close to Paddington Station, which is one of the busiest mainline railway stations in the city, and is also served by several London Underground lines, and many bus routes.

4. Environmental Quality

4.1 State of the Centre's Attractions and Environmental Quality / Attractions

The attitudinal assessment of the attractions and amenity of the centre is summarised in Table 4 below. The centre's overall score for attractions is 35%, which is higher than the Local Centre average of 31%, and means the centre is ranked =16th out of the 39 Local Centres in the City. The centre has a low provision of multiple retailers and poor cultural/community events, sport and leisure facilities and bank/building society provision. The centre's main strength is its good provision of restaurants and specialist shops.

4.2 Daytime Amenity

Connaught Street is an attractive Local Centre, with a day time amenity rating of 78.3% compared with the average for all Local Centres of 68%, and is ranked =11th out of the 39 Local Centres in the City. The centre's rating is good in terms of the quality of buildings, and for eleven out of the twelve security categories, including levels of graffiti, drunkenness, rough sleepers, beggars and touting. The centre has a good overall *'feel good factor'*. The centre is only rated as 'poor' due to the lack of street events and an identifying feature.

Table 4: Attractions within the Local Centre 2013

ATTRACTIONS	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Retail Provision									
Prominence of multiple retailers			X			X			X
Prominence of independent shops	X			X			X		
Availability of food shopping		X			X			X	
Prominence of specialist shops	X			X			X		
Quality of market (frequency, variety etc)	-	-	-	-	-	-	-	-	-
Quality of retail environment		X			X			X	
Art/Culture									
Quality of restaurants (availability, number etc)	X			X			X		
Quality of pub/club/bars			X			X		X	
Range of cultural/ community events (theatre, concerts)			X			X			X
Availability of sports and leisure facilities			X			X			X
Service Provision									
Local services (information, library etc)			X			X			X
Employment/ office space			X			X			X
Bank/ building society provision			X			X			X
Total	8/26			8/26			9/26		
Percentage	30.77%			30.77%			34.62%		

Source: City of Westminster site survey December 2013

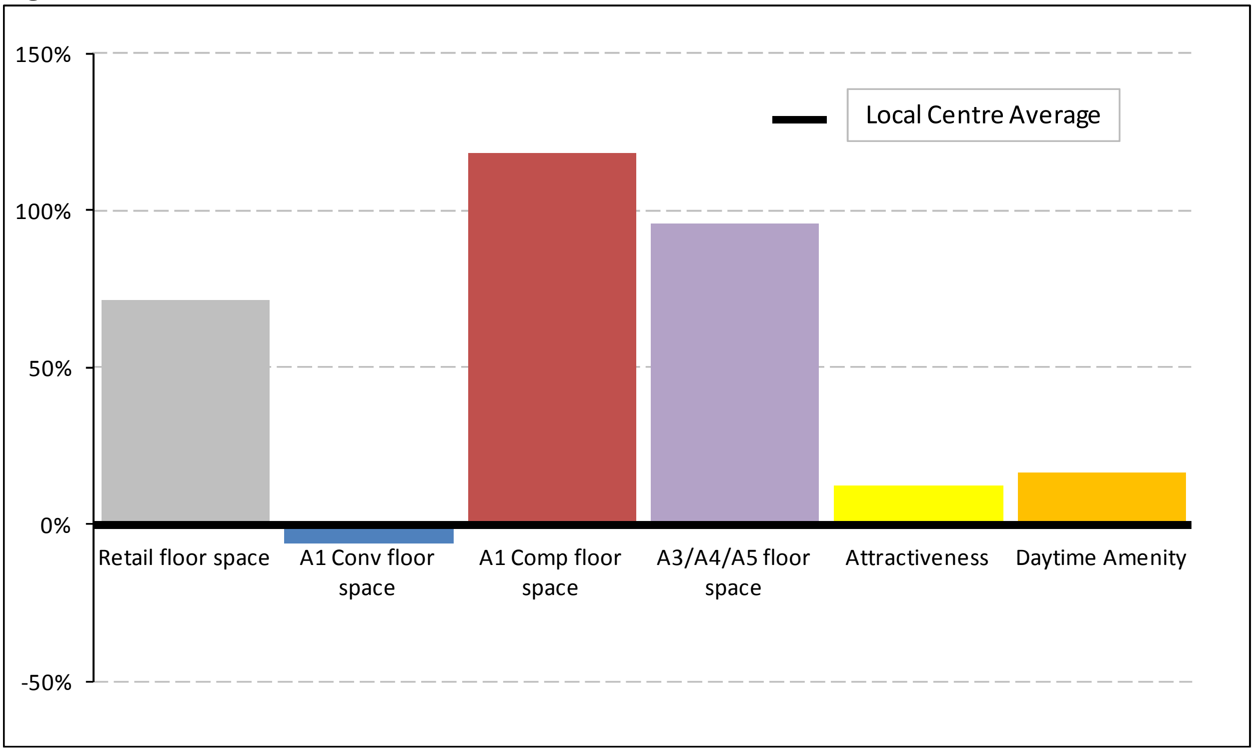
Table 5: Day Time Amenity within the Local Centre 2013

AMENITY – DAYTIME	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Overall environment of public areas in the centre									
General Cleanliness in Shopping Hours:									
Presence of litter		X		x			X		
Presence of refuse bags on the street		X		x			X		
Evidence of street fouling	X			x				X	
Presence of glass/glasses/other debris incl. Food and food containers/wrapping	X			x				X	
Condition		X		x			X		
Quality of buildings	X			x			X		
Special features (pedestrianisation, Street furniture, etc)		X			x			X	
Impact of vacant sites	X				x			X	
Security									
Evidence of Vandalism and Graffiti (incl. on street furniture)	X			x			X		
Security during shopping hours (availability, access, security etc)		X			x		X		
Ease of passage for pedestrians (incl. presence of obstacles eg illegally parked vehicles)		X			x		X		
Evidence of drunkenness, anti-social Behaviour, rowdiness	X			x			X		
Presence of rough sleepers	X			x			X		
Presence of beggars	X			x			X		
Presence of street drinkers	X			x			X		
Evidence of touting (e.g. mini cabs, ricksaws, Prostitution, drug dealing etc.)	X			x			X		
Presence of illegal street traders e.g counterfeit goods, hot dogs, peanuts etc.	X			x			X		
Effectiveness of any deterrent measures (CCTV, police patrols, door security etc)		X			x		X		
Quality of street lighting	X				x			X	
Safety perception in shopping hours	X			x			X		
Identity of town centre									
Features which identify the centre (eg flagship stores, buildings etc)			X			x			X
Promotion/ Street events			X			x			X
'Feel good' factor of town centre	X				x			X	
Total	35/46			35/46			36/46		
Percentage	76.1%			76.1%			78.3%		

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2013

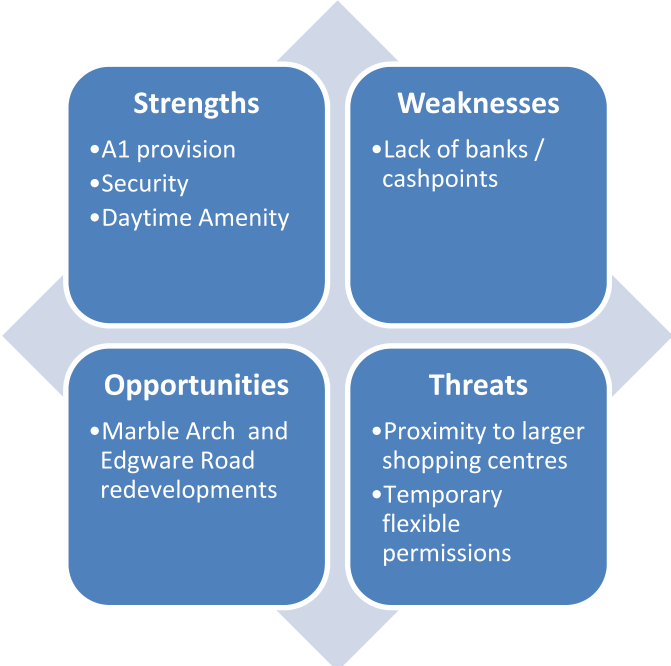
Figure 4: Deviation of centre from the mean for Local Centres 2013



Connaught Street is a reasonably large Local Centre that has an above average amount of retail floor space compared with the overall average for the 39 local centres. The same is true of food and drink uses (A3/A4/A5), and especially A1 comparison floor space which is more than twice the average. In terms of the rating of the physical environment, the centre's attractiveness and daytime amenity ratings are both above the local centre averages, illustrating the good standard of the physical environment in the centre.

5.2 Strengths, Weaknesses, Opportunities and Threats

Figure 5 SWOT analysis



6. Future capacity

6.1 Potential Capacity for Growth

Between 2007 and 2013, there were five permitted planning applications, involving two separate ground floor A1 class uses changing to A2 professional services uses. One A1 changing to a Dental practice (D1) and an A1 into a restaurant (A3). The last permission was an extension of time for a redevelopment that will extend the A1 floorspace by 25sqm.

7. Health of the Centre

Table 6: Summary of Health Check Assessment 2013

Subject	Subject Matter	Data	Number	Sq M
RETAILING	**Floor space**	**Total Floor space**		**5,385**
		Total Convenience (A1)		**507**
		Total Comparison (A1)		**2,355**
		Total Service (A2)		**521**
		Total A3		**1320**
		Total A4		**94**
		Total A5		**0**
		Toral Arts		**219**
		Total Vacant		**276**
	Retail Offer	**Total Number of Shop Units**	**65**	
		Total Number of A1 Units	**41**	
		a) Convenience shops	**6**	
		b) Department/principal stores	**0**	
		c) Prestige international shops	**0**	
		d) National comparison retailers	**1**	
		e) Specialist Independent shops	**17**	
		f) Independent shops	**17**	
		Total Comparison Multiples	**35**	
		Total Number of A2 Units	**5**	
		Total Number of A3 Units	**8**	
		Total Number of A4 Units	**1**	
		Total Number of A5 Units	**0**	
		Total Number of Sui Generis	**4**	
		Total Number of Vacant	**5**	
	Market	**Days of operation**	**0**	
		Number of stalls	**0**	
	Proposals	**Changes of use A1 to A2**	**2**	**222**
		Changes of use A1 to A3	**1**	**146**
		Changes of use A1 to A4	**0**	
		Changes of use A1 to A5	**0**	
ARTS/CULTURE		**(cinemas, galleries, theatres etc.)**	**0**	
HEALTH USES		**(clinics, surgeries etc.)**	**1**	
HOTELS			**0**	

In terms of its vitality and viability, and general economic health this centre is considered to be ‘healthy’, as it was when last surveyed in 2007.

Appendices

Appendix 1: Views of Local Centre

Appendix 2: Land Use Table (Westminster land use survey 2013)

Appendix 3: Land Use Map (GOAD 2012 retail data and Westminster land use survey 2013)

Appendix 4: Planning permissions Map (Westminster land use survey 2013)

Appendix 5: Location map of all local centres

Appendix 6: Glossary of Terms

Views of Connaught Street local centre

Attractive shop fronts and streetscape at the eastern end of the core frontage in the local centre.

Refuse on the street at the eastern end of the local centre, which has degraded the pavement underneath.

Purpose built covered shopping promenade at Coniston Court in the core shopping area.

Table 7 Land Use Table (Westminster land use survey 2013)

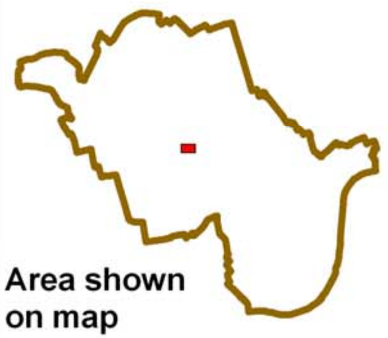
					A1	A1	A1	A1		A3	A4	B1	S G	Vacant	Health	2007 Use
ADDRESS	**FASCIA**	**DESCRIPTION**	**USE**	**SQM**	**Conv.**	**Nat.**	**Spec.**	**Ind**	**A2**	**Res/Caf**	**Pub/Bar**					
23ALBION STREET	CLUTTONS	ESTATE AGENTS	A2	51					1							A2
7CONNAUGHT STREET	Res	VACANT	Vacant	1										1		Vacant
9CONNAUGHT STREET	CONNAUGHT CARPETS	CARPET/ RUGS	A1 Ind	77				1								A1 Ind
11CONNAUGHT STREET	WALLERS	NEWSAGENTS	A1 Conv	61	1											A1 Conv
12CONNAUGHT STREET	COCOMAYER	COFFEE SHOP	A1 Ind	55				1								A1 Spec
13CONNAUGHT STREET	MARTINS COFFEE SHOP	COFFEE SHOP	A1 Ind	50				1								A1 Ind
14CONNAUGHT STREET	ASSAL	PATISSERIE	A1 Conv	51	1											A1 Conv
15CONNAUGHT STREET	GILL HARVEY	LADIESWEAR	A1 Spec	104			1									VACANT
16CONNAUGHT STREET	RITA WESTENHUIS	OFFICE	B1	51								1				B1
17CONNAUGHT STREET	HAIR @ 17	HAIRDRESSERS	A1 Ind	89				1								A1 Ind
18CONNAUGHT STREET	VACANT	VACANT	Vacant	69										1		A1 Spec
19CONNAUGHT STREET	HOBOUSHI	CLOTHING	A1 Ind	81				1								A1 Spec
20CONNAUGHT STREET	SAVANA FURNISING	FURNISHINGS	A1 Spec	80			1									A1 Spec
21CONNAUGHT STREET	ME + EM	CLOTHING	A1 Ind	78				1								A1 Ind
22CONNAUGHT STREET	INDAR PASRICHA	FINE ARTS	A1 Spec	70			1									A1 Spec
23CONNAUGHT STREET	CASE MALEVO	CAFÉ	A3 Rest/Café	77						1						A3 Rest/Café
24CONNAUGHT STREET	WILLIAM C MANSELL	WATCHMAKER	A1 Spec	71			1									A1 Spec
25CONNAUGHT STREET	VIOLA	CLOTHING	A1 Ind	79				1								A1 Spec
26CONNAUGHT STREET	THE PARK GALLERY	GALLERY (RETAIL)	A1 Spec	61			1									A1 Spec
27CONNAUGHT STREET	FARMILO FIUMANO	GALLERY (RETAIL)	A1 Spec	81			1									A1 Spec
28CONNAUGHT STREET	RITVA WESTENIUS	DRESS HIRE AND PURCHASE	A1 Spec	63			1									A1 Spec
29CONNAUGHT STREET	PARDIS	RESTAURANT	A3 Rest/Café	78						1						A1 Ind
30CONNAUGHT STREET	SALTANA	RESTAURANT	A3 Rest/Café	56						1						A3 Rest/Café
31CONNAUGHT STREET	CRYSALIS	CLOTHES SHOP	A1 Ind	83				1								A1 Ind
32CONNAUGHT STREET	BOURLET	RESTORERS	A1 Spec	57			1									A1 Spec
33CONNAUGHT STREET	ROSEWOOD GALLERY	ART	SG	54									1			SG
34CONNAUGHT STREET	NANCY DRYCLEANERS	LAUNDERETTE	SG	51									1			SG
35CONNAUGHT STREET	FIRMIN HOUSE	TAILORS	A1 Spec	56			1									Vacant
36-38CONNAUGHT STREET	THE DUKE OF KENDALL	PUBLIC HOUSE	A3 Pub/Bar	94							1					A3 Pub/Bar
37CONNAUGHT STREET	MEDICENTIES	TREATMENT ROOMS	A2	76					1							VACANT
39CONNAUGHT STREET	CONNAUGHTS HAIR TREATMENTS	HAIRDRESSERS	A1 Ind	55				1								A1 Ind

40-42CONNAUGHT STREET	CHESTERTONS	ESTATE AGENTS	A2	220					1							A2
41CONNAUGHT STREET	LE CHEF	RESTAURANT	A3 Rest/Café	55						1						A3 Rest/Café
44CONNAUGHT STREET	CARTER JONES	ESTATE AGENTS	A2	98					1							Vacant
46CONNAUGHT STREET	TREVI	INTERIORS	A1 Spec	75			1									Vacant
48CONNAUGHT STREET	VILLAGE DENTISTS	HEALTH	Vacant	93											1	Vacant
50CONNAUGHT STREET	BOMBAY PALACE	RESTAURANT	A3 Rest/Café	503						1						Vacant
53CONNAUGHT STREET	PREWETT MILLER FLOREAT	FLORIST	A1 Ind	90				1								A1 Ind
53-55CONNAUGHT STREET	VACANT	VACANT	Vacant	91										1		A1 Conv
57CONNAUGHT STREET	JEEVES OF BELGRAVIA	DRY CLEANERS	A1 Nat	79		1										A1 Nat
59ACONNAUGHT STREET	KAY & CO	ESTATE AGENTS	A2	76					1							A2
61CONNAUGHT STREET	HYDE PARK VETERINARY SURGERY	VETERINARY	SG	44									1			SG
63CONNAUGHT STREET	HYDE PARK VETERINARY SURGERY	VETERINARY	SG	70									1			A1 Spec
65CONNAUGHT STREET	Spirited Wine	OFF LICENCE	A1 Conv	69	1											A1 Conv
15-21KENDAL STREET	KURBATATA	RESTAURANT	A3 Rest/Café	372						1						A3 Rest/Café
22KENDAL STREET	FE BEAUTY	HAIRDRESSERS	A1 Ind	88				1								A1 Ind
23KENDAL STREET	ELEGANT DRY CLEANERS	DRY CLEANERS	A1 Conv	84	1											A1 Conv
24KENDAL STREET	STUZZICO	SANDWICH BAR	A1 Ind	78				1								A1 Ind
25KENDAL STREET	HOGG & SON	CHEMIST	A1 Conv	86	1											A1 Conv
26-27KENDAL STREET	FINE FOOD AND WINE	SUPERMARKET	A1 Conv	156	1											A1 Conv
28KENDAL STREET	CONNAUGHT KITCHENS	KITCHEN SHOWROOM	A1 Spec	55			1									A1 Spec
29KENDAL STREET	BIANCA FURS	FURS	A1 Spec	56			1									A1 Spec
30-31KENDAL STREET	LE PAIN QUOTIDIENT	RESTAURANT	A3 Rest/Café	118						1						A1 Ind
47KENDAL STREET	VACANT															A1 Spec
48KENDAL STREET	VACANT															A3 Rest/Café
2PORCHESTER PLACE	CONNAUGHT KITCHENS	KITCHEN SHOWROOM	A1 Spec	68			1									A1 Spec
3PORCHESTER PLACE	COCOMAYER	PATISSERIE & CAFÉ	A1 Ind	60				1								A1 Ind
4PORCHESTER PLACE	FOTO COMMUNICATIONS	MOBILE PHONES	A1 Ind	62				1								A1 Ind
5PORCHESTER PLACE	DE ROYMER	CLOTHING	A1 Spec	59			1									SG
6PORCHESTER PLACE	COLBEREH	RESTAURANT	A3 Rest/Café	61						1						A3 Rest/Café
7PORCHESTER PLACE	JEWELLER	JEWELLER	A1 Spec	63			1									A1 Spec
8PORCHESTER PLACE	CLARKE & Reilly	INTERIORS	A1 Spec	60			1									Vacant

9PORCHESTER PLACE	MARK GALLERY	GALLERY	A1 Spec	44			1									A1 Spec
10PORCHESTER PLACE	THE DRESSER	CLOTHING	A1 Ind	65				1								A1 Ind
12PORCHESTER PLACE	PROGRESSIVE TOURS	TRAVEL AGENTS	A1 Ind	63				1								A1 Ind
14PORCHESTER PLACE	VACANT	VACANT	Vacant	62										1		A1 Ind
16PORCHESTER PLACE	VACANT	VACANT	Vacant	53										1		A3 Rest/Café
11PORCHESTER PLACE	Atelier-mayer	CLOTHING	A1 Ind					1								

Source: GOAD Retail Survey 2013

Local Centre: Connaught Street



Area shown on map

Local Shopping Centre Boundary

A1: Retail

A2: Financial & Professional

A3: Restaurant/Café

A4: Pub/Bar

B1: Office

C1: Hotels

D1: Non-Res Institutions

UC: Unclassified

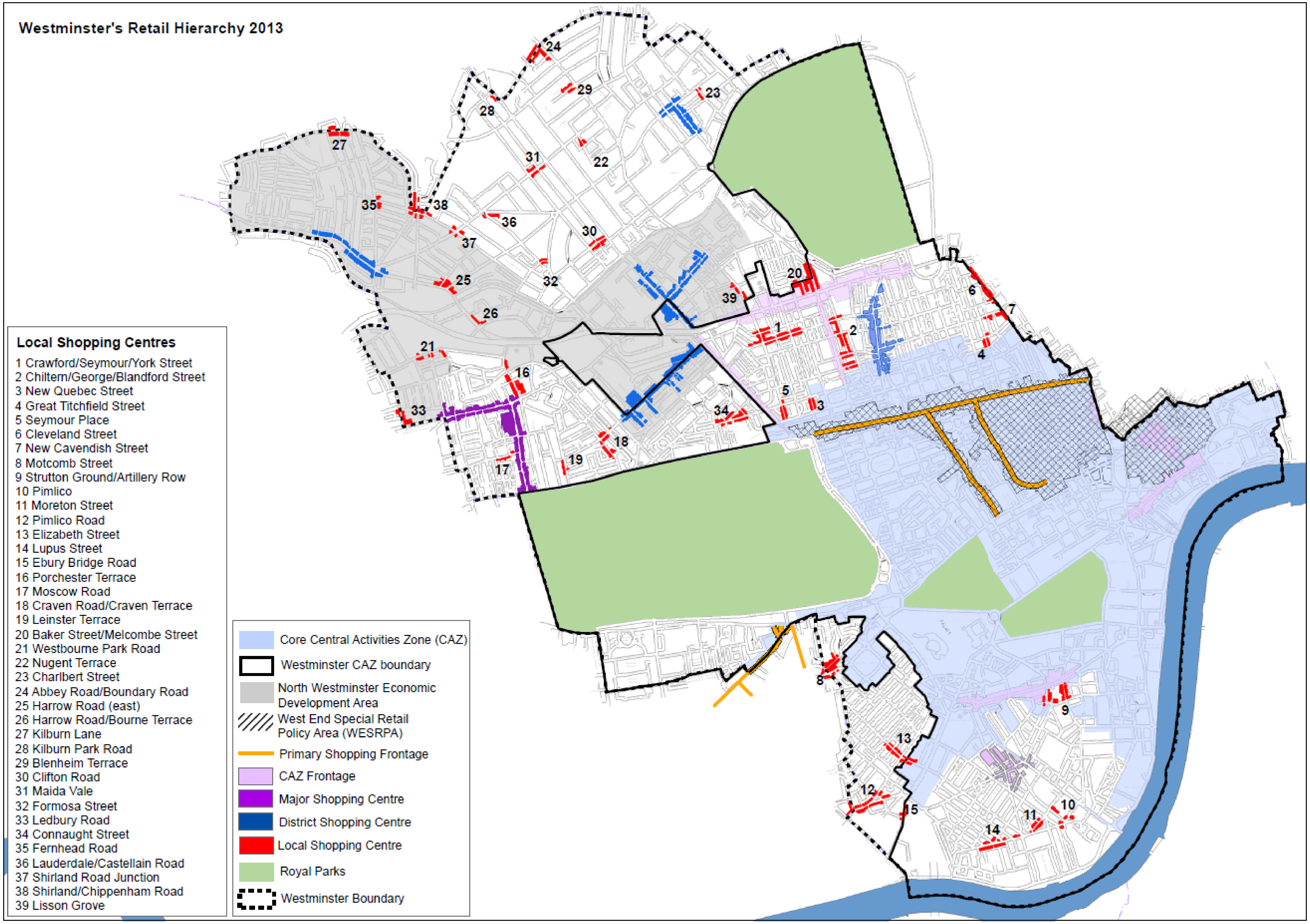
0 15 30

Metres

N


NEW QUEBEC STREET
BERKELEY MEWS
QUEBEC MEWS
Hotel
Marble Arch
Car Park
PH
Source: GOAD Retail Survey 2013
Local Centre: Connaught Street
Completed 2007-2013
Local Shopping Centre Boundary
Vacant
0 5 10
Metres
N
Area shown on map

Figure 1 Westminster wide shopping centre boundaries plan



Health Checks - Glossary of terms

A1	**Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, dry cleaners, pet shops, sandwich bars, retail showrooms, and domestic hire shops.**
A1 café type uses	**Shops such as sandwich bars or coffee shops selling food and drinks to be consumed mainly off the premises, but not hot food takeaways. Examples include certain Pret a Manger shops, Costa Coffee and the Seattle Coffee Co. shops.**
A2	**Banks, building societies, bureau de change, estate and employment agencies, professional and financial services, telephone bureaux, betting offices and beauty salons (excluding hair).**
A3	**Food and drink uses such as restaurants, pubs, snack bars, cafés, wine bars and shops for the sale of hot food (hot food take-aways).**
A4	**Drinking Establishments: Premises where the primary purpose is the sale and consumption of alcoholic drinks on the premises.**
A5	**Hot Food Take-away: Premises where the primary purpose is the sale of hot food to take away.**
B1	**Business uses such as offices, research and development and industrial uses.**
CAZ	**Central Activities Zone (CAZ). The CAZ is an area of mixed uses, many of which contribute directly to the national, regional and local economy. It is this mix of activities and their supporting resources which underpins the success of London's economy.**
CAZ Frontages	**Mixed use areas usually with a predominant retail function. Appropriate areas for retail growth.**
Comparison	**A1 floor space selling predominantly durable items and not in convenience use.**
Convenience	**This is based on the classification provided by the unit for Retail Planning Information (URPI) set out in URPI brief 99/2. The classifications are: food, alcoholic drink, tobacco and other goods (newspapers and magazines, cleaning materials and matches). For the purposes of this assessment, convenience includes shops selling food or drink (excluding A1 café-type uses), newsagents, (including specialist tobacco stores), chemists (including Boots the Chemist stores) and post offices.**
Department/ principle store	**This includes the main department stores such as John Lewis, Liberty, and Selfridges, as well as variety stores such as Marks & Spencer and Virgin Mega-stores.**
District Centre	**Distributed more widely than Metropolitan and Major centres, they provide convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000-50,000 sqm of retail floor space. Some district centres have developed specialist shopping functions.**
Experian GOAD	**An independent retail data consultancy who provide maps of ground floor uses in shopping centres.**
F&B	**Food and beverage offer, covered by parts A3 (cafe's/restaurants), A4 (drinking establishments) and A5 (take aways) of the use classes order.**
Gross Floorspace	**Floorspace of buildings on all floors including external walls, half the thickness of parting walls and circulation areas.**
Independent store	**This includes non-convenience stores (see definition above) irrespective of size, that are not considered to be specialist retailers (see definition overleaf), that are operated by retailers that are not included within national retail chains or groups.**
Major Centre	**Typically found in inner and some parts of outer London with a borough-wide catchment. They generally contain over 50,000sqm of retail floor space and a relatively high proportion of comparison goods relative to convenience goods. They may also have significant employment, leisure, service and civic functions.**
NPPF	**National Planning Policy Framework. Central Government's key, revised guidance document driving planning policy in England, which compressed the**

	previous PPS documents and other guidance into a single document. It includes key guidance on town centres and health checks.
National retailers	**This includes all retailers (Class A1 only) that operate within the context of a national retail chain or group, such as Next. A schedule of all national retail multiples can be found in Retail Directory of the UK 2002 (Hemming Information). Specialist shops that are part of a retail chain or group, such as Whittards and Thorntons, are classified as national retailers. Although there are national chains of food and drink uses and betting shops, such as Ladbrokes, these are classified based on the use class (e.g. betting shops as A2 uses) and not as national retailers.**
Prestige international retailers	**This includes prestigious retailers that operate in more than one country, such as Gucci, Gianni Versace, and Giorgio Armani. It also includes flagship stores that are only found in select town centres in Britain. National airline shops, such as British Airways, have also been classified as international retailers.**
Primary Frontages	**Internationally recognised shopping destinations. The Primary Frontages defined in Westminster's City Plan - Strategic Policies document are Oxford Street, Regent Street, Bond Street and Knightsbridge/Brompton Road.**
Retail floorspace	**This is all A1, A2, A3, A4, A5 and sui generis floorspace, and vacant floorspace of any of the aforementioned categories.**
Shisha	**Flavoured tobacco smoked through a water pipe or hookah. Smoke free legislation means that it cannot be smoked indoors in public places, and is often smoked at tables and chairs on the footway and in garden areas. There has been a rapid rise in shisha uses over the past five years, and there is concern over issues of health, residential amenity and other issues.**
Specialist independent	**Similar to an independent store, but this category reflects the quality and specialisation of the retailer so that a shopper may make a specific shopping trip to that shop. For example, The Pen Shop on Regent Street or antique shops.**
Sui generis	**Sui Generis is a term that refers to a use on its own. Any planning use not falling within a specific class within the Use Class Order falls within this category. Examples of sui generis uses in shopping centres are launderettes, mini cab offices, amusement centres and car showrooms.**
UDP	**Unitary Development Plan produced by Westminster City Council, with saved policies forming part of the statutory development plan for Westminster.**
Vacancy	**This category includes vacant street level units, as well as units that are under alteration. However, if at any time the survey was completed it was evident who the unit would be occupied by, the unit was treated as being occupied.**
Zone A Rent	**The rental level per square metre achieved on the first six metres of a shop unit.**

Information Sources

Westminster's City Plan - Strategic Policies (adopted November 2013)
https://www.westminster.gov.uk/westminsters-city-plan-strategic-policies

Westminster's Unitary Development Plan (UDP, adopted January 2007)
https://www.westminster.gov.uk/unitary-development-plan-udp

The Mayor's London Plan (GLA, July 2011 as amended)
http://www.london.gov.uk/priorities/planning/london-plan

The National Planning Policy Framework (NPPF, DCLG 2012)
https://www.gov.uk/government/publications/national-planning-policy-framework--2

National Planning Practice Guidance (NPPG, March 2014)
http://planningguidance.planningportal.gov.uk/

Westminster High Street Health Checks 2013
https://www.westminster.gov.uk/high-street-health-checks

Westminster Health Check Archive
https://www.westminster.gov.uk/shopping-centre-health-checks

City of Westminster

If you would like to obtain further copies of this Health Check report, please:

Email: ldf@westminster.gov.uk
Or Telephone: 0207 641 2447

City of Westminster

Shopping Centre Health Check Survey 2014

Local Centre 23: Craven Road & Craven Terrace

Contents

(i) Purpose of the Study

Former government guidance on Town Centres advised that 'health checks' be undertaken every five years to allow accurate and reasonable temporal analysis of the performance of town centres. This requirement has been superseded by more recent national and regional policy frameworks and guidance.

The National Planning Policy Framework (NPPF) (DCLG, 2012), states that when setting out requirements for Plan Making and using a proportionate evidence base, '*Local Planning Authorities should have a clear understanding of business needs within the economic markets operating in and across their area. To achieve this they should... assess... the role and function of town centres and the relationship between them, including any trends in the performance of centres, and the capacity of existing centres to accommodate new town centre development* (paragraphs 160, 161).'

The London Plan (2011) sets out strategic retail policy for Town Centres in London, as set out in more detail below. Paragraph 2.74 of the London Plan (July 2011) states that "*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 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.*"

This then forms the current national and regional planning policy framework for undertaking town centre health checks. The City Council is currently follow the former guidance and updating health checks every five years, as this is deemed to be a sensible and manageable time period for monitoring the viability and vitality of centres, given the extent of Westminster's town centre network.

(ii) Westminster's Local Centres and Planning Policy

Westminster's Local Centre Health Checks were last carried out in 2007, updating 2002 and 1997 surveys, and includes detailed analysis of Westminster's 39 Local Shopping Centres.

Local Centres normally have a purely local function and most are mainly comprised of convenience goods retailers with some food and drink and local service uses, mainly providing facilities for people living or working nearby (which the City Council wishes to safeguard in accordance with national guidance). However in Westminster some are also speciality centres which attract shoppers from a wider area.

Westminster's current local plan consists of the City Plan: Strategic Polices (adopted November 2013), and saved development management policies from the Unitary Development Plan (adopted January 2007). The local plan seek to protect and enhance the designated Local Shopping Centres for the service they provide to residents, visitors and workers, and because they reduce the need to travel.

Strategic policy CS21 is the general policy for retail across Westminster, seeking to protect existing A1 uses, direct new retail floor space to designated shopping centres, and to protect non-A1 retail and town centre uses in designated shopping centres from changes to uses that do not serve visiting members of the public and that do not have active shop fronts.

Saved UDP policy SS7 (Shopping and Services policy 7) is the detailed development management policy for local shopping centres. The policy covers the protection of shops and circumstances where changes of use away from shops may be permitted, taking into consideration the viability of units and the overall balance of uses in the centre.

(iii) Westminster's Retail Hierarchy

The City of Westminster is broadly divided into two zones in terms of retail policy, the Core Central Activities Zone (CAZ) and CAZ Frontages, and areas outside of this. The Core CAZ contains the two international shopping centres in London, the West End and Knightsbridge in addition to distinctive retail areas such as Covent Garden, Soho, Mayfair and St James's, as well as numerous small parades and individual shops. Outside the Core CAZ and CAZ Frontages there is one Major Shopping Centre, 4 District Centres (where previously there had been 7, 3 have subsequently been reclassified as CAZ Frontages and 1 as a Major Centre) and the 39 Local Centres which are designated to safeguard shopping facilities for local residents, and the retail character of local shopping areas.

In 2007, the District and Local Centres health check reports were all updated, as were 17 shopping areas inside the CAZ. More recently, reports for Westminster's high street shopping centres were updated in 2013.

(iv) Health Checks Methodology

As set out in the NPPF (DCLG, 2012) local planning authorities should recognise town centres as the heart of their communities and pursue policies to support their viability and vitality. Planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive.

Accessibility by public transport is considered to be excellent for all Westminster's larger shopping areas, and its Local Centres are accessible for people to walk to. The City Council wants to retain shops in Local Centres, in order to maintain a range of local convenience shops and protect the character and function of the centres. Local shops and services limit car trips, encourage walking, and make city life more practical and attractive.

The **National Planning Practice Guidance** was published in March 2014 by DCLG, several months after the field work for this project had commenced. It states that existing centres should be audited to assess their role, vitality, viability and their potential to accommodate new development and different types of development. It also sets out a series of indicators to determine the health of town centres, including:

- Diversity of use
- Vacant property
- Commercial yields on non-domestic property
- Customer views and behaviour
- Retailer representations
- Commercial rents
- Pedestrian flows and accessibility
- Perception of safety and crime
- State of environmental quality

Most of the above indicators will be assessed as part of this study, where data collection is available and reasonable. All of the above were included as part of the 2013 health checks for the larger high street type centres, where it is more appropriate to carry out consumer surveys, and where commercial data is more readily available. Given the size of this project, the indicators below are considered to be appropriate and comprehensive.

Land Use

(1) Diversity of town centre uses

This section considers the range of A1 uses, and compares the current diversity of land uses to previous Local Centre Health Check Surveys dated 1997, 2002 and 2007. It also includes the proportion of vacant street level property and the amount of space used for different functions such as shopping, leisure, cultural and entertainment activities, pubs, cafes, and restaurants.

Accessibility

(2) **Pedestrian flows (footfall):**
Visual assessments were undertaken to measure pedestrian flows which contribute towards the vitality of the Local Centres. These were conducted on comparable days of the week and compared to the average for all of the Local Centres;

(3) **Accessibility:**
The whole of Westminster has a Public Transport Accessibility Level (PTAL) score of 6, the highest level achievable. This section therefore concentrates on ease and convenience of access;

Environment

(4) **State of the town centre environmental quality assessment:**
Includes a subjective assessment of indicators such as security, air pollution, noise, clutter, litter and graffiti, as well as positive factors such as trees, landscaping and open spaces. Each centre is assessed as per the Attractions Table 4, and the Daytime Amenity Table 5 in the 2007 Health Check Survey. A comparison is made between the 1997, 2002, 2007 and 2013 surveys.

(5) **Daytime amenity:**
A qualitative assessment of the amenity within the local centre, assessing its cleanliness, security, and identity.

(6) **Relative performance of the centre:**
Measures the performance of the centre compared to the Westminster Local Centre average in terms of land use, attractiveness, and daytime amenity, with graphs comparing the performance of centres relative to one another. The centre's strengths, weaknesses, opportunities and threats are highlighted in a SWOT analysis diagram at the end of this section.

(7) **The potential capacity for growth or change of centres in the network:** opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development is considered here. Based on levels of demand, assessments are made to ascertain how much capacity each Local Centre has to accommodate retail growth, looking at retail related planning applications in and around the Local Centres. Consideration is given to whether the current Local Centre boundaries and Core and Secondary Frontage designations are still valid. Consideration is also given to ways in which the vitality and viability of the centres could be enhanced.

(8) **Summary of health check:**
This section contains a comparison of the relative performance of this centre, and summary of land use assessment as per the 2007 Health Check reports. General comments and analysis of the centre are included, along with a summary of any problems/issues. A classification as 'in decline', 'neutral', or 'healthy' is included, plus comment on whether things have improved, deteriorated, or remained the same since 2007 (see 2007 Health Checks, Tables 6 and 7). Where a Local Centre is considered to be "in decline" or "neutral", consideration is made on ways to improve the vitality and viability of the Centre.

The results of this study will be used to inform planning policy development and the inception of other relevant interventions, and will be used to assess the success of previous initiatives such as any investment in public realm.

Local Centre **23: Craven Road & Craven Terrace**

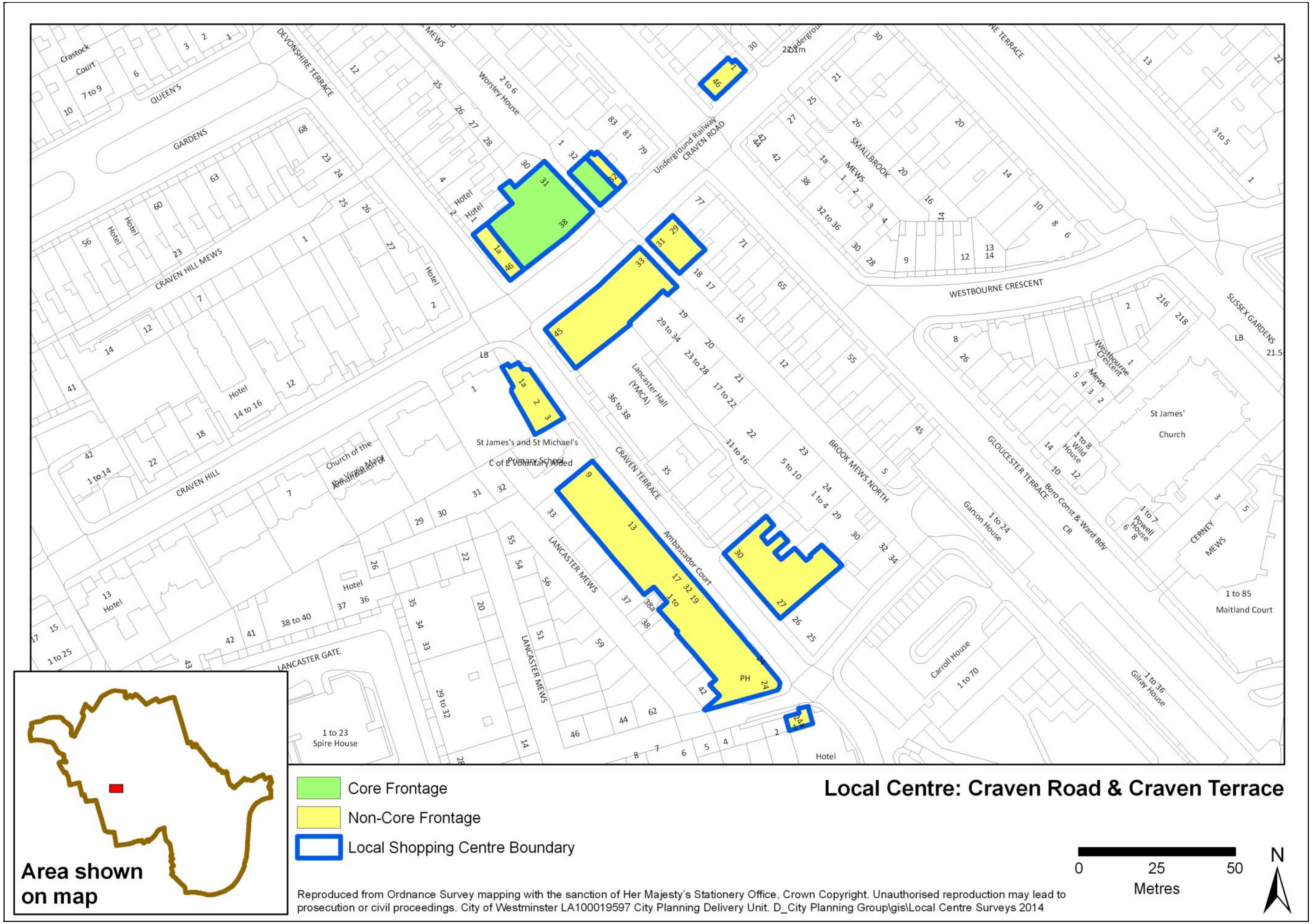
1. Introduction

1.1 Location

This medium-sized Local Centre is located in the western area of Westminster, in the vicinity of Bayswater to the west and Paddington to the east, with Hyde Park located to the south. It serves local residents and tourists from nearby hotels, however the catchment area of the centre is constrained by Hyde Park to the south. Moreover, it is in competition with other shopping centres nearby, particularly the larger Praed Street District Centre to the east, which is a continuation of Craven Road. Paddington Station could also be said to be a competitor due to the range of convenience shopping and food and drink outlets that it offers, five minutes walk from this centre.

The centre is easily accessed either via Paddington station to the east, or via many bus routes that run along Bayswater Road to the south.

Figure 1: Local Centre Boundary 2013



2 Land Use

2.1 Range of Uses

Table 1 shows that Craven Road/Craven Terrace Local Centre comprises a range of shopping and other town centre uses.

Table 1: Range of Town Centre Uses (1997-2013)

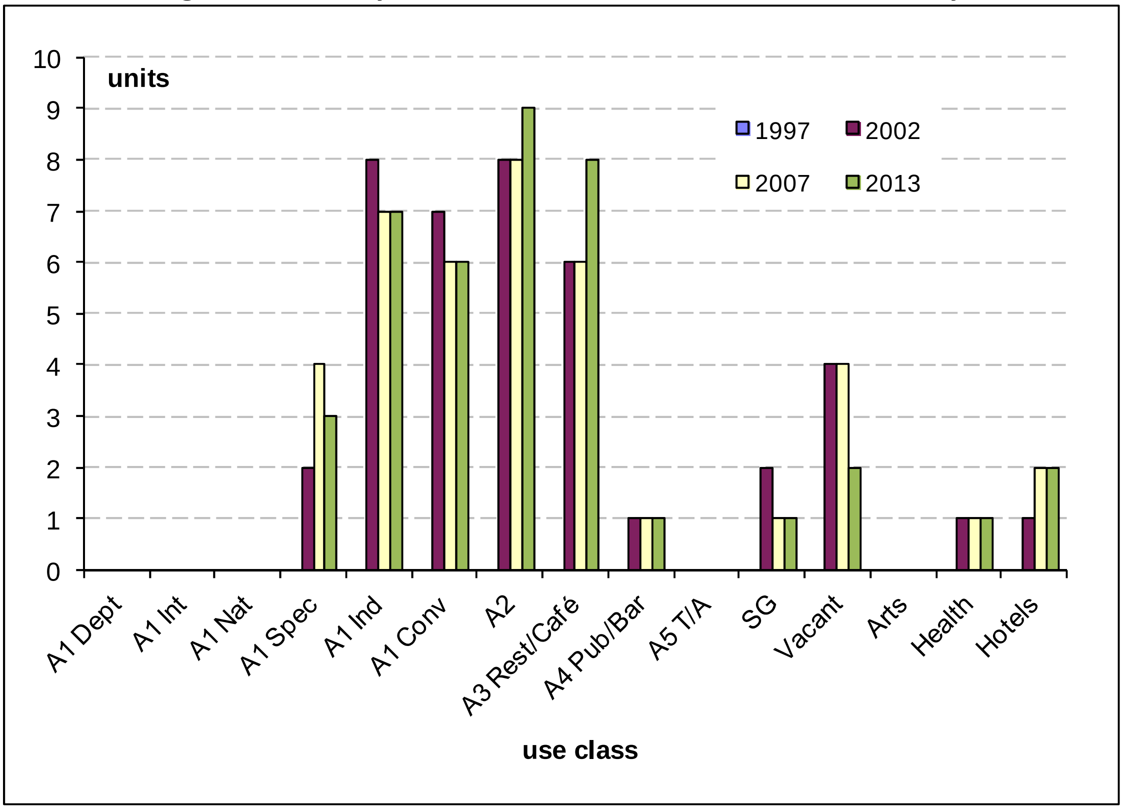
Use Class		**No. of Units**	**No. of Units**	**No. of Units**
		2002	**2007**	**2013**
Class A1 Retail		17	17	16
	Department/principle stores	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*
	National retailers	*0*	*0*	*0*
	Specialist Independent	*2*	*4*	*3*
	Independent	*8*	*7*	*7*
	Convenience	*7*	*6*	*6*
Class A2	Financial & Professional	8	8	9
Food & Drink		7	7	9
Class A3	*Restaurant/Café*	*6*	*6*	*8*
Class A4	*Pubs/Bars*	*1*	*1*	*1*
Class A5	*Takeaway*	*0*	*0*	*0*
	Takeaway/Restaurant			*0*
Sui Generis		2	1	1
Vacant Units		4	4	2
Arts/Culture		0	0	0
Health uses		1	1	1
Hotels		1	2	2
TOTAL		**40**	**40**	**40**

Source: WCC Land Use Survey December 2013

Craven Road/Craven Terrace Local Centre amounts to 40 units in total. A1 uses account for the largest single use class, comprising a mix of convenience and independent stores, along with three specialist stores. A2 and food and drink uses are also well represented in the centre, accounting for around a quarter of all units each. In addition to the A-class uses, there are two hotels and a single health use in the form of the Bayswater medical centre, both of which were present in 2007.

The composition of A-class uses has changed to a limited extent since 2007, when there was one more A1 use, one fewer A2 uses and two fewer food and drink uses. Overall, the number the specialist independent stores has decreased, however, the quality of stores might be considered to have improved somewhat; two specialist souvenir/gift shops have changed to other A-class uses, while a former A2 unit is now operating as wedding dress shop. A further change has been the occupation of two formerly vacant units as A3 restaurants/cafés and consequently only two units are currently vacant.

Figure 2: Units by use class within the Local Centre boundary



2.2 Range of A1 Uses

No department, international or national retail stores are present within the Craven Road/Craven Terrace Local Centre. There are 16 class A1 retail units, including six convenience stores, which are interspersed by seven independent stores and three specialist shops. The independent retailers comprise three hairdressers, two dry cleaners, a delicatessen and a hardware/garden shop. The three specialist uses comprise shops selling antiques, wedding dresses and pet accessories. The specialist shops are likely to draw from a wider catchment area. This Local Centre does not provide the same range and selection of shops and services found in large Local Centres or District Centres.

2.3 Total Retail Floor space

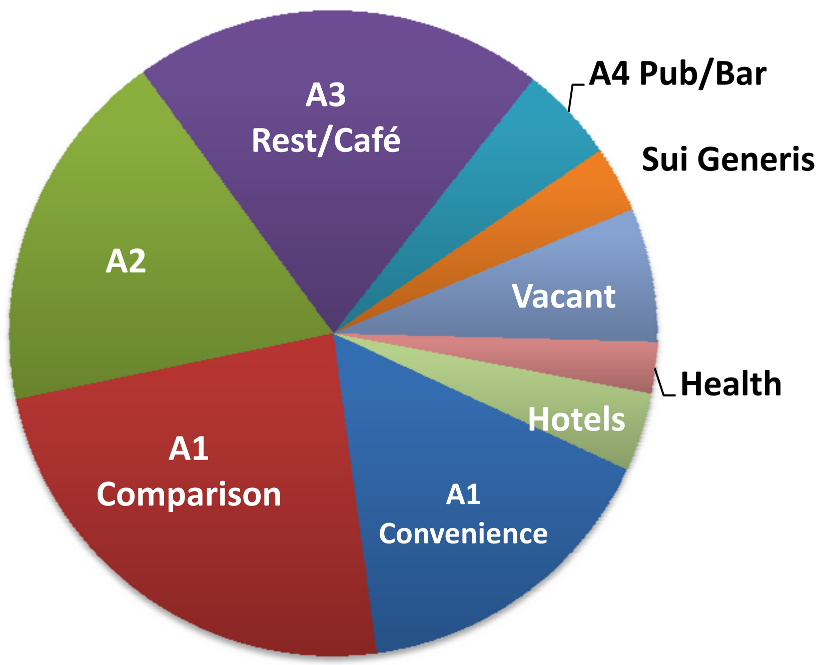
Total retail floor space in Craven Road/Craven Terrace is broken down in Table 2. In total, the centre has 3,965 sqm of retail floor space, which is above the average of 3,188 sqm for the 39 Local Centres in the City. The centre has a higher proportion of A2 floorspace, A3 and A1 convenience floorspace than compared to the other centres however the remaining use types are generally below the average.

A1 accounts for nearly 40% of floor space in the centre, with A2 accounting for 18% and food and drink uses accounting for over 25% of floor space.

Table 2: Total Retail Floor space 2013

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2013)
A1 Convenience	657	15.92%	14.9%
A1 Comparison	985	23.86%	35.2%
A2	755	18.29%	11.2%
A3 Rest/Café/TA	849	20.57%	17.4%
A4 Pub/Bar	199	4.82%	5.1%
Sui Generis	137	3.32%	3.9%
Vacant	277	6.71%	8.6%
Health	106	2.57%	2.0%
Hotels	163	3.95%	0.5%
Art	0	0.00%	1.3%
Leisure	0	0.00%	0.1%
Total	**4,128**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



Source: City of Westminster GIS System and site survey December 2013

In total, Craven Road/Craven Terrace has 3,965 sqm of ground floor non-residential floor space. Although convenience stores comprise a significant proportion of units, these are relatively small stores, amounting to under 16% of total floor space. It should be noted, however, that the Nisa store is an exception amongst the convenience stores; it is indeed the largest unit within this Local Centre. Comparison shops and A2 uses make up nearly a quarter and a fifth of total floor space respectively. Craven Road/Craven Terrace Local Centre accommodates 849 sqm of restaurant/café floor space, equating to 21% of total floor space. Table 2 indicates the remaining proportions of floor space by use class.

2.4 Proportion of Vacant Street Level Property

The unit vacancy rate in Craven Road/Craven Terrace is lower than the average rate for Local Centres in the City, as shown in Table 3. The vacancy rate has halved since 2007 to two units. The four units recorded as vacant in 2007 are all now occupied as a restaurant, a café, hairdressers and a wedding dress shop. The two units which are currently vacant were previously in use as one convenience store and one café.

Table 3: Level of Vacant Street Level Property 2013

% Vacant Units				% Local Centre Average
1997	2002	2007	2013	2013
0.0% (0) units	10.0% (4) units	10.0% (4) units	5.0% (2) units	8% (3 units)

Source: City of Westminster GIS System and site survey December 2013

3. Accessibility

3.1 Pedestrian Flows (footfall)

The centre was found to be quiet in terms of pedestrian vibrancy when the Health Check Survey was carried out on a cold, weekday afternoon in December 2013.

3.2 Accessibility on foot and by public transport

Craven Terrace/Craven Road is located within a 5 minute walk of Paddington mainline rail station and underground station. A further three underground stations – Bayswater, Lancaster Gate and Queensway – are all within a 10 minute walk. Although no bus routes pass directly along the Local Centre, several routes serve the adjacent roads of Bayswater Road (A40) to the south and Westbourne Terrace to the north.

4. Environmental Quality

4.1 State of the Centre's Attractions and Environmental Quality / Attractions

The attitudinal assessment of the attractions and amenity of the centre is summarised in Table 5 below. The centre's overall score for attractions is 26.9%, meaning that the environmental quality and range of attractions is poor. The rating is lower than the Local Centre average of 31%, and ranks =23rd out of the 39 Local Centres in the City. The Local Centre is rated as good in relation to the prominence of independent shops and quality of restaurants (availability and number). Table 5 shows that the Local Centre is mostly rated as poor for many categories, aside from availability of food shops, quality of the retail environment local information services, which were all rated as average.

4.2 Daytime Amenity

Craven Road/Craven Terrace is a pleasant Local Centre with a daytime amenity rating of 67.4%, compared with the average for all Local Centres of 68%, and is ranked =23rd out of the 39 Local Centres in the City.

The daytime amenity rating has remained the same since 2007, but reflects an improvement on 2002. Major utilities works were being undertaken at the time of the survey, however the associated obstacles, etc. are temporary and therefore the rating for 'ease of passage for pedestrians' has not been affected. The 2013 survey found an increase in the presence of glass, etc, however this was negated by decrease of vacant units. The majority of the factors relating to the security of the Local Centre were rated as good, while several factors, such as the quality of street lighting, might be improved upon. In contrast, factors relating to the identity of the town centre were rated as poor, although the overall 'feel good' factor was considered to be average.

Table 4: Attractions within the Local Centre 2013

ATTRACTIONS	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Retail Provision									
Prominence of multiple retailers			X			X			X
Prominence of independent shops	X			X			X		
Availability of food shopping	X			X				X	
Prominence of specialist shops			X		X				X
Quality of market (frequency, variety etc)	-	-	-	-	-	-	-	-	-
Quality of retail environment		X			X			X	
Art/Culture									
Quality of restaurants (availability, number etc)		X			X		X		
Quality of pub/club/bars			X			X			X
Range of cultural/ community events (theatre, concerts)			X			X			X
Availability of sports and leisure facilities			X			X			X
Service Provision									
Local services (information, library etc)		X			X			X	
Employment/ office space			X			X			X
Bank/ building society provision			X			X			X
Total	**7/26**			**8/26**			**7/26**		
Percentage	**26.9%**			**30.8%**			**26.9%**		

Source: City of Westminster site survey December 2013

Table 5: Day Time Amenity within the Local Centre 2013

AMENITY – DAYTIME	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Overall environment of public areas in the centre									
General Cleanliness in Shopping Hours:									
Presence of litter		X			X			X	
Presence of refuse bags on the street		X			X			X	
Evidence of street fouling		X			X			X	
Presence of glass/glasses/other debris incl. Food and food containers/wrapping	X			X				X	
Condition		X			X			X	
Quality of buildings	X			X			X		
Special features (pedestrianisation, Street furniture, etc)			X		X			X	
Impact of vacant sites		X			X		X		
Security									
Evidence of Vandalism and Graffiti (incl. on street furniture)	X			X			X		
Security during shopping hours (availability, access, security etc)		X			X			X	
Ease of passage for pedestrians (incl. presence of obstacles eg illegally parked vehicles)		X			X			X	
Evidence of drunkenness, anti-social Behaviour, rowdiness	X			X			X		
Presence of rough sleepers	X			X			X		
Presence of beggars	X			X			X		
Presence of street drinkers	X			X			X		
Evidence of touting (e.g. mini cabs, ricksaws, Prostitution, drug dealing etc.)	X			X			X		
Presence of illegal street traders e.g counterfeit goods, hot dogs, peanuts etc.	X			X			X		
Effectiveness of any deterrent measures (CCTV, police patrols, door security etc)		X			X			X	
Quality of street lighting		X			X			X	
Safety perception in shopping hours		X		X			X		
Identity of town centre									
Features which identify the centre (eg flagship stores, buildings etc)			X			X			X
Promotion/ Street events			X			X			X
'Feel good' factor of town centre		X			X			X	
Total	**29/46**			**31/46**			**30/46**		
Percentage	**63.0%**			**67.4%**			**67.4%**		

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2013

Figure 4: Deviation of centre from the mean for Local Centres 2013

Craven Road/Craven Terrace is a reasonably large Local Centre that has above the average retail floorspace compared to the overall average for the 39 Local Centres. This is also true for A1 convenience and food and drink floor space figures (A3/A4/A5). In terms of the rating of the physical environment the attractiveness rating is well below the Local Centre average, illustrating the poor quality of the retail environment.

5.2 Strengths, Weaknesses, Opportunities and Threats

Figure 5 SWOT analysis

6. Future capacity

6.1 Potential Capacity for Growth

Since 2007, there have not been any permitted or refused planning applications in the Local Centre involving A-class uses. However, a planning application relating to the uplift in hotel bedroom capacity from 30 to 41 bedrooms on Craven Terrace is likely to increase the immediate customer base. Note that the occupation of the two vacant units would result in growth.

7. Health of the Centre

Table 6: Summary of Health Check Assessment 2013

Subject	Subject Matter	Data	Number	Sqm
RETAILING	**Floor space**	**Total Floor space**		**3,965**
		Total Convenience (A1)		**657**
		Total Comparison (A1)		**985**
		Total Service (A2)		**755**
		Total A3		**849**
		Total A4		**199**
		Total A5		**0**
		Total Sui Generis		**137**
		Total Vacant		**277**
	Retail Offer	**Total Number of Shop Units**	**40**	
		Total Number of A1 Units	**16**	
		a) Convenience shops	**6**	
		b) Department/principal stores	**0**	
		c) Prestige international shops	**0**	
		d) National comparison retailers	**0**	
		e) Specialist Independent shops	**3**	
		f) Independent shops	**7**	
		Total Comparison Multiples	**10**	
		Total Number of A2 Units	**9**	
		Total Number of A3 Units	**8**	
		Total Number of A4 Units	**1**	
		Total Number of A5 Units	**0**	
		Total Number of Sui Generis	**1**	
		Total Number of Vacant	**2**	
	Market	**Days of operation**	**0**	
		Number of stalls	**0**	
	Proposals	**Changes of use A1 to A2**	**0**	
		Changes of use A1 to A3	**0**	
		Changes of use A1 to A4	**0**	
		Changes of use A1 to A5	**0**	
ARTS/CULTURE		**(Cinemas, galleries, theatres etc.)**	**0**	
HEALTH USES		**(Clinics, surgeries etc.)**	**1**	
HOTELS			**2**	

In terms of its vitality, viability and general economic health, this centre is considered to be healthy. The number of vacant units has halved since 2007 to just two units. The quality of specialist independent stores might be considered to have improved with the introduction of a wedding dress shop, despite the overall reduction in specialist independent shops, which involved the loss of souvenir/gift shops.

Appendices

Appendix 1: Views of Local Centre

Appendix 2: Land Use Table (Westminster land use survey 2013)

Appendix 3: Land Use Map (GOAD 2012 retail data and Westminster land use survey 2013)

Appendix 4: Planning permissions Map (Westminster land use survey 2013)

Appendix 5: Location map of all local centres

Appendix 6: Glossary of Terms

Views of Craven Road/Craven Terrace Local Centre

Views of Craven Road/Craven Terrace local centre

An attractive, well-maintained public house, and other shop frontages on Craven Terrace.

The shop frontages on the south side of Craven Road, with advertising boards obstructing the fairly narrow pavements.

The Local Centre is rated as good in relation to the quality of restaurants (availability and number).

Table 7 Land Use Table (Westminster land use survey 2013)

					A1	A1	A1		A3	A3	B1	S G	Vacant	Health	Hotels	2007 Use
ADDRESS	**FASCIA**	**DESCRIPTION**	**USE**	**SQM**	**Conv.**	**Spec.**	**Ind**	**A2**	**Res/Caf**	**Pub/Bar**						
29-31CRAVEN ROAD	Assaha	Restaurant	A3 Rest/Café	169					1							A3 Rest/Café
32CRAVEN ROAD	Cavendish Rowe	Estate Agents	A2	53				1								A2
33CRAVEN ROAD	The Mandarin	Restaurant	A3 Rest/Café	106					1							A3 Rest/Café
34CRAVEN ROAD	Raoul	Hairdressing	A1 Ind	106			1									A1 Ind
35CRAVEN ROAD	Le Supermarche	Mini Market	A1 Conv	86	1											A1 Conv
36CRAVEN ROAD	Vacant	Vacant	Vacant	181									1			A1 Ind
37CRAVEN ROAD	Kyoto Estates	Estate Agents	A2	103				1								A1 Spec
38CRAVEN ROAD	Vacant	Vacant	Vacant	96									1			A1 Conv
39CRAVEN ROAD	Hyde Park Living	Hardware & Garden Goods	A1 Ind	94			1									A1 Ind
40-42CRAVEN ROAD	Nisa	Grocers	A1 Conv	230	1											A1 Conv
41CRAVEN ROAD	Tukdin	Restaurant	A3 Rest/Café	89					1							A3 Rest/Café
43CRAVEN ROAD	Blank	Newsagents	A1 Conv	85	1											A1 Conv
44CRAVEN ROAD	Chelsea Delicatessen	Delicatessen and Sandwich Bar	A1 Ind	98			1									A1 Ind
45CRAVEN ROAD	Moore & Co	Chemist	A1 Conv	85	1											A1 Conv
46CRAVEN ROAD	Bayswater Medical Centre	Health Centre	Health	106										1		Health
1ACRAVEN TERRACE	Knight Frank	Estate Agents	A2	81				1								A2
2CRAVEN TERRACE	Pristine Dry Cleaners	Dry cleaners	A1 Ind	58			1									A1 Ind
3CRAVEN TERRACE	Pretty Paws	Cat and Dog Accessories	A1 Spec	63		1										A1 Spec
9CRAVEN TERRACE	Royal Food & Wine	Newsagents/souvenirs	A1 Conv	87	1											A1 Spec
10CRAVEN TERRACE	La Fiamma	Restaurant	A3 Rest/Café	79					1							A3 Rest/Café
11CRAVEN TERRACE	Hotel Crownwall	Hotel	Hotels	81											1	Hotels
12CRAVEN TERRACE	RF / MAX	Estate Agents	A2	81				1								A2
13CRAVEN TERRACE	The Oxford Hotel	Hotel	Hotels	82											1	Hotels
14CRAVEN TERRACE	Foreign Exchange	Financial services	A2	85				1								A2
15CRAVEN TERRACE	Craven Café	Café	A3 Rest/Café	81					1							A3 Rest/Café
16CRAVEN TERRACE	Helen's	Hairdressing	A1 Ind	82			1									Vacant

17CRAVEN TERRACE	Chard	Estate Agents	A2	89				1								A2
19CRAVEN TERRACE	Ristorante Taormina	Restaurant	A3 Rest/Café	122					1							A3 Rest/Café
20CRAVEN TERRACE	Office		B1	82							1					B1
21CRAVEN TERRACE	LG Food and News	Newsagents	A1 Conv	84	1											A1 Conv
22CRAVEN TERRACE	Wedding Atelier	Wedding dresses	A1 Spec	84		1										A2
23CRAVEN TERRACE	Mount Grange Heritage	Estate Agents	A2	79				1								A2
24CRAVEN TERRACE	The Mitre	Public House	A3 Pub/Bar	199						1						A3 Pub/Bar
27CRAVEN TERRACE	Come Together	Hairdressing	A1 Ind	188			1									A1 Ind
27ACRAVEN TERRACE	Come Together	Cafe	A3 Rest/Café	114					1							Vacant
28CRAVEN TERRACE	Laundrette & Dry Cleaners / Gi-Gi's Hot Food Cafe	Laundrette, Dry Cleaners / Cafe	SG	137								1				SG
29CRAVEN TERRACE	Blank	Antiques	A1 Spec	104		1										A1 Spec
30CRAVEN TERRACE	Tailor's Shop & Dry Cleaners	Tailor & Dry Cleaner	A1 Ind	108			1									A1 Ind
46GLOUCESTER TERRACE	Flavors of India	Restaurant	A3 Rest/Café	89					1							Vacant
46BGLOUCESTER TERRACE	Bureau De Change - London Souvenirs	Bureau De Change / Souvenirs	A2	89				1								Vacant
77GLOUCESTER TERRACE	William Hill	Bookmakers	A2	95				1								A2

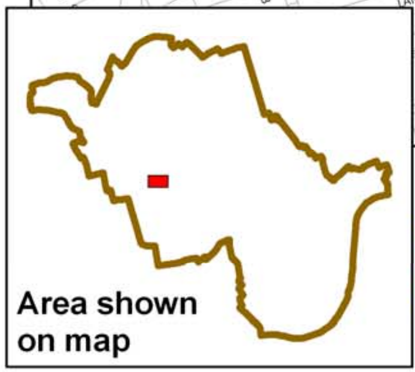
Source: GOAD Retail Survey 2013

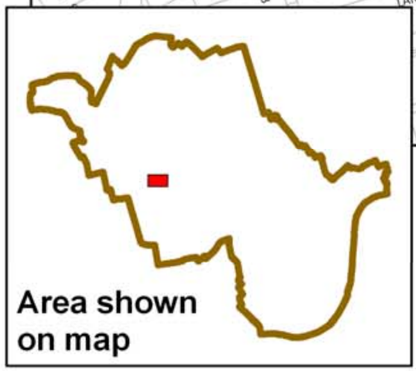
Local Centre: Craven Road & Craven Terrace

- Local Shopping Centre Boundary
- A1: Retail
- A2: Financial & Professional
- A3: Restaurant/Café
- A4: Pub/Bar
- ASG: Sui Generis
- B1: Office
- C1: Hotels
- D1: Non-Res Institutions
- UC: Unclassified

0 20 40
Metres

N





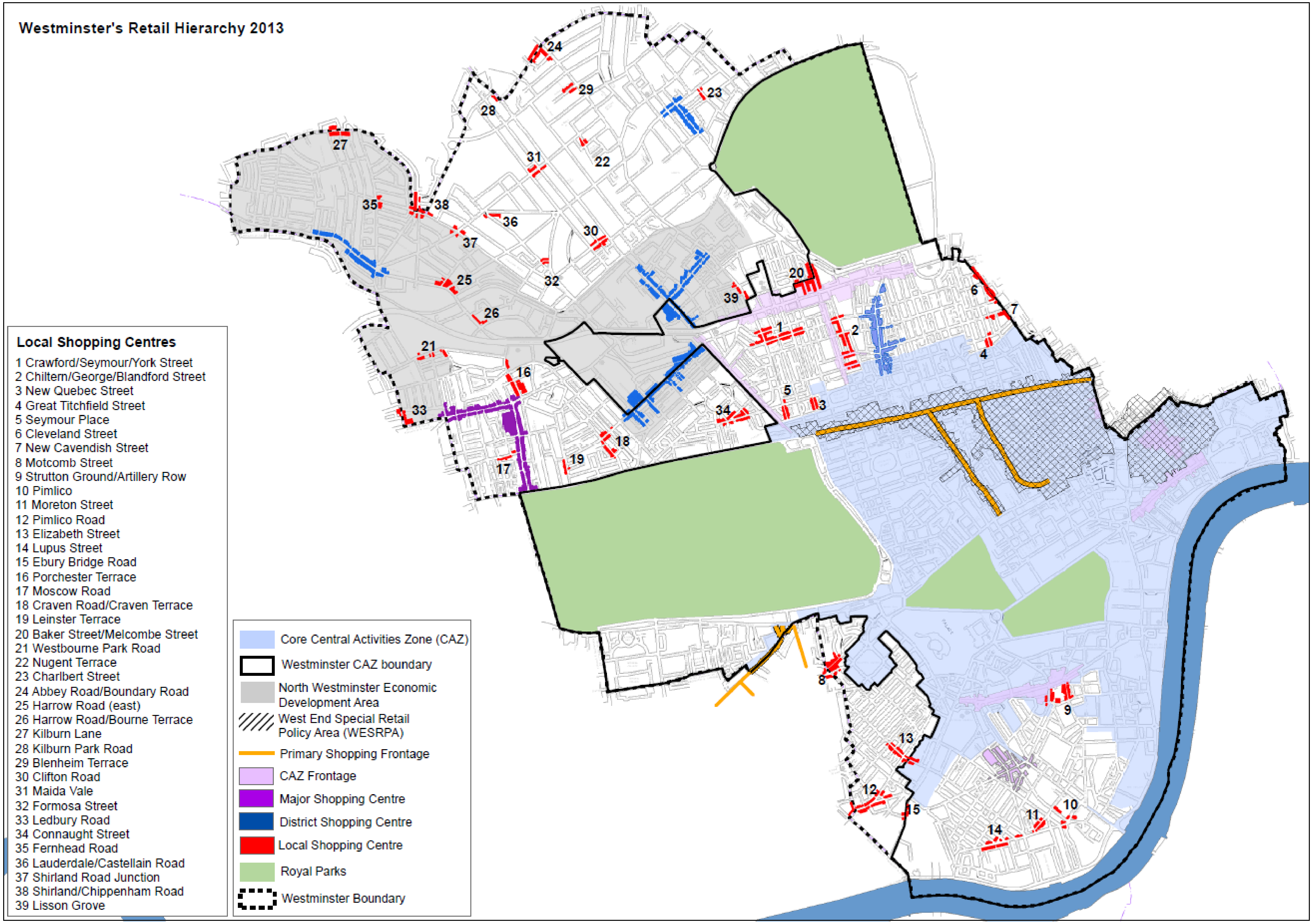
Source: GOAD Retail Survey 2013

Local Centre: Craven Road & Craven Terrace

- Completed 2007-2013
- Vacant
- Local Shopping Centre Boundary

0 25 50
Metres
N

Figure 1 Westminster wide shopping centre boundaries plan



Health Checks - Glossary of terms

A1	**Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, dry cleaners, pet shops, sandwich bars, retail showrooms, and domestic hire shops.**
A1 café type uses	**Shops such as sandwich bars or coffee shops selling food and drinks to be consumed mainly off the premises, but not hot food takeaways. Examples include certain Pret a Manger shops, Costa Coffee and the Seattle Coffee Co. shops.**
A2	**Banks, building societies, bureau de change, estate and employment agencies, professional and financial services, telephone bureaux, betting offices and beauty salons (excluding hair).**
A3	**Food and drink uses such as restaurants, pubs, snack bars, cafés, wine bars and shops for the sale of hot food (hot food take-aways).**
A4	**Drinking Establishments: Premises where the primary purpose is the sale and consumption of alcoholic drinks on the premises.**
A5	**Hot Food Take-away: Premises where the primary purpose is the sale of hot food to take away.**
B1	**Business uses such as offices, research and development and industrial uses.**
CAZ	**Central Activities Zone (CAZ). The CAZ is an area of mixed uses, many of which contribute directly to the national, regional and local economy. It is this mix of activities and their supporting resources which underpins the success of London's economy.**
CAZ Frontages	**Mixed use areas usually with a predominant retail function. Appropriate areas for retail growth.**
Comparison	**A1 floor space selling predominantly durable items and not in convenience use.**
Convenience	**This is based on the classification provided by the unit for Retail Planning Information (URPI) set out in URPI brief 99/2. The classifications are: food, alcoholic drink, tobacco and other goods (newspapers and magazines, cleaning materials and matches). For the purposes of this assessment, convenience includes shops selling food or drink (excluding A1 café-type uses), newsagents, (including specialist tobacco stores), chemists (including Boots the Chemist stores) and post offices.**
Department/ principle store	**This includes the main department stores such as John Lewis, Liberty, and Selfridges, as well as variety stores such as Marks & Spencer and Virgin Mega-stores.**
District Centre	**Distributed more widely than Metropolitan and Major centres, they provide convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000-50,000 sqm of retail floor space. Some district centres have developed specialist shopping functions.**
Experian GOAD	**An independent retail data consultancy who provide maps of ground floor uses in shopping centres.**
F&B	**Food and beverage offer, covered by parts A3 (cafe's/restaurants), A4 (drinking establishments) and A5 (take aways) of the use classes order.**
Gross Floorspace	**Floorspace of buildings on all floors including external walls, half the thickness of parting walls and circulation areas.**
Independent store	**This includes non-convenience stores (see definition above) irrespective of size, that are not considered to be specialist retailers (see definition overleaf), that are operated by retailers that are not included within national retail chains or groups.**
Major Centre	**Typically found in inner and some parts of outer London with a borough-wide catchment. They generally contain over 50,000sqm of retail floor space and a relatively high proportion of comparison goods relative to convenience goods.**

	They may also have significant employment, leisure, service and civic functions.
NPPF	National Planning Policy Framework. Central Government's key, revised guidance document driving planning policy in England, which compressed the previous PPS documents and other guidance into a single document. It includes key guidance on town centres and health checks.
National retailers	This includes all retailers (Class A1 only) that operate within the context of a national retail chain or group, such as Next. A schedule of all national retail multiples can be found in Retail Directory of the UK 2002 (Hemming Information). Specialist shops that are part of a retail chain or group, such as Whittards and Thorntons, are classified as national retailers. Although there are national chains of food and drink uses and betting shops, such as Ladbrokes, these are classified based on the use class (e.g. betting shops as A2 uses) and not as national retailers.
Prestige international retailers	This includes prestigious retailers that operate in more than one country, such as Gucci, Gianni Versace, and Giorgio Armani. It also includes flagship stores that are only found in select town centres in Britain. National airline shops, such as British Airways, have also been classified as international retailers.
Primary Frontages	Internationally recognised shopping destinations. The Primary Frontages defined in Westminster's City Plan - Strategic Policies document are Oxford Street, Regent Street, Bond Street and Knightsbridge/Brompton Road.
Retail floorspace	This is all A1, A2, A3, A4, A5 and sui generis floorspace, and vacant floorspace of any of the aforementioned categories.
Shisha	Flavoured tobacco smoked through a water pipe or hookah. Smoke free legislation means that it cannot be smoked indoors in public places, and is often smoked at tables and chairs on the footway and in garden areas. There has been a rapid rise in shisha uses over the past five years, and there is concern over issues of health, residential amenity and other issues.
Specialist independent	Similar to an independent store, but this category reflects the quality and specialisation of the retailer so that a shopper may make a specific shopping trip to that shop. For example, The Pen Shop on Regent Street or antique shops.
Sui generis	Sui Generis is a term that refers to a use on its own. Any planning use not falling within a specific class within the Use Class Order falls within this category. Examples of sui generis uses in shopping centres are launderettes, mini cab offices, amusement centres and car showrooms.
UDP	Unitary Development Plan produced by Westminster City Council, with saved policies forming part of the statutory development plan for Westminster.
Vacancy	This category includes vacant street level units, as well as units that are under alteration. However, if at any time the survey was completed it was evident who the unit would be occupied by, the unit was treated as being occupied.
Zone A Rent	The rental level per square metre achieved on the first six metres of a shop unit.

Information Sources

Westminster's City Plan - Strategic Policies (adopted November 2013)
https://www.westminster.gov.uk/westminsters-city-plan-strategic-policies

Westminster's Unitary Development Plan (UDP, adopted January 2007)
https://www.westminster.gov.uk/unitary-development-plan-udp

The Mayor's London Plan (GLA, July 2011 as amended)
http://www.london.gov.uk/priorities/planning/london-plan

The National Planning Policy Framework (NPPF, DCLG 2012)
https://www.gov.uk/government/publications/national-planning-policy-framework--2

National Planning Practice Guidance (NPPG, March 2014)
http://planningguidance.planningportal.gov.uk/

Westminster High Street Health Checks 2013
https://www.westminster.gov.uk/high-street-health-checks

Westminster Health Check Archive
https://www.westminster.gov.uk/shopping-centre-health-checks

City of Westminster

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City of Westminster

Shopping Centre Health Check Survey 2014

Local Centre 24: Harrow Road & Bourne Terrace

Contents

(i) Purpose of the Study

Former government guidance on Town Centres advised that 'health checks' be undertaken every five years to allow accurate and reasonable temporal analysis of the performance of town centres. This requirement has been superseded by more recent national and regional policy frameworks and guidance.

The National Planning Policy Framework (NPPF) (DCLG, 2012), states that when setting out requirements for Plan Making and using a proportionate evidence base, '*Local Planning Authorities should have a clear understanding of business needs within the economic markets operating in and across their area. To achieve this they should... assess... the role and function of town centres and the relationship between them, including any trends in the performance of centres, and the capacity of existing centres to accommodate new town centre development* (paragraphs 160, 161).'

The London Plan (2011) sets out strategic retail policy for Town Centres in London, as set out in more detail below. Paragraph 2.74 of the London Plan (July 2011) states that "*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 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.*"

This then forms the current national and regional planning policy framework for undertaking town centre health checks. The City Council is currently follow the former guidance and updating health checks every five years, as this is deemed to be a sensible and manageable time period for monitoring the viability and vitality of centres, given the extent of Westminster's town centre network.

(ii) Westminster's Local Centres and Planning Policy

Westminster's Local Centre Health Checks were last carried out in 2007, updating 2002 and 1997 surveys, and includes detailed analysis of Westminster's 39 Local Shopping Centres.

Local Centres normally have a purely local function and most are mainly comprised of convenience goods retailers with some food and drink and local service uses, mainly providing facilities for people living or working nearby (which the City Council wishes to safeguard in accordance with national guidance). However in Westminster some are also speciality centres which attract shoppers from a wider area.

Westminster's current local plan consists of the City Plan: Strategic Polices (adopted November 2013), and saved development management policies from the Unitary Development Plan (adopted January 2007). The local plan seek to protect and enhance the designated Local Shopping Centres for the service they provide to residents, visitors and workers, and because they reduce the need to travel.

Strategic policy CS21 is the general policy for retail across Westminster, seeking to protect existing A1 uses, direct new retail floor space to designated shopping centres, and to protect non-A1 retail and town centre uses in designated shopping centres from changes to uses that do not serve visiting members of the public and that do not have active shop fronts.

Saved UDP policy SS7 (Shopping and Services policy 7) is the detailed development management policy for local shopping centres. The policy covers the protection of shops and circumstances where changes of use away from shops may be permitted, taking into consideration the viability of units and the overall balance of uses in the centre.

(iii) Westminster's Retail Hierarchy

The City of Westminster is broadly divided into two zones in terms of retail policy, the Core Central Activities Zone (CAZ) and CAZ Frontages, and areas outside of this. The Core CAZ contains the two international shopping centres in London, the West End and Knightsbridge in addition to distinctive retail areas such as Covent Garden, Soho, Mayfair and St James's, as well as numerous small parades and individual shops. Outside the Core CAZ and CAZ Frontages there is one Major Shopping Centre, 4 District Centres (where previously there had been 7, 3 have subsequently been reclassified as CAZ Frontages and 1 as a Major Centre) and the 39 Local Centres which are designated to safeguard shopping facilities for local residents, and the retail character of local shopping areas.

In 2007, the District and Local Centres health check reports were all updated, as were 17 shopping areas inside the CAZ. More recently, reports for Westminster's high street shopping centres were updated in 2013.

(iv) Health Checks Methodology

As set out in the NPPF (DCLG, 2012) local planning authorities should recognise town centres as the heart of their communities and pursue policies to support their viability and vitality. Planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive.

Accessibility by public transport is considered to be excellent for all Westminster's larger shopping areas, and its Local Centres are accessible for people to walk to. The City Council wants to retain shops in Local Centres, in order to maintain a range of local convenience shops and protect the character and function of the centres. Local shops and services limit car trips, encourage walking, and make city life more practical and attractive.

The **National Planning Practice Guidance** was published in March 2014 by DCLG, several months after the field work for this project had commenced. It states that existing centres should be audited to assess their role, vitality, viability and their potential to accommodate new development and different types of development. It also sets out a series of indicators to determine the health of town centres, including:

- Diversity of use
- Vacant property
- Commercial yields on non-domestic property
- Customer views and behaviour
- Retailer representations
- Commercial rents
- Pedestrian flows and accessibility
- Perception of safety and crime
- State of environmental quality

Most of the above indicators will be assessed as part of this study, where data collection is available and reasonable. All of the above were included as part of the 2013 health checks for the larger high street type centres, where it is more appropriate to carry out consumer surveys, and where commercial data is more readily available. Given the size of this project, the indicators below are considered to be appropriate and comprehensive.

Land Use

(1) Diversity of town centre uses

This section considers the range of A1 uses, and compares the current diversity of land uses to previous Local Centre Health Check Surveys dated 1997, 2002 and 2007. It also includes the proportion of vacant street level property and the amount of space used for different functions such as shopping, leisure, cultural and entertainment activities, pubs, cafes, and restaurants.

Accessibility

(2) Pedestrian flows (footfall):
Visual assessments were undertaken to measure pedestrian flows which contribute towards the vitality of the Local Centres. These were conducted on comparable days of the week and compared to the average for all of the Local Centres;

(3) Accessibility:
The whole of Westminster has a Public Transport Accessibility Level (PTAL) score of 6, the highest level achievable. This section therefore concentrates on ease and convenience of access;

Environment

(4) State of the town centre environmental quality assessment:
Includes a subjective assessment of indicators such as security, air pollution, noise, clutter, litter and graffiti, as well as positive factors such as trees, landscaping and open spaces. Each centre is assessed as per the Attractions Table 4, and the Daytime Amenity Table 5 in the 2007 Health Check Survey. A comparison is made between the 1997, 2002, 2007 and 2013 surveys.

(5) Daytime amenity:
A qualitative assessment of the amenity within the local centre, assessing its cleanliness, security, and identity.

(6) Relative performance of the centre:
Measures the performance of the centre compared to the Westminster Local Centre average in terms of land use, attractiveness, and daytime amenity, with graphs comparing the performance of centres relative to one another. The centre's strengths, weaknesses, opportunities and threats are highlighted in a SWOT analysis diagram at the end of this section.

(7) The potential capacity for growth or change of centres in the network: opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development is considered here. Based on levels of demand, assessments are made to ascertain how much capacity each Local Centre has to accommodate retail growth, looking at retail related planning applications in and around the Local Centres. Consideration is given to whether the current Local Centre boundaries and Core and Secondary Frontage designations are still valid. Consideration is also given to ways in which the vitality and viability of the centres could be enhanced.

(8) Summary of health check:
This section contains a comparison of the relative performance of this centre, and summary of land use assessment as per the 2007 Health Check reports. General comments and analysis of the centre are included, along with a summary of any problems/issues. A classification as 'in decline', 'neutral', or 'healthy' is included, plus comment on whether things have improved, deteriorated, or remained the same since 2007 (see 2007 Health Checks, Tables 6 and 7). Where a Local Centre is considered to be "in decline" or "neutral", consideration is made on ways to improve the vitality and viability of the Centre.

The results of this study will be used to inform planning policy development and the inception of other relevant interventions, and will be used to assess the success of previous initiatives such as any investment in public realm.

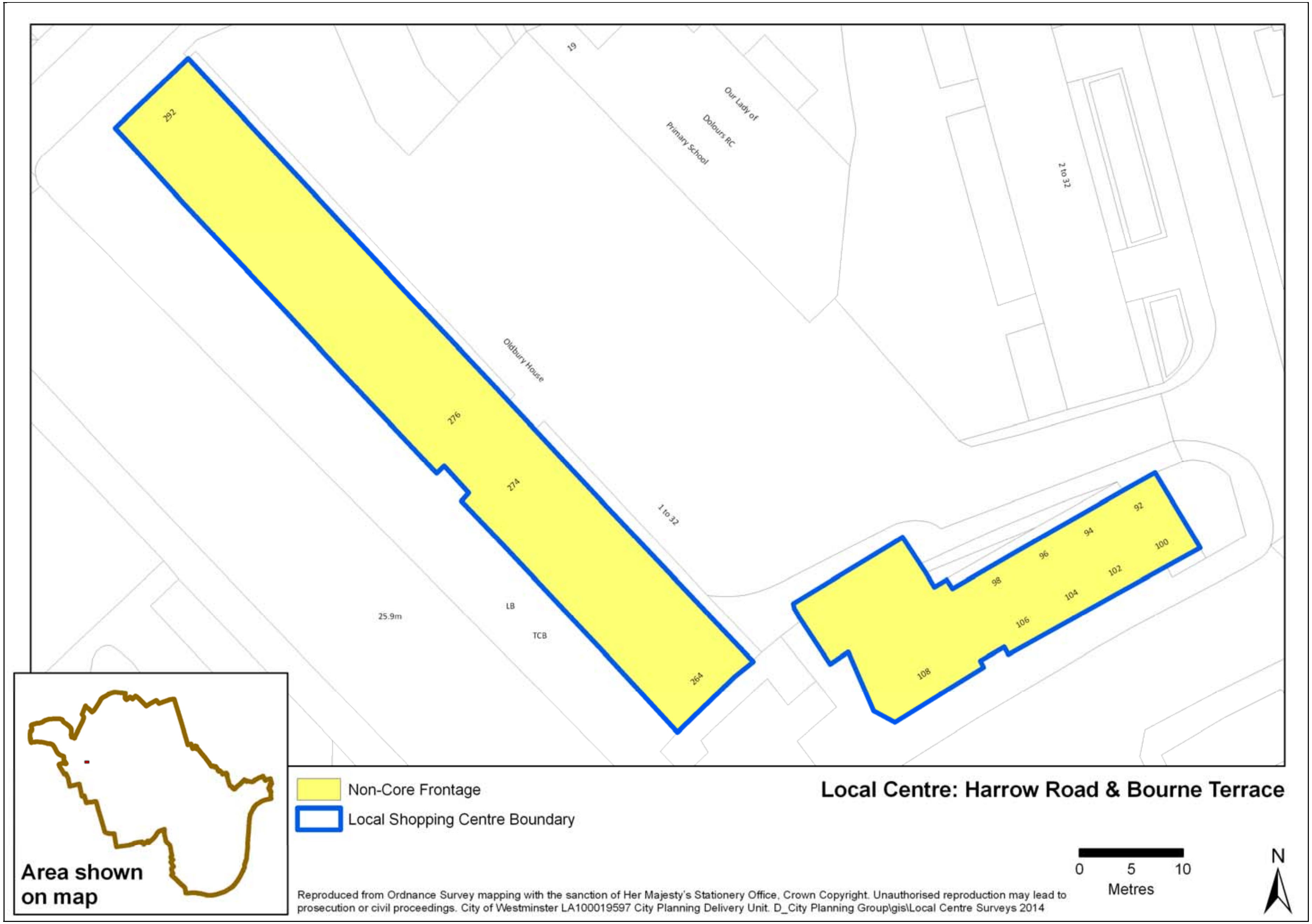
Local Centre **24: Harrow Road/Bourne Terrace**

1. Introduction

1.1 Location

Harrow Road/Bourne Terrace is a small local centre located in the north west of Westminster. The centre is a purpose built 1960's parade/undercroft development with residential units on upper floors. The local centre is in close proximity to the A40 (M) Westway and also to Royal Oak London Underground station. The centre serves local residents, however its catchment area is limited by the proximity to the Harrow Road District Centre and to the smaller Harrow Road (east) local centre.

Figure 1: Local Centre Boundary 2013



2 Land Use

2.1 Range of Uses

This centre comprises a range of shopping and other town centre uses. The diversity of uses represented in the centre is summarised in Table 1 below.

Table 1: Range of Town Centre Uses (1997-2013)

Use Class		No. of Units	No. of Units	No. of Units	No. of Units
		1997	**2002**	**2007**	**2013**
Class A1 Retail		13	15	15	13
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*0*
	National retailers	*1*	*0*	*0*	*0*
	Specialist Independent	*2*	*3*	*4*	*2*
	Independent	*5*	*4*	*3*	*3*
	Convenience	*5*	*8*	*8*	*8*
Class A2	Financial & Professional	0	1	1	1
Food & Drink		0	2	2	2
Class A3	*Restaurant/Café*	*0*	*1*	*1*	*1*
Class A4	*Pubs/Bars*	*0*	*1*	*0*	*0*
Class A5	*Takeaway*	*0*	*0*	*1*	*1*
	Takeaway/Restaurant				*0*
Sui Generis		0	1	1	1
Vacant Units		3	0	0	2
Arts/Culture		0	0	0	0
Health uses		1	0	0	0
Hotels		0	0	0	0
TOTAL		**17**	**19**	**19**	**19**

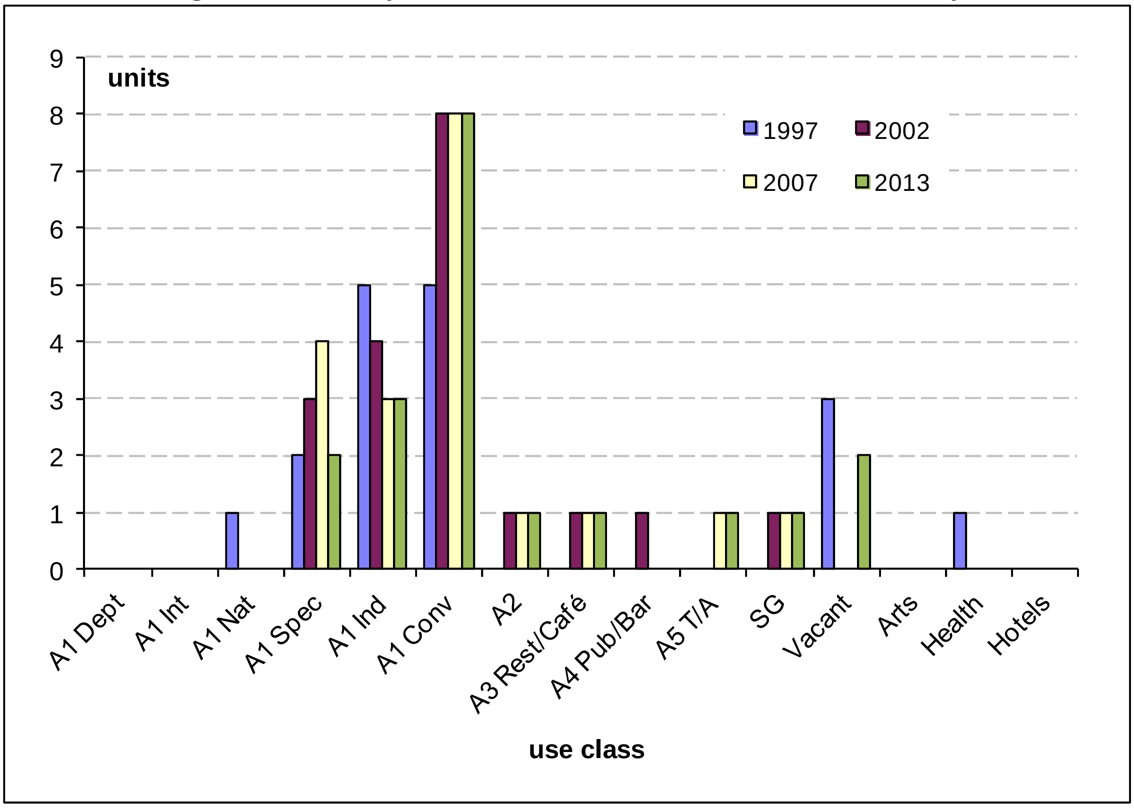
Source: WCC Land Use Survey December 2013

Harrow Road/Bourne Terrace is a small local centre with 19 units in total, which is the same total as the previous survey in 2007.

The number of A1 retail uses has decreased by two units since 2007 as two units have become vacant, when previously the centre was fully occupied. The number of Class A2, A3, A4 and A5 have remained the same. The A1 uses structure has changed with the closure of two specialist independent retailers.

Outside of A-class uses, the centre contains one sui generis use in the form of a laundrette, but does not contain any hotels, or health or arts uses.

Figure 2: Units by use class within the local centre boundary



2.2 Range of A1 Uses

Harrow Road/Bourne Terrace has 13 Class A1 retail units constituting a vast majority of total units in the centre, including 8 convenience stores, 2 specialist retailers and 3 independent retailers. The specialist retailers are a carpet store and a glass shop. The independent stores include a locksmith and stationers. The high proportion of convenience retailers suggests that Harrow Road/Bourne Terrace serves local residents on a day to day basis.

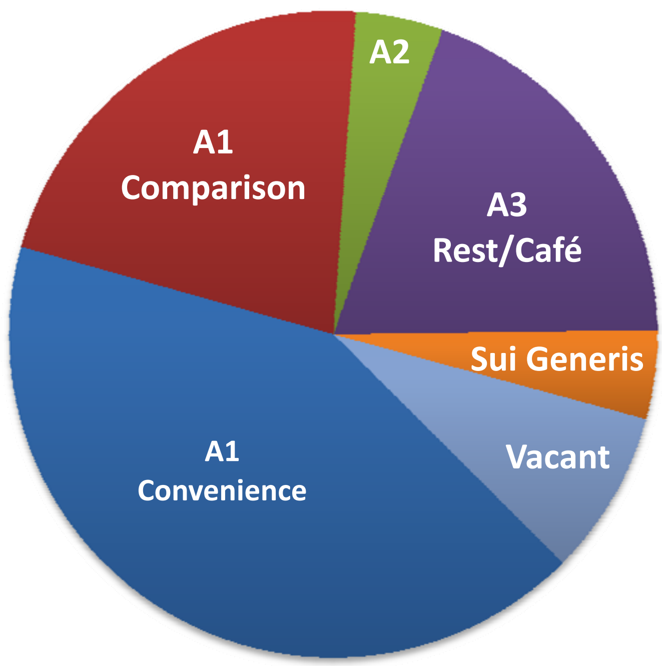
2.3 Total Retail Floor space

Total retail floor space in Harrow Road/Bourne Terrace is broken down in Table 2. In total, the centre has 1,149 sqm of retail floor space, which is below the average of 3,188 sqm for the 39 Local Centres in the City. Harrow Road/Bourne Terrace has a very high proportion of A1 convenience floor space. There are comparable proportions of A1 independent, A1 specialist and A3 floor space with the remaining uses making negligible contributions. The centre therefore has a lower than average proportion of comparison floor space, at 22% compared to the overall average of 35%.

Table 2: Total Retail Floor space 2013

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2013)
A1 Convenience	481	41.86%	14.9%
A1 Comparison	250	21.76%	35.2%
A2	50	4.35%	11.2%
A3 Rest/Café/TA	222	19.32%	17.4%
A4 Pub/Bar	0	0.00%	5.1%
Sui Generis	51	4.44%	3.9%
Vacant	95	8.27%	8.6%
Health	0	0.00%	2.0%
Hotels	0	0.00%	0.5%
Art	0	0.00%	1.3%
Leisure	0	0.00%	0.1%
Total	**1,149**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



Source: City of Westminster GIS System and site survey December 2013

Harrow Road/Bourne Terrace is a small Local Centre with a selection of local services and many food shops. There are no banks or building societies. In general, the Local Centre does not provide the same range and selection found in large Local Centres or District Centres.

2.4 Proportion of Vacant Street Level Property

The unit vacancy rate is higher than the average rate for Local Centres in the City, as shown in Table 3, however this is a very small centre so any vacancy will account for a reasonable proportion of units. There are currently two vacant units in Harrow Road / Bourne Terrace shopping area. The national average vacancy rate for shopping centres is over 14.1%.

Table 3: Level of Vacant Street Level Property 2013

% Vacant Units				% Local Centre Average
1997	2002	2007	2013	2013
0.00% (3) units	0.00% (0) units	0.00% (0) units	10.53% (2) units	8% (2 units)

Source: City of Westminster GIS System and site survey December 2013

3. Accessibility

3.1 Pedestrian Flows (footfall)

The centre was found to be high in terms of pedestrian vibrancy when the Health Check Survey was carried out on a weekday afternoon in December 2013. The centre is adjacent to a large secondary school/academy on Harrow Road, and also has a very busy bus stop used by local residents throughout the day.

3.2 Accessibility on foot and by public transport

Harrow Road/Bourne Terrace is located roughly 5-10 minutes walk from Royal Oak London Underground Station (Hammersmith & City Line), and 5-10 minutes from Warwick Avenue London Underground Station (Bakerloo Line). The buses 18 and 36 serves the local centre. The local centre is located adjacent to the Westway (A40), which is one of the main arterial roads through the centre of London, and Harrow Road (A404) is also a significant road through the north west of the city.

4. Environmental Quality

4.1 State of the Centre’s Attractions and Environmental Quality / Attractions

The attitudinal assessment of the attractions and amenity of the centre is summarised in Table 5 below. The centre’s overall score for attractions is 11.5%, meaning that this is an unattractive centre. This is lower than the Local Centre average of 31%, and ranks Harrow Road/Bourne Terrace =35th out of the 39 Local Centres in the City. The only real strength of the centre is the provision of food shops, and the average provision of independent shops. The remaining categories are all rated as being poor.

4.2 Daytime Amenity

Harrow Road/Bourne Terrace is an unattractive Local Centre with day time amenity rating of 47.8% compared with the average for all Local Centres of 68%, and is ranked 35th out of the 39 Local Centres in the City. The centre is only rated as being good in building condition and pedestrian ease due to the wide streets even though the street has many forecourt vendors. The centre is rated as being poor in terms of the three town centre identity ratings. The remaining categories are all rated as being average, including 7 of the 8 general cleanliness categories, and in 11 of the 12 security categories.

Table 4: Attractions within the Local Centre 2013

ATTRACTIONS	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Retail Provision									
Prominence of multiple retailers			X			X			X
Prominence of independent shops		X			X			X	
Availability of food shopping	X			X			X		
Prominence of specialist shops		X			X				X
Quality of market (frequency, variety etc)	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Quality of retail environment			X			X			X
Art/Culture									
Quality of restaurants (availability, number etc)			X			X			X
Quality of pub/club/bars			X			X			X
Range of cultural/ community events (theatre, concerts)			X			X			X
Availability of sports and leisure facilities			X			X			X
Service Provision									
Local services (information, library etc)			X			X			X
Employment/ office space			X			X			X
Bank/ building society provision			X			X			X
Total	4/26			4/26			3/26		
Percentage	15.38%			15.38%			11.54%		

Source: City of Westminster site survey December 2013

Table 5: Day Time Amenity within the Local Centre 2013

AMENITY – DAYTIME	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Overall environment of public areas in the centre									
General Cleanliness in Shopping Hours:									
Presence of litter			X			X		X	
Presence of refuse bags on the street		X			X			X	
Evidence of street fouling		X			X			X	
Presence of glass/glasses/other debris incl. Food and food containers/wrapping			X		X			X	
Condition		X			X		X		
Quality of buildings		X			X			X	
Special features (pedestrianisation, Street furniture, etc)		X			X			X	
Impact of vacant sites		X			X			X	
Security									
Evidence of Vandalism and Graffiti (incl. on street furniture)			X			X		X	
Security during shopping hours (availability, access, security etc)		X			X			X	
Ease of passage for pedestrians (incl. presence of obstacles eg illegally parked vehicles)	X				X		X		
Evidence of drunkenness, anti-social Behaviour, rowdiness			X		X			X	
Presence of rough sleepers	X				X			X	
Presence of beggars	X				X			X	
Presence of street drinkers	X				X			X	
Evidence of touting (e.g. mini cabs, ricksaws, Prostitution, drug dealing etc.)	X				X			X	
Presence of illegal street traders e.g counterfeit goods, hot dogs, peanuts etc.	X				X			X	
Effectiveness of any deterrent measures (CCTV, police patrols, door security etc)		X			X			X	
Quality of street lighting		X			X			X	
Safety perception in shopping hours			X		X			X	
Identity of town centre									
Features which identify the centre (eg flagship stores, buildings etc)			X			X			X
Promotion/ Street events			X			X			X
'Feel good' factor of town centre			X			X			X
Total	21/46			18/46			22/46		
Percentage	45.7%			39.1%			47.8%		

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2013

Figure 4: Deviation of centre from the mean for Local Centres 2013

Harrow Road/ Bourne Terrace is a small Local Centre that has a lower than average amount of retail floor space when compared to the overall average for the 39 local centres. Within this, the centre contains a below average amount of A1 convenience floor space, A1 comparison floor space, and food and drink floor space (A3/A4/A5). In terms of the rating of the physical environment, the centre has a significantly lower than average attractiveness rating and average daytime amenity rating, illustrating the overall decline in the physical environment.

5.2 Strengths, Weaknesses, Opportunities and Threats

Figure 5 SWOT analysis

6. Future capacity

6.1 Potential Capacity for Growth

Between 2007 and 2013, there were no permitted planning applications in the local centre, A permission was granted for just outside the centre boundary for an A1 changing to a duel use locksmith and manicure parlour.

7. Health of the Centre

Table 6: Summary of Health Check Assessment 2013

Subject	Subject Matter	Data	Number	Sq M
RETAILING	**Floor space**	**Total Floor space**		**1,149**
		Total Convenience (A1)		**481**
		Total Comparison (A1)		**250**
		Total Service (A2)		**50**
		Total A3		**172**
		Total A4		**0**
		Total A5		**50**
		Total Sui Generis		**51**
		Total Vacant		**95**
	Retail Offer	**Total Number of Shop Units**	**19**	
		Total Number of A1 Units	**13**	
		a) Convenience shops	**8**	
		b) Department/principal stores	**0**	
		c) Prestige international shops	**0**	
		d) National comparison retailers	**0**	
		e) Specialist Independent shops	**2**	
		f) Independent shops	**3**	
		Total Comparison Multiples	**5**	
		Total Number of A2 Units	**1**	
		Total Number of A3 Units	**1**	
		Total Number of A4 Units	**0**	
		Total Number of A5 Units	**1**	
		Total Number of Sui Generis	**1**	
		Total Number of Vacant	**2**	
	Market	**Days of operation**	**0**	
		Number of stalls	**0**	
	Proposals	**Changes of use A1 to A2**	**0**	
		Changes of use A1 to A3	**0**	
		Changes of use A1 to A4	**0**	
		Changes of use A1 to A5	**0**	
ARTS/CULTURE		**(cinemas, galleries, theatres etc.)**	**0**	
HEALTH USES		**(clinics, surgeries etc.)**	**0**	
HOTELS			**0**	

In terms of its vitality and viability, and general economic health this centre is considered to be ‘neutral’.

Appendices

Appendix 1: Views of Local Centre

Appendix 2: Land Use Table (Westminster land use survey 2013)

Appendix 3: Land Use Map (GOAD 2012 retail data and Westminster land use survey 2013)

Appendix 4: Planning permissions Map (Westminster land use survey 2013)

Appendix 5: Location map of all local centres

Appendix 6: Glossary of Terms

Views of Harrow Road (East) local centre

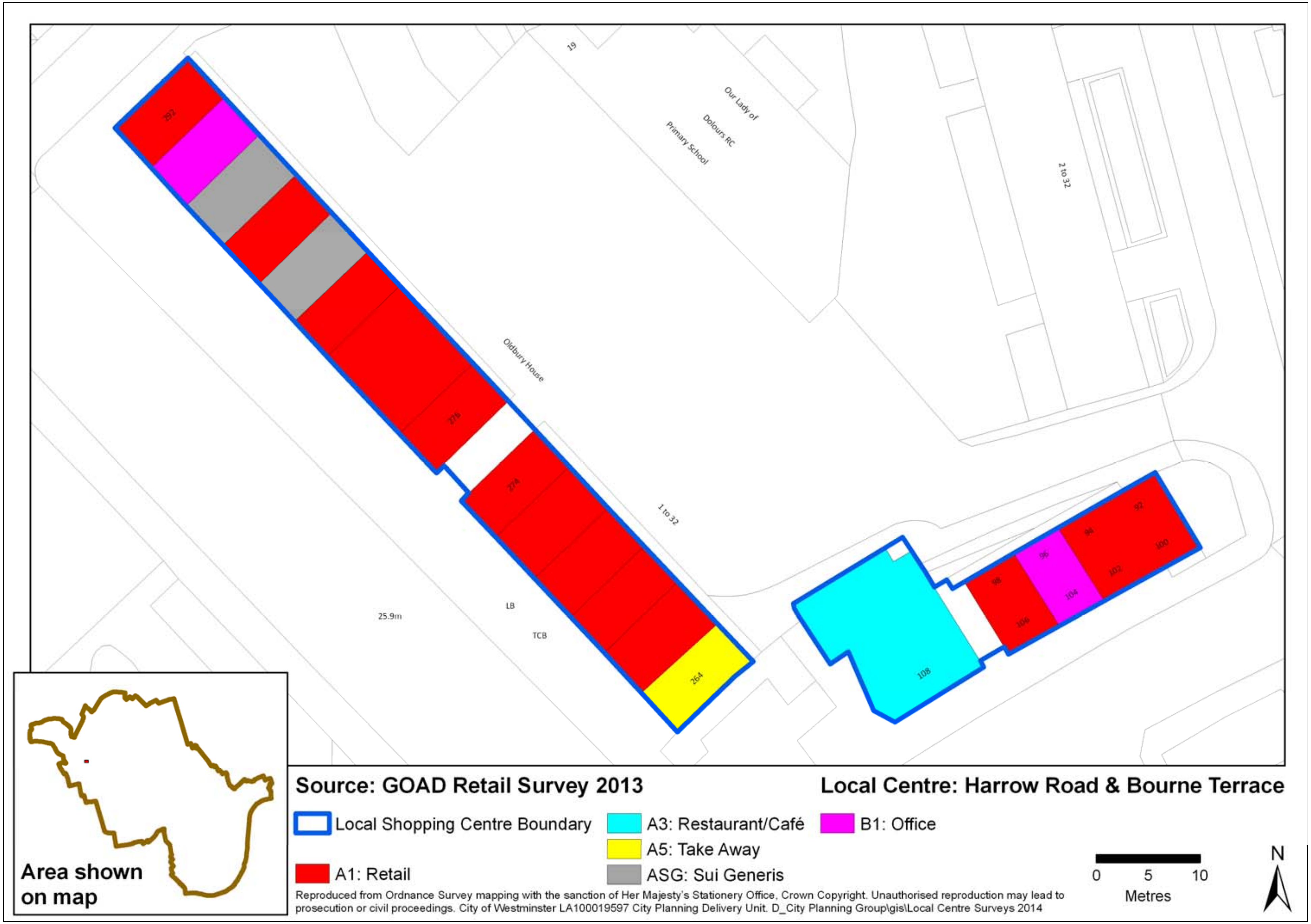
The Harrow Road shopping frontage, with litter outside a convenience store, and displays blocking the pavement.

The Bourne Terrace frontage, with litter on the street, unattractive shop fronts and some vacant units.

The busy Harrow Road shopping frontage, again showing litter on the street, caused in part due to the heavy use of the bus stop in the centre.

Table 7 Land Use Table (Westminster land use survey 2013)

ADDRESS	FASCIA	DESCRIPTION	USE	SQM	A1 Conv.	A1 Spec.	A1 Ind	A2	A3 Res/Caf	A3 Takeaw.	S G	Vacant	2007 Use
100BOURNE TERRACE	KUNDAZ SUPERMARKET	APPLICANCES	A1 Conv	49	1								A1 Spec
102BOURNE TERRACE	NO NAME	CARPET SHOP	A1 Spec	40		1							A1 Spec
104BOURNE TERRACE		VACANT	Vacant	41								1	A1 Ind
106BOURNE TERRACE	WINDSOR MAINTENANCE LTD	LOCKSMITH	A1 Ind	67			1						A1 Ind
108BOURNE TERRACE	ARIANA RESTAURANT	RESTAURANT	A3 Res/Caf	172					1				A3 Res/Caf
264HARROW ROAD	WARSI FISHBAR	TAKE AWAY	A3 T/A	50						1			A3 T/A
266HARROW ROAD	WARWICK FOOD CENTRE	CONVENIENCE STORE	A1 Conv	54	1								A1 Conv
268HARROW ROAD	BLUE NILE BAKERY	BAKERS	A1 Conv	47	1								A1 Conv
270HARROW ROAD	A1 - HAYAT	GROCERS	A1 Conv	50	1								A1 Conv
272HARROW ROAD		VACANT	Vacant	54								1	A1 Conv
274HARROW ROAD	AFRO-CARIBBEAN FOODS	GROCERS	A1 Conv	80	1								A1 Conv
276HARROW ROAD	BENSON PHARMACY	CHEMIST	A1 Conv	50	1								A1 Conv
278-280HARROW ROAD	COSTCUTTER	GENERAL STORE	A1 Conv	101	1								A1 Conv
282HARROW ROAD	DESIGN & PRINTING	STATIONERS	A1 Ind	45			1						A1 Ind
284HARROW ROAD	WESTMINSTER REFUGEE CONSORTIUM OFFICE	REFUGEE ADVICE OFFICE	A2	50				1					A2
286HARROW ROAD	HAIR SALON	HAIRDRESSERS	A1 Ind	49			1						A1 Spec
288HARROW ROAD	MILLENIUM LAUNDERETTE AND DRY CLEANER	LAUNDERETTE	SG	51							1		SG
290HARROW ROAD	PADDINGTON GLASS COMPANY LTD	GLASS STORE	A1 Spec	49		1							A1 Spec
292HARROW ROAD	QUALITY FOOD AND WINES	GENERAL STORE	A1 Conv	50	1								A1 Conv


19
Our Lady of
Dolours RC
Primary School
2 to 32
Oldbury House
1 to 32
292
276
274
264
LB
TCB
25.9m
108
92
94
96
98
100
102
104
106
Area shown on map
Source: GOAD Retail Survey 2013
Local Centre: Harrow Road & Bourne Terrace
Local Shopping Centre Boundary
A1: Retail
A3: Restaurant/Café
A5: Take Away
ASG: Sui Generis
B1: Office
0
5
10
Metres
N
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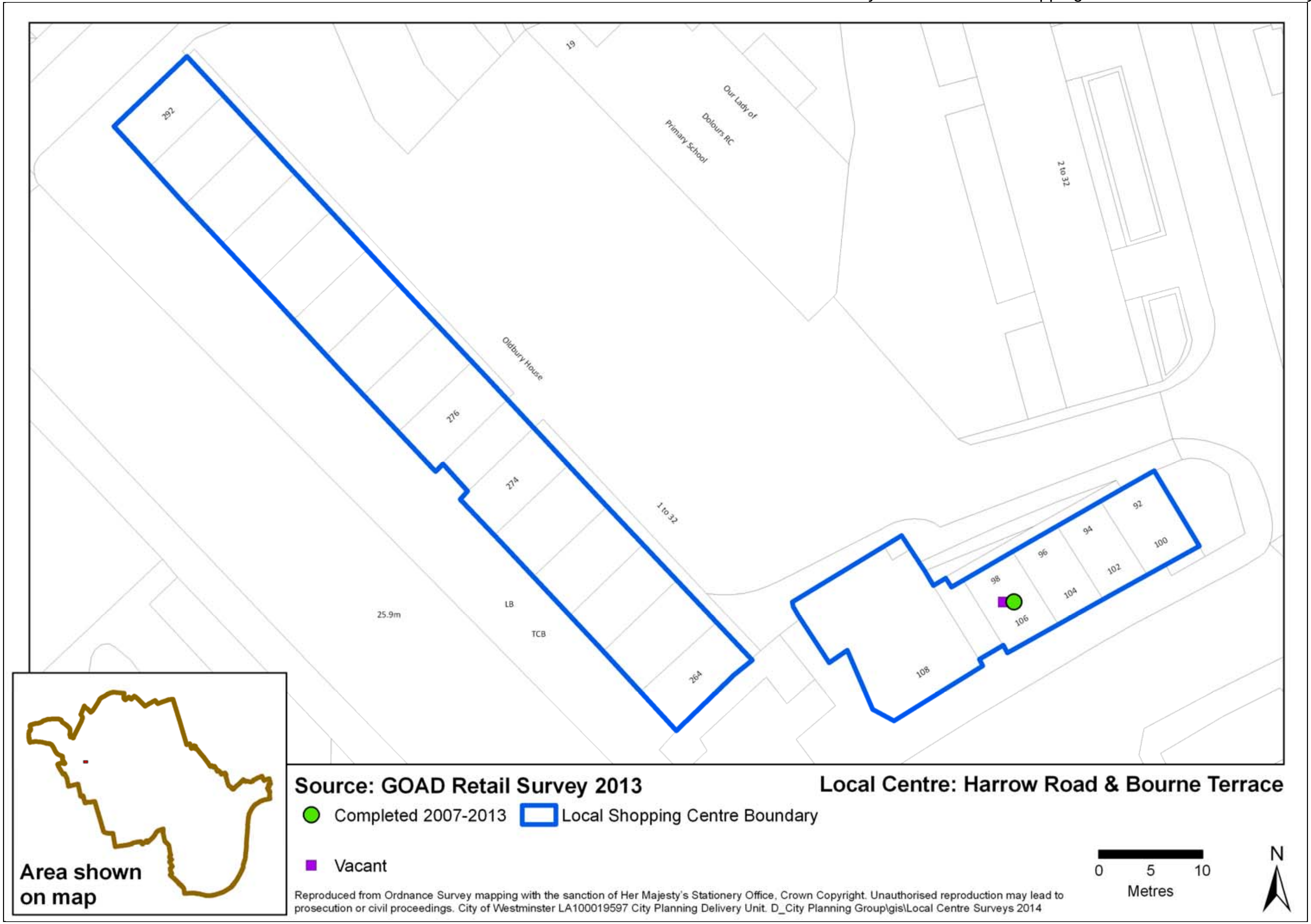

19
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25.9m
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TCB
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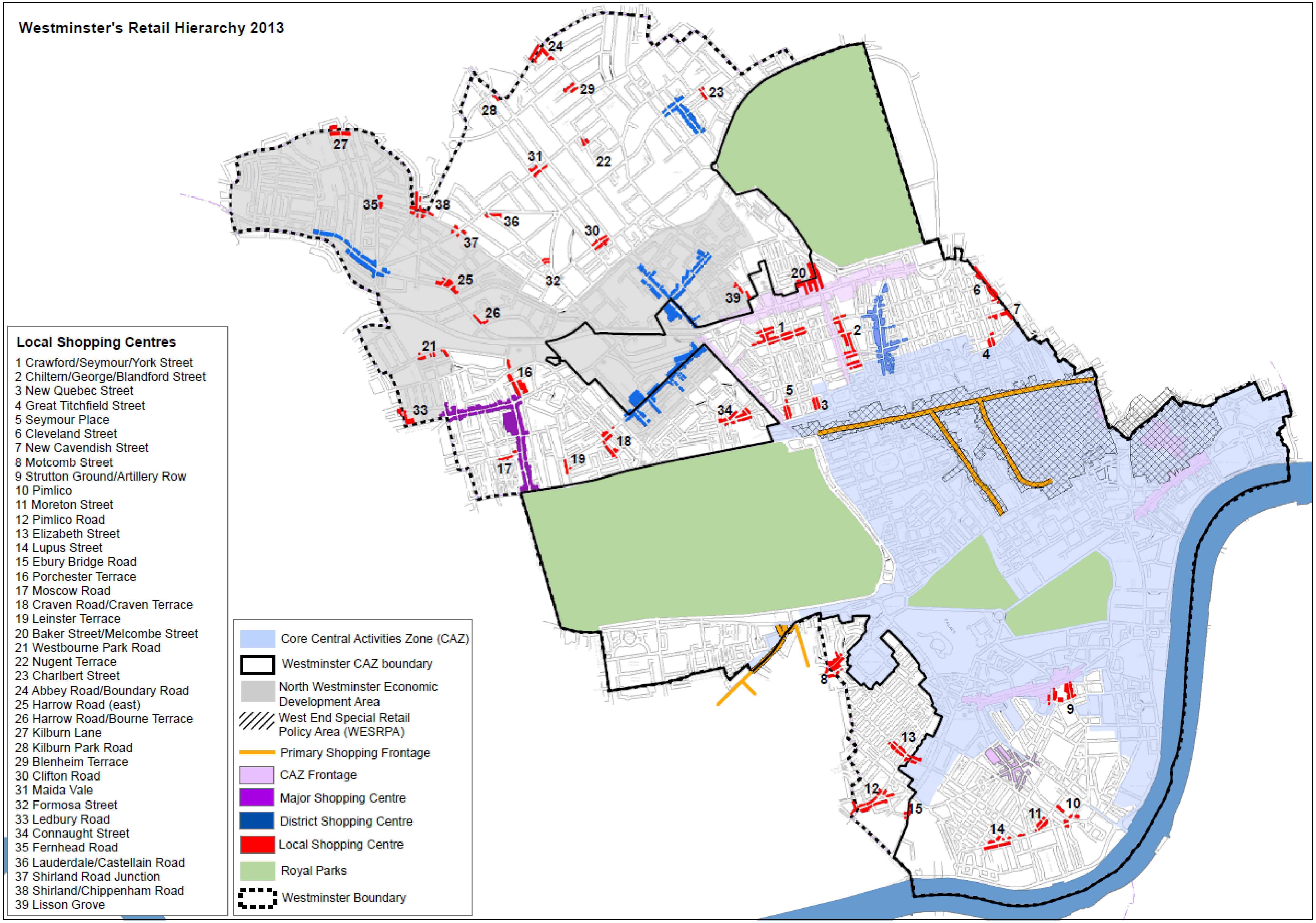
96
98
100
102
104
106
108
Area shown
on map
Source: GOAD Retail Survey 2013
Local Centre: Harrow Road & Bourne Terrace
Completed 2007-2013
Local Shopping Centre Boundary
Vacant
0
5
10
Metres
N

Figure 1 Westminster wide shopping centre boundaries plan



Health Checks - Glossary of terms

A1	**Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, dry cleaners, pet shops, sandwich bars, retail showrooms, and domestic hire shops.**
A1 café type uses	**Shops such as sandwich bars or coffee shops selling food and drinks to be consumed mainly off the premises, but not hot food takeaways. Examples include certain Pret a Manger shops, Costa Coffee and the Seattle Coffee Co. shops.**
A2	**Banks, building societies, bureau de change, estate and employment agencies, professional and financial services, telephone bureaux, betting offices and beauty salons (excluding hair).**
A3	**Food and drink uses such as restaurants, pubs, snack bars, cafés, wine bars and shops for the sale of hot food (hot food take-aways).**
A4	**Drinking Establishments: Premises where the primary purpose is the sale and consumption of alcoholic drinks on the premises.**
A5	**Hot Food Take-away: Premises where the primary purpose is the sale of hot food to take away.**
B1	**Business uses such as offices, research and development and industrial uses.**
CAZ	**Central Activities Zone (CAZ). The CAZ is an area of mixed uses, many of which contribute directly to the national, regional and local economy. It is this mix of activities and their supporting resources which underpins the success of London's economy.**
CAZ Frontages	**Mixed use areas usually with a predominant retail function. Appropriate areas for retail growth.**
Comparison	**A1 floor space selling predominantly durable items and not in convenience use.**
Convenience	**This is based on the classification provided by the unit for Retail Planning Information (URPI) set out in URPI brief 99/2. The classifications are: food, alcoholic drink, tobacco and other goods (newspapers and magazines, cleaning materials and matches). For the purposes of this assessment, convenience includes shops selling food or drink (excluding A1 café-type uses), newsagents, (including specialist tobacco stores), chemists (including Boots the Chemist stores) and post offices.**
Department/ principle store	**This includes the main department stores such as John Lewis, Liberty, and Selfridges, as well as variety stores such as Marks & Spencer and Virgin Mega-stores.**
District Centre	**Distributed more widely than Metropolitan and Major centres, they provide convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000-50,000 sqm of retail floor space. Some district centres have developed specialist shopping functions.**
Experian GOAD	**An independent retail data consultancy who provide maps of ground floor uses in shopping centres.**
F&B	**Food and beverage offer, covered by parts A3 (cafe's/restaurants), A4 (drinking establishments) and A5 (take aways) of the use classes order.**
Gross Floorspace	**Floorspace of buildings on all floors including external walls, half the thickness of parting walls and circulation areas.**
Independent store	**This includes non-convenience stores (see definition above) irrespective of size, that are not considered to be specialist retailers (see definition overleaf), that are operated by retailers that are not included within national retail chains or groups.**
Major Centre	**Typically found in inner and some parts of outer London with a borough-wide catchment. They generally contain over 50,000sqm of retail floor space and a relatively high proportion of comparison goods relative to convenience goods. They may also have significant employment, leisure, service and civic functions.**
NPPF	**National Planning Policy Framework. Central Government's key, revised guidance document driving planning policy in England, which compressed the**

	previous PPS documents and other guidance into a single document. It includes key guidance on town centres and health checks.
National retailers	**This includes all retailers (Class A1 only) that operate within the context of a national retail chain or group, such as Next. A schedule of all national retail multiples can be found in Retail Directory of the UK 2002 (Hemming Information). Specialist shops that are part of a retail chain or group, such as Whittards and Thorntons, are classified as national retailers. Although there are national chains of food and drink uses and betting shops, such as Ladbrokes, these are classified based on the use class (e.g. betting shops as A2 uses) and not as national retailers.**
Prestige international retailers	**This includes prestigious retailers that operate in more than one country, such as Gucci, Gianni Versace, and Giorgio Armani. It also includes flagship stores that are only found in select town centres in Britain. National airline shops, such as British Airways, have also been classified as international retailers.**
Primary Frontages	**Internationally recognised shopping destinations. The Primary Frontages defined in Westminster's City Plan - Strategic Policies document are Oxford Street, Regent Street, Bond Street and Knightsbridge/Brompton Road.**
Retail floorspace	**This is all A1, A2, A3, A4, A5 and sui generis floorspace, and vacant floorspace of any of the aforementioned categories.**
Shisha	**Flavoured tobacco smoked through a water pipe or hookah. Smoke free legislation means that it cannot be smoked indoors in public places, and is often smoked at tables and chairs on the footway and in garden areas. There has been a rapid rise in shisha uses over the past five years, and there is concern over issues of health, residential amenity and other issues.**
Specialist independent	**Similar to an independent store, but this category reflects the quality and specialisation of the retailer so that a shopper may make a specific shopping trip to that shop. For example, The Pen Shop on Regent Street or antique shops.**
Sui generis	**Sui Generis is a term that refers to a use on its own. Any planning use not falling within a specific class within the Use Class Order falls within this category. Examples of sui generis uses in shopping centres are launderettes, mini cab offices, amusement centres and car showrooms.**
UDP	**Unitary Development Plan produced by Westminster City Council, with saved policies forming part of the statutory development plan for Westminster.**
Vacancy	**This category includes vacant street level units, as well as units that are under alteration. However, if at any time the survey was completed it was evident who the unit would be occupied by, the unit was treated as being occupied.**
Zone A Rent	**The rental level per square metre achieved on the first six metres of a shop unit.**

Information Sources

Westminster's City Plan - Strategic Policies (adopted November 2013)
https://www.westminster.gov.uk/westminsters-city-plan-strategic-policies

Westminster's Unitary Development Plan (UDP, adopted January 2007)
https://www.westminster.gov.uk/unitary-development-plan-udp

The Mayor's London Plan (GLA, July 2011 as amended)
http://www.london.gov.uk/priorities/planning/london-plan

The National Planning Policy Framework (NPPF, DCLG 2012)
https://www.gov.uk/government/publications/national-planning-policy-framework--2

National Planning Practice Guidance (NPPG, March 2014)
http://planningguidance.planningportal.gov.uk/

Westminster High Street Health Checks 2013
https://www.westminster.gov.uk/high-street-health-checks

Westminster Health Check Archive
https://www.westminster.gov.uk/shopping-centre-health-checks

City of Westminster

If you would like to obtain further copies of this Health Check report, please:

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City of Westminster

Shopping Centre Health Check Survey 2014

Local Centre 25: Leinster Terrace

Contents

(i) Purpose of the Study

Former government guidance on Town Centres advised that 'health checks' be undertaken every five years to allow accurate and reasonable temporal analysis of the performance of town centres. This requirement has been superseded by more recent national and regional policy frameworks and guidance.

The National Planning Policy Framework (NPPF) (DCLG, 2012), states that when setting out requirements for Plan Making and using a proportionate evidence base, '*Local Planning Authorities should have a clear understanding of business needs within the economic markets operating in and across their area. To achieve this they should... assess... the role and function of town centres and the relationship between them, including any trends in the performance of centres, and the capacity of existing centres to accommodate new town centre development* (paragraphs 160, 161).'

The London Plan (2011) sets out strategic retail policy for Town Centres in London, as set out in more detail below. Paragraph 2.74 of the London Plan (July 2011) states that "*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 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.*"

This then forms the current national and regional planning policy framework for undertaking town centre health checks. The City Council is currently follow the former guidance and updating health checks every five years, as this is deemed to be a sensible and manageable time period for monitoring the viability and vitality of centres, given the extent of Westminster's town centre network.

(ii) Westminster's Local Centres and Planning Policy

Westminster's Local Centre Health Checks were last carried out in 2007, updating 2002 and 1997 surveys, and includes detailed analysis of Westminster's 39 Local Shopping Centres.

Local Centres normally have a purely local function and most are mainly comprised of convenience goods retailers with some food and drink and local service uses, mainly providing facilities for people living or working nearby (which the City Council wishes to safeguard in accordance with national guidance). However in Westminster some are also speciality centres which attract shoppers from a wider area.

Westminster's current local plan consists of the City Plan: Strategic Polices (adopted November 2013), and saved development management policies from the Unitary Development Plan (adopted January 2007). The local plan seek to protect and enhance the designated Local Shopping Centres for the service they provide to residents, visitors and workers, and because they reduce the need to travel.

Strategic policy CS21 is the general policy for retail across Westminster, seeking to protect existing A1 uses, direct new retail floor space to designated shopping centres, and to protect non-A1 retail and town centre uses in designated shopping centres from changes to uses that do not serve visiting members of the public and that do not have active shop fronts.

Saved UDP policy SS7 (Shopping and Services policy 7) is the detailed development management policy for local shopping centres. The policy covers the protection of shops and circumstances where changes of use away from shops may be permitted, taking into consideration the viability of units and the overall balance of uses in the centre.

(iii) Westminster's Retail Hierarchy

The City of Westminster is broadly divided into two zones in terms of retail policy, the Core Central Activities Zone (CAZ) and CAZ Frontages, and areas outside of this. The Core CAZ contains the two international shopping centres in London, the West End and Knightsbridge in addition to distinctive retail areas such as Covent Garden, Soho, Mayfair and St James's, as well as numerous small parades and individual shops. Outside the Core CAZ and CAZ Frontages there is one Major Shopping Centre, 4 District Centres (where previously there had been 7, 3 have subsequently been reclassified as CAZ Frontages and 1 as a Major Centre) and the 39 Local Centres which are designated to safeguard shopping facilities for local residents, and the retail character of local shopping areas.

In 2007, the District and Local Centres health check reports were all updated, as were 17 shopping areas inside the CAZ. More recently, reports for Westminster's high street shopping centres were updated in 2013.

(iv) Health Checks Methodology

As set out in the NPPF (DCLG, 2012) local planning authorities should recognise town centres as the heart of their communities and pursue policies to support their viability and vitality. Planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive.

Accessibility by public transport is considered to be excellent for all Westminster's larger shopping areas, and its Local Centres are accessible for people to walk to. The City Council wants to retain shops in Local Centres, in order to maintain a range of local convenience shops and protect the character and function of the centres. Local shops and services limit car trips, encourage walking, and make city life more practical and attractive.

The **National Planning Practice Guidance** was published in March 2014 by DCLG, several months after the field work for this project had commenced. It states that existing centres should be audited to assess their role, vitality, viability and their potential to accommodate new development and different types of development. It also sets out a series of indicators to determine the health of town centres, including:

- Diversity of use
- Vacant property
- Commercial yields on non-domestic property
- Customer views and behaviour
- Retailer representations
- Commercial rents
- Pedestrian flows and accessibility
- Perception of safety and crime
- State of environmental quality

Most of the above indicators will be assessed as part of this study, where data collection is available and reasonable. All of the above were included as part of the 2013 health checks for the larger high street type centres, where it is more appropriate to carry out consumer surveys, and where commercial data is more readily available. Given the size of this project, the indicators below are considered to be appropriate and comprehensive.

Land Use

(1) Diversity of town centre uses

This section considers the range of A1 uses, and compares the current diversity of land uses to previous Local Centre Health Check Surveys dated 1997, 2002 and 2007. It also includes the

proportion of vacant street level property and the amount of space used for different functions such as shopping, leisure, cultural and entertainment activities, pubs, cafes, and restaurants.

Accessibility

(2) **Pedestrian flows (footfall):**
Visual assessments were undertaken to measure pedestrian flows which contribute towards the vitality of the Local Centres. These were conducted on comparable days of the week and compared to the average for all of the Local Centres;

(3) **Accessibility:**
The whole of Westminster has a Public Transport Accessibility Level (PTAL) score of 6, the highest level achievable. This section therefore concentrates on ease and convenience of access;

Environment

(4) **State of the town centre environmental quality assessment:**
Includes a subjective assessment of indicators such as security, air pollution, noise, clutter, litter and graffiti, as well as positive factors such as trees, landscaping and open spaces. Each centre is assessed as per the Attractions Table 4, and the Daytime Amenity Table 5 in the 2007 Health Check Survey. A comparison is made between the 1997, 2002, 2007 and 2013 surveys.

(5) **Daytime amenity:**
A qualitative assessment of the amenity within the local centre, assessing its cleanliness, security, and identity.

(6) **Relative performance of the centre:**
Measures the performance of the centre compared to the Westminster Local Centre average in terms of land use, attractiveness, and daytime amenity, with graphs comparing the performance of centres relative to one another. The centre's strengths, weaknesses, opportunities and threats are highlighted in a SWOT analysis diagram at the end of this section.

(7) **The potential capacity for growth or change of centres in the network:** opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development is considered here. Based on levels of demand, assessments are made to ascertain how much capacity each Local Centre has to accommodate retail growth, looking at retail related planning applications in and around the Local Centres. Consideration is given to whether the current Local Centre boundaries and Core and Secondary Frontage designations are still valid. Consideration is also given to ways in which the vitality and viability of the centres could be enhanced.

(8) **Summary of health check:**
This section contains a comparison of the relative performance of this centre, and summary of land use assessment as per the 2007 Health Check reports. General comments and analysis of the centre are included, along with a summary of any problems/issues. A classification as 'in decline', 'neutral', or 'healthy' is included, plus comment on whether things have improved, deteriorated, or remained the same since 2007 (see 2007 Health Checks, Tables 6 and 7). Where a Local Centre is considered to be "in decline" or "neutral", consideration is made on ways to improve the vitality and viability of the Centre.

The results of this study will be used to inform planning policy development and the inception of other relevant interventions, and will be used to assess the success of previous initiatives such as any investment in public realm.

Local Centre **25: Leinster Street**

1. Introduction

1.1 Location

This small, linear Local Centre is located in the western area of Westminster, within the Bayswater area, running parallel to Queensway (major shopping centre) which is several streets to the west of this centre. It serves local residents and tourists from nearby hotels, however the catchment area of the centre is constrained by Hyde Park to the south. Moreover, it is in competition with other shopping centres nearby, including the large Queensway/Westbourne Grove major shopping centre to the west, with Craven Road/Craven Terrace Local Centre and Praed Street district centre to the east.

The centre is roughly five minutes walk from both Queensway and Bayswater London Underground Stations, and is well served by the many bus routes running along Bayswater Road at the southern end of the centre.

Figure 1: Local Centre Boundary 2013

2 Land Use

2.1 Range of Uses

Table 1 shows that Leinster Terrace Local Centre comprises a range of shopping and other town centre uses.

Table 1: Range of Town Centre Uses (1997-2013)

Use Class		**No. of Units**	**No. of Units**	**No. of Units**
		2002	**2007**	**2013**
Class A1 Retail		7	9	8
	Department/principle stores	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*
	National retailers	*0*	*1*	*1*
	Specialist Independent	*0*	*1*	*1*
	Independent	*2*	*3*	*3*
	Convenience	*5*	*4*	*3*
Class A2	Financial & Professional	6	3	4
Food & Drink		4	3	3
Class A3	*Restaurant/Café*	*2*	*2*	*1*
Class A4	*Pubs/Bars*	*1*	*1*	*1*
Class A5	*Takeaway*	*1*	*0*	*0*
	Takeaway/Restaurant			*1*
Sui Generis		0	0	1
Vacant Units		0	2	1
Arts/Culture		0	0	0
Health uses		1	1	1
Hotels		0	0	0
TOTAL		**18**	**18**	**18**

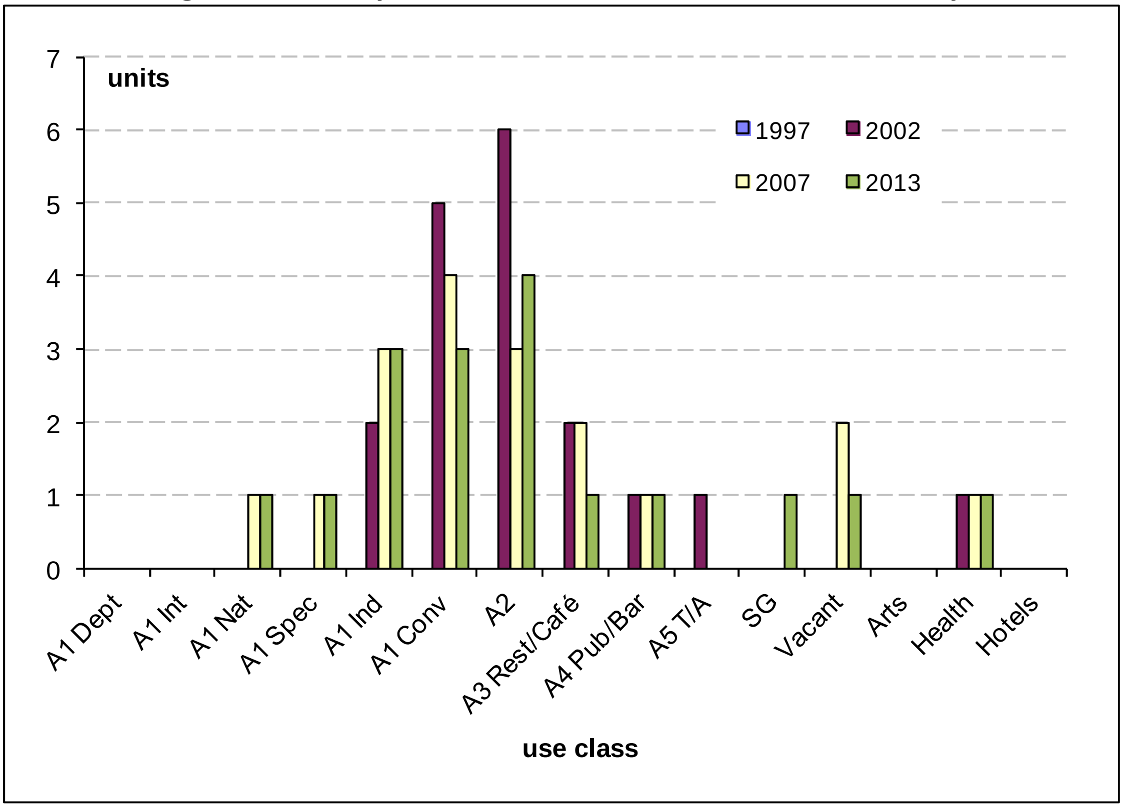
Source: WCC Land Use Survey December 2013

Leinster Street Local Centre has 18 units in total. The majority of these units are in class A1 use, comprising convenience and independent stores, along with national and specialist stores.

The national retailer (Kodak Express (instant photograph processing)) appears to have been incorrectly recorded as a class A1 independent store in 2007; however, it should have been categorised as a national retailer and has since remained unchanged. Furthermore, an internet cafe (class A1) was mistakenly assigned to class A2 in 2007; it should have been categorised as a class A1 independent store. Note that the figures for 2007 have been amended accordingly.

Since 2007, a class A1 independent travel agents has changed to a class A2 Bureau de Change, while a class A1 convenience store has changed to a class A1 hair salon. Notably, a previously vacant unit is now operating as a Shisha Bar (Sui Generis use).

Figure 2: Units by use class within the Local Centre boundary



2.2 Range of A1 Uses

The centre has eight class A1 retail units, including three convenience stores, which are interspersed by three independent stores, one national retailer and one specialist retailer. The independent stores comprise a coffee shop, hair salon and a dry cleaners, while the national retailer is an instant photograph processing shop and the specialist store is a skate shop. The specialist skate shop is likely to draw from a wider catchment area. This small Local Centre does not provide the same range and selection of shops and services found in large Local Centres or District Centres, and based on the makeup of units is geared towards local convenience shopping for residents and local visitors.

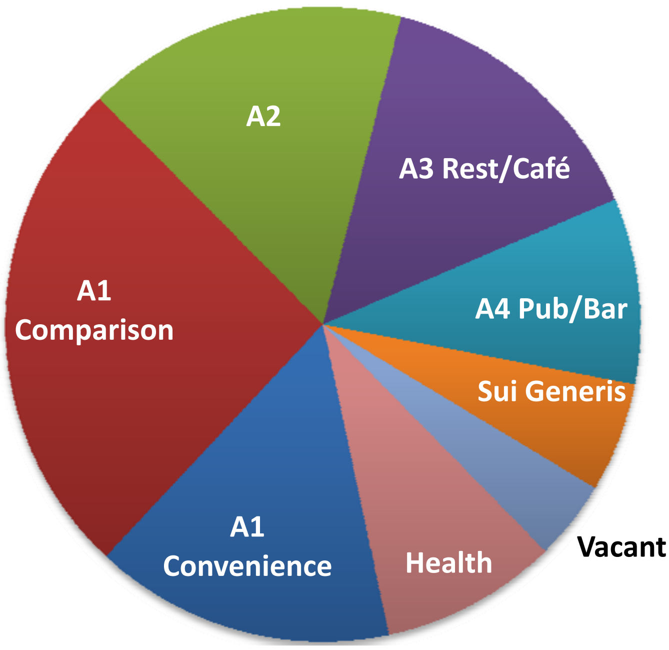
2.3 Total Retail Floor space

Total retail floor space in Leinster Terrace is broken down in Table 2. In total, the centre has 1,288 sqm of retail floor space, which is below the average of 3,188 sqm for the 39 Local Centres in the City. Leinster Terrace has an above average proportion of A1 convenience floor space and comparable proportions of A1 independent, A2 and A4 floor space. The remaining use classes are relatively minor in terms of their contribution to the total. The centre contains only one pub/bar and one take away, lower than the Local Centre average. The centre also contains a significantly lower than average proportion of comparison retail floor space, 26% compared to the Local Centre average of 35%.

Table 2: Total Retail Floor space 2013

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2013)
A1 Convenience	197	15.30%	14.9%
A1 Comparison	330	25.62%	35.2%
A2	211	16.38%	11.2%
A3 Rest/Café/TA	188	14.60%	17.4%
A4 Pub/Bar	122	9.47%	5.1%
Sui Generis	72	5.59%	3.9%
Vacant	52	4.04%	8.6%
Health	116	9.01%	2.0%
Hotels	0	0.00%	0.5%
Art	0	0.00%	1.3%
Leisure	0	0.00%	0.1%
Total	**1,288**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



Source: City of Westminster GIS System and site survey December 2013

In total, Leinster Terrace has 1,288 sqm of ground floor non-residential floor space. Comparison shops make up the highest proportion of total floor space. Although convenience stores comprise the highest proportion of units, these are relatively small units, amounting to 15.30% of total floor space. A2 uses comprise a similar proportion of total floor space to convenience stores. Leinster Terrace Local Centre accommodates 188 sqm of restaurant/café floor space, equating to 14.6% of total floor space. Table 2 indicates the remaining proportions of floor space by use class.

2.4 Proportion of Vacant Street Level Property

The unit vacancy rate in Leinster Terrace is lower than the average rate for Local Centres in the City, as shown in Table 3. The vacancy rate has decreased since 2007 by one unit. Note that there were no vacant units in 1997 and 2002. The only vacant unit present was also vacant in 2007.

Table 3: Level of Vacant Street Level Property 2013

% Vacant Units				% Local Centre Average
1997	**2002**	**2007**	**2013**	**2013**
0.0% **(0) units**	**0.0%** **(0) units**	**11.1%** **(2) units**	**5.6%** **(1) units**	**8%** **(1 unit)**

Source: City of Westminster GIS System and site survey December 2013

3. Accessibility

3.1 Pedestrian Flows (footfall)

The centre was found to be quiet in terms of pedestrian vibrancy when the Health Check Survey was carried out on a cold, weekday afternoon in December 2013.

3.2 Accessibility on foot and by public transport

Leinster Terrace is located within a 10 minute walk of Paddington mainline rail station and underground station, plus three further underground stations; namely, Bayswater, Lancaster Gate and Queensway. Although no bus routes pass directly along Leinster Terrace, several routes serve the adjacent roads of Inverness Terrace and Bayswater Road (A40), which is also a main road through the centre of London.

4. Environmental Quality

4.1 State of the Centre's Attractions and Environmental Quality / Attractions

The attitudinal assessment of the attractions and amenity of the centre is summarised in Table 5 below. The centre's overall score for attractions is 23.08%, meaning that the range of attractions is poor, which is unsurprising given the size of the centre, one of the smallest in Westminster. The rating is lower than the Local Centre average of 31%, and ranks Leinster Terrace =31st out of the 39 Local Centres in the City. Six categories are rated as average, which relate to the availability of certain shops and local services (which is enhanced by the presence of a health centre) and the general quality of the retail environment, restaurants and pubs. The arts/culture categories are all rated as poor.

4.2 Daytime Amenity

Leinster Terrace is a pleasant Local Centre with a daytime amenity rating of 63% compared with the average for all Local Centres of 68%, and is ranked =27th out of the 39 Local Centres in the City. The centre appears to have improved significantly since 2007, with higher ratings attributed to almost all aspects relating to the general cleanliness during shopping hours, and some aspects relating to security, such as the quality of street lighting. All aspects of daytime amenity are rated as either Good or Average, apart from four aspects, which relate to the quality of buildings, presence of special features (pedestrianisation, street furniture, etc.) and the identity of the town centre.

Table 4: Attractions within the Local Centre 2013

ATTRACTIONS	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Retail Provision									
Prominence of multiple retailers			X			X			X
Prominence of independent shops			X		X			X	
Availability of food shopping		X			X			X	
Prominence of specialist shops			X			X			X
Quality of market (frequency, variety etc)	-	-	-	-	-	-	-	-	-
Quality of retail environment		X			X			X	
Art/Culture									
Quality of restaurants (availability, number etc)		X				X		X	
Quality of pub/club/bars			X			X		X	
Range of cultural/ community events (theatre, concerts)			X			X			X
Availability of sports and leisure facilities			X			X			X
Service Provision									
Local services (information, library etc)		X			X			X	
Employment/ office space			X			X			X
Bank/ building society provision			X			X			X
Total	**4/26**			**4/26**			**6/26**		
Percentage	**15.38%**			**15.38%**			**23.08%**		

Source: City of Westminster site survey December 2013

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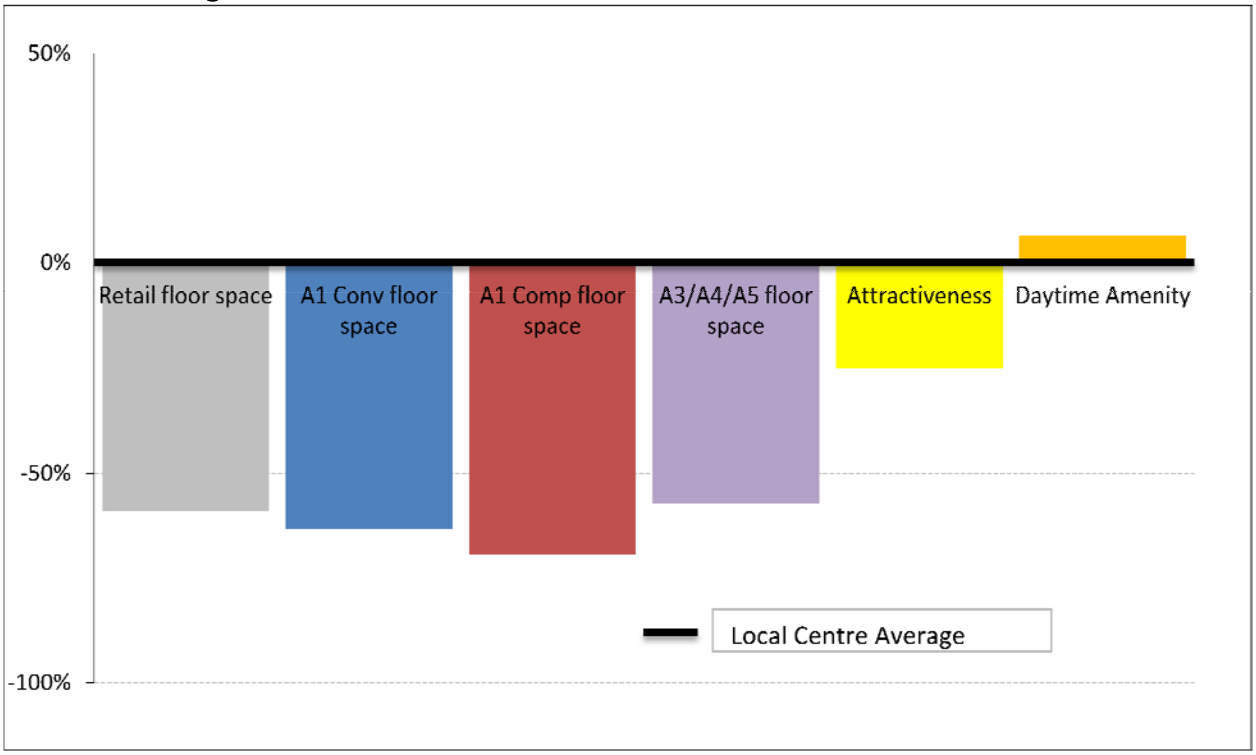
Table 5: Day Time Amenity within the Local Centre 2013

AMENITY – DAYTIME	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Overall environment of public areas in the centre									
General Cleanliness in Shopping Hours:									
Presence of litter			x		x		x		
Presence of refuse bags on the street			x		x		x		
Evidence of street fouling		x				x		x	
Presence of glass/glasses/other debris incl. Food and food containers/wrapping		x			x		x		
Condition		x			x			x	
Quality of buildings			x			x			x
Special features (pedestrianisation, Street furniture, etc)			x			x			x
Impact of vacant sites		x				x		x	
Security									
Evidence of Vandalism and Graffiti (incl. on street furniture)	x				x		x		
Security during shopping hours (availability, access, security etc)		x			x			x	
Ease of passage for pedestrians (incl. presence of obstacles eg illegally parked vehicles)		x				x		x	
Evidence of drunkenness, anti-social Behaviour, rowdiness	x			x			x		
Presence of rough sleepers	x			x			x		
Presence of beggars	x			x			x		
Presence of street drinkers	x			x			x		
Evidence of touting (e.g. mini cabs, ricksaws, Prostitution, drug dealing etc.)	x			x			x		
Presence of illegal street traders e.g counterfeit goods, hot dogs, peanuts etc.	x			x			x		
Effectiveness of any deterrent measures (CCTV, police patrols, door security etc)		x			x			x	
Quality of street lighting			x			x		x	
Safety perception in shopping hours		x			x			x	
Identity of town centre									
Features which identify the centre (eg flagship stores, buildings etc)			x			x			x
Promotion/ Street events			x			x			x
'Feel good' factor of town centre		x			x			x	
Total	**23/46**			**21/46**			**29/46**		
Percentage	**50.0%**			**45.7%**			**63.0%**		

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2013

Figure 4: Deviation of centre from the mean for Local Centres 2013



Leinster Terrace is a small Local Centre with a total retail floor space that is only roughly a third of the overall average for the 39 Local Centres. This is also true for A1 convenience and comparison floor space figures, and for food and drink floor space figures (A3/A4/A5), all of which are well below the Local Centre average due to the size of this centre. In terms of the rating of the physical environment, the attractiveness rating is below the Local Centre average, illustrating the limited offer of the centre, however the retail environment is attractive.

5.2 Strengths, Weaknesses, Opportunities and Threats

Figure 5 SWOT analysis

6. Future capacity

6.1 Potential Capacity for Growth

Since 2007, there have not been any permitted or refused planning applications in the Local Centre involving A-class uses. Note that the vacant unit could accommodate additional growth.

7. Health of the Centre

Table 6: Summary of Health Check Assessment 2013

Subject	Subject Matter	Data	Number	Sqm
RETAILING	**Floor space**	**Total Floor space**		**1,288**
		Total Convenience (A1)		**197**
		Total Comparison (A1)		**330**
		Total Service (A2)		**211**
		Total A3		**82**
		Total A4		**122**
		Total A5		**106**
		Total Sui Generis		**72**
		Total Vacant		**52**
	Retail Offer	**Total Number of Shop Units**	**18**	
		Total Number of A1 Units	**8**	
		a) Convenience shops	**3**	
		b) Department/principal stores	**0**	
		c) Prestige international shops	**0**	
		d) National comparison retailers	**1**	
		e) Specialist Independent shops	**1**	
		f) Independent shops	**3**	
		Total Comparison Multiples	**5**	
		Total Number of A2 Units	**4**	
		Total Number of A3 Units	**1**	
		Total Number of A4 Units	**1**	
		Total Number of A5 Units	**1**	
		Total Number of Sui Generis	**1**	
		Total Number of Vacant	**1**	
	Market	**Days of operation**	**0**	
		Number of stalls	**0**	
	Proposals	**Changes of use A1 to A2**	**0**	
		Changes of use A1 to A3	**0**	
		Changes of use A1 to A4	**0**	
		Changes of use A1 to A5	**0**	
ARTS/CULTURE		**(Cinemas, galleries, theatres etc.)**	**0**	
HEALTH USES		**(Clinics, surgeries etc.)**	**1**	
HOTELS			**0**	

In terms of its vitality, viability and general economic health, this centre is considered to be healthy, compared to its ‘in decline’ rating received from the 2007 survey, due to an increase in the daytime amenity ratings and decrease in the vacancy rate.

Appendices

Appendix 1: Views of Local Centre

Appendix 2: Land Use Table (Westminster land use survey 2013)

Appendix 3: Land Use Map (GOAD 2012 retail data and Westminster land use survey 2013)

Appendix 4: Planning permissions Map (Westminster land use survey 2013)

Appendix 5: Location map of all local centres

Appendix 6: Glossary of Terms

Views of Leinster Terrace Local Centre

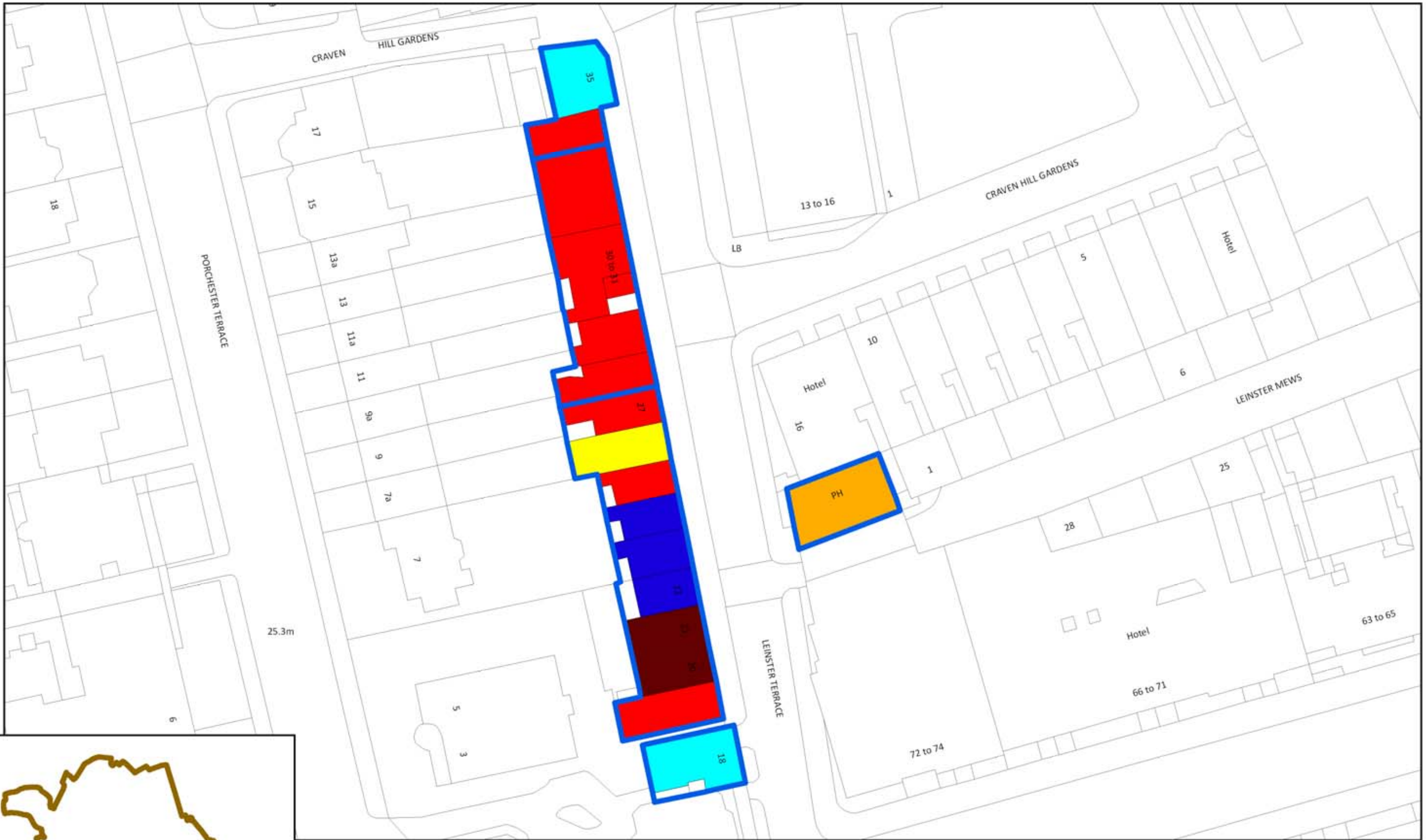
The attractive, well kept public house on the east side of the Local Centre.

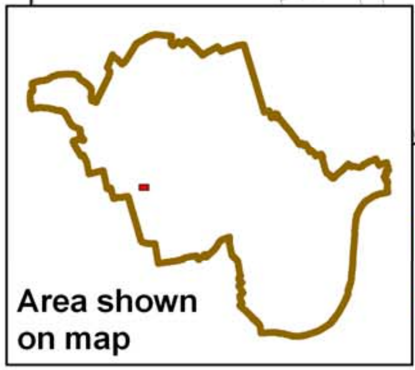
The central part of the secondary frontage, with more convenience shopping and other services.

The southern end of the Local Centre, featuring one of two Greek restaurants.

Table 7 Land Use Table (Westminster land use survey 2013)

					A1	A1	A1	A1		A3	A4	A3	SG	Vacant	Health	2007 Use
ADDRESS	FASCIA	DESCRIPTION	USE	SQM	Conv.	Nat.	Spec.	Ind	A2	Res/Caf	Pub/Bar	Rest/TA				
17LEINSTER TERRACE	The Leinster Arms	Public House	A4 Pub/Bar	122							1					A4 Pub/Bar
18LEINSTER TERRACE	Halepi	Restaurant/Take Away	A3 Rest/TA	106								1				A3 Rest/TA
19LEINSTER TERRACE *		Café	A1 Ind	78				1								A1 Ind
20-21LEINSTER TERRACE	Lancaster Gate Medical Centre	Health Centre	Health	116											1	Health
22LEINSTER TERRACE	Global Foreign Exchange	Bureau de Change	A2	58					1							A1 Ind
23LEINSTER TERRACE	Kinleigh Folkard & Hayward	Estate Agent	A2	58					1							A2
24LEINSTER TERRACE	Lero Properties	Estate Agent/Management	A2	52					1							A2
25LEINSTER TERRACE	Annam's Food and Wine	Grocer	A1 Conv	50	1											A1 Conv
26LEINSTER TERRACE	Bite Way	Shisha Bar	SG	72									1			Vacant
27LEINSTER TERRACE	London Skate Centre	Skate Shop	A1 Spec	69			1									A1 Spec
28LEINSTER TERRACE	Snacks Delight	Sandwich shop/grocer	A1 Conv	68	1											A1 Conv
29LEINSTER TERRACE **	Kodak Express	Photographic Goods	A1 Nat	64		1										A1 Nat
30 LEINSTER TERRACE	Bureau de Change	Bureau de Change	A2	43					1							A2
31 LEINSTER TERRACE	Mido Food and Wine	Grocer	A1 Conv	79	1											A1 Conv
32LEINSTER TERRACE	Salako	Hairdresser	A1 Ind	67				1								A1 Conv
33LEINSTER TERRACE	Dry Cleaners	Dry Cleaners	A1 Ind	52				1								A1 Ind
34LEINSTER TERRACE		Vacant	Vacant	52										1		Vacant
35LEINSTER TERRACE	Zorbas	Greek Restaurant	A3 Rest/Café	82						1						A3 Rest/Café





Source: GOAD Retail Survey 2013

Local Centre: Leinster Terrace

- Local Shopping Centre Boundary
- A1: Retail
- A2: Financial & Professional
- A3: Restaurant/Café
- A4: Pub/Bar
- A5: Take Away
- D1: Non-Res Institutions

0 10 20
Metres

N

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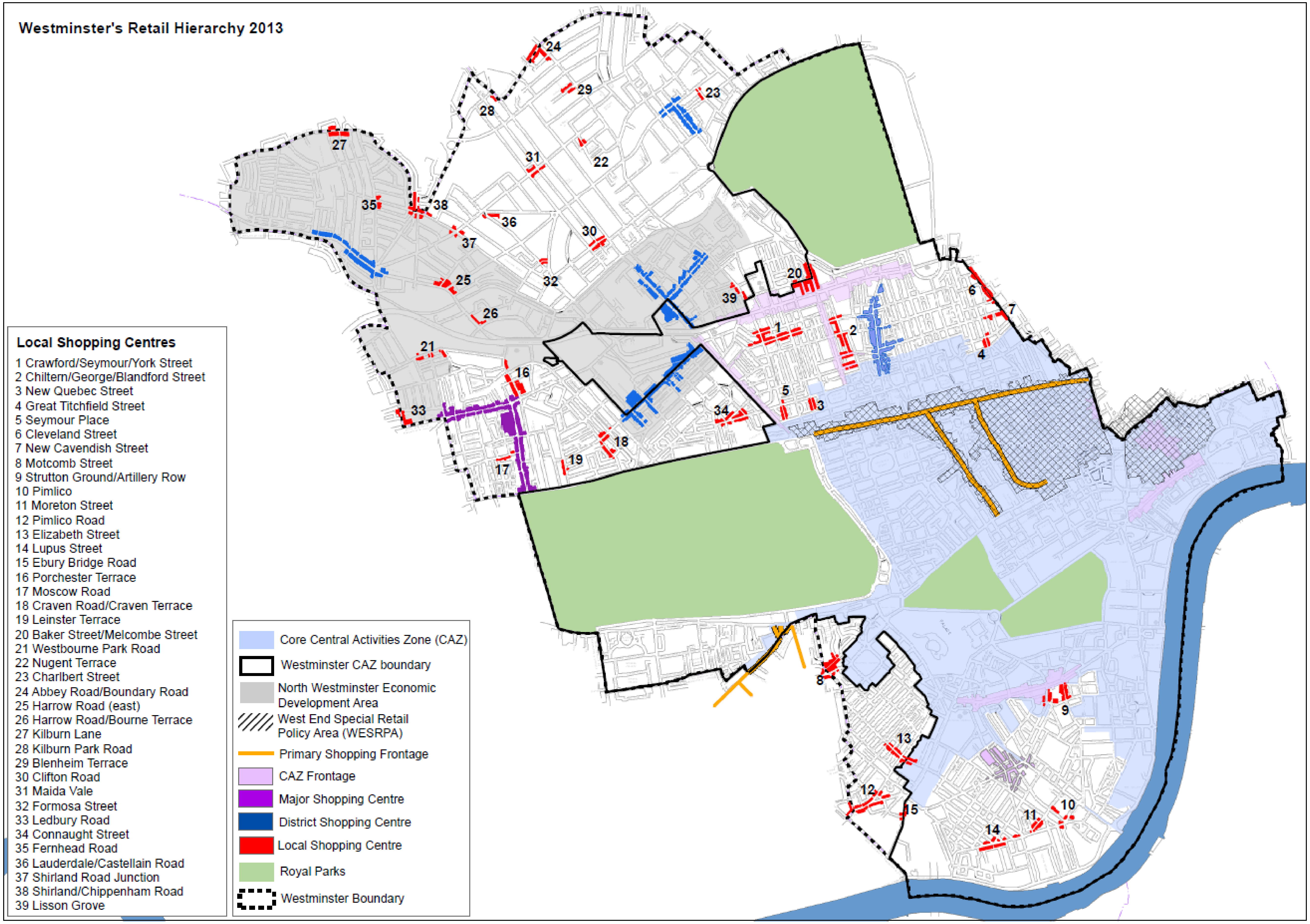
Figure 1 Westminster wide shopping centre boundaries plan



Health Checks - Glossary of terms

A1	**Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, dry cleaners, pet shops, sandwich bars, retail showrooms, and domestic hire shops.**
A1 café type uses	**Shops such as sandwich bars or coffee shops selling food and drinks to be consumed mainly off the premises, but not hot food takeaways. Examples include certain Pret a Manger shops, Costa Coffee and the Seattle Coffee Co. shops.**
A2	**Banks, building societies, bureau de change, estate and employment agencies, professional and financial services, telephone bureaux, betting offices and beauty salons (excluding hair).**
A3	**Food and drink uses such as restaurants, pubs, snack bars, cafés, wine bars and shops for the sale of hot food (hot food take-aways).**
A4	**Drinking Establishments: Premises where the primary purpose is the sale and consumption of alcoholic drinks on the premises.**
A5	**Hot Food Take-away: Premises where the primary purpose is the sale of hot food to take away.**
B1	**Business uses such as offices, research and development and industrial uses.**
CAZ	**Central Activities Zone (CAZ). The CAZ is an area of mixed uses, many of which contribute directly to the national, regional and local economy. It is this mix of activities and their supporting resources which underpins the success of London's economy.**
CAZ Frontages	**Mixed use areas usually with a predominant retail function. Appropriate areas for retail growth.**
Comparison	**A1 floor space selling predominantly durable items and not in convenience use.**
Convenience	**This is based on the classification provided by the unit for Retail Planning Information (URPI) set out in URPI brief 99/2. The classifications are: food, alcoholic drink, tobacco and other goods (newspapers and magazines, cleaning materials and matches). For the purposes of this assessment, convenience includes shops selling food or drink (excluding A1 café-type uses), newsagents, (including specialist tobacco stores), chemists (including Boots the Chemist stores) and post offices.**
Department/ principle store	**This includes the main department stores such as John Lewis, Liberty, and Selfridges, as well as variety stores such as Marks & Spencer and Virgin Mega-stores.**
District Centre	**Distributed more widely than Metropolitan and Major centres, they provide convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000-50,000 sqm of retail floor space. Some district centres have developed specialist shopping functions.**
Experian GOAD	**An independent retail data consultancy who provide maps of ground floor uses in shopping centres.**
F&B	**Food and beverage offer, covered by parts A3 (cafe's/restaurants), A4 (drinking establishments) and A5 (take aways) of the use classes order.**
Gross Floorspace	**Floorspace of buildings on all floors including external walls, half the thickness of parting walls and circulation areas.**
Independent store	**This includes non-convenience stores (see definition above) irrespective of size, that are not considered to be specialist retailers (see definition overleaf), that are operated by retailers that are not included within national retail chains or groups.**
Major Centre	**Typically found in inner and some parts of outer London with a borough-wide catchment. They generally contain over 50,000sqm of retail floor space and a relatively high proportion of comparison goods relative to convenience goods.**

	They may also have significant employment, leisure, service and civic functions.
NPPF	National Planning Policy Framework. Central Government's key, revised guidance document driving planning policy in England, which compressed the previous PPS documents and other guidance into a single document. It includes key guidance on town centres and health checks.
National retailers	This includes all retailers (Class A1 only) that operate within the context of a national retail chain or group, such as Next. A schedule of all national retail multiples can be found in Retail Directory of the UK 2002 (Hemming Information). Specialist shops that are part of a retail chain or group, such as Whittards and Thorntons, are classified as national retailers. Although there are national chains of food and drink uses and betting shops, such as Ladbrokes, these are classified based on the use class (e.g. betting shops as A2 uses) and not as national retailers.
Prestige international retailers	This includes prestigious retailers that operate in more than one country, such as Gucci, Gianni Versace, and Giorgio Armani. It also includes flagship stores that are only found in select town centres in Britain. National airline shops, such as British Airways, have also been classified as international retailers.
Primary Frontages	Internationally recognised shopping destinations. The Primary Frontages defined in Westminster's City Plan - Strategic Policies document are Oxford Street, Regent Street, Bond Street and Knightsbridge/Brompton Road.
Retail floorspace	This is all A1, A2, A3, A4, A5 and sui generis floorspace, and vacant floorspace of any of the aforementioned categories.
Shisha	Flavoured tobacco smoked through a water pipe or hookah. Smoke free legislation means that it cannot be smoked indoors in public places, and is often smoked at tables and chairs on the footway and in garden areas. There has been a rapid rise in shisha uses over the past five years, and there is concern over issues of health, residential amenity and other issues.
Specialist independent	Similar to an independent store, but this category reflects the quality and specialisation of the retailer so that a shopper may make a specific shopping trip to that shop. For example, The Pen Shop on Regent Street or antique shops.
Sui generis	Sui Generis is a term that refers to a use on its own. Any planning use not falling within a specific class within the Use Class Order falls within this category. Examples of sui generis uses in shopping centres are launderettes, mini cab offices, amusement centres and car showrooms.
UDP	Unitary Development Plan produced by Westminster City Council, with saved policies forming part of the statutory development plan for Westminster.
Vacancy	This category includes vacant street level units, as well as units that are under alteration. However, if at any time the survey was completed it was evident who the unit would be occupied by, the unit was treated as being occupied.
Zone A Rent	The rental level per square metre achieved on the first six metres of a shop unit.

Information Sources

Westminster's City Plan - Strategic Policies (adopted November 2013)
https://www.westminster.gov.uk/westminsters-city-plan-strategic-policies

Westminster's Unitary Development Plan (UDP, adopted January 2007)
https://www.westminster.gov.uk/unitary-development-plan-udp

The Mayor's London Plan (GLA, July 2011 as amended)
http://www.london.gov.uk/priorities/planning/london-plan

The National Planning Policy Framework (NPPF, DCLG 2012)
https://www.gov.uk/government/publications/national-planning-policy-framework--2

National Planning Practice Guidance (NPPG, March 2014)
http://planningguidance.planningportal.gov.uk/

Westminster High Street Health Checks 2013
https://www.westminster.gov.uk/high-street-health-checks

Westminster Health Check Archive
https://www.westminster.gov.uk/shopping-centre-health-checks

City of Westminster

If you would like to obtain further copies of this Health Check report, please:

Email: ldf@westminster.gov.uk
Or Telephone: 0207 641 2447

City of Westminster

Shopping Centre Health Check Survey 2014

Local Centre 26: Moscow Road

Contents

(i) Purpose of the Study

Former government guidance on Town Centres advised that 'health checks' be undertaken every five years to allow accurate and reasonable temporal analysis of the performance of town centres. This requirement has been superseded by more recent national and regional policy frameworks and guidance.

The National Planning Policy Framework (NPPF) (DCLG, 2012), states that when setting out requirements for Plan Making and using a proportionate evidence base, '*Local Planning Authorities should have a clear understanding of business needs within the economic markets operating in and across their area. To achieve this they should... assess... the role and function of town centres and the relationship between them, including any trends in the performance of centres, and the capacity of existing centres to accommodate new town centre development* (paragraphs 160, 161).'

The London Plan (2011) sets out strategic retail policy for Town Centres in London, as set out in more detail below. Paragraph 2.74 of the London Plan (July 2011) states that "*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 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.*"

This then forms the current national and regional planning policy framework for undertaking town centre health checks. The City Council is currently follow the former guidance and updating health checks every five years, as this is deemed to be a sensible and manageable time period for monitoring the viability and vitality of centres, given the extent of Westminster's town centre network.

(ii) Westminster's Local Centres and Planning Policy

Westminster's Local Centre Health Checks were last carried out in 2007, updating 2002 and 1997 surveys, and includes detailed analysis of Westminster's 39 Local Shopping Centres.

Local Centres normally have a purely local function and most are mainly comprised of convenience goods retailers with some food and drink and local service uses, mainly providing facilities for people living or working nearby (which the City Council wishes to safeguard in accordance with national guidance). However in Westminster some are also speciality centres which attract shoppers from a wider area.

Westminster's current local plan consists of the City Plan: Strategic Polices (adopted November 2013), and saved development management policies from the Unitary Development Plan (adopted January 2007). The local plan seek to protect and enhance the designated Local Shopping Centres for the service they provide to residents, visitors and workers, and because they reduce the need to travel.

Strategic policy CS21 is the general policy for retail across Westminster, seeking to protect existing A1 uses, direct new retail floor space to designated shopping centres, and to protect non-A1 retail and town centre uses in designated shopping centres from changes to uses that do not serve visiting members of the public and that do not have active shop fronts.

Saved UDP policy SS7 (Shopping and Services policy 7) is the detailed development management policy for local shopping centres. The policy covers the protection of shops and circumstances where changes of use away from shops may be permitted, taking into consideration the viability of units and the overall balance of uses in the centre.

(iii) Westminster's Retail Hierarchy

The City of Westminster is broadly divided into two zones in terms of retail policy, the Core Central Activities Zone (CAZ) and CAZ Frontages, and areas outside of this. The Core CAZ contains the two international shopping centres in London, the West End and Knightsbridge in addition to distinctive retail areas such as Covent Garden, Soho, Mayfair and St James's, as well as numerous small parades and individual shops. Outside the Core CAZ and CAZ Frontages there is one Major Shopping Centre, 4 District Centres (where previously there had been 7, 3 have subsequently been reclassified as CAZ Frontages and 1 as a Major Centre) and the 39 Local Centres which are designated to safeguard shopping facilities for local residents, and the retail character of local shopping areas.

In 2007, the District and Local Centres health check reports were all updated, as were 17 shopping areas inside the CAZ. More recently, reports for Westminster's high street shopping centres were updated in 2013.

(iv) Health Checks Methodology

As set out in the NPPF (DCLG, 2012) local planning authorities should recognise town centres as the heart of their communities and pursue policies to support their viability and vitality. Planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive.

Accessibility by public transport is considered to be excellent for all Westminster's larger shopping areas, and its Local Centres are accessible for people to walk to. The City Council wants to retain shops in Local Centres, in order to maintain a range of local convenience shops and protect the character and function of the centres. Local shops and services limit car trips, encourage walking, and make city life more practical and attractive.

The **National Planning Practice Guidance** was published in March 2014 by DCLG, several months after the field work for this project had commenced. It states that existing centres should be audited to assess their role, vitality, viability and their potential to accommodate new development and different types of development. It also sets out a series of indicators to determine the health of town centres, including:

- Diversity of use
- Vacant property
- Commercial yields on non-domestic property
- Customer views and behaviour
- Retailer representations
- Commercial rents
- Pedestrian flows and accessibility
- Perception of safety and crime
- State of environmental quality

Most of the above indicators will be assessed as part of this study, where data collection is available and reasonable. All of the above were included as part of the 2013 health checks for the larger high street type centres, where it is more appropriate to carry out consumer surveys, and where commercial data is more readily available. Given the size of this project, the indicators below are considered to be appropriate and comprehensive.

Land Use

(1) Diversity of town centre uses

This section considers the range of A1 uses, and compares the current diversity of land uses to previous Local Centre Health Check Surveys dated 1997, 2002 and 2007. It also includes the

proportion of vacant street level property and the amount of space used for different functions such as shopping, leisure, cultural and entertainment activities, pubs, cafes, and restaurants.

Accessibility

(2) **Pedestrian flows (footfall):**
Visual assessments were undertaken to measure pedestrian flows which contribute towards the vitality of the Local Centres. These were conducted on comparable days of the week and compared to the average for all of the Local Centres;

(3) **Accessibility:**
The whole of Westminster has a Public Transport Accessibility Level (PTAL) score of 6, the highest level achievable. This section therefore concentrates on ease and convenience of access;

Environment

(4) **State of the town centre environmental quality assessment:**
Includes a subjective assessment of indicators such as security, air pollution, noise, clutter, litter and graffiti, as well as positive factors such as trees, landscaping and open spaces. Each centre is assessed as per the Attractions Table 4, and the Daytime Amenity Table 5 in the 2007 Health Check Survey. A comparison is made between the 1997, 2002, 2007 and 2013 surveys.

(5) **Daytime amenity:**
A qualitative assessment of the amenity within the local centre, assessing its cleanliness, security, and identity.

(6) **Relative performance of the centre:**
Measures the performance of the centre compared to the Westminster Local Centre average in terms of land use, attractiveness, and daytime amenity, with graphs comparing the performance of centres relative to one another. The centre's strengths, weaknesses, opportunities and threats are highlighted in a SWOT analysis diagram at the end of this section.

(7) **The potential capacity for growth or change of centres in the network:** opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development is considered here. Based on levels of demand, assessments are made to ascertain how much capacity each Local Centre has to accommodate retail growth, looking at retail related planning applications in and around the Local Centres. Consideration is given to whether the current Local Centre boundaries and Core and Secondary Frontage designations are still valid. Consideration is also given to ways in which the vitality and viability of the centres could be enhanced.

(8) **Summary of health check:**
This section contains a comparison of the relative performance of this centre, and summary of land use assessment as per the 2007 Health Check reports. General comments and analysis of the centre are included, along with a summary of any problems/issues. A classification as 'in decline', 'neutral', or 'healthy' is included, plus comment on whether things have improved, deteriorated, or remained the same since 2007 (see 2007 Health Checks, Tables 6 and 7). Where a Local Centre is considered to be "in decline" or "neutral", consideration is made on ways to improve the vitality and viability of the Centre.

The results of this study will be used to inform planning policy development and the inception of other relevant interventions, and will be used to assess the success of previous initiatives such as any investment in public realm.

Local Centre **26: Moscow Road**

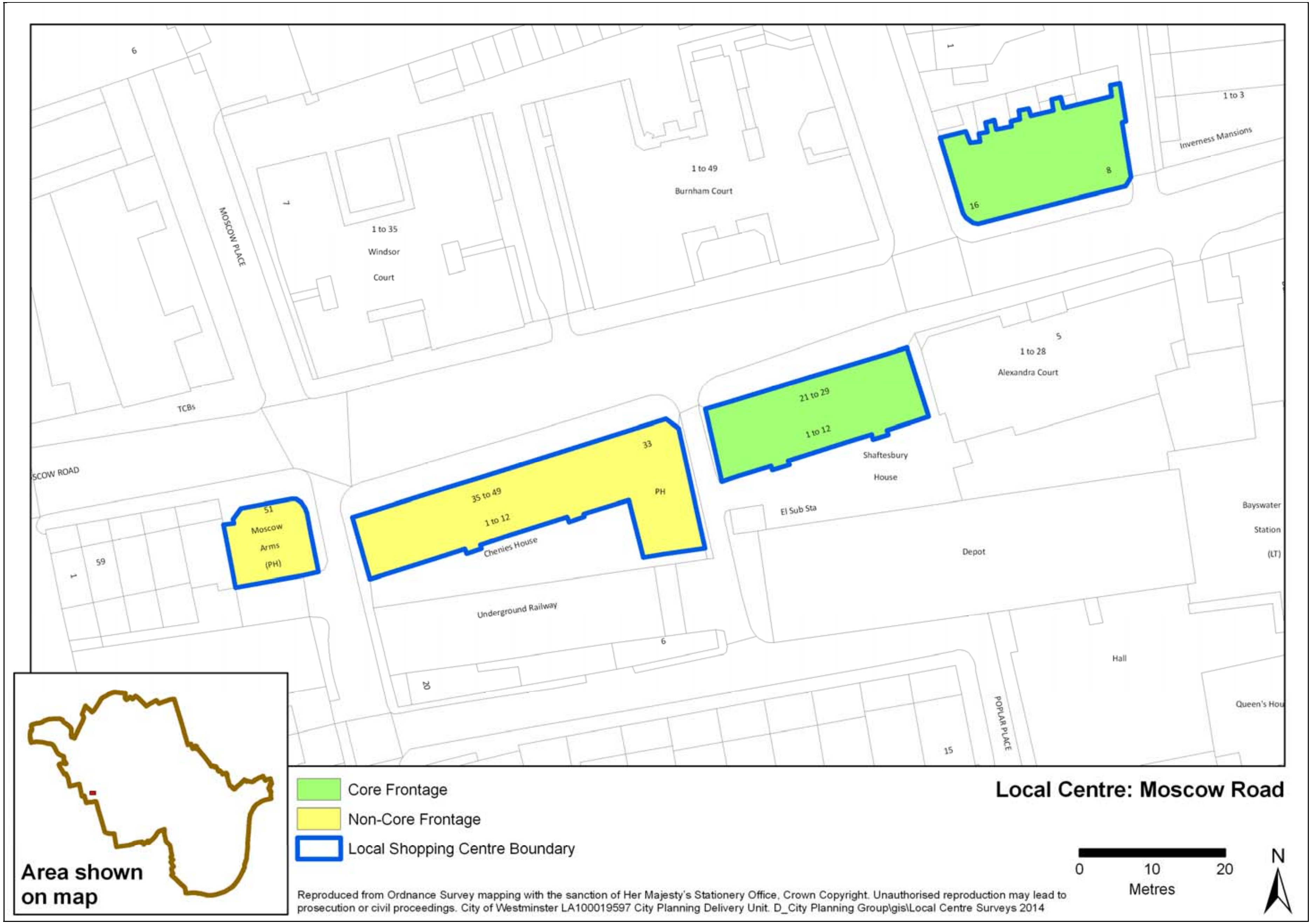
1. Introduction

1.1 Location

Moscow Road is a small linear local centre in the west of Westminster, a side street off the west side of Queensway, and was indeed previously included in the Queensway/Westbourne Grove major shopping centre. The centre is in the vicinity of Hyde Park to the south and is a couple of minutes walk from both Bayswater and Queensway London Underground stations.

This small centre serves local residents and workers in the Bayswater area, but its catchment area is restricted by the proximity of the Queensway/Westbourne Grove major shopping centre to the east, and by Hyde Park to the south.

Figure 1: Local Centre Boundary 2013



2 Land Use

2.1 Range of Uses

This centre comprises a range of shopping and other town centre uses. The diversity of uses represented in the centre is summarised in Table 1 below.

Table 1: Range of Town Centre Uses (1997-2013)

Use Class		No. of Units	No. of Units	No. of Units	No. of Units
		1997	**2002**	**2007**	**2013**
Class A1 Retail		6	7	6	5
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*0*
	National retailers	*0*	*0*	*0*	*0*
	Specialist Independent	*0*	*1*	*0*	*0*
	Independent	*1*	*1*	*1*	*1*
	Convenience	*5*	*5*	*5*	*4*
Class A2	Financial & Professional	0	1	1	2
Food & Drink		0	6	6	6
Class A3	*Restaurant/Café*	*0*	*3*	*4*	*4*
Class A4	*Pubs/Bars*	*0*	*2*	*2*	*2*
Class A5	*Takeaway*	*0*	*1*	*0*	*0*
	Takeaway/Restaurant				*0*
Sui Generis		0	0	0	0
Vacant Units		0	0	1	0
Arts/Culture		0	0	0	0
Health uses		0	1	1	2
Hotels		0	0	0	0
TOTAL		**6**	**15**	**15**	**15**

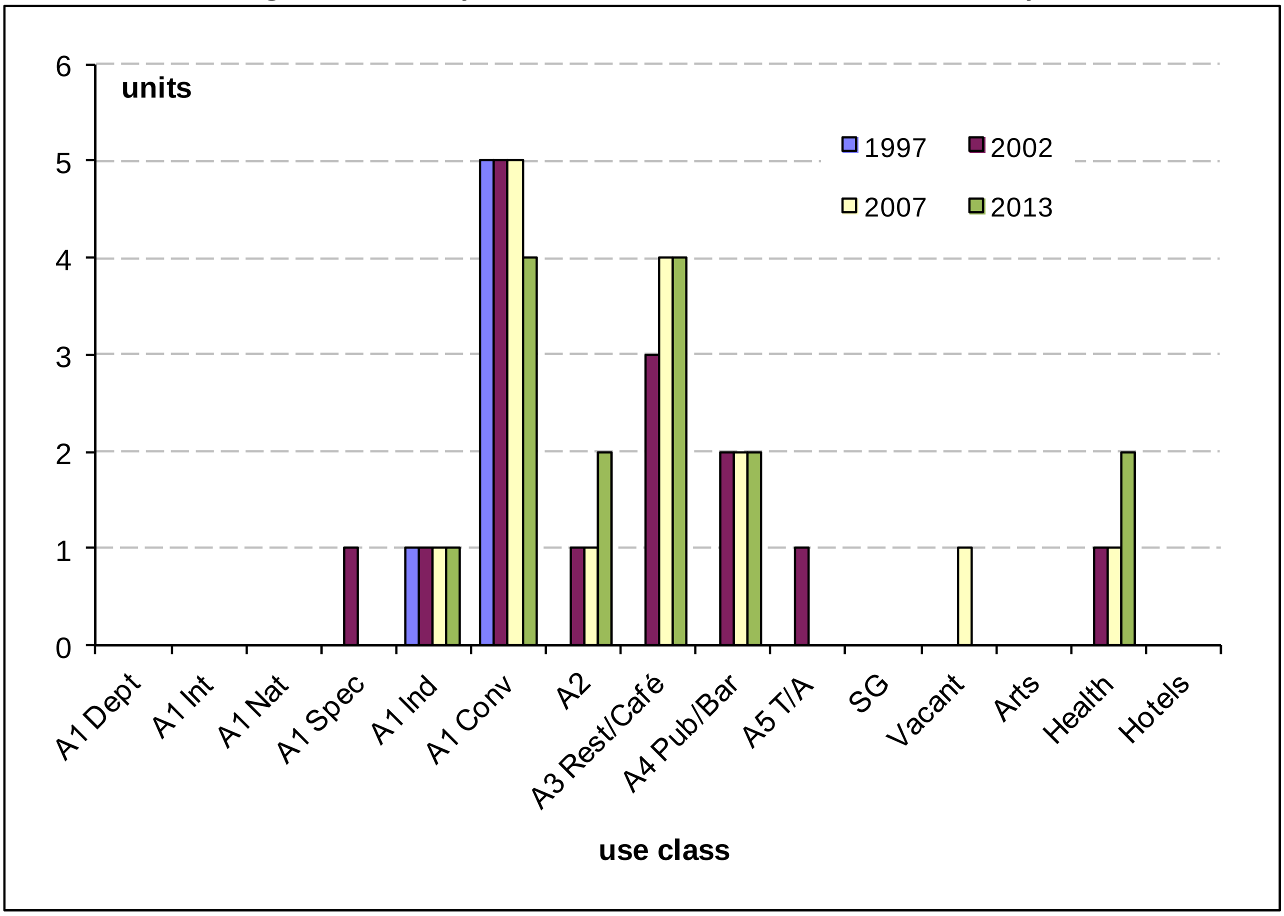
Source: WCC Land Use Survey December 2013

In total there are 15 units, which is the same number as recorded during the previous survey in 2007, making this a relatively small shopping centre.

The number of A1 retail uses has decreased by one unit since 2007, with an A1 travel agent changing to an A2 estate agent. The A-class uses have remained broadly stable since 1997, with A1 accounting for a third of units, and food and drink accounting for another third.

The only vacant unit present in 2007 is now occupied as a medical clinic. Aside from two medical units, Moscow Road does not contain any other non A1-class uses.

Figure 2: Units by use class within the local centre boundary



2.2 Range of A1 Uses

The centre has five A1 class retail units, including four convenience stores and one independent retailer, which is a hairdresser. The high proportion of convenience shops and no multiple retailers suggests that Moscow Road serves local residents as a day to day top up shopping location.

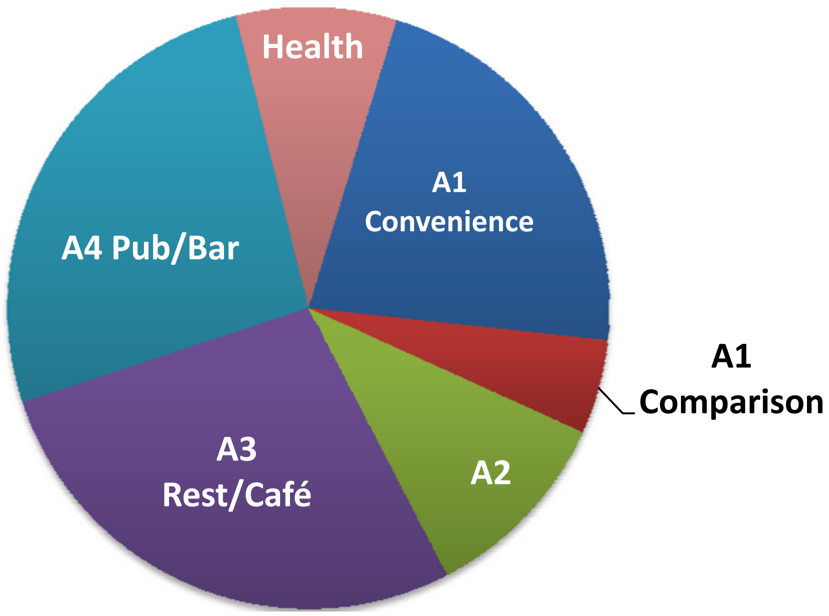
2.3 Total Retail Floor space

Total retail floor space in Moscow Road is broken down in Table 2. In total, Moscow Road has 1,046 sqm of retail floor space, which is below the average of 3,188 sqm for the 39 Local Centres in the City. In terms of the makeup of the centre, Moscow Road has comparable proportions of A1 convenience, A3 Restaurant/Café and A4 Pub/Bar floor space, which together account for nearly 85% of the centre's total. The centre has 2 A4 pubs, but no A5 takeaways, lower than the Local Centre average. The centre also has a significantly lower than average proportion of A1 comparison floor space, only 5% compared to the local centre average of 35%. However this is a small local centre and therefore the offer is limited.

Table 2: Total Retail Floor space 2013

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2013)
A1 Convenience	230	21.99%	14.9%
A1 Comparison	53	5.07%	35.2%
A2	111	10.61%	11.2%
A3 Rest/Café/TA	288	27.53%	17.4%
A4 Pub/Bar	274	26.20%	5.1%
Sui Generis	0	0.00%	3.9%
Vacant	0	0.00%	8.6%
Health	90	8.60%	2.0%
Hotels	0	0.00%	0.5%
Art	0	0.00%	1.3%
Leisure	0	0.00%	0.1%
Total	**1,046**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



Source: City of Westminster GIS System and site survey December 2013

Moscow Road is a Local Centre with a focus on convenience retailers, restaurants and pubs. There are two A2 class estate agents, but there are no banks or building societies. The Local Centre does not provide the same range and selection found in large Local Centres or District Centres, however it is complemented by its proximity to the larger Queensway/Westbourne Grove Major Shopping Centre, which offers a much wider range of shops and local services.

2.4 Proportion of Vacant Street Level Property

The centre is fully occupied, therefore the unit vacancy rate in Moscow Road is lower than the average rate for Local Centres in the City, as shown in Table 3. The vacancy rate has decreased by 1 unit to zero. The national average vacancy rate for shopping centres is over 14.1%.

Table 3: Level of Vacant Street Level Property 2013

% Vacant Units				% Local Centre Average
1997	2002	2007	2013	2013
N/A	0.0% (0) units	6.7% (1) units	0.0% (0) units	8% (1 units)

Source: City of Westminster GIS System and site survey December 2013

3. Accessibility

3.1 Pedestrian Flows (footfall)

The centre was found to be average in terms of pedestrian vibrancy when the Health Check Survey was carried out on a weekday afternoon in December 2013.

3.2 Accessibility on foot and by public transport

Moscow Road is an accessible local centre. Bayswater London Underground station (District and Circle Lines) is located at the end of Moscow Road. Queensway London Underground Station (Central Line) is also located roughly five minutes from the local centre, and Notting Hill Gate station (Central, District and Circle lines) is located roughly 5-10 minutes walk from the centre. The bus route number 70 serves Queensway which links onto Moscow Road, and several other bus routes run close to the centre along Bayswater Road (A40) to the south, which is also a main road through London.

4. Environmental Quality

4.1 State of the Centre’s Attractions and Environmental Quality / Attractions

The attitudinal assessment of the attractions and amenity of the centre is summarised in Table 4 below. The centre’s overall score for attractions is 23.1%, meaning that the centre offers little in the way of attractions. This rating is lower than the Local Centre average of 31%, and ranks Moscow Road =32nd out of the 39 Local Centres in the City. Moscow Road has a poor provision of multiple retailers, independent and specialist shops, sport and leisure facilities and bank/building society provision. The centre’s main strengths are the good provision of grocers, restaurants and pubs.

4.2 Daytime Amenity

Moscow Road is a relatively attractive Local Centre, with a day time amenity rating of 63% compared with the average for all Local Centres of 68%, and is ranked =28th out of the 39 Local Centres in the City. The centre is only rated as being poor in terms of features that identify the centre and street events, however this is more relevant potentially to the neighbouring Queensway/Westbourne Grove major centre. The centre’s rating is good in terms of the absence of refuse bags; the impact of vacant sites; evidence of drunkenness; presence of rough sleepers, beggars and street drinkers; touting and illegal street traders. The centre has an average ‘feel good factor’, and the remaining categories are all rated as being average, including six of the eight general cleanliness categories and half of the security categories.

Table 4: Attractions within the Local Centre 2013

ATTRACTIONS	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Retail Provision									
Prominence of multiple retailers			X			X			X
Prominence of independent shops			X			X			X
Availability of food shopping		X		X			X		
Prominence of specialist shops			X			X			X
Quality of market (frequency, variety etc)	-	-	-	-	-	-	-	-	-
Quality of retail environment		X			X			X	
Art/Culture									
Quality of restaurants (availability, number etc)		X		X			X		
Quality of pub/club/bars		X			X			X	
Range of cultural/ community events (theatre, concerts)			X			X			X
Availability of sports and leisure facilities			X			X			X
Service Provision									
Local services (information, library etc)			X		X				X
Employment/ office space			X			X			X
Bank/ building society provision			X			X			X
Total	4/26			7/26			6/26		
Percentage	15.4%			26.9%			23.1%		

Source: City of Westminster site survey December 2013

Table 5: Day Time Amenity within the Local Centre 2013

AMENITY – DAYTIME	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Overall environment of public areas in the centre									
General Cleanliness in Shopping Hours:									
Presence of litter	X			X				X	
Presence of refuse bags on the street	X				X		X		
Evidence of street fouling		X			X			X	
Presence of glass/glasses/other debris incl. Food and food containers/wrapping	X				X			X	
Condition		X			X			X	
Quality of buildings		X			X			X	
Special features (pedestrianisation, Street furniture, etc)			X		X			X	
Impact of vacant sites	X			X			X		
Security									
Evidence of Vandalism and Graffiti (incl. on street furniture)	X				X			X	
Security during shopping hours (availability, access, security etc)		X			X			X	
Ease of passage for pedestrians (incl. presence of obstacles eg illegally parked vehicles)		X			X			X	
Evidence of drunkenness, anti-social Behaviour, rowdiness	X			X			X		
Presence of rough sleepers	X			X			X		
Presence of beggars	X			X			X		
Presence of street drinkers	X			X			X		
Evidence of touting (e.g. mini cabs, ricksaws, Prostitution, drug dealing etc.)	X			X			X		
Presence of illegal street traders e.g counterfeit goods, hot dogs, peanuts etc.	X			X			X		
Effectiveness of any deterrent measures (CCTV, police patrols, door security etc)		X			X			X	
Quality of street lighting		X			X			X	
Safety perception in shopping hours		X			X			X	
Identity of town centre									
Features which identify the centre (eg flagship stores, buildings etc)			X			X			X
Promotion/ Street events			X			X			X
'Feel good' factor of town centre		X			X			X	
Total	31/46			29/46			29/46		
Percentage	67.4%			63.0%			63.0%		

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2013

Figure 4: Deviation of centre from the mean for Local Centres 2013

Moscow Road is a small Local Centre with a total retail floor space that is under a third of the overall average for the 39 local centres. This is also true for A1 convenience and comparison floor space figures, and for food and drink floor space figures (A3/A4/A5), all of which are well below the local centre average due to the size of the centre. In terms of the rating of the physical environment, the centre's attractiveness and daytime amenity ratings are both marginally below the local centre averages.

5.2 Strengths, Weaknesses, Opportunities and Threats

SWOT analysis

6. Future capacity

6.1 Potential Capacity for Growth

Between 2007 and 2013, there have been several planning applications for premises fronting Moscow Road. Two applications concerned the placing of tables and chairs on the public highway; one was permitted and another is currently under consideration. Two applications have been refused concerning alterations to shop fronts which would have otherwise presented public amenity issues.

Note that there are no vacant units to accommodate growth.

7. Health of the Centre

Table 6: Summary of Health Check Assessment 2013

Subject	Subject Matter	Data	Number	Sq M
RETAILING	**Floor space**	**Total Floor space**		**1,046**
		Total Convenience (A1)		**230**
		Total Comparison (A1)		**53**
		Total Service (A2)		**111**
		Total A3		**288**
		Total A4		**274**
		Total A5		**0**
		Total Sui Generis		**0**
		Total Vacant		**0**
	Retail Offer	**Total Number of Shop Units**	**15**	
		Total Number of A1 Units	**5**	
		a) Convenience shops	**4**	
		b) Department/principal stores	**0**	
		c) Prestige international shops	**0**	
		d) National comparison retailers	**0**	
		e) Specialist Independent shops	**0**	
		f) Independent shops	**1**	
		Total Comparison Multiples	**1**	
		Total Number of A2 Units	**2**	
		Total Number of A3 Units	**4**	
		Total Number of A4 Units	**2**	
		Total Number of A5 Units	**0**	
		Total Number of Sui Generis	**0**	
		Total Number of Vacant	**0**	
	Market	**Days of operation**	**0**	
		Number of stalls	**0**	
	Proposals	**Changes of use A1 to A2**	**0**	
		Changes of use A1 to A3	**0**	
		Changes of use A1 to A4	**0**	
		Changes of use A1 to A5	**0**	
ARTS/CULTURE		**(cinemas, galleries, theatres etc.)**	**0**	
HEALTH USES		**(clinics, surgeries etc.)**	**0**	
HOTELS			**0**	

In terms of its vitality and viability, and general economic health this centre is considered to be ’neutral’.

Appendices

Appendix 1: Views of Local Centre

Appendix 2: Land Use Table (Westminster land use survey 2013)

Appendix 3: Land Use Map (GOAD 2012 retail data and Westminster land use survey 2013)

Appendix 4: Planning permissions Map (Westminster land use survey 2013)

Appendix 5: Location map of all local centres

Appendix 6: Glossary of Terms

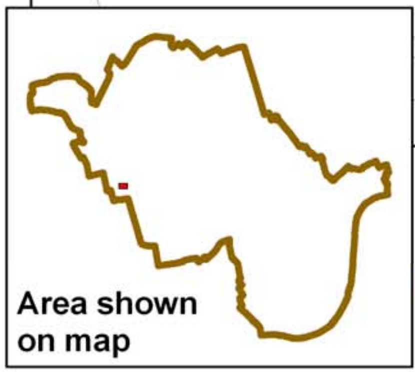
Views of Moscow Road local centre

The core shopping frontage on the north side of the local shopping centre, with convenience shops and other uses.

The core shopping frontage on the south side of the local shopping centre, with a well-kept streetscape.

The secondary shopping frontage at the western end of the local centre.

					A1	A1		A3	A4	Health	2007 Use
ADDRESS	**FASCIA**	**DESCRIPTION**	**USE**	**SQM**	**Conv.**	**Ind**	**A2**	**Res/Caf**	**Pub/Bar**		
8MOSCOW ROAD	Manolia Homes	Estate agent	A2	69			1				A1 Ind
10-12MOSCOW ROAD	Santorini	Restaurant	A3 Rest/Café	125				1			A3 Rest/Café
14MOSCOW ROAD	Archie	Greengrocers	A1 Conv	56	1						A1 Conv
16MOSCOW ROAD	Athenian Grocery	Grocers	A1 Conv	54	1						A1 Conv
21MOSCOW ROAD	Olympic Food Centre	Grocers	A1 Conv	58	1						A1 Conv
23MOSCOW ROAD		Entrance		66							
25MOSCOW ROAD	4 Ur Convenience	Newsagents	A1 Conv	62	1						A1 Conv
27MOSCOW ROAD	Emile	Hair salon	A1 Ind	53		1					A1 Conv
29MOSCOW ROAD		Entrance		54							
31MOSCOW ROAD	Byzantium	Café	A3 Rest/Café	62				1			A3 Rest/Café
33MOSCOW ROAD	Kings Head	Public House	A4 Pub/Bar	156					1		A4 Pub/Bar
35MOSCOW ROAD	On Physio	Medical Clinic	Health	44						1	Vacant
37MOSCOW ROAD		Entrance		47							
39MOSCOW ROAD	Alpaps Estates	Estate Agent	A2	42			1				A2
41MOSCOW ROAD	Harvey Street Treatments	Medical Clinic	Health	46						1	Health
45MOSCOW ROAD	The Shiori	Restaurant	A3 Rest/Café	55				1			A3 Rest/Café
47MOSCOW ROAD	Mulberry Street	Restaurant	A3 Rest/Café	46				1			A3 Rest/Café
49MOSCOW ROAD		Entrance		44							
51MOSCOW ROAD	Phoenix	Public House	A4 Pub/Bar	118					1		A4 Pub/Bar



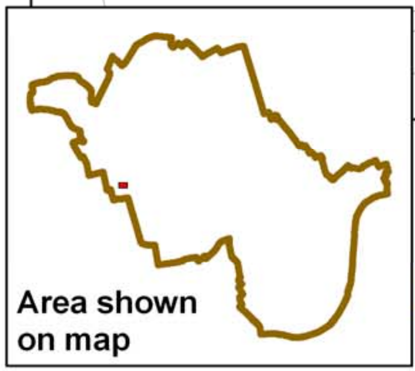
Source: GOAD Retail Survey 2013

Local Centre: Moscow Road

Local Shopping Centre Boundary
A1: Retail
A2: Financial & Professional
A3: Restaurant/Café
A4: Pub/Bar
D1: Non-Res Institutions

0 10 20
Metres

N



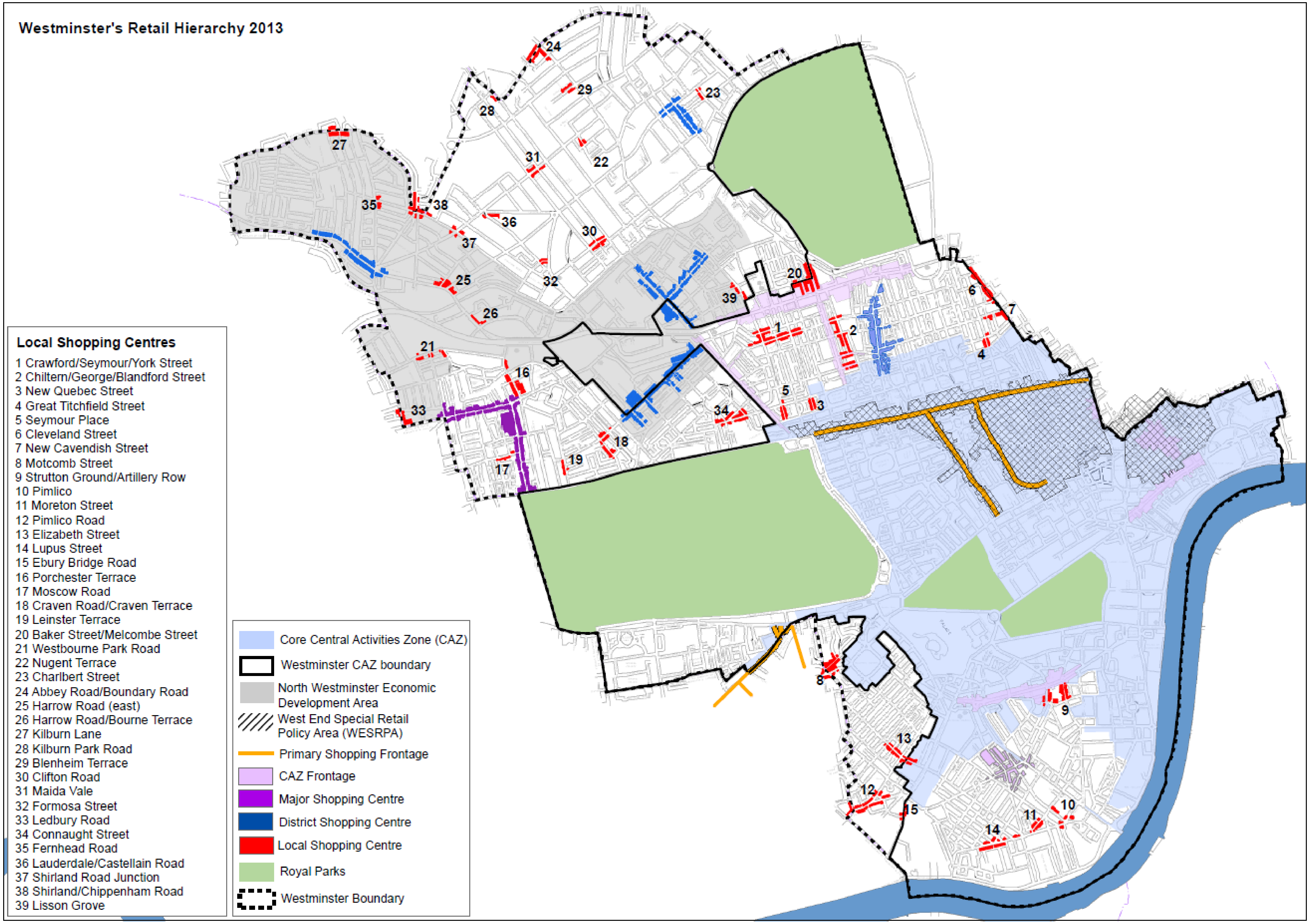
Local Centre: Moscow Road

Source: GOAD Retail Survey 2013

Local Shopping Centre Boundary

0 10 20
Metres
N

Figure 7 Westminster wide shopping centre boundaries plan



Health Checks - Glossary of terms

A1	**Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, dry cleaners, pet shops, sandwich bars, retail showrooms, and domestic hire shops.**
A1 café type uses	**Shops such as sandwich bars or coffee shops selling food and drinks to be consumed mainly off the premises, but not hot food takeaways. Examples include certain Pret a Manger shops, Costa Coffee and the Seattle Coffee Co. shops.**
A2	**Banks, building societies, bureau de change, estate and employment agencies, professional and financial services, telephone bureaux, betting offices and beauty salons (excluding hair).**
A3	**Food and drink uses such as restaurants, pubs, snack bars, cafés, wine bars and shops for the sale of hot food (hot food take-aways).**
A4	**Drinking Establishments: Premises where the primary purpose is the sale and consumption of alcoholic drinks on the premises.**
A5	**Hot Food Take-away: Premises where the primary purpose is the sale of hot food to take away.**
B1	**Business uses such as offices, research and development and industrial uses.**
CAZ	**Central Activities Zone (CAZ). The CAZ is an area of mixed uses, many of which contribute directly to the national, regional and local economy. It is this mix of activities and their supporting resources which underpins the success of London's economy.**
CAZ Frontages	**Mixed use areas usually with a predominant retail function. Appropriate areas for retail growth.**
Comparison	**A1 floor space selling predominantly durable items and not in convenience use.**
Convenience	**This is based on the classification provided by the unit for Retail Planning Information (URPI) set out in URPI brief 99/2. The classifications are: food, alcoholic drink, tobacco and other goods (newspapers and magazines, cleaning materials and matches). For the purposes of this assessment, convenience includes shops selling food or drink (excluding A1 café-type uses), newsagents, (including specialist tobacco stores), chemists (including Boots the Chemist stores) and post offices.**
Department/ principle store	**This includes the main department stores such as John Lewis, Liberty, and Selfridges, as well as variety stores such as Marks & Spencer and Virgin Mega-stores.**
District Centre	**Distributed more widely than Metropolitan and Major centres, they provide convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000-50,000 sqm of retail floor space. Some district centres have developed specialist shopping functions.**
Experian GOAD	**An independent retail data consultancy who provide maps of ground floor uses in shopping centres.**
F&B	**Food and beverage offer, covered by parts A3 (cafe's/restaurants), A4 (drinking establishments) and A5 (take aways) of the use classes order.**
Gross Floorspace	**Floorspace of buildings on all floors including external walls, half the thickness of parting walls and circulation areas.**
Independent store	**This includes non-convenience stores (see definition above) irrespective of size, that are not considered to be specialist retailers (see definition overleaf), that are operated by retailers that are not included within national retail chains or groups.**
Major Centre	**Typically found in inner and some parts of outer London with a borough-wide catchment. They generally contain over 50,000sqm of retail floor space and a relatively high proportion of comparison goods relative to convenience goods.**

	They may also have significant employment, leisure, service and civic functions.
NPPF	**National Planning Policy Framework. Central Government's key, revised guidance document driving planning policy in England, which compressed the previous PPS documents and other guidance into a single document. It includes key guidance on town centres and health checks.**
National retailers	**This includes all retailers (Class A1 only) that operate within the context of a national retail chain or group, such as Next. A schedule of all national retail multiples can be found in Retail Directory of the UK 2002 (Hemming Information). Specialist shops that are part of a retail chain or group, such as Whittards and Thorntons, are classified as national retailers. Although there are national chains of food and drink uses and betting shops, such as Ladbrokes, these are classified based on the use class (e.g. betting shops as A2 uses) and not as national retailers.**
Prestige international retailers	**This includes prestigious retailers that operate in more than one country, such as Gucci, Gianni Versace, and Giorgio Armani. It also includes flagship stores that are only found in select town centres in Britain. National airline shops, such as British Airways, have also been classified as international retailers.**
Primary Frontages	**Internationally recognised shopping destinations. The Primary Frontages defined in Westminster's City Plan - Strategic Policies document are Oxford Street, Regent Street, Bond Street and Knightsbridge/Brompton Road.**
Retail floorspace	**This is all A1, A2, A3, A4, A5 and sui generis floorspace, and vacant floorspace of any of the aforementioned categories.**
Shisha	**Flavoured tobacco smoked through a water pipe or hookah. Smoke free legislation means that it cannot be smoked indoors in public places, and is often smoked at tables and chairs on the footway and in garden areas. There has been a rapid rise in shisha uses over the past five years, and there is concern over issues of health, residential amenity and other issues.**
Specialist independent	**Similar to an independent store, but this category reflects the quality and specialisation of the retailer so that a shopper may make a specific shopping trip to that shop. For example, The Pen Shop on Regent Street or antique shops.**
Sui generis	**Sui Generis is a term that refers to a use on its own. Any planning use not falling within a specific class within the Use Class Order falls within this category. Examples of sui generis uses in shopping centres are launderettes, mini cab offices, amusement centres and car showrooms.**
UDP	**Unitary Development Plan produced by Westminster City Council, with saved policies forming part of the statutory development plan for Westminster.**
Vacancy	**This category includes vacant street level units, as well as units that are under alteration. However, if at any time the survey was completed it was evident who the unit would be occupied by, the unit was treated as being occupied.**
Zone A Rent	**The rental level per square metre achieved on the first six metres of a shop unit.**

Information Sources

Westminster's City Plan - Strategic Policies (adopted November 2013)
https://www.westminster.gov.uk/westminsters-city-plan-strategic-policies

Westminster's Unitary Development Plan (UDP, adopted January 2007)
https://www.westminster.gov.uk/unitary-development-plan-udp

The Mayor's London Plan (GLA, July 2011 as amended)
http://www.london.gov.uk/priorities/planning/london-plan

The National Planning Policy Framework (NPPF, DCLG 2012)
https://www.gov.uk/government/publications/national-planning-policy-framework--2

National Planning Practice Guidance (NPPG, March 2014)
http://planningguidance.planningportal.gov.uk/

Westminster High Street Health Checks 2013
https://www.westminster.gov.uk/high-street-health-checks

Westminster Health Check Archive
https://www.westminster.gov.uk/shopping-centre-health-checks

City of Westminster

If you would like to obtain further copies of this Health Check report, please:

Email: ldf@westminster.gov.uk
Or Telephone: 0207 641 2447

City of Westminster

Shopping Centre Health Check Survey 2014

Local Centre 27: Porchester Road

Contents

(i) Purpose of the Study

Former government guidance on Town Centres advised that 'health checks' be undertaken every five years to allow accurate and reasonable temporal analysis of the performance of town centres. This requirement has been superseded by more recent national and regional policy frameworks and guidance.

The National Planning Policy Framework (NPPF) (DCLG, 2012), states that when setting out requirements for Plan Making and using a proportionate evidence base, '*Local Planning Authorities should have a clear understanding of business needs within the economic markets operating in and across their area. To achieve this they should... assess... the role and function of town centres and the relationship between them, including any trends in the performance of centres, and the capacity of existing centres to accommodate new town centre development* (paragraphs 160, 161).'

The London Plan (2011) sets out strategic retail policy for Town Centres in London, as set out in more detail below. Paragraph 2.74 of the London Plan (July 2011) states that "*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 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.*"

This then forms the current national and regional planning policy framework for undertaking town centre health checks. The City Council is currently follow the former guidance and updating health checks every five years, as this is deemed to be a sensible and manageable time period for monitoring the viability and vitality of centres, given the extent of Westminster's town centre network.

(ii) Westminster's Local Centres and Planning Policy

Westminster's Local Centre Health Checks were last carried out in 2007, updating 2002 and 1997 surveys, and includes detailed analysis of Westminster's 39 Local Shopping Centres.

Local Centres normally have a purely local function and most are mainly comprised of convenience goods retailers with some food and drink and local service uses, mainly providing facilities for people living or working nearby (which the City Council wishes to safeguard in accordance with national guidance). However in Westminster some are also speciality centres which attract shoppers from a wider area.

Westminster's current local plan consists of the City Plan: Strategic Polices (adopted November 2013), and saved development management policies from the Unitary Development Plan (adopted January 2007). The local plan seek to protect and enhance the designated Local Shopping Centres for the service they provide to residents, visitors and workers, and because they reduce the need to travel.

Strategic policy CS21 is the general policy for retail across Westminster, seeking to protect existing A1 uses, direct new retail floor space to designated shopping centres, and to protect non-A1 retail and town centre uses in designated shopping centres from changes to uses that do not serve visiting members of the public and that do not have active shop fronts.

Saved UDP policy SS7 (Shopping and Services policy 7) is the detailed development management policy for local shopping centres. The policy covers the protection of shops and circumstances where changes of use away from shops may be permitted, taking into consideration the viability of units and the overall balance of uses in the centre.

(iii) Westminster's Retail Hierarchy

The City of Westminster is broadly divided into two zones in terms of retail policy, the Core Central Activities Zone (CAZ) and CAZ Frontages, and areas outside of this. The Core CAZ contains the two international shopping centres in London, the West End and Knightsbridge in addition to distinctive retail areas such as Covent Garden, Soho, Mayfair and St James's, as well as numerous small parades and individual shops. Outside the Core CAZ and CAZ Frontages there is one Major Shopping Centre, 4 District Centres (where previously there had been 7, 3 have subsequently been reclassified as CAZ Frontages and 1 as a Major Centre) and the 39 Local Centres which are designated to safeguard shopping facilities for local residents, and the retail character of local shopping areas.

In 2007, the District and Local Centres health check reports were all updated, as were 17 shopping areas inside the CAZ. More recently, reports for Westminster's high street shopping centres were updated in 2013.

(iv) Health Checks Methodology

As set out in the NPPF (DCLG, 2012) local planning authorities should recognise town centres as the heart of their communities and pursue policies to support their viability and vitality. Planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive.

Accessibility by public transport is considered to be excellent for all Westminster's larger shopping areas, and its Local Centres are accessible for people to walk to. The City Council wants to retain shops in Local Centres, in order to maintain a range of local convenience shops and protect the character and function of the centres. Local shops and services limit car trips, encourage walking, and make city life more practical and attractive.

The **National Planning Practice Guidance** was published in March 2014 by DCLG, several months after the field work for this project had commenced. It states that existing centres should be audited to assess their role, vitality, viability and their potential to accommodate new development and different types of development. It also sets out a series of indicators to determine the health of town centres, including:

- Diversity of use
- Vacant property
- Commercial yields on non-domestic property
- Customer views and behaviour
- Retailer representations
- Commercial rents
- Pedestrian flows and accessibility
- Perception of safety and crime
- State of environmental quality

Most of the above indicators will be assessed as part of this study, where data collection is available and reasonable. All of the above were included as part of the 2013 health checks for the larger high street type centres, where it is more appropriate to carry out consumer surveys, and where commercial data is more readily available. Given the size of this project, the indicators below are considered to be appropriate and comprehensive.

Land Use

(1) Diversity of town centre uses

This section considers the range of A1 uses, and compares the current diversity of land uses to previous Local Centre Health Check Surveys dated 1997, 2002 and 2007. It also includes the

proportion of vacant street level property and the amount of space used for different functions such as shopping, leisure, cultural and entertainment activities, pubs, cafes, and restaurants.

Accessibility

(2) **Pedestrian flows (footfall):**
Visual assessments were undertaken to measure pedestrian flows which contribute towards the vitality of the Local Centres. These were conducted on comparable days of the week and compared to the average for all of the Local Centres;

(3) **Accessibility:**
The whole of Westminster has a Public Transport Accessibility Level (PTAL) score of 6, the highest level achievable. This section therefore concentrates on ease and convenience of access;

Environment

(4) **State of the town centre environmental quality assessment:**
Includes a subjective assessment of indicators such as security, air pollution, noise, clutter, litter and graffiti, as well as positive factors such as trees, landscaping and open spaces. Each centre is assessed as per the Attractions Table 4, and the Daytime Amenity Table 5 in the 2007 Health Check Survey. A comparison is made between the 1997, 2002, 2007 and 2013 surveys.

(5) **Daytime amenity:**
A qualitative assessment of the amenity within the local centre, assessing its cleanliness, security, and identity.

(6) **Relative performance of the centre:**
Measures the performance of the centre compared to the Westminster Local Centre average in terms of land use, attractiveness, and daytime amenity, with graphs comparing the performance of centres relative to one another. The centre's strengths, weaknesses, opportunities and threats are highlighted in a SWOT analysis diagram at the end of this section.

(7) **The potential capacity for growth or change of centres in the network:** opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development is considered here. Based on levels of demand, assessments are made to ascertain how much capacity each Local Centre has to accommodate retail growth, looking at retail related planning applications in and around the Local Centres. Consideration is given to whether the current Local Centre boundaries and Core and Secondary Frontage designations are still valid. Consideration is also given to ways in which the vitality and viability of the centres could be enhanced.

(8) **Summary of health check:**
This section contains a comparison of the relative performance of this centre, and summary of land use assessment as per the 2007 Health Check reports. General comments and analysis of the centre are included, along with a summary of any problems/issues. A classification as 'in decline', 'neutral', or 'healthy' is included, plus comment on whether things have improved, deteriorated, or remained the same since 2007 (see 2007 Health Checks, Tables 6 and 7). Where a Local Centre is considered to be "in decline" or "neutral", consideration is made on ways to improve the vitality and viability of the Centre.

The results of this study will be used to inform planning policy development and the inception of other relevant interventions, and will be used to assess the success of previous initiatives such as any investment in public realm.

Local Centre **27: Porchester Road**

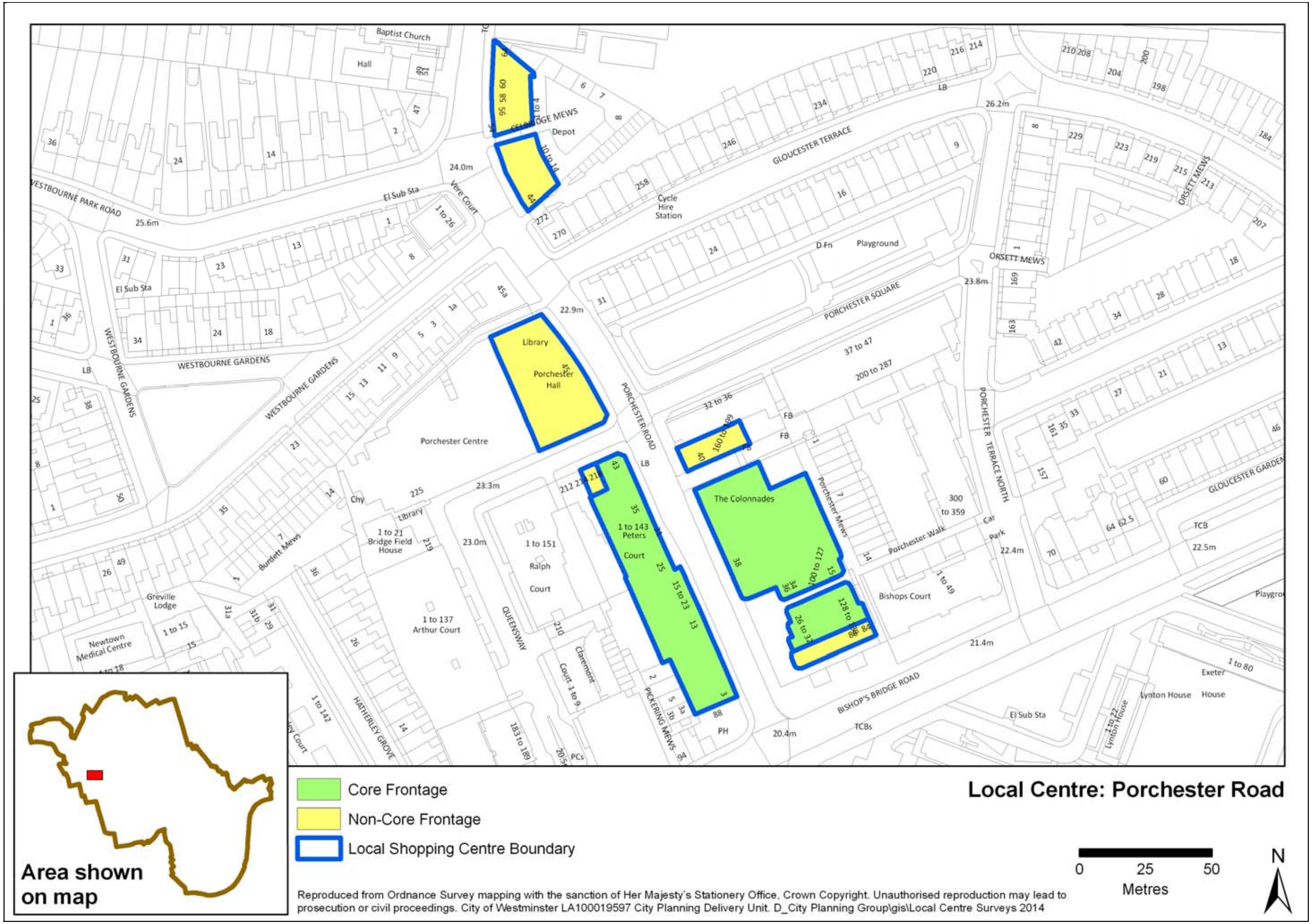
1. Introduction

1.1 Location

Porchester Road is a reasonably large linear Local Centre located in the west of Westminster, serving local residents and workers in the north Bayswater area. It was formerly part of the larger Queensway/Westbourne Grove Major Shopping Centre, and is a more localised extension of this centre, running up to the rail tracks.

The centre runs north to south and is in close proximity to several transport interchanges, such as Paddington Station and the A40 Westway, and is well served by bus routes at its southern end, while also being close to Royal Oak London Underground station, located at the northern end of the centre. The catchment area is limited by Porchester Road’s proximity to the Westway to the north and the Queensway/Westbourne Grove Major Shopping Centre to the south.

Figure 1: Local Centre Boundary 2013



2 Land Use

2.1 Range of Uses

Porchester Road comprises a range of shopping and other town centre uses. This diversity is summarised in Table 1 below.

Table 1: Range of Town Centre Uses (1997-2013)

Use Class		No. of Units 1997	No. of Units 2002	No. of Units 2007	No. of Units 2013
Class A1 Retail		14	17	17	15
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*0*
	National retailers	*1*	*0*	*1*	*1*
	Specialist Independent	*2*	*2*	*3*	*1*
	Independent	*4*	*9*	*6*	*6*
	Convenience	*7*	*6*	*7*	*7*
Class A2	Financial & Professional	2	4	4	2
Food & Drink		0	10	11	11
Class A3	*Restaurant/Café*	*0*	*8*	*8*	*8*
Class A4	*Pubs/Bars*	*0*	*1*	*1*	*2*
Class A5	*Takeaway*	*0*	*1*	*2*	*1*
	Takeaway/Restaurant				*0*
Sui Generis		1	0	0	1
Vacant Units		1	2	1	5
Arts/Culture		1	1	1	1
Health uses		0	1	1	1
Hotels		0	0	0	0
TOTAL		**19**	**35**	**35**	**36**

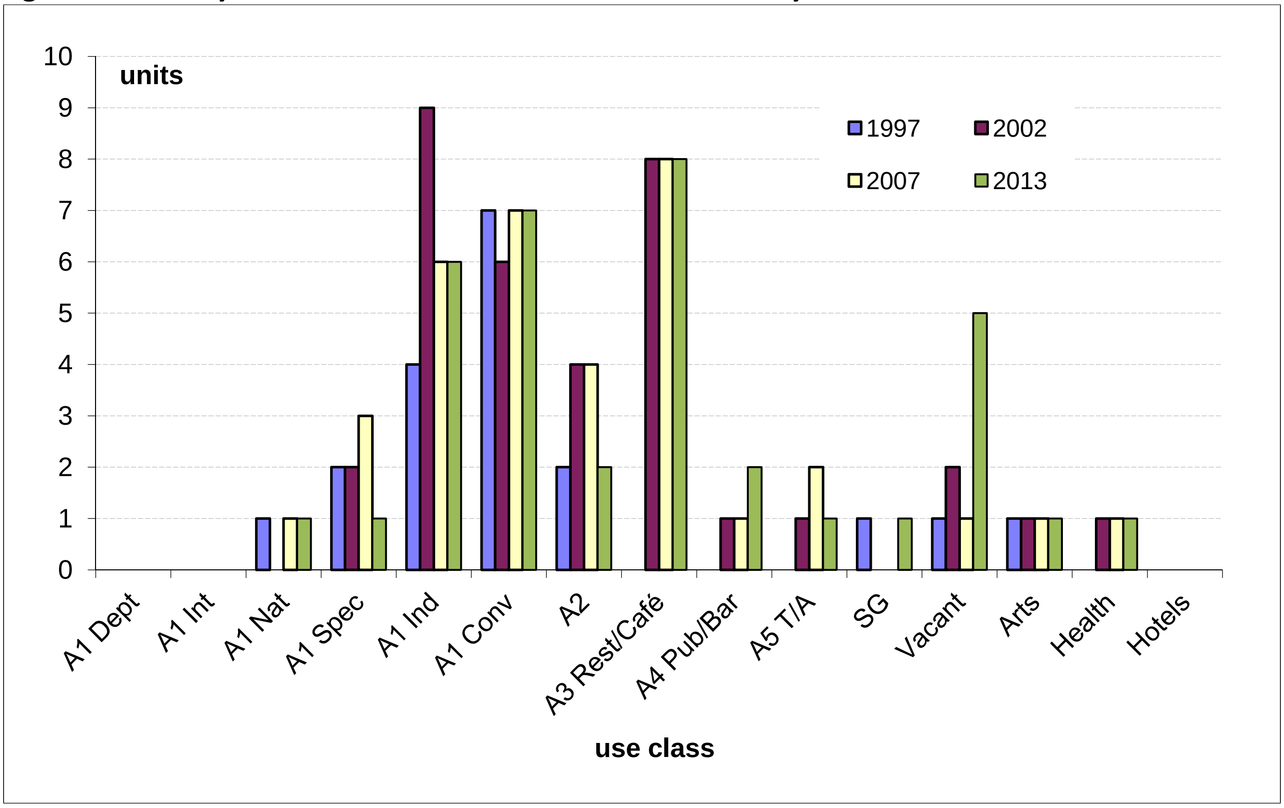
Source: WCC Site Survey December 2013

In total there are 36 units, one more than the number recorded in the 2002 and 2007 surveys.

The number of A1 retail uses in Porchester Road has declined by two since 2007 and there have also been slight internal shifts of use within the A1 class, including the loss of two specialist retailers (a massage centre and a bookbinding service) which have become vacant. The number of Class A2 uses has declined by two units, and there has been the loss of a takeaway, but the number of Pubs/Bars has increased by one. Restaurant/Café uses have remained constant since 2002 with eight. Several retail units in Porchester Road, including mini-markets, cafés, a restaurant and a bookshop, cater for Middle Eastern residents and visitors. One such café had facilities for outside shisha smoking, hence the presence of the first sui generis unit in the area since 1997.

Outside of the A-class uses, there has been a significant increase in vacant units (from one to five), while the number of arts/culture and health uses has remained constant. The centre does not contain any hotels. The centre contains the Porchester Spa (leisure centre) and library, therefore the community service provision is strong.

Figure 2: Units by use class within the Local Centre boundary



2.2 Range of A1 Uses

Porchester Road has no department stores or international retailers. The centre has 15 Class A1 retail units including seven convenience stores, six independent retailers, one national retailer (a tanning shop) and one specialist retailer (a book shop). The largest convenience store in Porchester Road has changed ownership since 2007, with the large anchor Waitrose store having previously been a Budgens. The independent stores comprise three hairdressers, two dry cleaners and a travel agent. The high proportion of convenience shops and no multiple retailers suggests that Porchester Road serves local residents with a mix of convenience and comparison shopping facilities, and independent food and drink uses.

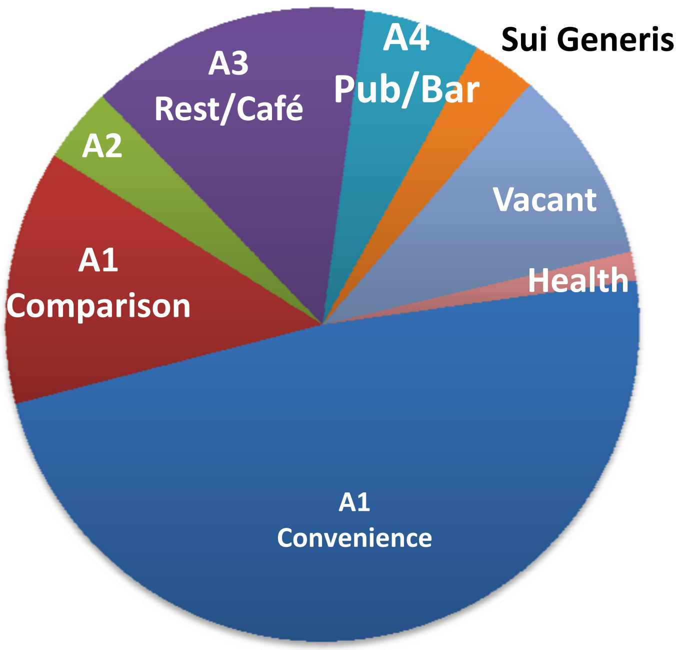
2.3 Total Retail Floor Space

Total retail floor space in Porchester Road is broken down in Table 2. It has 5,337 sqm of retail floor space, which is above the average of 3,188 sqm for the 39 Local Centres in Westminster. Porchester Road has a high proportion of convenience stores, accounting for almost half of the total retail floor space, related in part to the presence of a large Waitrose supermarket in the centre. Outside of this, A3 use accounts for a considerable proportion of the floor space, while the remaining seven use classes make smaller contributions. The centre has a lower than average proportion of A1 comparison floor space, only 13% compared to the overall Local Centre average of 41%, although as a proportion of units this figure is higher.

Table 2: Total Retail Floor space 2013

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2013)
A1 Convenience	2572	48.19%	16.10%
A1 Comparison	693	12.98%	40.50%
A2	205	3.84%	10.60%
A3 Rest/Café	767	14.37%	13.30%
A4 Pub/Bar	316	5.92%	5.60%
Sui Generis	174	3.26%	2.90%
Vacant	531	9.95%	2.90%
Health	79	1.48%	2.90%
Hotels	0	0.00%	0.5%
Art	0	0.00%	1.3%
Leisure	0	0.00%	0.1%
Total	**5,337**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



Source: City of Westminster GIS System and site survey December 2013

2.4 Proportion of Vacant Street Level Property

The unit vacancy rate in Porchester Road is higher than the average rate for Local Centres in Westminster, as shown in Table 3. Vacancies have increased significantly since 2007, with five units now vacant in the centre, meaning the centre exceeds the Local Centre average of 8%. The national average vacancy rate for shopping centres is more than 14.1%.

Table 3: Level of Vacant Street Level Property 2013

% Vacant Units				% Local Centre Average
1997	2002	2007	2013	2013
4.3% (1 unit)	5.7% (2 units)	2.9% (1 unit)	13.9% (5 units)	8% (3 units)

Source: City of Westminster GIS System and site survey December 2013

3. Accessibility

3.1 Pedestrian Flows (footfall)

The centre was found to be busy in terms of pedestrian vibrancy when the Health Check Survey was carried out on a bright but cold weekday afternoon in January 2014.

3.2 Accessibility on foot and by public transport

In general, Porchester Road is an accessible Local Centre. Royal Oak London Underground Station (Hammersmith & City Line) is located at its northern end of the centre, with Bayswater (District & Circle Line) and Queensway (Central Line) London Underground Stations a 5-10 minute walk to the south of the centre on Queensway. The centre is also served by the bus route 36, which runs through Victoria and into south London. Several other bus routes run along Bishop's Bridge Road to the south. Porchester Road is located to the south of the A40 (M) Westway, one of the main arterial roads through London, and is in the vicinity of Paddington Station to the east.

4. Environmental Quality

4.1 State of the Centre's Attractions and Environmental Quality / Attractions

The attitudinal assessment of the attractions and amenity of the centre is summarised in Tables 4 and 5 below. Porchester Road's overall score for attractions is 46.2%, which is higher than the Local Centre average of 31%, and ranks the centre =6th out of the 39 Local Centres in the City. The range of uses is good when compared to most local centres in the city. Porchester Road has poor provision of multiple retailers, employment space and banks/building societies. The centre's main strengths are its good provision of food and independent shops, restaurants, leisure facilities and local services.

4.2 Daytime Amenity

Porchester Road has a daytime amenity rating of 63%, compared with the average for all Local Centres of 68%, meaning the centre is ranked 26th out of the 39 Local Centres in Westminster in this respect. The centre is rated as being average in the majority of categories, but is rated as being poor in terms of special features in the centre and the absence of street events. The centre is rated more positively in six of the 12 security categories, with little evidence of drunkenness, rough sleepers, beggars, touting and illegal street trading. The remaining 16 categories are all rated as average, including the overall 'feel good factor' of the centre.

Table 4: Attractions within the Local Centre 2013

ATTRACTIONS	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Retail Provision									
Prominence of multiple retailers			x			x			x
Prominence of independent shops	x			x			x		
Availability of food shopping	x			x			x		
Prominence of specialist shops		x			x			x	
Quality of market (frequency, variety etc.)	-	-	-	-	-	-	-	-	-
Quality of retail environment			x			x			x
Art/Culture									
Quality of restaurants (availability, number etc.)		x		x				x	
Quality of pubs/clubs/bars			x		x				x
Range of cultural/community events (theatre, concerts)	x			x			x		
Availability of sports and leisure facilities	x			x			x		
Service Provision									
Local services (information, library etc.)	x			x			x		
Employment/office space			x			x			x
Bank/building society provision			x			x			x
Total	12/26			14/26			12/26		
Percentage	46.20%			53.80%			46.20%		

Source: City of Westminster site survey December 2013

Table 5: Day Time Amenity within the Local Centre 2013

AMENITY – DAYTIME	1997			2002			2007			2013		
	Good=2	Average= 1	Poor=0	Good=2	Average= 1	Poor=0	Good=2	Average= 1	Poor=0	Good=2	Average= 1	Poor=0
Overall environment of public areas in the centre												
General Cleanliness in Shopping Hours:												
Presence of litter		N/A			x			x		x		
Presence of refuse bags on the street		N/A			x			x			x	
Evidence of street fouling		N/A			x			x			x	
Presence of glass/glasses/other debris incl. Food and food containers/wrapping		N/A		x				x			x	
Condition		N/A			x			x			x	
Quality of buildings		N/A			x			x			x	
Special features (pedestrianisation, street furniture, etc.)		N/A				x			x			x
Impact of vacant sites		N/A			x			x			x	
Security												
Evidence of vandalism and graffiti (incl. on street furniture)		N/A			x			x			x	
Security during shopping hours (availability, access, security etc.)		N/A			x			x			x	
Ease of passage for pedestrians (incl. presence of obstacles e.g. illegally parked vehicles)		N/A			x			x			x	
Evidence of drunkenness, anti-social Behaviour, rowdiness		N/A		x			x			x		
Presence of rough sleepers		N/A		x			x			x		
Presence of beggars		N/A		x			x			x		
Presence of street drinkers		N/A		x				x		x		
Evidence of touting (e.g. mini cabs, rickshaws, Prostitution, drug dealing etc.)		N/A		x			x			x		
Presence of illegal street traders e.g. counterfeit goods, hot dogs, peanuts etc.		N/A		x			x			x		
Effectiveness of any deterrent measures (CCTV, police patrols, door security etc.)		N/A			x			x			x	
Quality of street lighting		N/A			x			x			x	
Safety perception in shopping hours		N/A			x			x			x	
Identity of town centre												
Features which identify the centre (e.g. flagship stores, buildings etc.)		N/A		x				x			x	
Promotion/ Street events		N/A				x			x			x
'Feel good' factor of town centre		N/A			x			x			x	
Total				29/46			26/46			29/46		
Percentage		N/A		63.0%			56.5%			63.0%		

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2013

Figure 4: Deviation of centre from the mean for Local Centres 2013

Porchester Road is a large Local Centre that has a higher than average amount of retail floor space when compared with the overall average for the 39 Local Centres. The A1 Convenience floor space focus in the centre is illustrated by how much higher than the overall Local Centre average it is in Porchester Road. This is also true for A3/A4/A5 food and drink floor space, which is well above the Local Centre average, but is less true for A1 comparison floor space, which is marginally lower than the overall Local Centre average.

5.2 Strengths, Weaknesses, Opportunities and Threats

Figure 5 SWOT analysis

6. Future capacity

6.1 Potential Capacity for Growth

Between 2007 and 2013, there were no permitted planning applications in the Local Centre involving A-class uses. Work has commenced to build a new language school and nine flats at 45A Porchester Road which will potentially provide more customers for this centre. There is also an application for the redevelopment of the Waitrose site which could bring substantial benefits to the centre and some growth in retail floor space.

Additional capacity could also be accommodated in the vacant retail units.

7. Health of the Centre

Table 6: Summary of Health Check Assessment 2013

Subject	Subject Matter	Data	Number	Sq M
RETAILING	Floor space	Total Floor space		5,337
		Total Convenience (A1)		2572
		Total Comparison (A1)		693
		Total Service (A2)		205
		Total A3		661
		Total A4		316
		Total A5		106
		Total Sui Generis		174
		Total Vacant		531
	Retail Offer	Total Number of Shop Units	36	
		Total Number of A1 Units	15	
		a) Convenience shops	7	
		b) Department/principle stores	0	
		c) Prestige international shops	0	
		d) National comparison retailers	1	
		e) Specialist Independent shops	1	
		f) Independent shops	6	
		Total Comparison Multiples	8	
		Total Number of A2 Units	2	
		Total Number of A3 Units	8	
		Total Number of A4 Units	2	
		Total Number of A5 Units	1	
		Total Number of Sui Generis	1	
		Total Number of Vacant	5	
	Market	Days of operation	0	
		Number of stalls	0	
	Proposals	Changes of use A1 to A2	0	
		Changes of use A1 to A3	0	
		Changes of use A1 to A4	0	
		Changes of use A1 to A5	0	
ARTS/CULTURE		(cinemas, galleries, theatres etc.)	1	
HEALTH USES		(clinics, surgeries etc.)	1	
HOTELS			0	

In terms of its vitality and viability, and general economic health this centre is considered to be ’healthy’.

Appendices

Appendix 1: Views of Local Centre

Appendix 2: Land Use Table (Westminster land use survey 2013)

Appendix 3: Land Use Map (GOAD 2012 retail data and Westminster land use survey 2013)

Appendix 4: Planning permissions Map (Westminster land use survey 2013)

Appendix 5: Location map of all local centres

Appendix 6: Glossary of Terms

Views of Porchester Road Local Centre

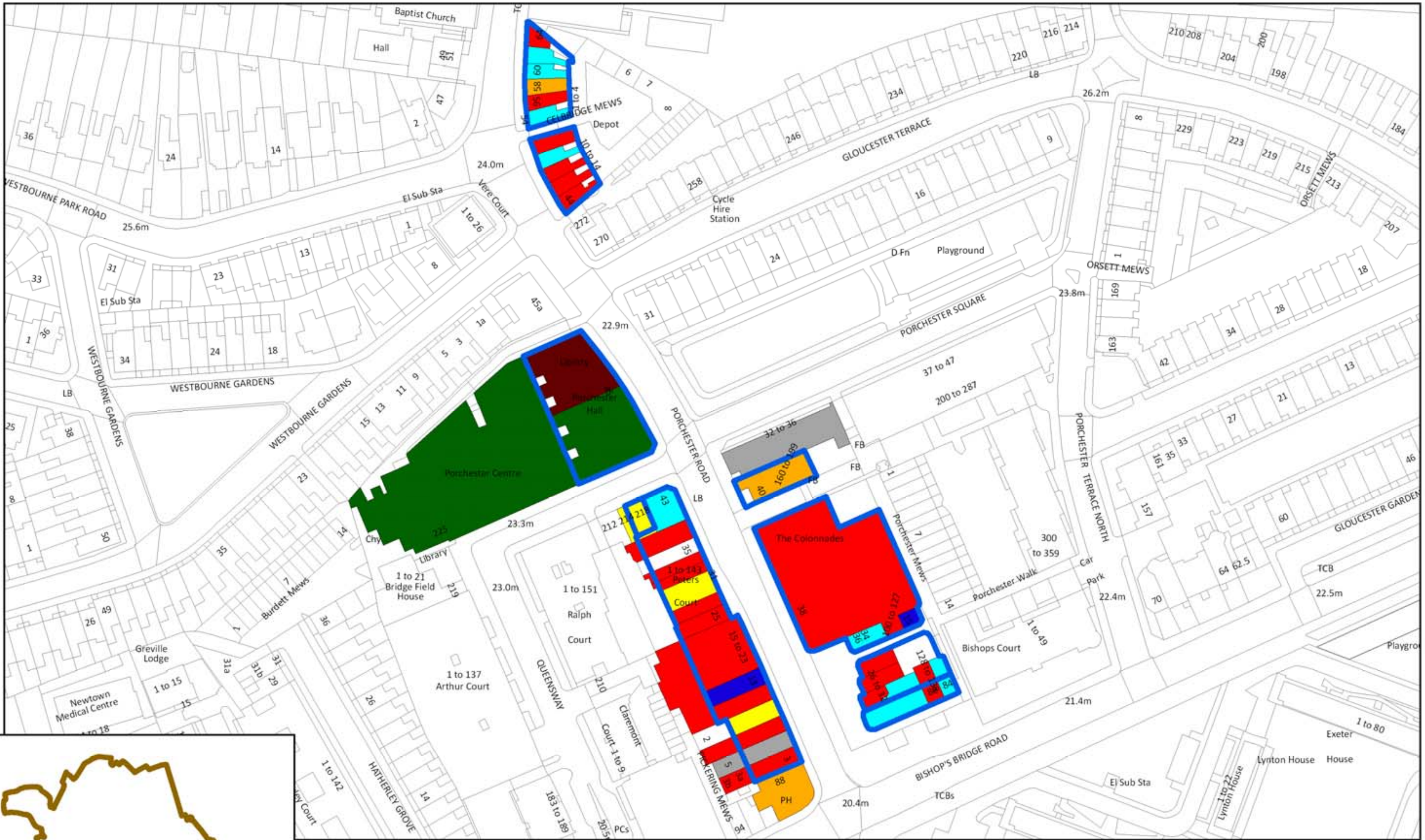
A more attractive part of the secondary shopping frontage at the north end of the Local Centre.

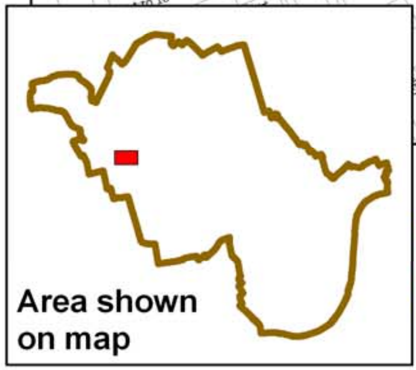
Porchester Hall contains a public library, a valuable service in the Local Centre.

A large supermarket and public house in the core frontage area of the Local Centre.

					A1	A1	A1	A1		A3	A4	A3	SG	Vacant	Health	Arts
ADDRESS	FACIA	DESCRIPTION	USE	SQM	Conv.	Nat.	Spec.	Ind	A2	Res/Caf	Pub/Bar	Takeaw.				
84BISHOP'S BRIDGE ROAD	Berdees	Coffee Shop	A3 Rest/Café	112						1						
86BISHOP'S BRIDGE ROAD	Leah Unisex Hair Cut	Hairdresser	A1 Ind	115				1								
3PORCHESTER ROAD	Al Farawlah	Mini-market	A1 Conv	100	1											
5PORCHESTER ROAD	The Launderette Centre	Dry Cleaner	A1 Ind	100				1								
7PORCHESTER ROAD	The Tanning Shop	Health and Beauty	A1 Nat	96		1										
9PORCHESTER ROAD	Mr Fish	Takeaway	A3 T/A	106								1				
11PORCHESTER ROAD	Agape Arabic Christian Centre	Book Shop	A1 Spec	119			1									
13PORCHESTER ROAD	William Hill	Bookmaker	A2	120					1							
15-23PORCHESTER ROAD	Al Khalifa Home Store	Mini-market	A1 Conv	392	1											
25PORCHESTER ROAD	Nails Design	Nail Bar	A2	85					1							
26PORCHESTER ROAD	World Tours Mega	Travel Agent	A1 Ind	20				1								
27PORCHESTER ROAD		Vacant	Vacant	75										1		
28PORCHESTER ROAD	Marhba Café	Café	SG	174									1			
29-31PORCHESTER ROAD		Vacant	Vacant	156										1		
30PORCHESTER ROAD		Vacant	Vacant	159										1		
32PORCHESTER ROAD	Al-Ikhlas	Mini-market	A1 Conv	102	1											
33PORCHESTER ROAD	Peter's Court	Hairdresser	A1 Ind	96				1								
34-36PORCHESTER ROAD	Le Bistro	Café	A3 Rest/Café	144						1						
35PORCHESTER ROAD	Porchester Sweet Shop	Newsagent	A1 Conv	100	1											
37PORCHESTER ROAD		Entrance to residential		117												
38PORCHESTER ROAD	Waitrose	Supermarket	A1 Conv	1704	1											
39-41PORCHESTER ROAD	Bayswater Pharmacy	Chemist	A1 Conv	108	1											
40PORCHESTER ROAD	The Daniel Gooch	Public House	A4 Pub/Bar	247							1					
43-45PORCHESTER ROAD	All In One	Restaurant	A3 Rest/Café	51						1						
44PORCHESTER ROAD	Sun Dry	Dry Cleaner	A1 Ind	74				1								

PORCHESTER ROAD	Porchester Hall/Paddington Library	Entrance to spa	Arts	1207												1
46PORCHESTER ROAD		Vacant	Vacant	77										1		
48PORCHESTER ROAD	Mario	Hairdresser	A1 Ind	73				1								
50PORCHESTER ROAD	Lou Lou's	Sandwich Café	A3 Rest/Café	69						1						
52PORCHESTER ROAD	Crista Galli	Osteopath	Health	79											1	
54PORCHESTER ROAD	Antony's	Restaurant	A3 Rest/Café	80						1						
56PORCHESTER ROAD	Porchester News	Newsagent	A1 Conv	66	1											
58PORCHESTER ROAD	Shimmy	Bar	A3 Pub/Bar	69							1					
60PORCHESTER ROAD	Royal Rock	Restaurant	A3 Rest/Café	70						1						
62PORCHESTER ROAD	Bengal Restaurant	Restaurant	A3 Rest/Café	67						1						
64PORCHESTER ROAD		Vacant	Vacant	64										1		
218QUEENSWAY	Domano's Pizza	Restaurant	A3 Rest/Café	68						1						



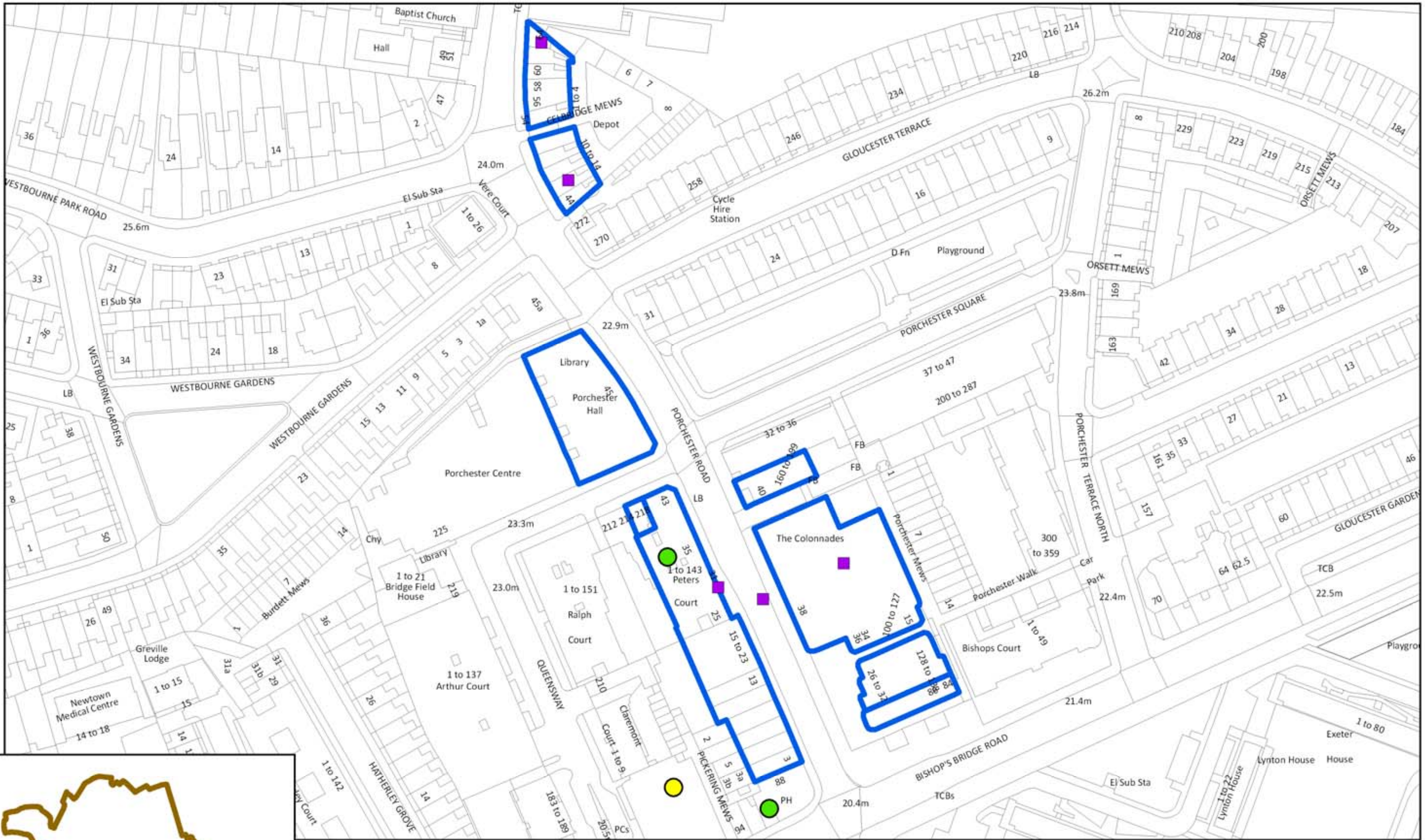


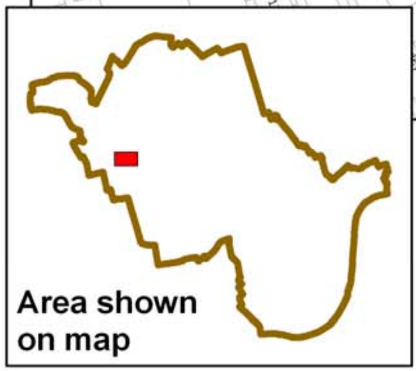
Source: GOAD Retail Survey 2013

Local Centre: Porchester Road

- Local Shopping Centre Boundary
- A1: Retail
- A2: Financial & Professional
- A3: Restaurant/Café
- A4: Pub/Bar
- A5: Take Away
- ASG: Sui Generis
- D1: Non-Res Institutions
- D2: Assembly & Leisure
- UC: Unclassified

0 25 50
Metres
N





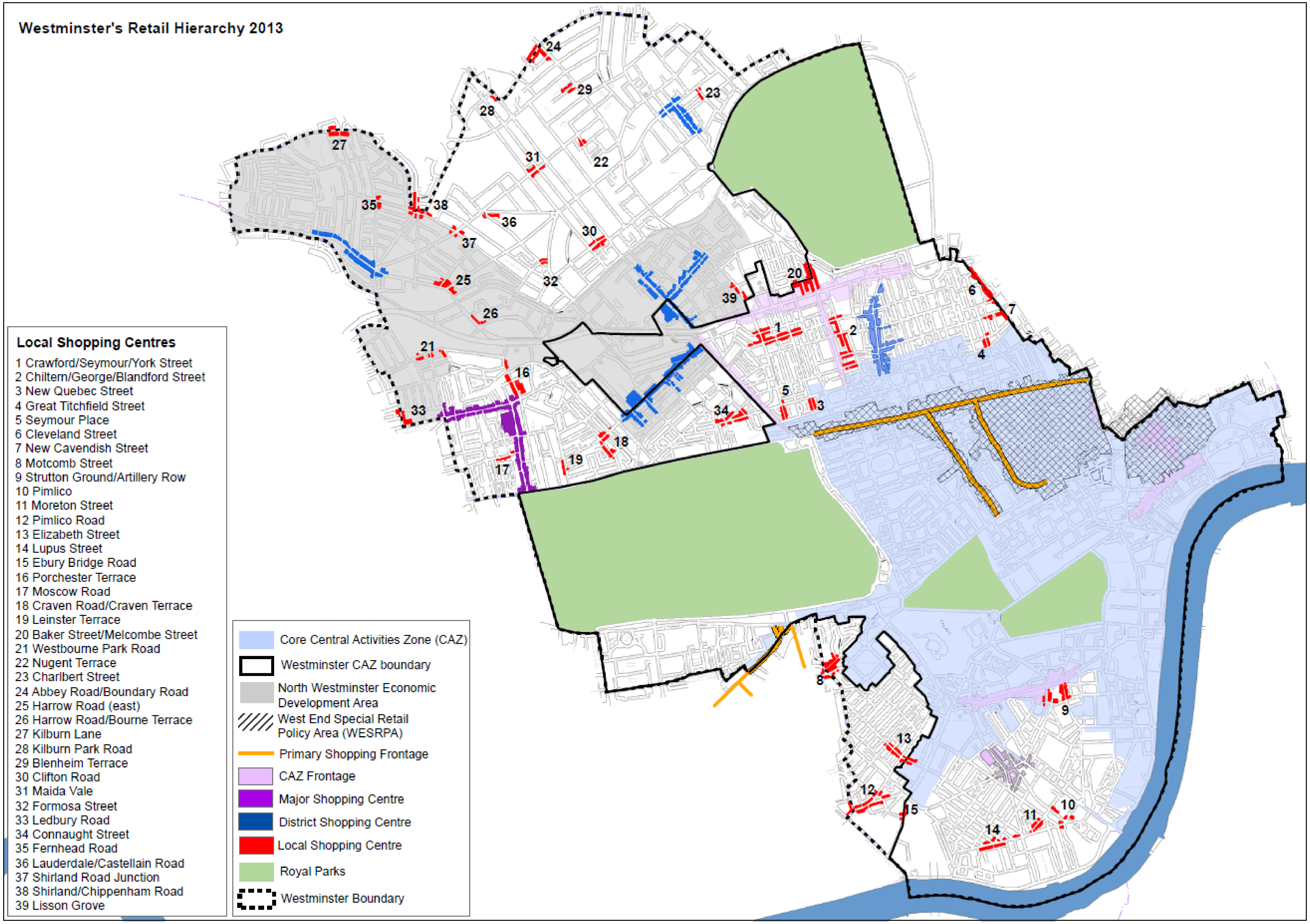
Local Centre: Porchester Road

Source: GOAD Retail Survey 2013

- Completed 2007-2013
- Vacant
- Under Construction
- Local Shopping Centre Boundary

0 25 50
Metres
N

Figure 1 Westminster wide shopping centre boundaries plan



Health Checks - Glossary of terms

A1	**Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, dry cleaners, pet shops, sandwich bars, retail showrooms, and domestic hire shops.**
A1 café type uses	**Shops such as sandwich bars or coffee shops selling food and drinks to be consumed mainly off the premises, but not hot food takeaways. Examples include certain Pret a Manger shops, Costa Coffee and the Seattle Coffee Co. shops.**
A2	**Banks, building societies, bureau de change, estate and employment agencies, professional and financial services, telephone bureaux, betting offices and beauty salons (excluding hair).**
A3	**Food and drink uses such as restaurants, pubs, snack bars, cafés, wine bars and shops for the sale of hot food (hot food take-aways).**
A4	**Drinking Establishments: Premises where the primary purpose is the sale and consumption of alcoholic drinks on the premises.**
A5	**Hot Food Take-away: Premises where the primary purpose is the sale of hot food to take away.**
B1	**Business uses such as offices, research and development and industrial uses.**
CAZ	**Central Activities Zone (CAZ). The CAZ is an area of mixed uses, many of which contribute directly to the national, regional and local economy. It is this mix of activities and their supporting resources which underpins the success of London's economy.**
CAZ Frontages	**Mixed use areas usually with a predominant retail function. Appropriate areas for retail growth.**
Comparison	**A1 floor space selling predominantly durable items and not in convenience use.**
Convenience	**This is based on the classification provided by the unit for Retail Planning Information (URPI) set out in URPI brief 99/2. The classifications are: food, alcoholic drink, tobacco and other goods (newspapers and magazines, cleaning materials and matches). For the purposes of this assessment, convenience includes shops selling food or drink (excluding A1 café-type uses), newsagents, (including specialist tobacco stores), chemists (including Boots the Chemist stores) and post offices.**
Department/ principle store	**This includes the main department stores such as John Lewis, Liberty, and Selfridges, as well as variety stores such as Marks & Spencer and Virgin Mega-stores.**
District Centre	**Distributed more widely than Metropolitan and Major centres, they provide convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000-50,000 sqm of retail floor space. Some district centres have developed specialist shopping functions.**
Experian GOAD	**An independent retail data consultancy who provide maps of ground floor uses in shopping centres.**
F&B	**Food and beverage offer, covered by parts A3 (cafe's/restaurants), A4 (drinking establishments) and A5 (take aways) of the use classes order.**
Gross Floorspace	**Floorspace of buildings on all floors including external walls, half the thickness of parting walls and circulation areas.**
Independent store	**This includes non-convenience stores (see definition above) irrespective of size, that are not considered to be specialist retailers (see definition overleaf), that are operated by retailers that are not included within national retail chains or groups.**
Major Centre	**Typically found in inner and some parts of outer London with a borough-wide catchment. They generally contain over 50,000sqm of retail floor space and a relatively high proportion of comparison goods relative to convenience goods. They may also have significant employment, leisure, service and civic functions.**
NPPF	**National Planning Policy Framework. Central Government's key, revised guidance document driving planning policy in England, which compressed the**

	previous PPS documents and other guidance into a single document. It includes key guidance on town centres and health checks.
National retailers	**This includes all retailers (Class A1 only) that operate within the context of a national retail chain or group, such as Next. A schedule of all national retail multiples can be found in Retail Directory of the UK 2002 (Hemming Information). Specialist shops that are part of a retail chain or group, such as Whittards and Thorntons, are classified as national retailers. Although there are national chains of food and drink uses and betting shops, such as Ladbrokes, these are classified based on the use class (e.g. betting shops as A2 uses) and not as national retailers.**
Prestige international retailers	**This includes prestigious retailers that operate in more than one country, such as Gucci, Gianni Versace, and Giorgio Armani. It also includes flagship stores that are only found in select town centres in Britain. National airline shops, such as British Airways, have also been classified as international retailers.**
Primary Frontages	**Internationally recognised shopping destinations. The Primary Frontages defined in Westminster's City Plan - Strategic Policies document are Oxford Street, Regent Street, Bond Street and Knightsbridge/Brompton Road.**
Retail floorspace	**This is all A1, A2, A3, A4, A5 and sui generis floorspace, and vacant floorspace of any of the aforementioned categories.**
Shisha	**Flavoured tobacco smoked through a water pipe or hookah. Smoke free legislation means that it cannot be smoked indoors in public places, and is often smoked at tables and chairs on the footway and in garden areas. There has been a rapid rise in shisha uses over the past five years, and there is concern over issues of health, residential amenity and other issues.**
Specialist independent	**Similar to an independent store, but this category reflects the quality and specialisation of the retailer so that a shopper may make a specific shopping trip to that shop. For example, The Pen Shop on Regent Street or antique shops.**
Sui generis	**Sui Generis is a term that refers to a use on its own. Any planning use not falling within a specific class within the Use Class Order falls within this category. Examples of sui generis uses in shopping centres are launderettes, mini cab offices, amusement centres and car showrooms.**
UDP	**Unitary Development Plan produced by Westminster City Council, with saved policies forming part of the statutory development plan for Westminster.**
Vacancy	**This category includes vacant street level units, as well as units that are under alteration. However, if at any time the survey was completed it was evident who the unit would be occupied by, the unit was treated as being occupied.**
Zone A Rent	**The rental level per square metre achieved on the first six metres of a shop unit.**

Information Sources

Westminster's City Plan - Strategic Policies (adopted November 2013)
https://www.westminster.gov.uk/westminsters-city-plan-strategic-policies

Westminster's Unitary Development Plan (UDP, adopted January 2007)
https://www.westminster.gov.uk/unitary-development-plan-udp

The Mayor's London Plan (GLA, July 2011 as amended)
http://www.london.gov.uk/priorities/planning/london-plan

The National Planning Policy Framework (NPPF, DCLG 2012)
https://www.gov.uk/government/publications/national-planning-policy-framework--2

National Planning Practice Guidance (NPPG, March 2014)
http://planningguidance.planningportal.gov.uk/

Westminster High Street Health Checks 2013
https://www.westminster.gov.uk/high-street-health-checks

Westminster Health Check Archive
https://www.westminster.gov.uk/shopping-centre-health-checks

City of Westminster

If you would like to obtain further copies of this Health Check report, please:

Email: ldf@westminster.gov.uk
Or Telephone: 0207 641 2447

City of Westminster

Shopping Centre Health Check Survey 2014

Local Centre 28: Westbourne Park Road

Contents

(i) Purpose of the Study

Former government guidance on Town Centres advised that 'health checks' be undertaken every five years to allow accurate and reasonable temporal analysis of the performance of town centres. This requirement has been superseded by more recent national and regional policy frameworks and guidance.

The National Planning Policy Framework (NPPF) (DCLG, 2012), states that when setting out requirements for Plan Making and using a proportionate evidence base, '*Local Planning Authorities should have a clear understanding of business needs within the economic markets operating in and across their area. To achieve this they should... assess... the role and function of town centres and the relationship between them, including any trends in the performance of centres, and the capacity of existing centres to accommodate new town centre development* (paragraphs 160, 161).'

The London Plan (2011) sets out strategic retail policy for Town Centres in London, as set out in more detail below. Paragraph 2.74 of the London Plan (July 2011) states that "*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 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.*"

This then forms the current national and regional planning policy framework for undertaking town centre health checks. The City Council is currently follow the former guidance and updating health checks every five years, as this is deemed to be a sensible and manageable time period for monitoring the viability and vitality of centres, given the extent of Westminster's town centre network.

(ii) Westminster's Local Centres and Planning Policy

Westminster's Local Centre Health Checks were last carried out in 2007, updating 2002 and 1997 surveys, and includes detailed analysis of Westminster's 39 Local Shopping Centres.

Local Centres normally have a purely local function and most are mainly comprised of convenience goods retailers with some food and drink and local service uses, mainly providing facilities for people living or working nearby (which the City Council wishes to safeguard in accordance with national guidance). However in Westminster some are also speciality centres which attract shoppers from a wider area.

Westminster's current local plan consists of the City Plan: Strategic Polices (adopted November 2013), and saved development management policies from the Unitary Development Plan (adopted January 2007). The local plan seek to protect and enhance the designated Local Shopping Centres for the service they provide to residents, visitors and workers, and because they reduce the need to travel.

Strategic policy CS21 is the general policy for retail across Westminster, seeking to protect existing A1 uses, direct new retail floor space to designated shopping centres, and to protect non-A1 retail and town centre uses in designated shopping centres from changes to uses that do not serve visiting members of the public and that do not have active shop fronts.

Saved UDP policy SS7 (Shopping and Services policy 7) is the detailed development management policy for local shopping centres. The policy covers the protection of shops and circumstances where changes of use away from shops may be permitted, taking into consideration the viability of units and the overall balance of uses in the centre.

(iii) Westminster's Retail Hierarchy

The City of Westminster is broadly divided into two zones in terms of retail policy, the Core Central Activities Zone (CAZ) and CAZ Frontages, and areas outside of this. The Core CAZ contains the two international shopping centres in London, the West End and Knightsbridge in addition to distinctive retail areas such as Covent Garden, Soho, Mayfair and St James's, as well as numerous small parades and individual shops. Outside the Core CAZ and CAZ Frontages there is one Major Shopping Centre, 4 District Centres (where previously there had been 7, 3 have subsequently been reclassified as CAZ Frontages and 1 as a Major Centre) and the 39 Local Centres which are designated to safeguard shopping facilities for local residents, and the retail character of local shopping areas.

In 2007, the District and Local Centres health check reports were all updated, as were 17 shopping areas inside the CAZ. More recently, reports for Westminster's high street shopping centres were updated in 2013.

(iv) Health Checks Methodology

As set out in the NPPF (DCLG, 2012) local planning authorities should recognise town centres as the heart of their communities and pursue policies to support their viability and vitality. Planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive.

Accessibility by public transport is considered to be excellent for all Westminster's larger shopping areas, and its Local Centres are accessible for people to walk to. The City Council wants to retain shops in Local Centres, in order to maintain a range of local convenience shops and protect the character and function of the centres. Local shops and services limit car trips, encourage walking, and make city life more practical and attractive.

The **National Planning Practice Guidance** was published in March 2014 by DCLG, several months after the field work for this project had commenced. It states that existing centres should be audited to assess their role, vitality, viability and their potential to accommodate new development and different types of development. It also sets out a series of indicators to determine the health of town centres, including:

- Diversity of use
- Vacant property
- Commercial yields on non-domestic property
- Customer views and behaviour
- Retailer representations
- Commercial rents
- Pedestrian flows and accessibility
- Perception of safety and crime
- State of environmental quality

Most of the above indicators will be assessed as part of this study, where data collection is available and reasonable. All of the above were included as part of the 2013 health checks for the larger high street type centres, where it is more appropriate to carry out consumer surveys, and where commercial data is more readily available. Given the size of this project, the indicators below are considered to be appropriate and comprehensive.

Land Use

(1) Diversity of town centre uses

This section considers the range of A1 uses, and compares the current diversity of land uses to previous Local Centre Health Check Surveys dated 1997, 2002 and 2007. It also includes the

proportion of vacant street level property and the amount of space used for different functions such as shopping, leisure, cultural and entertainment activities, pubs, cafes, and restaurants.

Accessibility

(2) **Pedestrian flows (footfall):**
Visual assessments were undertaken to measure pedestrian flows which contribute towards the vitality of the Local Centres. These were conducted on comparable days of the week and compared to the average for all of the Local Centres;

(3) **Accessibility:**
The whole of Westminster has a Public Transport Accessibility Level (PTAL) score of 6, the highest level achievable. This section therefore concentrates on ease and convenience of access;

Environment

(4) **State of the town centre environmental quality assessment:**
Includes a subjective assessment of indicators such as security, air pollution, noise, clutter, litter and graffiti, as well as positive factors such as trees, landscaping and open spaces. Each centre is assessed as per the Attractions Table 4, and the Daytime Amenity Table 5 in the 2007 Health Check Survey. A comparison is made between the 1997, 2002, 2007 and 2013 surveys.

(5) **Daytime amenity:**
A qualitative assessment of the amenity within the local centre, assessing its cleanliness, security, and identity.

(6) **Relative performance of the centre:**
Measures the performance of the centre compared to the Westminster Local Centre average in terms of land use, attractiveness, and daytime amenity, with graphs comparing the performance of centres relative to one another. The centre's strengths, weaknesses, opportunities and threats are highlighted in a SWOT analysis diagram at the end of this section.

(7) **The potential capacity for growth or change of centres in the network:** opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development is considered here. Based on levels of demand, assessments are made to ascertain how much capacity each Local Centre has to accommodate retail growth, looking at retail related planning applications in and around the Local Centres. Consideration is given to whether the current Local Centre boundaries and Core and Secondary Frontage designations are still valid. Consideration is also given to ways in which the vitality and viability of the centres could be enhanced.

(8) **Summary of health check:**
This section contains a comparison of the relative performance of this centre, and summary of land use assessment as per the 2007 Health Check reports. General comments and analysis of the centre are included, along with a summary of any problems/issues. A classification as 'in decline', 'neutral', or 'healthy' is included, plus comment on whether things have improved, deteriorated, or remained the same since 2007 (see 2007 Health Checks, Tables 6 and 7). Where a Local Centre is considered to be "in decline" or "neutral", consideration is made on ways to improve the vitality and viability of the Centre.

The results of this study will be used to inform planning policy development and the inception of other relevant interventions, and will be used to assess the success of previous initiatives such as any investment in public realm.

Local Centre **28: Westbourne Park Road**

1. Introduction

1.1 Location

Westbourne Park Road is a small, disjointed Local Centre in the north west of Westminster, serving residents to the south of the A40 (M) Westway. The centre is close to the Westbourne Park London Underground station, Paddington Mainline rail station, and is also close to Notting Hill.

The catchment area is limited by the A40 (M) Westway to the north and by the centre's proximity to the larger Queensway/Westbourne Grove District Centre to the south. The A40 and the railway tracks to the north also have an impact in terms of creating severance from the wider area to the north of the centre.

Figure 1: Local Centre Boundary 2013

2 Land Use

2.1 Range of Uses

Westbourne Park Road comprises a range of shopping and other town centre uses. This diversity is summarised in Table 1 below.

Table 1: Range of Town Centre Uses (2002-2013)

Use Class		No. of Units 2002	No. of Units 2007	No. of Units 2013
Class A1 Retail		12	12	12
	Department/principle stores	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*
	National retailers	*0*	*0*	*0*
	Specialist Independent	*5*	*7*	*6*
	Independent	*4*	*2*	*3*
	Convenience	*3*	*3*	*3*
Class A2	Financial & Professional	0	1	1
Food & Drink		7	9	8
Class A3	*Restaurant/Café*	*4*	*6*	*6*
Class A4	*Pubs/Bars*	*2*	*2*	*1*
Class A5	*Takeaway*	*1*	*1*	*1*
	Takeaway/Restaurant			*0*
Sui Generis		0	0	0
Vacant Units		3	1	2
Arts/Culture		0	0	0
Health uses		0	0	0
Hotels		0	0	0
TOTAL		**22**	**23**	**23**

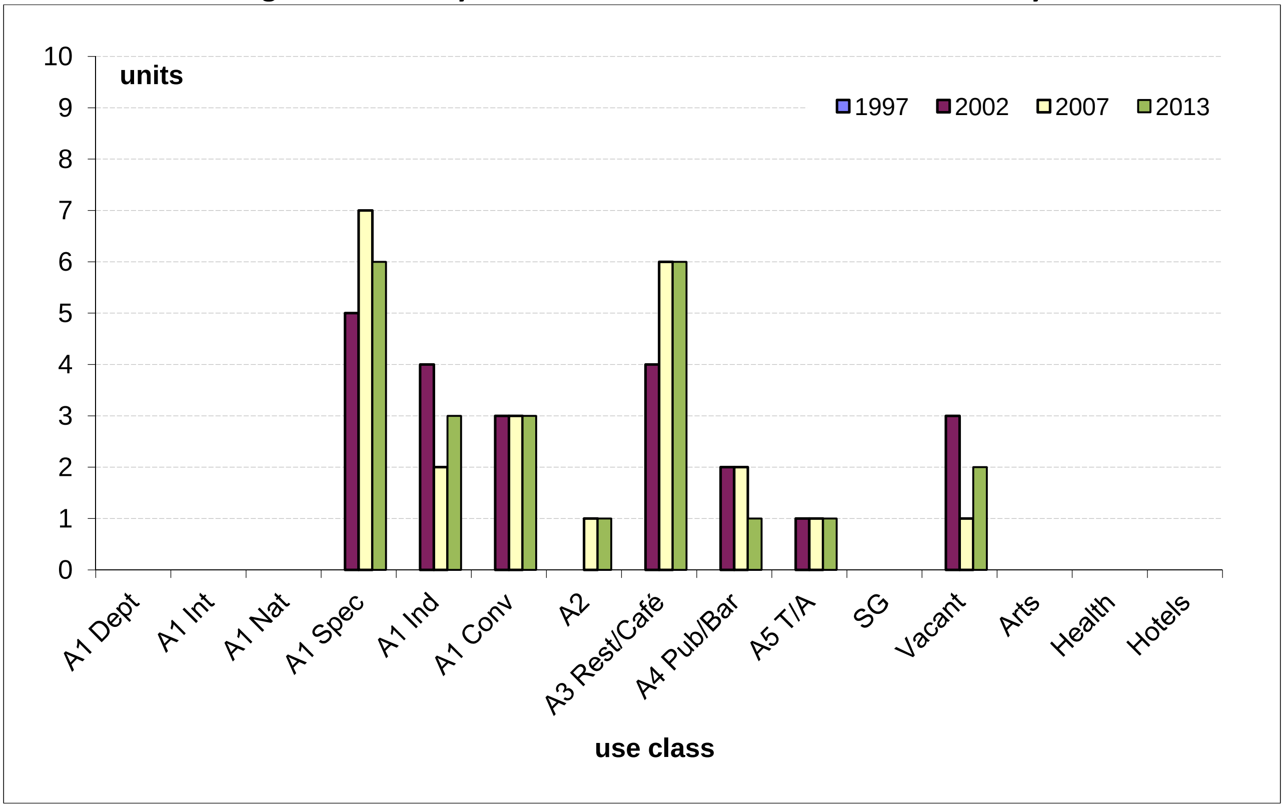
Source: WCC Site Survey December 2013

In total there are 23 units, the same number as that recorded in the 2007 survey.

The number of A1 retail uses in Westbourne Park Road has remained constant since 2002 but there have been internal shifts of use, namely the gain of one independent retailer (a hairdresser) set against the loss of one specialist (a women's clothes shop). The number of Class A2 uses has also remained constant at one unit (an estate agent), as have the number of takeaways, but pubs/bars has decreased by one. Restaurant/Café uses have remained constant since 2007 with six, including some good quality destination restaurants and bars.

Outside of the A-class uses, the number of vacant units has increased from one to two. The centre does not have any sui generis, arts/culture, health or hotel uses.

Figure 2: Units by use class within the Local Centre boundary



2.2 Range of A1 Uses

Westbourne Park Road has 12 Class A1 retail units including three convenience stores, three independent retailers (a dry cleaner and two hairdressers) and six specialist retailers (two galleries, a jeweller, a women's clothes shop, a soft furnishings shop and a book shop), illustrating a good mix of A1 uses. The specialist retailers include two art galleries, a jeweller, a clothes shop, a book shop and a furnishing shop, while the independent retailers include a dry cleaner and two hairdressers. The mix shows that the centre serves local residents with a mix of convenience, local service retail, and comparison shopping facilities.

2.3 Total Retail Floor Space

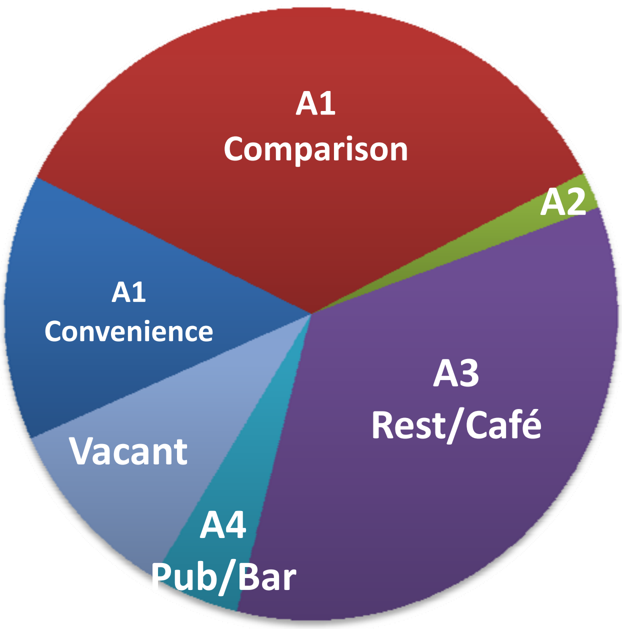
Total retail floor space in Westbourne Park Road is broken down in Table 2. It has 1,753 sqm of retail floor space, which is below the average of 3,188 sqm for the 39 Local Centres in Westminster. There are comparable proportions of A1 comparison and A3 floor space, which together account for over 70% of the total floor space. There is also a reasonably significant proportion of A1 convenience floor space, while the other use classes make negligible contributions. The centre has above average floor space figures for A3 use, but a slightly below average proportion of comparison floor space (35% compared with the overall local centre average of 41%).

Westbourne Park Road is a Local Centre with a selection of local services, specialist retail units, food shops and restaurants/cafés. There are no banks or building societies, and the only Class A2 use is an estate agent. The Local Centre does not provide the same range and selection found in larger Local Centres or District Centres.

Table 2: Total Retail Floor space 2013

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2013)
A1 Convenience	246	14.03%	16.10%
A1 Comparison	614	35.03%	40.50%
A2	34	1.94%	10.60%
A3 Rest/Café/TA	606	34.57%	13.30%
A4 Pub/Bar	82	4.68%	5.60%
Sui Generis	0	0.00%	2.90%
Vacant	171	9.75%	2.90%
Health	0	0.00%	2.90%
Hotels	0	0.00%	0.5%
Art	0	0.00%	1.3%
Leisure	0	0.00%	0.1%
Total	**1,753**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



Source: City of Westminster GIS System and site survey December 2013

2.4 Proportion of Vacant Street Level Property

The unit vacancy rate in Westbourne Park Road is close to the average rate for Local Centres in Westminster, as shown in Table 3. Vacancies have increased since 2007 but remain behind the national average vacancy rate (more than 14.1%) for shopping centres.

Table 3: Level of Vacant Street Level Property 2013

% Vacant Units				% Local Centre Average
1997	2002	2007	2013	2013
0.0% (0 units)	13.6% (1 unit)	4.4% (1 unit)	8.7% (2 units)	8% (2 units)

Source: City of Westminster GIS System and site survey December 2013

3. Accessibility

3.1 Pedestrian Flows (footfall)

The centre was found to be reasonably quiet in terms of pedestrian vibrancy when the Health Check Survey was carried out on a bright but cold weekday afternoon in January 2014.

3.2 Accessibility on foot and by public transport

Westbourne Park Road is a 5 minute walk from Westbourne Park London Underground Station (Hammersmith & City Line) and 5-10 minutes walk from Royal Oak (Hammersmith & City Line) to the east of the centre. The Local Centre is served by several bus routes, including numbers 7, 70, 28, 31 and 328, which serve different parts of the city. Westbourne Park is also very close to the A40 (M) Westway, one of the main arterial roads through London, and is in the vicinity of Paddington mainline railway station.

4. Environmental Quality

4.1 State of the Centre's Attractions and Environmental Quality / Attractions

The attitudinal assessment of the attractions and amenity of the centre is summarised in Tables 4 and 5 below. Westbourne Park Road's overall score for attractions is 38.7%, an improvement of almost 12% on the previous survey from 2007. This is higher than the Local Centre average of 31%, and ranks the centre =13th out of the 39 Local Centres in the City. Westbourne Park Road has poor provision of multiple retailers, employment space and banks/building societies. The centre's main strengths are the good provision of independent and specialist retailers, restaurants, cafés, pubs and food shopping. Weaknesses include the absence of community events and the provision of banks and building societies.

4.2 Daytime Amenity

Westbourne Park Road is a reasonably attractive Local Centre in terms of daytime amenity with a rating of 67.4%. This compares with the average for all Local Centres of 68%, and is ranked 24th out of the 39 Local Centres in Westminster in this respect. The centre is rated as being good or average in all categories, with little evidence of drunkenness, rough sleepers, beggars, touting and illegal street trading.

Table 4: Attractions within the Local Centre 2013

ATTRACTIONS	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Retail Provision									
Prominence of multiple retailers			x			x			x
Prominence of independent shops		x			x		x		
Availability of food shopping			x		x			x	
Prominence of specialist shops	x			x			x		
Quality of market (frequency, variety etc.)	-	-	-	-	-	-	-	-	-
Quality of retail environment			x			x		x	
Art/Culture									
Quality of restaurants (availability, number etc.)		x		x			x		
Quality of pubs/clubs/bars		x			x		x		
Range of cultural/community events (theatre, concerts)			x			x			x
Availability of sports and leisure facilities			x			x			x
Service Provision									
Local services (information, library etc.)			x			x			x
Employment/office space			x			x			x
Bank/building society provision			x			x			x
Total	5/26			7/26			10/26		
Percentage	19.23%			26.92%			38.46%		

Source: City of Westminster site survey December 2013

Table 5: Day Time Amenity within the Local Centre 2013

AMENITY – DAYTIME	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Overall environment of public areas in the centre									
General Cleanliness in Shopping Hours:									
Presence of litter		x			x		x		
Presence of refuse bags on the street		x			x			x	
Evidence of street fouling		x			x		x		
Presence of glass/glasses/other debris incl. food and food containers/wrapping		x			x		x		
Condition		x			x		x		
Quality of buildings	x				x			x	
Special features (pedestrianisation, Street furniture, etc.)			x			x		x	
Impact of vacant sites		x			x		x		
Security									
Evidence of vandalism and graffiti (incl. on street furniture)		x			x		x		
Security during shopping hours (availability, access, security etc.)		x			x			x	
Ease of passage for pedestrians (incl. presence of obstacles e.g. illegally parked vehicles)		x			x			x	
Evidence of drunkenness, anti-social Behaviour, rowdiness		x			x			x	
Presence of rough sleepers	x				x			x	
Presence of beggars	x				x			x	
Presence of street drinkers	x				x			x	
Evidence of touting (e.g. mini cabs, rickshaws, Prostitution, drug dealing etc.)	x				x			x	
Presence of illegal street traders e.g. counterfeit goods, hot dogs, peanuts etc.	x				x		x		
Effectiveness of any deterrent measures (CCTV, police patrols, door security etc.)		x			x			x	
Quality of street lighting		x			x			x	
Safety perception in shopping hours		x			x		x		
Identity of town centre									
Features which identify the centre (e.g. flagship stores, buildings etc.)			x			x		x	
Promotion/ Street events			x			x		x	
'Feel good' factor of town centre		x			x			x	
Total	26/46			20/46			31/46		
Percentage	56.5%			43.5%			67.4%		

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2013

Figure 4: Deviation of centre from the mean for Local Centres 2013

Westbourne Park Road is a relatively small Local Centre and therefore has a lower than average amount of retail floor space when compared to the overall average for the 39 Local Centres. This is also true for A1 convenience and comparison floor space figures, both of which are below the overall Local Centre average. However, this is slightly compensated for by A3/A4/A5 food and drink floor space which is closer to the Local Centre average and is of high quality. In terms of the rating of the physical environment, both the attractiveness and daytime amenity ratings are above the overall Local Centre average.

5.2 Strengths, Weaknesses, Opportunities and Threats

SWOT analysis

6. Future capacity

6.1 Potential Capacity for Growth

Between 2007 and 2013, there were no permitted planning applications in the Local Centre involving A-class uses.

Additional capacity could be accommodated in the vacant retail units.

7. Health of the Centre

Table 6: Summary of Health Check Assessment 2013

Subject	Subject Matter	Data	Number	Sq M
RETAILING	Floor space	Total Floor space		1,753
		Total Convenience (A1)		246
		Total Comparison (A1)		614
		Total Service (A2)		34
		Total A3		511
		Total A4		82
		Total A5		95
		Total Sui Generis		0
		Total Vacant		171
	Retail Offer	Total Number of Shop Units	23	
		Total Number of A1 Units	12	
		a) Convenience shops	3	
		b) Department/principal stores	0	
		c) Prestige international shops	0	
		d) National comparison retailers	0	
		e) Specialist Independent shops	6	
		f) Independent shops	3	
		Total Comparison Multiples	9	
		Total Number of A2 Units	1	
		Total Number of A3 Units	6	
		Total Number of A4 Units	1	
		Total Number of A5 Units	1	
		Total Number of Sui Generis	0	
		Total Number of Vacant	2	
	Market	Days of operation	0	
		Number of stalls	0	
	Proposals	Changes of use A1 to A2	0	
		Changes of use A1 to A3	0	
		Changes of use A1 to A4	0	
		Changes of use A1 to A5	0	
ARTS/CULTURE		(cinemas, galleries, theatres etc.)	0	
HEALTH USES		(clinics, surgeries etc.)	0	
HOTELS			0	

In terms of its vitality and viability, and general economic health, this centre is considered to be 'healthy'**.**

Appendices

Appendix 1: Views of Local Centre

Appendix 2: Land Use Table (Westminster land use survey 2013)

Appendix 3: Land Use Map (GOAD 2012 retail data and Westminster land use survey 2013)

Appendix 4: Planning permissions Map (Westminster land use survey 2013)

Appendix 5: Location map of all local centres

Appendix 6: Glossary of Terms

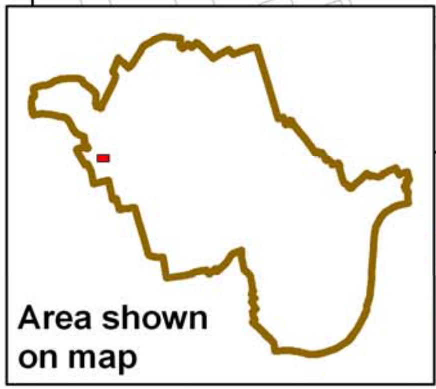
Views of Westbourne Park Road Local Centre

One of the attractive specialist retailers that comprise the core frontage at the east end of the Local Centre.

Another of the specialist retailers that comprise the core frontage.

A gallery in the core frontage.

ADDRESS	FASCIA	DESCRIPTION	USE	SQ M	A1 Conv.	A1 Spec.	A1 Ind	A 2	A3 Res/Caf	A4 Pub/Bar	A3 Takeaw.	Vacant	2007 Use
75CHEPSTOW ROAD	Piaza	Dry Cleaners	A1 Ind	41			1						A1 Ind
104CHEPSTOW ROAD	Marianne	Restaurant	A3 Rest/Café	47					1				A3 Rest/Café
106CHEPSTOW ROAD	True You Gallery	Hairdresser	A1 Ind	66			1						A1 Ind
108CHEPSTOW ROAD	Wildflower Café	Café	A3 Rest/Café	49					1				A3 Rest/Café
110CHEPSTOW ROAD	Nog's Supermarket	Mini-market	A1 Conv	43	1								A1 Conv
69WESTBOURNE PARK ROAD		Vacant	Vacant	85								1	A3 Rest/Café
71WESTBOURNE PARK ROAD	Wilson Stephen & Jones	Gallery	A1 Spec	65		1							A1 Spec
73WESTBOURNE PARK ROAD	Brooke Gregson Jewelry	Jeweller	A1 Spec	87		1							A1 Spec
75WESTBOURNE PARK ROAD	Pistol Panties	Women's Clothes	A1 Spec	82		1							A1 Spec
77WESTBOURNE PARK ROAD	77 Hair Salon	Hairdresser	A1 Ind	85			1						A1 Spec
79WESTBOURNE PARK ROAD	Crucial Trading	Soft Furnishings	A1 Spec	76		1							A1 Spec
81WESTBOURNE PARK ROAD	The Idler Academy	Book Shop	A1 Spec	57		1							A1 Spec
83WESTBOURNE PARK ROAD	The Vintage Collection	Gallery	A1 Spec	55		1							A1 Spec
89WESTBOURNE PARK ROAD	The Cow	Public House	A3 Pub/Bar	82						1			A3 Pub/Bar
107WESTBOURNE PARK ROAD	JK Estate Agent	Estate Agent	A2	34				1					A2
109WESTBOURNE PARK ROAD	Centonove	Restaurant	A3 Rest/Café	78					1				A3 Rest/Café
125WESTBOURNE PARK ROAD	Crazy Homies	Restaurant	A3 Rest/Café	105					1				A3 Rest/Café
127WESTBOURNE PARK ROAD	Lucky Seven	Café	A3 Rest/Café	90					1				A3 Rest/Café
129WESTBOURNE PARK ROAD	Domino's	Takeaway	A3 Takeaway	95							1		A3 T/A
131WESTBOURNE PARK ROAD		Vacant	Vacant	86								1	Vacant
133WESTBOURNE PARK ROAD	Smith's News, Food & Wine	Mini-market	A1 Conv	96	1								A1 Conv
137WESTBOURNE PARK ROAD	The Oak	Restaurant	A3 Rest/Café	142					1				A3 Pub/Bar
WESTBOURNE PARK ROAD	Nice	Mini-market	A1 Conv	107	1								A1 Conv

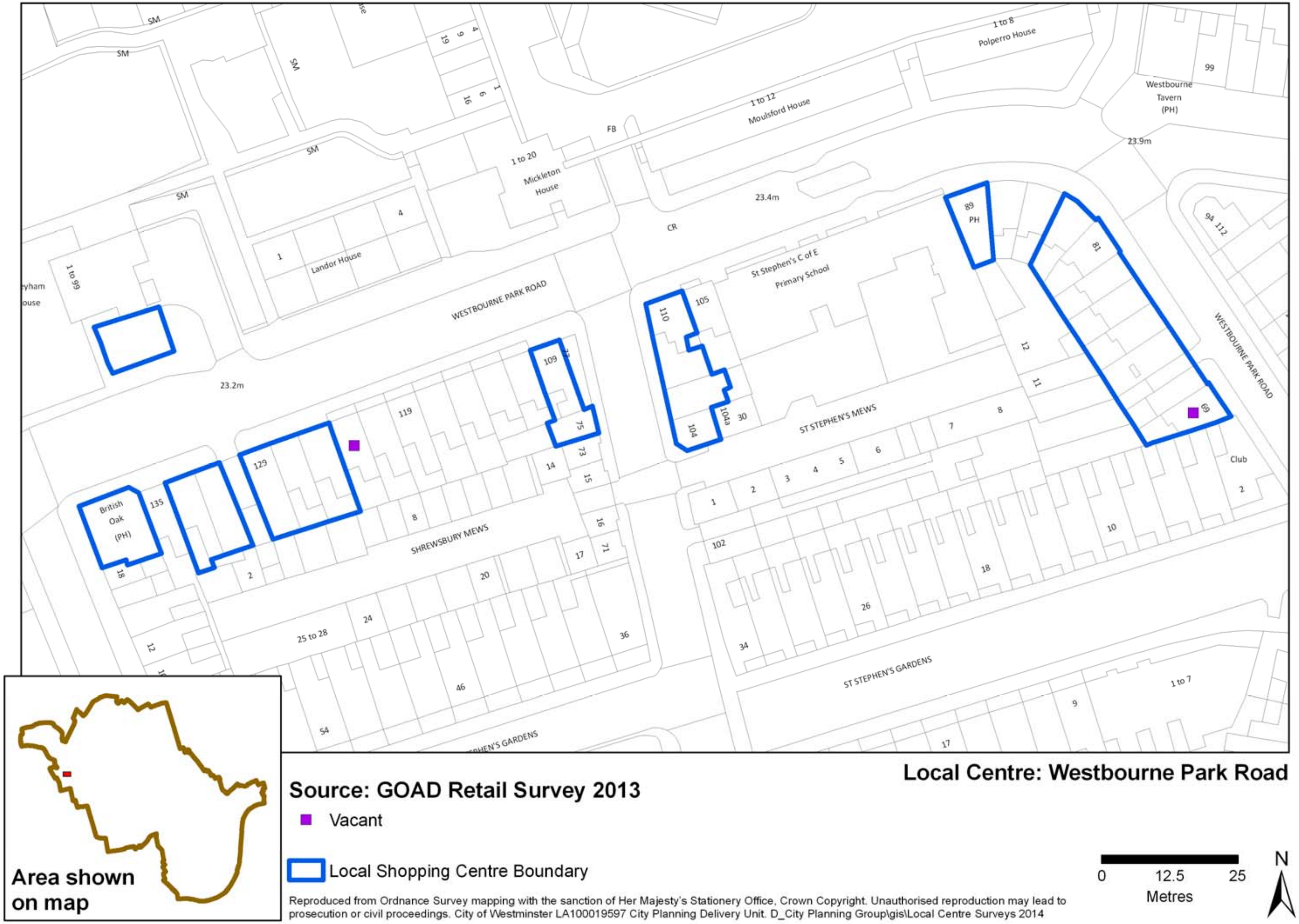


Source: GOAD Retail Survey 2013

Local Centre: Westbourne Park Road

Local Shopping Centre Boundary
A1: Retail
A2: Financial & Professional
A3: Restaurant/Café
A4: Pub/Bar
A5: Take Away
B1: Office
D1: Non-Res Institutions

0 15 30
Metres
N



Local Centre: Westbourne Park Road

Source: GOAD Retail Survey 2013

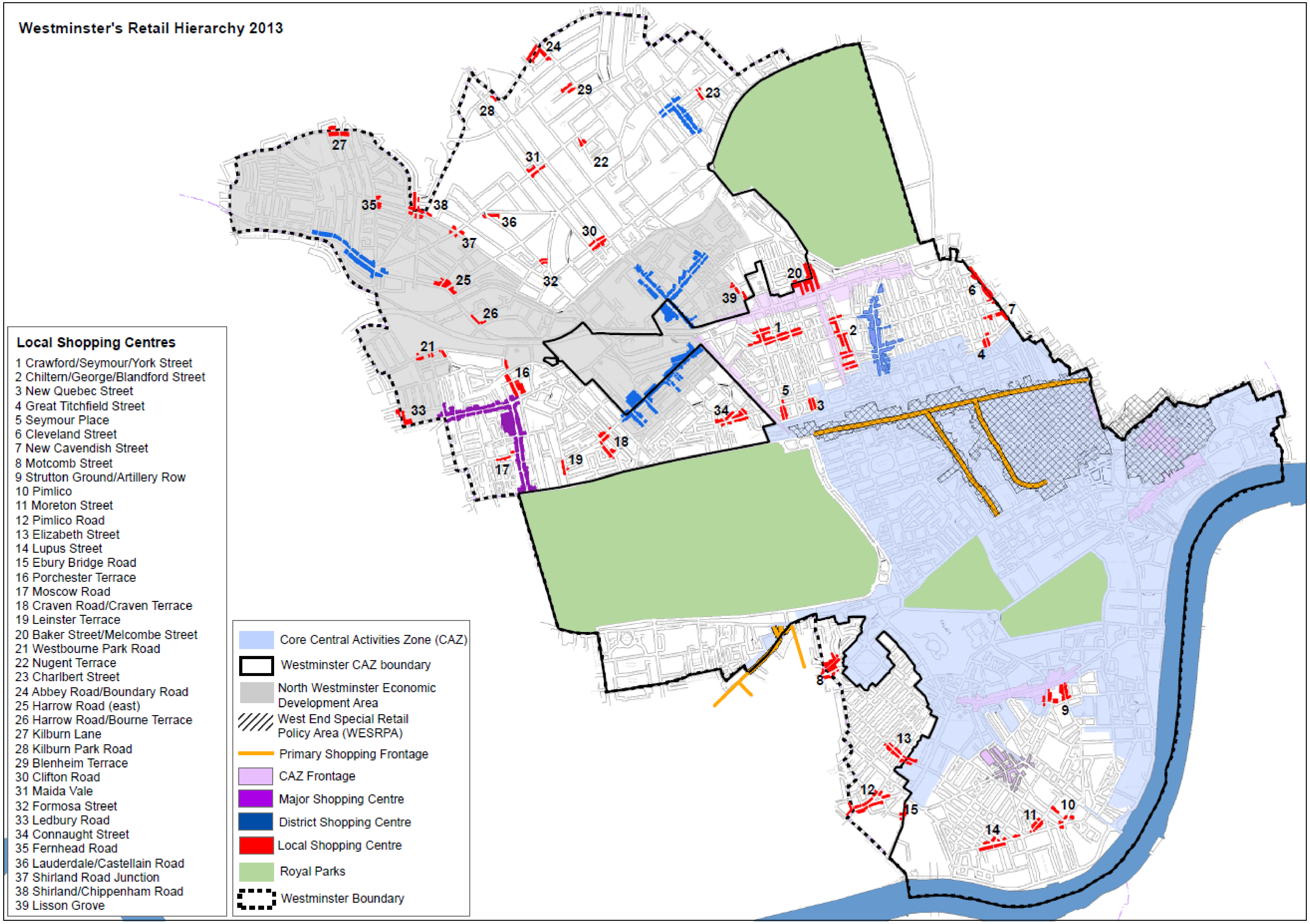
■ Vacant

Local Shopping Centre Boundary

0 12.5 25
Metres

N

Figure 7 Westminster wide shopping centre boundaries plan



Health Checks - Glossary of terms

A1	**Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, dry cleaners, pet shops, sandwich bars, retail showrooms, and domestic hire shops.**
A1 café type uses	**Shops such as sandwich bars or coffee shops selling food and drinks to be consumed mainly off the premises, but not hot food takeaways. Examples include certain Pret a Manger shops, Costa Coffee and the Seattle Coffee Co. shops.**
A2	**Banks, building societies, bureau de change, estate and employment agencies, professional and financial services, telephone bureaux, betting offices and beauty salons (excluding hair).**
A3	**Food and drink uses such as restaurants, pubs, snack bars, cafés, wine bars and shops for the sale of hot food (hot food take-aways).**
A4	**Drinking Establishments: Premises where the primary purpose is the sale and consumption of alcoholic drinks on the premises.**
A5	**Hot Food Take-away: Premises where the primary purpose is the sale of hot food to take away.**
B1	**Business uses such as offices, research and development and industrial uses.**
CAZ	**Central Activities Zone (CAZ). The CAZ is an area of mixed uses, many of which contribute directly to the national, regional and local economy. It is this mix of activities and their supporting resources which underpins the success of London's economy.**
CAZ Frontages	**Mixed use areas usually with a predominant retail function. Appropriate areas for retail growth.**
Comparison	**A1 floor space selling predominantly durable items and not in convenience use.**
Convenience	**This is based on the classification provided by the unit for Retail Planning Information (URPI) set out in URPI brief 99/2. The classifications are: food, alcoholic drink, tobacco and other goods (newspapers and magazines, cleaning materials and matches). For the purposes of this assessment, convenience includes shops selling food or drink (excluding A1 café-type uses), newsagents, (including specialist tobacco stores), chemists (including Boots the Chemist stores) and post offices.**
Department/ principle store	**This includes the main department stores such as John Lewis, Liberty, and Selfridges, as well as variety stores such as Marks & Spencer and Virgin Mega-stores.**
District Centre	**Distributed more widely than Metropolitan and Major centres, they provide convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000-50,000 sqm of retail floor space. Some district centres have developed specialist shopping functions.**
Experian GOAD	**An independent retail data consultancy who provide maps of ground floor uses in shopping centres.**
F&B	**Food and beverage offer, covered by parts A3 (cafe's/restaurants), A4 (drinking establishments) and A5 (take aways) of the use classes order.**
Gross Floorspace	**Floorspace of buildings on all floors including external walls, half the thickness of parting walls and circulation areas.**
Independent store	**This includes non-convenience stores (see definition above) irrespective of size, that are not considered to be specialist retailers (see definition overleaf), that are operated by retailers that are not included within national retail chains or groups.**
Major Centre	**Typically found in inner and some parts of outer London with a borough-wide catchment. They generally contain over 50,000sqm of retail floor space and a relatively high proportion of comparison goods relative to convenience goods. They may also have significant employment, leisure, service and civic functions.**
NPPF	**National Planning Policy Framework. Central Government's key, revised guidance document driving planning policy in England, which compressed the**

	previous PPS documents and other guidance into a single document. It includes key guidance on town centres and health checks.
National retailers	**This includes all retailers (Class A1 only) that operate within the context of a national retail chain or group, such as Next. A schedule of all national retail multiples can be found in Retail Directory of the UK 2002 (Hemming Information). Specialist shops that are part of a retail chain or group, such as Whittards and Thorntons, are classified as national retailers. Although there are national chains of food and drink uses and betting shops, such as Ladbrokes, these are classified based on the use class (e.g. betting shops as A2 uses) and not as national retailers.**
Prestige international retailers	**This includes prestigious retailers that operate in more than one country, such as Gucci, Gianni Versace, and Giorgio Armani. It also includes flagship stores that are only found in select town centres in Britain. National airline shops, such as British Airways, have also been classified as international retailers.**
Primary Frontages	**Internationally recognised shopping destinations. The Primary Frontages defined in Westminster's City Plan - Strategic Policies document are Oxford Street, Regent Street, Bond Street and Knightsbridge/Brompton Road.**
Retail floorspace	**This is all A1, A2, A3, A4, A5 and sui generis floorspace, and vacant floorspace of any of the aforementioned categories.**
Shisha	**Flavoured tobacco smoked through a water pipe or hookah. Smoke free legislation means that it cannot be smoked indoors in public places, and is often smoked at tables and chairs on the footway and in garden areas. There has been a rapid rise in shisha uses over the past five years, and there is concern over issues of health, residential amenity and other issues.**
Specialist independent	**Similar to an independent store, but this category reflects the quality and specialisation of the retailer so that a shopper may make a specific shopping trip to that shop. For example, The Pen Shop on Regent Street or antique shops.**
Sui generis	**Sui Generis is a term that refers to a use on its own. Any planning use not falling within a specific class within the Use Class Order falls within this category. Examples of sui generis uses in shopping centres are launderettes, mini cab offices, amusement centres and car showrooms.**
UDP	**Unitary Development Plan produced by Westminster City Council, with saved policies forming part of the statutory development plan for Westminster.**
Vacancy	**This category includes vacant street level units, as well as units that are under alteration. However, if at any time the survey was completed it was evident who the unit would be occupied by, the unit was treated as being occupied.**
Zone A Rent	**The rental level per square metre achieved on the first six metres of a shop unit.**

Information Sources

Westminster's City Plan - Strategic Policies (adopted November 2013)
https://www.westminster.gov.uk/westminsters-city-plan-strategic-policies

Westminster's Unitary Development Plan (UDP, adopted January 2007)
https://www.westminster.gov.uk/unitary-development-plan-udp

The Mayor's London Plan (GLA, July 2011 as amended)
http://www.london.gov.uk/priorities/planning/london-plan

The National Planning Policy Framework (NPPF, DCLG 2012)
https://www.gov.uk/government/publications/national-planning-policy-framework--2

National Planning Practice Guidance (NPPG, March 2014)
http://planningguidance.planningportal.gov.uk/

Westminster High Street Health Checks 2013
https://www.westminster.gov.uk/high-street-health-checks

Westminster Health Check Archive
https://www.westminster.gov.uk/shopping-centre-health-checks

City of Westminster

If you would like to obtain further copies of this Health Check report, please:

Email: ldf@westminster.gov.uk
Or Telephone: 0207 641 2447

City of Westminster

Shopping Centre Health Check Survey 2014

Local Centre 29: Clifton Road

Contents

(i) Purpose of the Study

Former government guidance on Town Centres advised that 'health checks' be undertaken every five years to allow accurate and reasonable temporal analysis of the performance of town centres. This requirement has been superseded by more recent national and regional policy frameworks and guidance.

The National Planning Policy Framework (NPPF) (DCLG, 2012), states that when setting out requirements for Plan Making and using a proportionate evidence base, '*Local Planning Authorities should have a clear understanding of business needs within the economic markets operating in and across their area. To achieve this they should... assess... the role and function of town centres and the relationship between them, including any trends in the performance of centres, and the capacity of existing centres to accommodate new town centre development* (paragraphs 160, 161).'

The London Plan (2011) sets out strategic retail policy for Town Centres in London, as set out in more detail below. Paragraph 2.74 of the London Plan (July 2011) states that "*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 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.*"

This then forms the current national and regional planning policy framework for undertaking town centre health checks. The City Council is currently follow the former guidance and updating health checks every five years, as this is deemed to be a sensible and manageable time period for monitoring the viability and vitality of centres, given the extent of Westminster's town centre network.

(ii) Westminster's Local Centres and Planning Policy

Westminster's Local Centre Health Checks were last carried out in 2007, updating 2002 and 1997 surveys, and includes detailed analysis of Westminster's 39 Local Shopping Centres.

Local Centres normally have a purely local function and most are mainly comprised of convenience goods retailers with some food and drink and local service uses, mainly providing facilities for people living or working nearby (which the City Council wishes to safeguard in accordance with national guidance). However in Westminster some are also speciality centres which attract shoppers from a wider area.

Westminster's current local plan consists of the City Plan: Strategic Polices (adopted November 2013), and saved development management policies from the Unitary Development Plan (adopted January 2007). The local plan seek to protect and enhance the designated Local Shopping Centres for the service they provide to residents, visitors and workers, and because they reduce the need to travel.

Strategic policy CS21 is the general policy for retail across Westminster, seeking to protect existing A1 uses, direct new retail floor space to designated shopping centres, and to protect non-A1 retail and town centre uses in designated shopping centres from changes to uses that do not serve visiting members of the public and that do not have active shop fronts.

Saved UDP policy SS7 (Shopping and Services policy 7) is the detailed development management policy for local shopping centres. The policy covers the protection of shops and circumstances where changes of use away from shops may be permitted, taking into consideration the viability of units and the overall balance of uses in the centre.

(iii) Westminster's Retail Hierarchy

The City of Westminster is broadly divided into two zones in terms of retail policy, the Core Central Activities Zone (CAZ) and CAZ Frontages, and areas outside of this. The Core CAZ contains the two international shopping centres in London, the West End and Knightsbridge in addition to distinctive retail areas such as Covent Garden, Soho, Mayfair and St James's, as well as numerous small parades and individual shops. Outside the Core CAZ and CAZ Frontages there is one Major Shopping Centre, 4 District Centres (where previously there had been 7, 3 have subsequently been reclassified as CAZ Frontages and 1 as a Major Centre) and the 39 Local Centres which are designated to safeguard shopping facilities for local residents, and the retail character of local shopping areas.

In 2007, the District and Local Centres health check reports were all updated, as were 17 shopping areas inside the CAZ. More recently, reports for Westminster's high street shopping centres were updated in 2013.

(iv) Health Checks Methodology

As set out in the NPPF (DCLG, 2012) local planning authorities should recognise town centres as the heart of their communities and pursue policies to support their viability and vitality. Planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive.

Accessibility by public transport is considered to be excellent for all Westminster's larger shopping areas, and its Local Centres are accessible for people to walk to. The City Council wants to retain shops in Local Centres, in order to maintain a range of local convenience shops and protect the character and function of the centres. Local shops and services limit car trips, encourage walking, and make city life more practical and attractive.

The **National Planning Practice Guidance** was published in March 2014 by DCLG, several months after the field work for this project had commenced. It states that existing centres should be audited to assess their role, vitality, viability and their potential to accommodate new development and different types of development. It also sets out a series of indicators to determine the health of town centres, including:

- Diversity of use
- Vacant property
- Commercial yields on non-domestic property
- Customer views and behaviour
- Retailer representations
- Commercial rents
- Pedestrian flows and accessibility
- Perception of safety and crime
- State of environmental quality

Most of the above indicators will be assessed as part of this study, where data collection is available and reasonable. All of the above were included as part of the 2013 health checks for the larger high street type centres, where it is more appropriate to carry out consumer surveys, and where commercial data is more readily available. Given the size of this project, the indicators below are considered to be appropriate and comprehensive.

Land Use

(1) Diversity of town centre uses

This section considers the range of A1 uses, and compares the current diversity of land uses to previous Local Centre Health Check Surveys dated 1997, 2002 and 2007. It also includes the

proportion of vacant street level property and the amount of space used for different functions such as shopping, leisure, cultural and entertainment activities, pubs, cafes, and restaurants.

Accessibility

(2) **Pedestrian flows (footfall):**
Visual assessments were undertaken to measure pedestrian flows which contribute towards the vitality of the Local Centres. These were conducted on comparable days of the week and compared to the average for all of the Local Centres;

(3) **Accessibility:**
The whole of Westminster has a Public Transport Accessibility Level (PTAL) score of 6, the highest level achievable. This section therefore concentrates on ease and convenience of access;

Environment

(4) **State of the town centre environmental quality assessment:**
Includes a subjective assessment of indicators such as security, air pollution, noise, clutter, litter and graffiti, as well as positive factors such as trees, landscaping and open spaces. Each centre is assessed as per the Attractions Table 4, and the Daytime Amenity Table 5 in the 2007 Health Check Survey. A comparison is made between the 1997, 2002, 2007 and 2013 surveys.

(5) **Daytime amenity:**
A qualitative assessment of the amenity within the local centre, assessing its cleanliness, security, and identity.

(6) **Relative performance of the centre:**
Measures the performance of the centre compared to the Westminster Local Centre average in terms of land use, attractiveness, and daytime amenity, with graphs comparing the performance of centres relative to one another. The centre’s strengths, weaknesses, opportunities and threats are highlighted in a SWOT analysis diagram at the end of this section.

(7) **The potential capacity for growth or change of centres in the network:** opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development is considered here. Based on levels of demand, assessments are made to ascertain how much capacity each Local Centre has to accommodate retail growth, looking at retail related planning applications in and around the Local Centres. Consideration is given to whether the current Local Centre boundaries and Core and Secondary Frontage designations are still valid. Consideration is also given to ways in which the vitality and viability of the centres could be enhanced.

(8) **Summary of health check:**
This section contains a comparison of the relative performance of this centre, and summary of land use assessment as per the 2007 Health Check reports. General comments and analysis of the centre are included, along with a summary of any problems/issues. A classification as ‘in decline’, ‘neutral’, or ‘healthy’ is included, plus comment on whether things have improved, deteriorated, or remained the same since 2007 (see 2007 Health Checks, Tables 6 and 7). Where a Local Centre is considered to be “in decline” or “neutral”, consideration is made on ways to improve the vitality and viability of the Centre.

The results of this study will be used to inform planning policy development and the inception of other relevant interventions, and will be used to assess the success of previous initiatives such as any investment in public realm.

Local Centre **29: Clifton Road**

1. Introduction

1.1 Location

This exemplary, medium sized linear local centre is located in the north of Westminster, just north of the Regent's Canal, serving residents in the Maida Vale, Little Venice and St John's Wood area. The local centre is close to Warwick Avenue London Underground station, and is located just off Edgware Road.

The catchment area of the centre is restricted by several other centres in the vicinity including the larger Church Street/Edgware Road district centre to the south, and Formosa Street local centre to the west, however this is one of the best local centres in Westminster in terms of its offer and physical environment.

Figure 1: Local Centre Boundary 2013

2 Land Use

2.1 Range of Uses

This centre comprises a range of shopping and other town centre uses. The diversity of uses represented in the centre is summarised in Table 1 below.

Table 1: Range of Town Centre Uses (1997-2013)

Use Class		**No. of Units**	**No. of Units**	**No. of Units**	**No. of Units**
		1997	**2002**	**2007**	**2013**
Class A1 Retail		20	23	21	21
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*0*
	National retailers	*1*	*2*	*2*	*3*
	Specialist Independent	*4*	*5*	*7*	*5*
	Independent	*2*	*4*	*4*	*7*
	Convenience	*13*	*12*	*8*	*6*
Class A2	Financial & Professional	6	2	4	4
Food & Drink		0	6	8	8
Class A3	*Restaurant/Café*	*0*	*4*	*6*	*6*
Class A4	*Pubs/Bars*	*0*	*2*	*2*	*2*
Class A5	*Takeaway*	*0*	*0*	*0*	*0*
	Takeaway/Restaurant				*0*
Sui Generis		1	1	1	0
Vacant Units		2	0	0	0
Arts/Culture		0	0	0	0
Health uses		0	0	0	0
Hotels		0	0	0	0
TOTAL		**29**	**32**	**34**	**33**

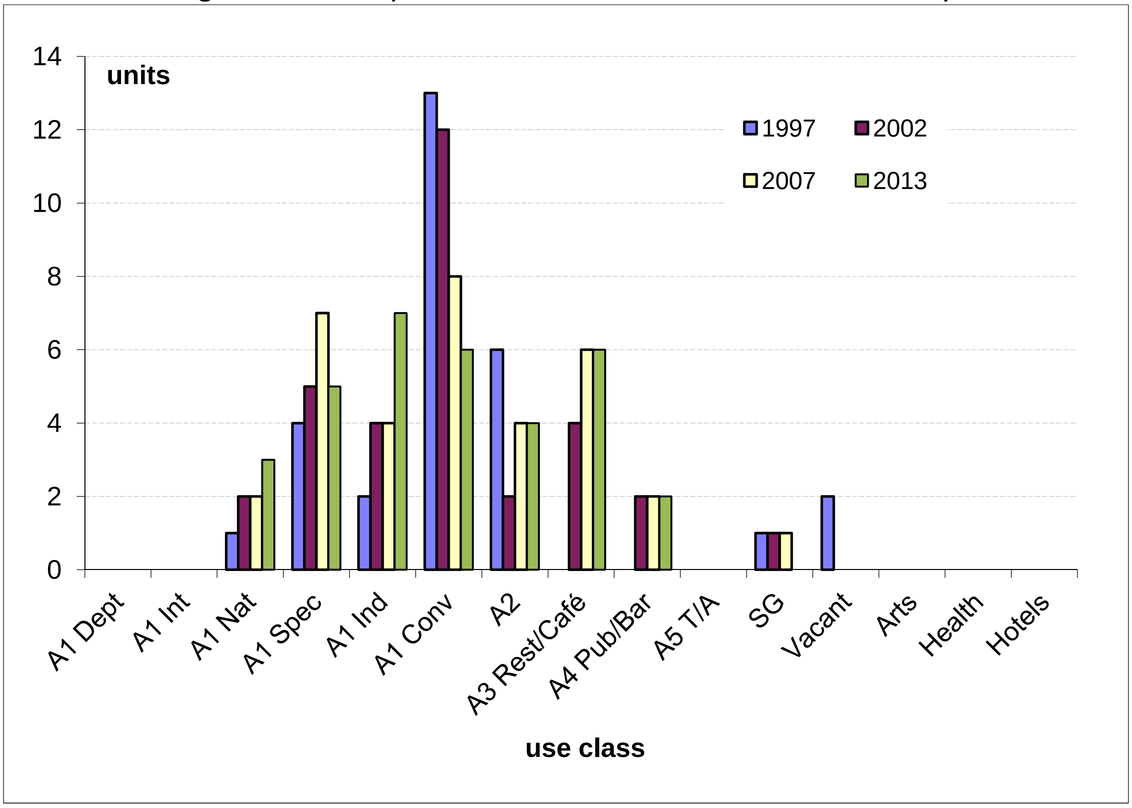
Source: WCC Land Use Survey February 2014

The number of units has decreased by one since 2007 with the amalgamation of 27-29 Clifton Road into the adjoining Tesco Express now occupying 21-29 Clifton Road.

The number of A1 retail uses in Clifton Road has remained static but remains the majority use in the centre, comprising nearly two thirds of all units, offering a good selection across the A1 sub classes. Within the A1 class, national retailers have increased by one with the opening of Mary's Living and Giving Shop for Save the Children. Two specialist independent shops have been lost and three more new independent shops been created. Two convenience stores have been lost but this includes the expansion of Tesco Express into the former adjoining Cullens minimarket. The number of A2 and A3 uses has remained constant, with both of these classes being well represented given the size of the centre, with the A3 uses being of good quality, including both national chains and independent outlets such as coffee shops and small restaurants.

The only SG launderette use has been replaced by a hairdresser. The centre does not contain any hotels, arts of health uses.

Figure 2: Units by use class within the local centre boundary



2.2 Range of A1 Uses

Clifton Road has 21 Class A1 retail units including 6 convenience stores, 5 specialist retailers, 7 independent retailers and 3 national retailers. The specialist retailers include clothes shops and a pet shop. The independent stores include two hairdressers and a florist. The high proportion of A1 uses suggests that Clifton Road serves local residents with a mix of convenience and comparison shopping.

2.3 Total Retail Floor space

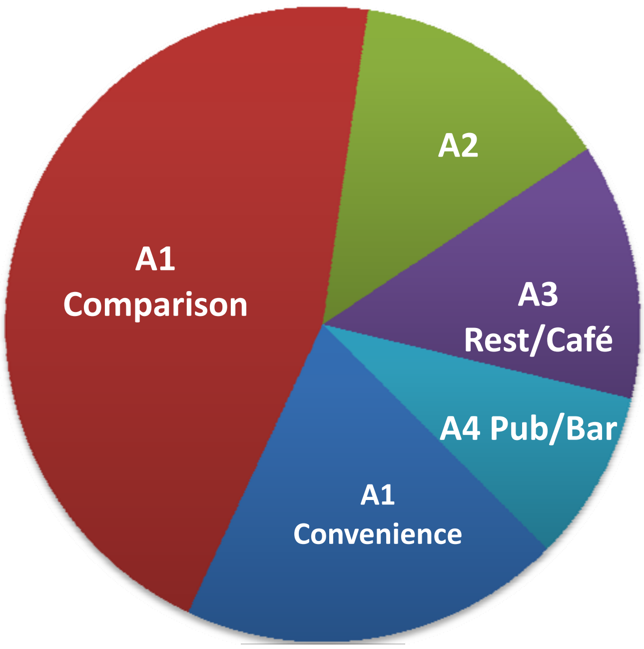
Total retail floor space in Clifton Road is broken down in Table 2. In total, Clifton Road has 2,893 sqm of retail floor space, which is slightly below the average of 3,188 sqm for the 39 Local Centres in the City. A1 comparison accounts for nearly half of the total floor space in the centre, with A1 as a whole accounting for just under 65% of all floor space in the centre, which is higher than the local centre average.

Levels of A2 and A3 floor space are also comparable to the overall local centre average, which together account for nearly quarter of the floor space in the centre. The centre has 2 A4 pubs, with a floor space above the overall average, but does not contain any A5 takeaways. The food and drink uses are of high quality. Unlike other centres, Clifford Street does not contain any vacant floor space, and does not have any uses outside of the A-class category. This is therefore a retail centre with no other services.

Table 2: Total Retail Floor space 2013

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2013)
A1 Convenience	563	19.46%	16.10%
A1 Comparison	1311	45.32%	40.50%
A2	388	13.41%	10.60%
A3 Rest/Café	378	13.07%	13.30%
A4 Pub/Bar	253	8.75%	5.60%
Sui Generis	0	0.00%	2.90%
Vacant	0	0.00%	2.90%
Health	0	0.00%	2.90%
Hotels	0	0.00%	0.5%
Art	0	0.00%	1.3%
Leisure	0	0.00%	0.1%
Total	**2,893**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



Source: City of Westminster GIS System and site survey December 2013

Clifton Road is a Local Centre with a good selection of local food and comparison shops. There are no banks or building societies in the centre, and most of the Class A2 uses are estate agents. The Local Centre provides a good range and selection of shops and services compared to other centres.

2.4 Proportion of Vacant Street Level Property

There are no vacant units in Clifton Road, meaning that the unit vacancy rate is lower than the average rate for Local Centres in the City of 8%, as shown in Table 3. The full occupancy of the centre has remained constant from 2002, when a decrease was noted from the previous figures in 1997. This is therefore one of the most vibrant and viable centres in Westminster, both today and over the last fifteen years.

Table 3: Level of Vacant Street Level Property 2013

% Vacant Units				% Local Centre Average
1997	2002	2007	2013	2013
0.00% (0) units	11.11% (1) units	0.00% (0) units	0.00% (0) units	8% (3) units

Source: City of Westminster GIS System and site survey February 2014

3. Accessibility

3.1 Pedestrian Flows (footfall)

The centre was found to be average in terms of pedestrian vibrancy when the Health Check Survey was carried out on a cold, weekday afternoon in February 2014, however generally this is a busy, vibrant centre.

3.2 Accessibility on foot and by public transport

Clifton Road is located roughly 5 minutes walk from Warwick Avenue London Underground station (Bakerloo Line), and is also located close to the A40 (M) Westway to the south of the centre, which is one of the main arterial roads in London. Roughly five bus routes serve the centre, running along Maida Vale, which intersects with the east end of Clifton Road, and Clifton Gardens, which leads on from Clifton Road.

4. Environmental Quality

4.1 State of the Centre's Attractions and Environmental Quality / Attractions

The attitudinal assessment of the attractions and amenity of the centre is summarised in Table 4 below. The centre's overall score for attractions is 42.3%, meaning that the environmental quality is good. This is higher than the Local Centre average of 31%, and ranks Clifton Road =10th out of the 39 Local Centres in the City. The main strengths of the centre are the provision of food and specialist shops, restaurants and the general quality of the retail environment. The centre is rated poorly in all three service provision categories and two of the arts/culture categories.

4.2 Daytime Amenity

Clifton Road is a very attractive Local Centre, with a day time amenity rating of 91.3% compared with the average for all Local Centres of 68%, and is ranked 1st out of the 39 Local Centres in the City. The centre is only rated as being poor in terms of the presence of street events which is unsurprising given the size of the centre, and is rated as being average in only two categories including, the effectiveness of deterrent measures and features that identify the centre. However, the centre is overwhelmingly rated in a very positive way, with eight of the eight cleanliness categories rated as being 'good', along with eleven of the twelve security categories and one of the three identity categories. Clifton Road is therefore the most attractive local centre in terms of daytime amenity.

Table 4: Attractions within the Local Centre 2013

ATTRACTIONS	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Retail Provision									
Prominence of multiple retailers		X			X			X	
Prominence of independent shops		X			X			X	
Availability of food shopping	X			X			X		
Prominence of specialist shops		X			X			X	
Quality of market (frequency, variety etc)			X			X			X
Quality of retail environment	X			X			X		
Art/Culture									
Quality of restaurants (availability, number etc)	X			X			X		
Quality of pub/club/bars		X			X		X		
Range of cultural/ community events (theatre, concerts)			X			X			X
Availability of sports and leisure facilities			X			X			X
Service Provision									
Local services (information, library etc)			X			X			X
Employment/ office space			X			X			X
Bank/ building society provision			X			X			X
Total		10/26			10/26			11/26	
Percentage		38.46%			38.46%			42.31%	

Source: City of Westminster site survey December 2013

Table 5: Day Time Amenity within the Local Centre 2013

AMENITY – DAYTIME	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Overall environment of public areas in the centre									
General Cleanliness in Shopping Hours:									
Presence of litter		X			X		X		
Presence of refuse bags on the street		X		X			X		
Evidence of street fouling	X			X			X		
Presence of glass/glasses/other debris incl. Food and food containers/wrapping	X			X			X		
Condition	X			X			X		
Quality of buildings	X			X			X		
Special features (pedestrianisation, Street furniture, etc)	X			X			X		
Impact of vacant sites	X			X			X		
Security									
Evidence of Vandalism and Graffiti (incl. on street furniture)	X			X			X		
Security during shopping hours (availability, access, security etc)	X			X			X		
Ease of passage for pedestrians (incl. presence of obstacles eg illegally parked vehicles)	X			X			X		
Evidence of drunkenness, anti-social Behaviour, rowdiness	X			X			X		
Presence of rough sleepers	X			X			X		
Presence of beggars	X			X			X		
Presence of street drinkers	X			X			X		
Evidence of touting (e.g. mini cabs, ricksaws, Prostitution, drug dealing etc.)	X			X			X		
Presence of illegal street traders e.g counterfeit goods, hot dogs, peanuts etc.	X			X			X		
Effectiveness of any deterrent measures (CCTV, police patrols, door security etc)		X			X			X	
Quality of street lighting	X			X			X		
Safety perception in shopping hours	X			X			X		
Identity of town centre									
Features which identify the centre (eg flagship stores, buildings etc)		X			X			X	
Promotion/ Street events			X			X			X
'Feel good' factor of town centre	X			X			X		
Total	40/46			41/46			4246		
Percentage	87.0%			89.1%			91.3%		

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2013

Figure 4: Deviation of centre from the mean for Local Centres 2013

Clifton Road is an average sized Local Centre with a total floor space very close to the overall average for the 39 local centres. This is also true for A1convenience floor space, and for food and drink floor space figures (A3/A4/A5). However, A1 comparison floor space in the centre is considerably higher than average. In terms of the rating of the physical environment, the rating for attractiveness is considerably higher than the local centre average, and the centre has the highest rating for daytime amenity out of the 39 centres, illustrating the range of services offered and the quality of the physical environment in the centre.

5.2 Strengths, Weaknesses, Opportunities and Threats

SWOT analysis

6. Future capacity

6.1 Potential Capacity for Growth

Between 2007 and 2013 there were no permissions or refusals relating to retail uses in this centre.

7. Health of the Centre

Table 6: Summary of Health Check Assessment 2013

Subject	Subject Matter	Data	Number	Sqm
RETAILING	**Floor space**	**Total Floor space**		**2,893**
		Total Convenience (A1)		**563**
		Total Comparison (A1)		**1,311**
		Total Service (A2)		**388**
		Total A3		**378**
		Total A4		**253**
		Total A5		**0**
		Total Sui Generis		**0**

		Total Vacant		**0**
	Retail Offer	**Total Number of Shop Units**	**33**	
		Total Number of A1 Units	**21**	
		a) Convenience shops	**6**	
		b) Department/principal stores	**0**	
		c) Prestige international shops	**0**	
		d) National comparison retailers	**3**	
		e) Specialist Independent shops	**5**	
		f) Independent shops	**7**	
		Total Comparison Multiples	**15**	
		Total Number of A2 Units	**4**	
		Total Number of A3 Units	**6**	
		Total Number of A4 Units	**2**	
		Total Number of A5 Units	**0**	
		Total Number of Sui Generis	**0**	
		Total Number of Vacant	**0**	
	Market	**Days of operation**	**0**	
		Number of stalls	**0**	
	Proposals	**Changes of use A1 to A2**	**0**	
		Changes of use A1 to A3	**0**	
		Changes of use A1 to A4	**0**	
		Changes of use A1 to A5	**0**	
ARTS/CULTURE		**(Cinemas, galleries, theatres etc.)**	**0**	
HEALTH USES		**(Clinics, surgeries etc.)**	**0**	
HOTELS			**0**	

In terms of its vitality and viability, and general economic health this centre is considered to be ‘healthy’.

Appendices

Appendix 1: Views of Local Centre

Appendix 2: Land Use Table (Westminster land use survey 2013)

Appendix 3: Land Use Map (GOAD 2012 retail data and Westminster land use survey 2013)

Appendix 4: Planning permissions Map (Westminster land use survey 2013)

Appendix 5: Location map of all local centres

Appendix 6: Glossary of Terms

Views of Clifton Road local centre

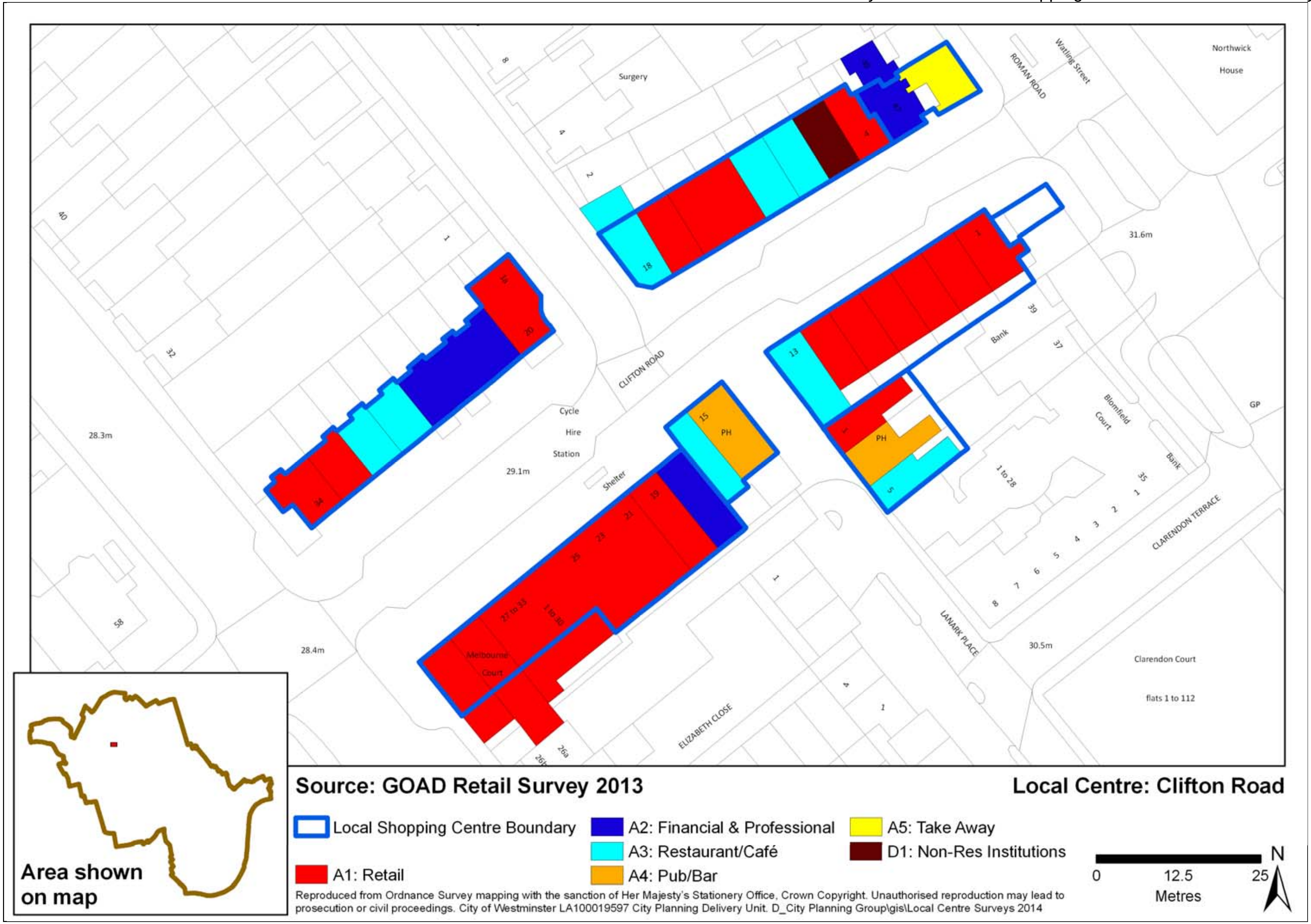
Attractive, well maintained shop fronts, and a clean, spacious street environment in the western secondary frontage of the local centre

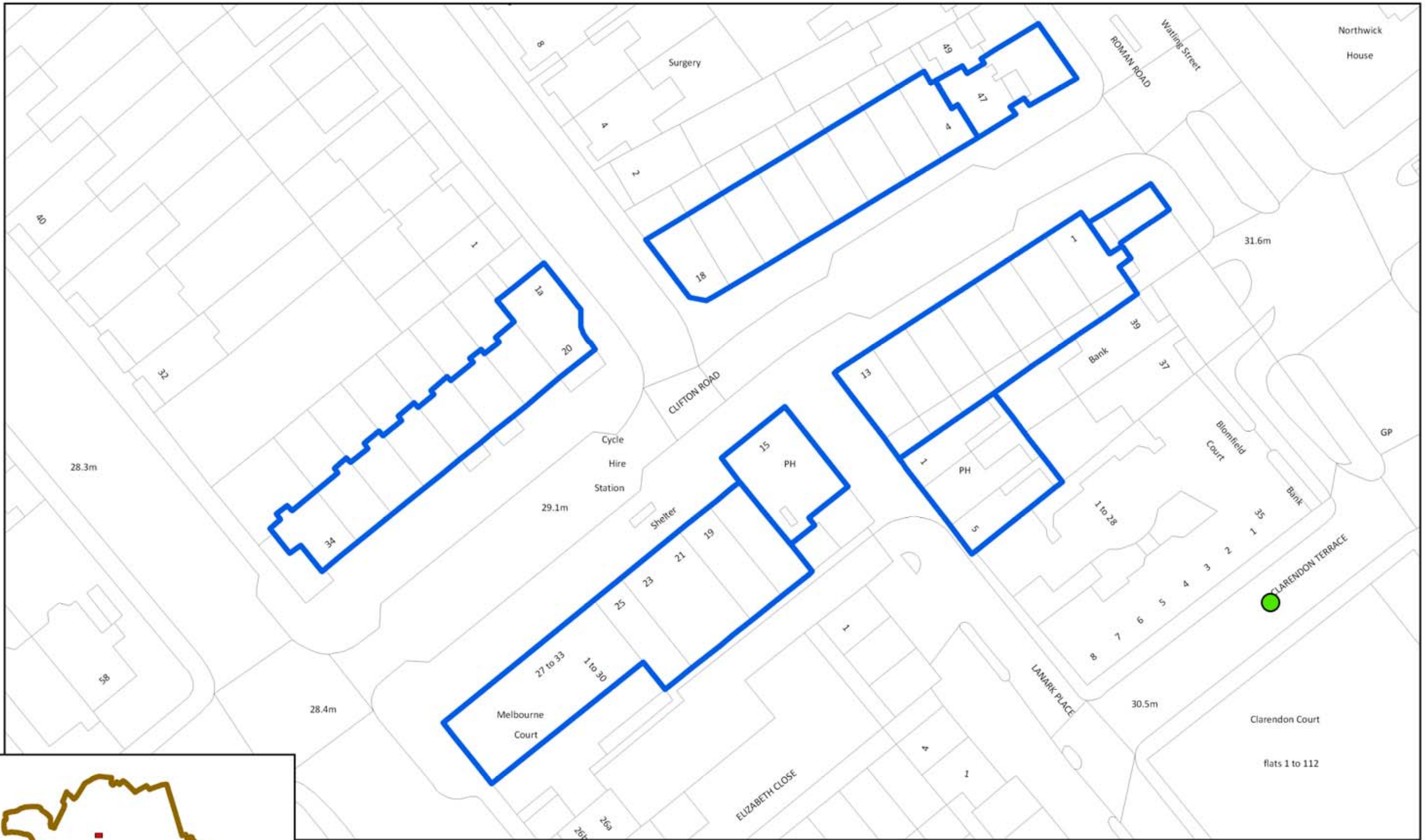
Attractive, well designed portion of the core shopping frontage in the local centre, with mature trees, bicycle parking, seating and a wide pedestrian walking area.

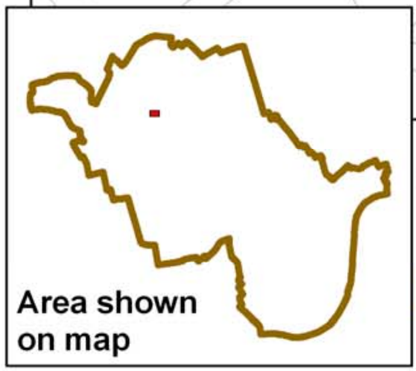
Further attractive shop fronts at the eastern end of the local centre, with the pavement and parking bays well integrated, and attractive street furniture such as the lamp posts.

					A1	A1	A1	A1		A3	A3	2007 Use
ADDRESS	**FASCIA**	**DESCRIPTION**	**USE**	**SQM**	**Conv.**	**Nat.**	**Spec.**	**Ind**	**A2**	**Res/Caf**	**Pub/Bar**	
1CLIFTON ROAD	REMEDYS CHEMIST AND FLORAL AND HARDY	CHEMIST AND FLORIST STORE	A1 Conv	194	1							A1 Conv
3CLIFTON ROAD	AMERICAN DRY CLEANING CO.	DRY CLEANERS	A1 Ind	79				1				A1 Ind
4CLIFTON ROAD	THE WINERY	OFF LICENCE	A1 Conv	58	1							A1 Conv
5CLIFTON ROAD	SHEEPDROVE	BUTCHERS	A1 Conv	76	1							A1 Conv
6CLIFTON ROAD	VILLAGE VET	PET SHOP	A1 Spec	62			1					A1 Spec
7CLIFTON ROAD	NAILSPA	NAILS/BEAUTY	A1 Spec	79			1					A1 Spec
8CLIFTON ROAD	RAOUL'S DELI	DELICATESSEN	A1 Spec	68			1					A1 Spec
9CLIFTON ROAD	HOWARD ESTATES	ESTATE AGENTS (1ST FLOOR)		78								
9CLIFTON ROAD	SAS SALON	HAIRDRESSER	A1 Ind	78				1				SG
10CLIFTON ROAD	RAOUL'S EXPRESS	SANDWICH BAR	A1 Ind	61				1				A1 Ind
11CLIFTON ROAD	MARY'S LIVING AND GIVING SHOP FOR SAVE THE CHILDREN	CHARITY SHOP	A1 Nat	74		1						A1 Spec
12CLIFTON ROAD	RAOUL'S DELI	PICTURES AND ART	A1 Ind	61				1				A1 Spec
13CLIFTON ROAD	RAOUL'S	CAFE	A3 Rest/Café	82						1		A3 Rest/Café
14CLIFTON ROAD	ABSOLUTE FLOWERS	FLORIST	A1 Ind	64				1				A1 Ind
15CLIFTON ROAD	THE EAGLE	PUBLIC HOUSE	A3 Pub/Bar	156							1	A3 Pub/Bar
16CLIFTON ROAD	CLIFTON GREENS	GREENGROCER	A1 Ind	63				1				A1 Nat
17CLIFTON ROAD	THE ORGANIC GROCER	GROCERS (GROUND FLOOR)	A1 Conv	83	1							A1 Conv
17CLIFTON ROAD	CORAL	BETTING OFFICE (DOWNSTAIRS)	A2	83					1			A2
18CLIFTON ROAD	CAFE NERO	COFFEE SHOP	A1 Nat	66		1						A1 Conv
19CLIFTON ROAD	THE MAIDA	NEWSAGENTS	A1 Conv	82	1							A1 Conv
20CLIFTON ROAD	BAKER AND SPICE	CAFE	A3 Rest/Café	100						1		A3 Rest/Café
21-29CLIFTON ROAD	TESCO EXPRESS	MINI MARKET	A1 Nat	360		1						A1 Nat
24-26CLIFTON ROAD	CHESTERTONS	ESTATE AGENTS	A2	109					1			A2
27-29CLIFTON ROAD	INCORPORATED INTO TESCO METRO											A1 Conv
28CLIFTON ROAD	HOLLY'S	SANDWICH BAR/CAFÉ	A3 Rest/Café	57						1		A3 Rest/Café
30CLIFTON ROAD	CAFE ROUGE	RESTAURANT	A3 Rest/Café	53						1		A3 Rest/Café

31CLIFTON ROAD	PAULIE	WOMENSWEAR	A1 Spec	76			1					A1 Spec
32CLIFTON ROAD	JOUJOU LUCY	CHILDRENS CLOTHES SHOP	A1 Spec	55			1					A1 Spec
33CLIFTON ROAD	BOOTS	CHEMIST	A1 Conv	70	1							A1 Conv
34CLIFTON ROAD	SIMON WARWICK	HAIRDRESSER AND BEAUTY	A1 Ind	65				1				A1 Ind
1LANARK PLACE	DIAMOND RESIDENTIAL	ESTATE AGENT	A2	74					1			A2
3LANARK PLACE	WINDSOR CASTLE	PUBLIC HOUSE	A3 Pub/Bar	97							1	A3 Pub/Bar
5LANARK PLACE	MAGURO SUSHI	RESTAURANT	A3 Rest/Café	73						1		A3 Rest/Café
47MAIDA VALE	GOLDSCHMIDT RESIDENTIAL	ESTATE AGENT	A2	122					1			A2
47 MAIDA VALE	BOMBAY BICYCLE CLUB	RESTAURANT	A3 Rest/Café	13						1		A3 Rest/Café


Source: GOAD Retail Survey 2013
Local Centre: Clifton Road
Local Shopping Centre Boundary
A1: Retail
A2: Financial & Professional
A3: Restaurant/Café
A4: Pub/Bar
A5: Take Away
D1: Non-Res Institutions
0
12.5
25
Metres
N
Area shown on map
Reproduced from Ordnance Survey mapping with the sanction of Her Majesty's Stationery Office, Crown Copyright. Unauthorised reproduction may lead to prosecution or civil proceedings. City of Westminster LA100019597 City Planning Delivery Unit. D_City Planning Group\gis\Local Centre Surveys 2014
CLIFTON ROAD
ROMAN ROAD
Watling Street
ELIZABETH CLOSE
LANARK PLACE
CLARENDON TERRACE
Surgery
Northwick House
Cycle Hire Station
Shelter
Bank
Blomfield Court
Melbourne Court
Clarendon Court
flats 1 to 112
GP
PH
28.3m
29.1m
28.4m
31.6m
30.5m





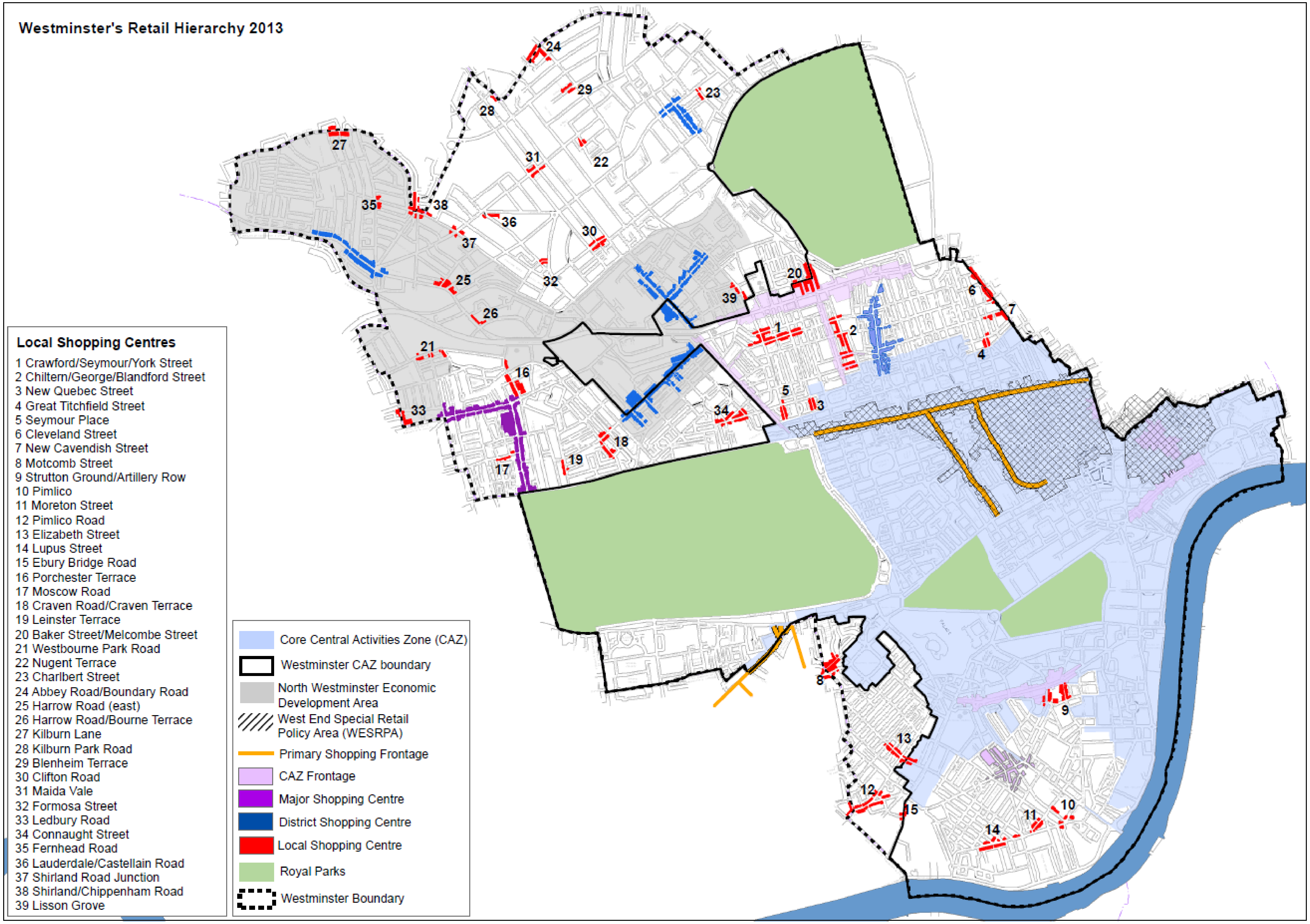
Local Centre: Clifton Road

Source: GOAD Retail Survey 2013

- Completed 2007-2013
- Local Shopping Centre Boundary

0 10 20
Metres
N

Figure 7 Westminster wide shopping centre boundaries plan



Health Checks - Glossary of terms

A1	**Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, dry cleaners, pet shops, sandwich bars, retail showrooms, and domestic hire shops.**
A1 café type uses	**Shops such as sandwich bars or coffee shops selling food and drinks to be consumed mainly off the premises, but not hot food takeaways. Examples include certain Pret a Manger shops, Costa Coffee and the Seattle Coffee Co. shops.**
A2	**Banks, building societies, bureau de change, estate and employment agencies, professional and financial services, telephone bureaux, betting offices and beauty salons (excluding hair).**
A3	**Food and drink uses such as restaurants, pubs, snack bars, cafés, wine bars and shops for the sale of hot food (hot food take-aways).**
A4	**Drinking Establishments: Premises where the primary purpose is the sale and consumption of alcoholic drinks on the premises.**
A5	**Hot Food Take-away: Premises where the primary purpose is the sale of hot food to take away.**
B1	**Business uses such as offices, research and development and industrial uses.**
CAZ	**Central Activities Zone (CAZ). The CAZ is an area of mixed uses, many of which contribute directly to the national, regional and local economy. It is this mix of activities and their supporting resources which underpins the success of London's economy.**
CAZ Frontages	**Mixed use areas usually with a predominant retail function. Appropriate areas for retail growth.**
Comparison	**A1 floor space selling predominantly durable items and not in convenience use.**
Convenience	**This is based on the classification provided by the unit for Retail Planning Information (URPI) set out in URPI brief 99/2. The classifications are: food, alcoholic drink, tobacco and other goods (newspapers and magazines, cleaning materials and matches). For the purposes of this assessment, convenience includes shops selling food or drink (excluding A1 café-type uses), newsagents, (including specialist tobacco stores), chemists (including Boots the Chemist stores) and post offices.**
Department/ principle store	**This includes the main department stores such as John Lewis, Liberty, and Selfridges, as well as variety stores such as Marks & Spencer and Virgin Mega-stores.**
District Centre	**Distributed more widely than Metropolitan and Major centres, they provide convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000-50,000 sqm of retail floor space. Some district centres have developed specialist shopping functions.**
Experian GOAD	**An independent retail data consultancy who provide maps of ground floor uses in shopping centres.**
F&B	**Food and beverage offer, covered by parts A3 (cafe's/restaurants), A4 (drinking establishments) and A5 (take aways) of the use classes order.**
Gross Floorspace	**Floorspace of buildings on all floors including external walls, half the thickness of parting walls and circulation areas.**
Independent store	**This includes non-convenience stores (see definition above) irrespective of size, that are not considered to be specialist retailers (see definition overleaf), that are operated by retailers that are not included within national retail chains or groups.**
Major Centre	**Typically found in inner and some parts of outer London with a borough-wide catchment. They generally contain over 50,000sqm of retail floor space and a relatively high proportion of comparison goods relative to convenience goods. They may also have significant employment, leisure, service and civic functions.**
NPPF	**National Planning Policy Framework. Central Government's key, revised guidance document driving planning policy in England, which compressed the**

	previous PPS documents and other guidance into a single document. It includes key guidance on town centres and health checks.
National retailers	**This includes all retailers (Class A1 only) that operate within the context of a national retail chain or group, such as Next. A schedule of all national retail multiples can be found in Retail Directory of the UK 2002 (Hemming Information). Specialist shops that are part of a retail chain or group, such as Whittards and Thorntons, are classified as national retailers. Although there are national chains of food and drink uses and betting shops, such as Ladbrokes, these are classified based on the use class (e.g. betting shops as A2 uses) and not as national retailers.**
Prestige international retailers	**This includes prestigious retailers that operate in more than one country, such as Gucci, Gianni Versace, and Giorgio Armani. It also includes flagship stores that are only found in select town centres in Britain. National airline shops, such as British Airways, have also been classified as international retailers.**
Primary Frontages	**Internationally recognised shopping destinations. The Primary Frontages defined in Westminster's City Plan - Strategic Policies document are Oxford Street, Regent Street, Bond Street and Knightsbridge/Brompton Road.**
Retail floorspace	**This is all A1, A2, A3, A4, A5 and sui generis floorspace, and vacant floorspace of any of the aforementioned categories.**
Shisha	**Flavoured tobacco smoked through a water pipe or hookah. Smoke free legislation means that it cannot be smoked indoors in public places, and is often smoked at tables and chairs on the footway and in garden areas. There has been a rapid rise in shisha uses over the past five years, and there is concern over issues of health, residential amenity and other issues.**
Specialist independent	**Similar to an independent store, but this category reflects the quality and specialisation of the retailer so that a shopper may make a specific shopping trip to that shop. For example, The Pen Shop on Regent Street or antique shops.**
Sui generis	**Sui Generis is a term that refers to a use on its own. Any planning use not falling within a specific class within the Use Class Order falls within this category. Examples of sui generis uses in shopping centres are launderettes, mini cab offices, amusement centres and car showrooms.**
UDP	**Unitary Development Plan produced by Westminster City Council, with saved policies forming part of the statutory development plan for Westminster.**
Vacancy	**This category includes vacant street level units, as well as units that are under alteration. However, if at any time the survey was completed it was evident who the unit would be occupied by, the unit was treated as being occupied.**
Zone A Rent	**The rental level per square metre achieved on the first six metres of a shop unit.**

Information Sources

Westminster's City Plan - Strategic Policies (adopted November 2013)
https://www.westminster.gov.uk/westminsters-city-plan-strategic-policies

Westminster's Unitary Development Plan (UDP, adopted January 2007)
https://www.westminster.gov.uk/unitary-development-plan-udp

The Mayor's London Plan (GLA, July 2011 as amended)
http://www.london.gov.uk/priorities/planning/london-plan

The National Planning Policy Framework (NPPF, DCLG 2012)
https://www.gov.uk/government/publications/national-planning-policy-framework--2

National Planning Practice Guidance (NPPG, March 2014)
http://planningguidance.planningportal.gov.uk/

Westminster High Street Health Checks 2013
https://www.westminster.gov.uk/high-street-health-checks

Westminster Health Check Archive
https://www.westminster.gov.uk/shopping-centre-health-checks

City of Westminster

If you would like to obtain further copies of this Health Check report, please:

Email: ldf@westminster.gov.uk
Or Telephone: 0207 641 2447

City of Westminster

Shopping Centre Health Check Survey 2014

Local Centre 30: Fernhead Road

Contents

(i) Purpose of the Study

Former government guidance on Town Centres advised that 'health checks' be undertaken every five years to allow accurate and reasonable temporal analysis of the performance of town centres. This requirement has been superseded by more recent national and regional policy frameworks and guidance.

The National Planning Policy Framework (NPPF) (DCLG, 2012), states that when setting out requirements for Plan Making and using a proportionate evidence base, '*Local Planning Authorities should have a clear understanding of business needs within the economic markets operating in and across their area. To achieve this they should... assess... the role and function of town centres and the relationship between them, including any trends in the performance of centres, and the capacity of existing centres to accommodate new town centre development* (paragraphs 160, 161).'

The London Plan (2011) sets out strategic retail policy for Town Centres in London, as set out in more detail below. Paragraph 2.74 of the London Plan (July 2011) states that "*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 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.*"

This then forms the current national and regional planning policy framework for undertaking town centre health checks. The City Council is currently follow the former guidance and updating health checks every five years, as this is deemed to be a sensible and manageable time period for monitoring the viability and vitality of centres, given the extent of Westminster's town centre network.

(ii) Westminster's Local Centres and Planning Policy

Westminster's Local Centre Health Checks were last carried out in 2007, updating 2002 and 1997 surveys, and includes detailed analysis of Westminster's 39 Local Shopping Centres.

Local Centres normally have a purely local function and most are mainly comprised of convenience goods retailers with some food and drink and local service uses, mainly providing facilities for people living or working nearby (which the City Council wishes to safeguard in accordance with national guidance). However in Westminster some are also speciality centres which attract shoppers from a wider area.

Westminster's current local plan consists of the City Plan: Strategic Polices (adopted November 2013), and saved development management policies from the Unitary Development Plan (adopted January 2007). The local plan seek to protect and enhance the designated Local Shopping Centres for the service they provide to residents, visitors and workers, and because they reduce the need to travel.

Strategic policy CS21 is the general policy for retail across Westminster, seeking to protect existing A1 uses, direct new retail floor space to designated shopping centres, and to protect non-A1 retail and town centre uses in designated shopping centres from changes to uses that do not serve visiting members of the public and that do not have active shop fronts.

Saved UDP policy SS7 (Shopping and Services policy 7) is the detailed development management policy for local shopping centres. The policy covers the protection of shops and circumstances where changes of use away from shops may be permitted, taking into consideration the viability of units and the overall balance of uses in the centre.

(iii) Westminster's Retail Hierarchy

The City of Westminster is broadly divided into two zones in terms of retail policy, the Core Central Activities Zone (CAZ) and CAZ Frontages, and areas outside of this. The Core CAZ contains the two international shopping centres in London, the West End and Knightsbridge in addition to distinctive retail areas such as Covent Garden, Soho, Mayfair and St James's, as well as numerous small parades and individual shops. Outside the Core CAZ and CAZ Frontages there is one Major Shopping Centre, 4 District Centres (where previously there had been 7, 3 have subsequently been reclassified as CAZ Frontages and 1 as a Major Centre) and the 39 Local Centres which are designated to safeguard shopping facilities for local residents, and the retail character of local shopping areas.

In 2007, the District and Local Centres health check reports were all updated, as were 17 shopping areas inside the CAZ. More recently, reports for Westminster's high street shopping centres were updated in 2013.

(iv) Health Checks Methodology

As set out in the NPPF (DCLG, 2012) local planning authorities should recognise town centres as the heart of their communities and pursue policies to support their viability and vitality. Planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive.

Accessibility by public transport is considered to be excellent for all Westminster's larger shopping areas, and its Local Centres are accessible for people to walk to. The City Council wants to retain shops in Local Centres, in order to maintain a range of local convenience shops and protect the character and function of the centres. Local shops and services limit car trips, encourage walking, and make city life more practical and attractive.

The **National Planning Practice Guidance** was published in March 2014 by DCLG, several months after the field work for this project had commenced. It states that existing centres should be audited to assess their role, vitality, viability and their potential to accommodate new development and different types of development. It also sets out a series of indicators to determine the health of town centres, including:

- Diversity of use
- Vacant property
- Commercial yields on non-domestic property
- Customer views and behaviour
- Retailer representations
- Commercial rents
- Pedestrian flows and accessibility
- Perception of safety and crime
- State of environmental quality

Most of the above indicators will be assessed as part of this study, where data collection is available and reasonable. All of the above were included as part of the 2013 health checks for the larger high street type centres, where it is more appropriate to carry out consumer surveys, and where commercial data is more readily available. Given the size of this project, the indicators below are considered to be appropriate and comprehensive.

Land Use

(1) Diversity of town centre uses

This section considers the range of A1 uses, and compares the current diversity of land uses to previous Local Centre Health Check Surveys dated 1997, 2002 and 2007. It also includes the

proportion of vacant street level property and the amount of space used for different functions such as shopping, leisure, cultural and entertainment activities, pubs, cafes, and restaurants.

Accessibility

(2) **Pedestrian flows (footfall):**
Visual assessments were undertaken to measure pedestrian flows which contribute towards the vitality of the Local Centres. These were conducted on comparable days of the week and compared to the average for all of the Local Centres;

(3) **Accessibility:**
The whole of Westminster has a Public Transport Accessibility Level (PTAL) score of 6, the highest level achievable. This section therefore concentrates on ease and convenience of access;

Environment

(4) **State of the town centre environmental quality assessment:**
Includes a subjective assessment of indicators such as security, air pollution, noise, clutter, litter and graffiti, as well as positive factors such as trees, landscaping and open spaces. Each centre is assessed as per the Attractions Table 4, and the Daytime Amenity Table 5 in the 2007 Health Check Survey. A comparison is made between the 1997, 2002, 2007 and 2013 surveys.

(5) **Daytime amenity:**
A qualitative assessment of the amenity within the local centre, assessing its cleanliness, security, and identity.

(6) **Relative performance of the centre:**
Measures the performance of the centre compared to the Westminster Local Centre average in terms of land use, attractiveness, and daytime amenity, with graphs comparing the performance of centres relative to one another. The centre's strengths, weaknesses, opportunities and threats are highlighted in a SWOT analysis diagram at the end of this section.

(7) **The potential capacity for growth or change of centres in the network:** opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development is considered here. Based on levels of demand, assessments are made to ascertain how much capacity each Local Centre has to accommodate retail growth, looking at retail related planning applications in and around the Local Centres. Consideration is given to whether the current Local Centre boundaries and Core and Secondary Frontage designations are still valid. Consideration is also given to ways in which the vitality and viability of the centres could be enhanced.

(8) **Summary of health check:**
This section contains a comparison of the relative performance of this centre, and summary of land use assessment as per the 2007 Health Check reports. General comments and analysis of the centre are included, along with a summary of any problems/issues. A classification as 'in decline', 'neutral', or 'healthy' is included, plus comment on whether things have improved, deteriorated, or remained the same since 2007 (see 2007 Health Checks, Tables 6 and 7). Where a Local Centre is considered to be "in decline" or "neutral", consideration is made on ways to improve the vitality and viability of the Centre.

The results of this study will be used to inform planning policy development and the inception of other relevant interventions, and will be used to assess the success of previous initiatives such as any investment in public realm.

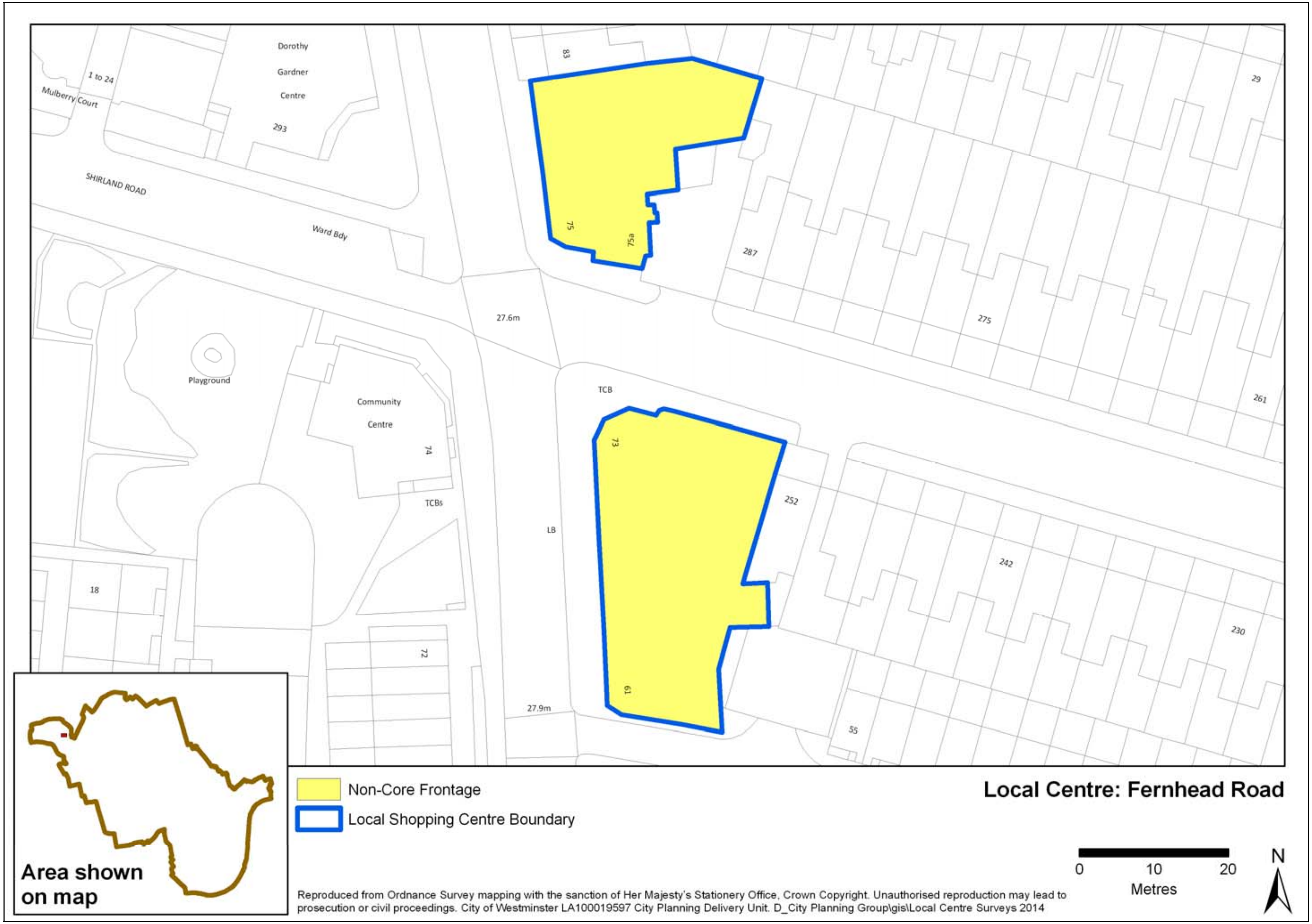
Local Centre **30: Fernhead Road**

1. Introduction

1.1 Location

Fernhead Road is a small linear Local Centre in the north west of Westminster on the junction with Shirland Road, near to the boundary with the London Borough of Brent. It is close to Queen's Park London Underground and London Overground station, and meets the larger Harrow Road (A404) to the south. The catchment area is limited by Fernhead Road's proximity to Shirland Road/Chippenham Junction Local Centre to the east and the larger Harrow Road District Centre to the south. The centre contains only secondary frontage.

Figure 1: Local Centre Boundary 2013



2 Land Use

2.1 Range of Uses

Fernhead Road comprises a range of shopping and other town centre uses. This diversity is summarised in Table 1 below.

Table 1: Range of Town Centre Uses (1997-2013)

Use Class		No. of Units	No. of Units	No. of Units
		2002	**2007**	**2013**
Class A1 Retail		7	6	5
	Department/principle stores	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*
	National retailers	*0*	*0*	*0*
	Specialist Independent	*1*	*1*	*1*
	Independent	*2*	*1*	*1*
	Convenience	*4*	*4*	*3*
Class A2	Financial & Professional	0	0	0
Food & Drink		1	3	4
Class A3	*Restaurant/Café*	*1*	*3*	*4*
Class A4	*Pubs/Bars*	*0*	*0*	*0*
Class A5	*Takeaway*	*0*	*0*	*0*
	Takeaway/Restaurant			*0*
Sui Generis		1	0	0
Vacant Units		2	2	2
Arts/Culture		0	0	0
Health uses		0	0	0
Hotels		0	0	0
TOTAL		**11**	**11**	**11**

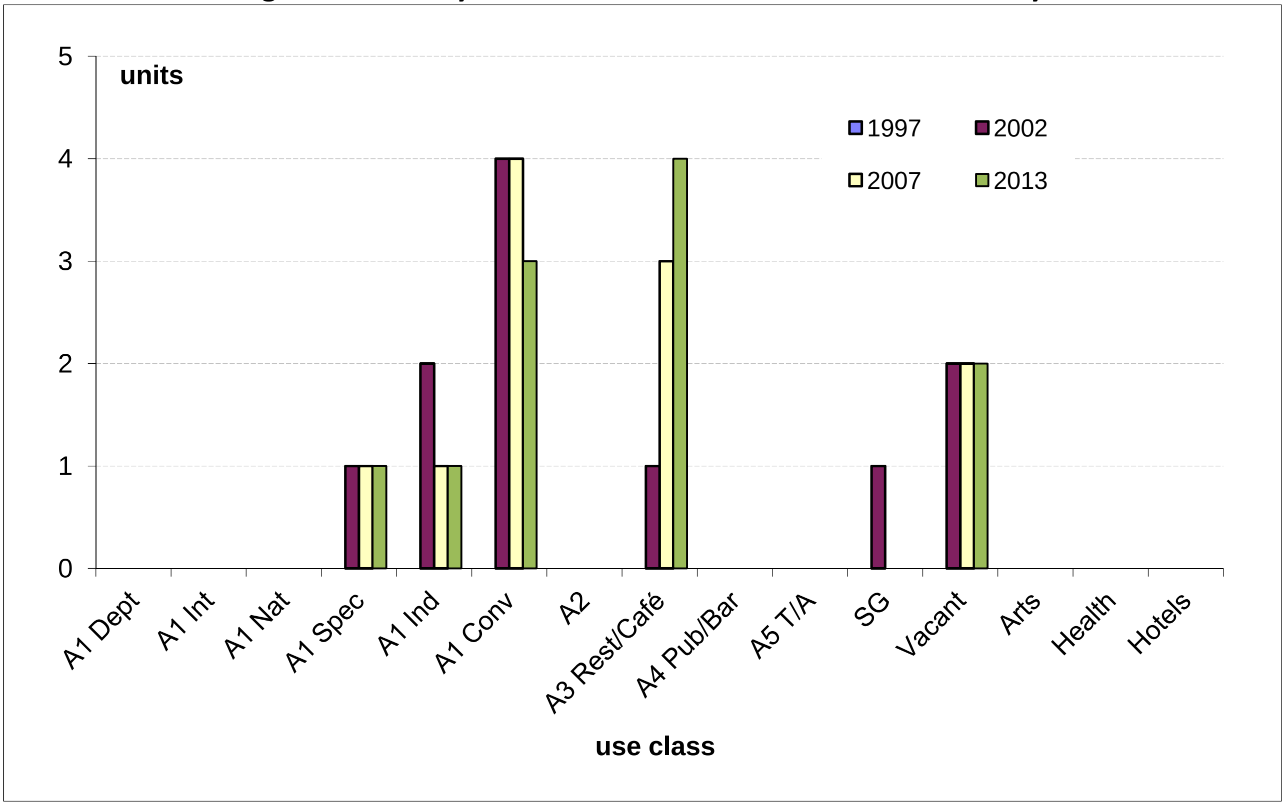
Source: WCC Site Survey December 2013

In total there are eleven units, the same number as was recorded in the 2002 and 2007 surveys, making this one of the smaller local centres in Westminster.

The number of A1 retail uses in Fernhead Road has decreased by one since 2007with the gain of one restaurant/café being offset by the loss of a convenience shop (an off-licence). There are no Class A2 uses, nor are there any pubs/bars or takeaways. In total there are four food and drink uses in the centre.

Outside of the A-class uses, there are two vacant units. This number remains the same as that recorded in 2007 but the circumstances underpinning it have changed. A previously vacant property is now occupied by an accountancy firm and so falls under the B1 use class. Elsewhere, a unit previously recorded as an office is now vacant. A third unit, recorded as vacant in 2007, remains vacant in 2013. Fernhead Road does not have any sui generis, arts/culture, health or hotel uses.

Figure 2: Units by use class within the Local Centre boundary



2.2 Range of A1 Uses

Fernhead Road has five Class A1 retail units comprising three convenience shops, one independent retailer (a hairdresser) and one specialist retailer (a second hand furniture shop). The high proportion of convenience shops and no multiple retailers suggests that Fernhead Road serves local residents with a mix of convenience and comparison shopping facilities.

2.3 Total Retail Floor Space

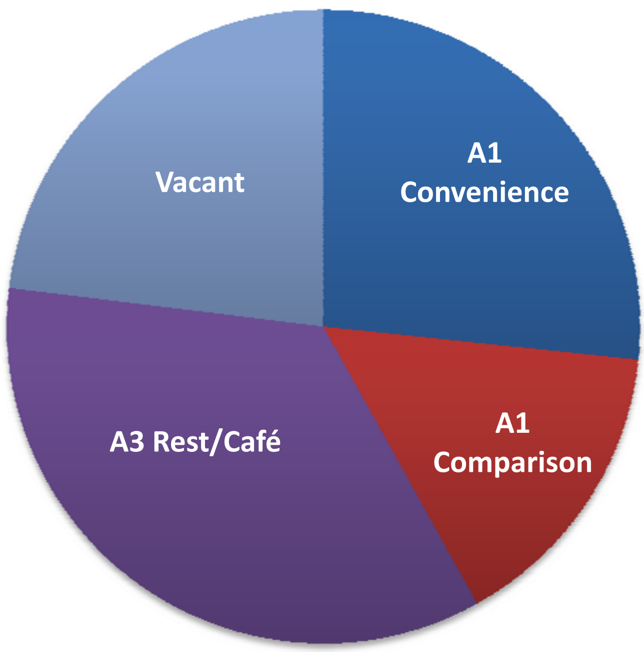
Total retail floor space in Fernhead Road is broken down in Table 2. It has 1,245 sqm of retail floor space, which is below the average of 3,188 sqm for the 39 Local Centres in Westminster. Fernhead Road has a high proportion of A1 convenience floor space (more than a quarter of the total) and A3 restaurant/café floor space (more than a third). Vacant floor space also accounts for a significant proportion of the total, although in only two units totalling just over 200 square metres. A1 comparison floor space makes a smaller contribution to the overall total in the centre, while there are no A4 or A5 uses. Overall, it has a lower than average proportion of A1 convenience floor space (27% compared with the Local Centre average of 41%).

Fernhead Road is a small Local Centre with a limited selection of local services and food shops. There are no banks, building societies or A2 uses. It does not provide the same range and selection found in larger Local Centres or District Centres.

Table 2: Total Retail Floor space 2013

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2013)
A1 Convenience	332	26.67%	14.9%
A1 Comparison	190	15.26%	35.2%
A2	0	0.00%	11.2%
A3 Rest/Café/TA	436	35.02%	17.4%
A4 Pub/Bar	0	0.00%	5.1%
Sui Generis	0	0.00%	3.9%
Vacant	287	23.05%	8.6%
Health	0	0.00%	2.0%
Hotels	0	0.00%	0.5%
Art	0	0.00%	1.3%
Leisure	0	0.00%	0.1%
Total	**1,245**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



Source: City of Westminster GIS System and site survey December 2013

2.4 Proportion of Vacant Street Level Property

The unit vacancy rate in Fernhead Road is higher than the average rate for Local Centres in Westminster (8%), as shown in Table. Vacancies have remained constant since 2002. As Fernhead Road is a small Local Centre with few units, the proportion of vacancies should be noted with some caution.

Table 3: Level of Vacant Street Level Property 2013

% Vacant Units				% Local Centre Average
1997	2002	2007	2013	2013
0.0% (0 units)	18.2% (2 units)	18.2% (2 units)	18.2% (2 units)	8% (1 unit)

Source: City of Westminster GIS System and site survey December 2013

3. Accessibility

3.1 Pedestrian Flows (footfall)

The centre was found to be reasonably quiet in terms of pedestrian vibrancy when the Health Check Survey was carried out on a cold, overcast weekday afternoon in February 2014.

3.2 Accessibility on foot and by public transport

Fernhead Road is located approximately 10 minutes' walk from Queen's Park, which serves as both a London Overground station and London Underground station (Bakerloo line). To the south of the centre, Harrow Road (A404) serves as the main vehicular route through the north west of the borough, while several bus routes run along the nearby Shirland Road and Harrow Road and around Queen's Park station.

4. Environmental Quality

4.1 State of the Centre's Attractions and Environmental Quality / Attractions

The attitudinal assessment of the attractions and amenity of the centre is summarised in Tables 4 and 5 below. Fernhead Road's overall score for attractions is 11.5%, a decline since the previous survey. This is significantly lower than the Local Centre average of 31%, and ranks the centre =36th out of the 39 Local Centres in the City. It is only rated as average in three categories (the prominence of independent shops, availability of food shopping and the number of restaurants); the remaining categories are all rated as poor, reflecting the size of the centre and variety of uses within it.

4.2 Daytime Amenity

Fernhead Road is a relatively unattractive Local Centre with a day time amenity rating of 43.5%. This compares with an average for all Local Centres of 68%, placing Fernhead Road 36th out of the 39 Local Centres in the City. The centre is rated as good regarding the presence of rough sleepers, but poor in terms of refuse bags on the street, special features, identifying features and promotion/street events. For all the remaining categories, Fernhead Road is rated as average.

Table 4: Attractions within the Local Centre 2013

ATTRACTIONS	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Retail Provision									
Prominence of multiple retailers			x			x			x
Prominence of independent shops		x			x			x	
Availability of food shopping		x			x			x	
Prominence of specialist shops			x		x				x
Quality of market (frequency, variety etc.)	-	-	-	-	-	-	-	-	-
Quality of retail environment		x			x				
Art/Culture									
Quality of restaurants (availability, number etc.)		x			x			x	
Quality of pubs/clubs/bars			x			x			x
Range of cultural/community events (theatre, concerts)			x			x			x
Availability of sports and leisure facilities			x			x			x
Service Provision									
Local services (information, library etc.)			x			x			x
Employment/office space			x			x			x
Bank/building society provision			x			x			x
Total	4/26			5/26			3/26		
Percentage	15.38%			19.23%			11.54%		

Source: City of Westminster site survey December 2013

Table 5: Day Time Amenity within the Local Centre 2013

AMENITY – DAYTIME	1997			2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Overall environment of public areas in the centre												
General Cleanliness in Shopping Hours:												
Presence of litter		N/A			x			x			x	
Presence of refuse bags on the street		N/A				x			x			x
Evidence of street fouling		N/A			x			x			x	
Presence of glass/glasses/other debris incl. food and food containers/w rapping		N/A			x			x			x	
Condition		N/A			x			x			x	
Quality of buildings		N/A			x			x			x	
Special features (pedestrianisation, street furniture, etc.)		N/A				x		x				x
Impact of vacant sites		N/A		x			x				x	
Security												
Evidence of vandalism and graffiti (incl. on street furniture)		N/A			x			x			x	
Security during shopping hours (availability, access, security etc.)		N/A			x			x			x	
Ease of passage for pedestrians (incl. presence of obstacles e.g. illegally parked vehicles)		N/A				x		x			x	
Evidence of drunkenness, anti-social behaviour, row diness		N/A			x			x			x	
Presence of rough sleepers		N/A		x			x			x		
Presence of beggars		N/A		x				x			x	
Presence of street drinkers		N/A		x			x				x	
Evidence of touting (e.g. mini cabs, rickshaw s, prostitution, drug dealing etc.)		N/A		x			x				x	
Presence of illegal street traders e.g. counterfeit goods, hot dogs, peanuts etc.		N/A		x				x			x	
Effectiveness of any deterrent measures (CCTV, police patrols, door security etc.)		N/A			x			x			x	
Quality of street lighting		N/A			x			x			x	
Safety perception in shopping hours		N/A			x			x			x	
Identity of town centre												
Features w hich identify the centre (e.g. flagship stores, buildings etc.)		N/A				x			X			x
Promotion/Street events		N/A				x			X			x
'Feel good' factor of tow n centre		N/A			x				X		x	
Total				24/46			23/46			20/46		
Percentage		N/A		52.2%			50.0%			43.5%		

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2013

Figure 4: Deviation of centre from the mean for Local Centres 2013

Fernhead Road is a small local centre with a lower than average amount of retail floor space when compared with the overall average for the 39 local centres. The centre has around a third of the retail floorspace compared to the local centre average which is primarily from comparison floorspace. The attractiveness and amenity ratings are also at the bottom of the local centre table rankings.

5.2 Strengths, Weaknesses, Opportunities and Threats

SWOT analysis

6. Future capacity

6.1 Potential Capacity for Growth

Between 2007 and 2013, there were no permitted planning applications in the Local Centre involving A-class uses. Additional capacity could be accommodated in the vacant retail units.

7. Health of the Centre

Table 6: Summary of Health Check Assessment 2013

Subject	Subject Matter	Data	Number	Sq M
RETAILING	**Floor space**	**Total Floor space**		**1,245**
		Total Convenience (A1)		**332**
		Total Comparison (A1)		**190**
		Total Service (A2)		**0**
		Total A3		**436**
		Total A4		**0**
		Total A5		**0**
		Total Sui Generis		**0**
		Total Vacant		**287**
	Retail Offer	**Total Number of Shop Units**	**11**	
		Total Number of A1 Units	**5**	
		a) Convenience shops	**3**	
		b) Department/principal stores	**0**	
		c) Prestige international shops	**0**	
		d) National comparison retailers	**0**	
		e) Specialist Independent shops	**1**	
		f) Independent shops	**1**	
		Total Comparison Multiples	**2**	
		Total Number of A2 Units	**0**	
		Total Number of A3 Units	**4**	
		Total Number of A4 Units	**0**	
		Total Number of A5 Units	**0**	
		Total Number of Sui Generis	**0**	
		Total Number of Vacant	**2**	
	Market	**Days of operation**	**0**	
		Number of stalls	**0**	
	Proposals	**Changes of use A1 to A2**	**0**	
		Changes of use A1 to A3	**0**	
		Changes of use A1 to A4	**0**	
		Changes of use A1 to A5	**0**	
ARTS/CULTURE		**(cinemas, galleries, theatres etc.)**	**0**	
HEALTH USES		**(clinics, surgeries etc.)**	**0**	
HOTELS			**0**	

In terms of its vitality, viability and general economic health, Fernhead Road is considered to be ‘in decline’, the same as when the centre was last surveyed in 2007.

Appendices

Appendix 1: Views of Local Centre

Appendix 2: Land Use Table (Westminster land use survey 2013)

Appendix 3: Land Use Map (GOAD 2012 retail data and Westminster land use survey 2013)

Appendix 4: Planning permissions Map (Westminster land use survey 2013)

Appendix 5: Location map of all local centres

Appendix 6: Glossary of Terms

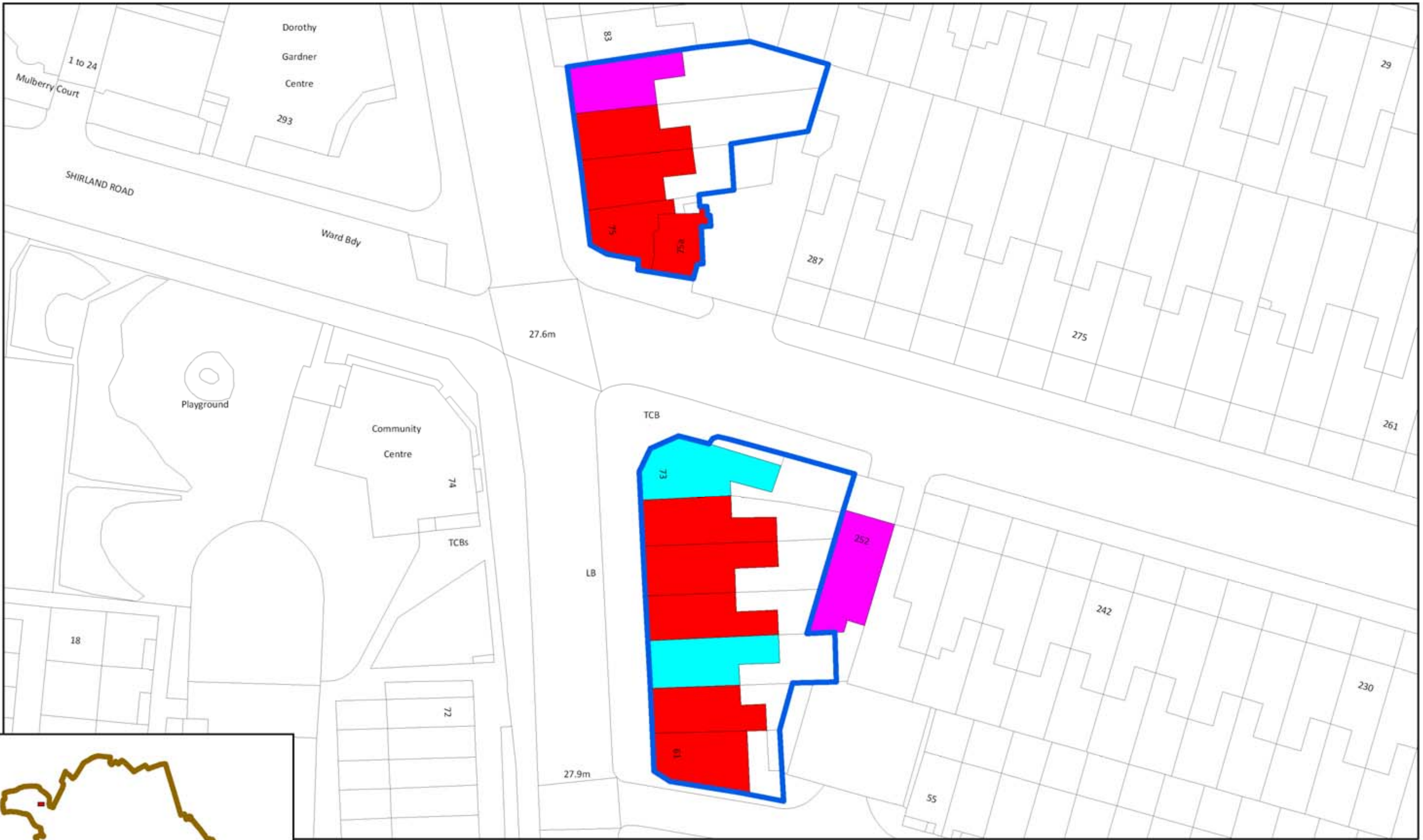
Views of Fernhead Road local centre

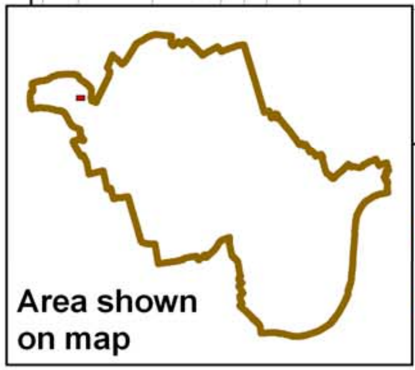
The corner convenience store at the north end of Fernhead Road.

The fairly attractive streetscape at the southern end of the Local Centre, with mature trees and a well maintained pavement.

The pavement in the north section of the Local Centre.

					A1	A1	A1	A3	B1	Vacant	2007 Use
ADDRESS	**FASCIA**	**DESCRIPTION**	**USE**	**SQM**	**Conv.**	**Spec.**	**Ind**	**Res/Caf**			
61 FERNHEAD ROAD	MORE MUNCHIES	CAFÉ	A3 Rest/Café	104				1			A1 Conv
63 FERNHEAD ROAD	MOUNS	HAIRDRESSER	A1 Ind	87			1				A1 Ind
65 FERNHEAD ROAD	THE CEDAR	RESTAURANT	A3 Rest/Café	128				1			A3 Rest/Café
67 FERNHEAD ROAD	JLS BUSINESS SOLUTIONS	OFFICE	B1	104					1		Vacant
69 FERNHEAD ROAD	RV NEWS	NEWSAGENT	A1 Conv	128	1						A1 Conv
71 FERNHEAD ROAD		VACANT	Vacant	116						1	Vacant
73 FERNHEAD ROAD	THE BREEZE CAFÉ	CAFÉ	A3 Rest/Café	151				1			A3 Rest/Café
75 FERNHEAD ROAD	THE BREEZE CAFÉ	CAFÉ	A3 Rest/Café	53				1			A3 Rest/Café
75 AFERNHEAD ROAD	AL SULTAN	GROCERIES	A1 Conv	48	1						A1 Conv
77 FERNHEAD ROAD	FERNHEAD FURNITURE	SECOND HAND FURNITURE	A1 Spec	103		1					A1 Spec
79 FERNHEAD ROAD	MARKSTORE LIQUORMART	OFF LICENCE	A1 Conv	156	1						A1 Conv
81FERNHEAD ROAD		VACANT	Vacant	171						1	B1



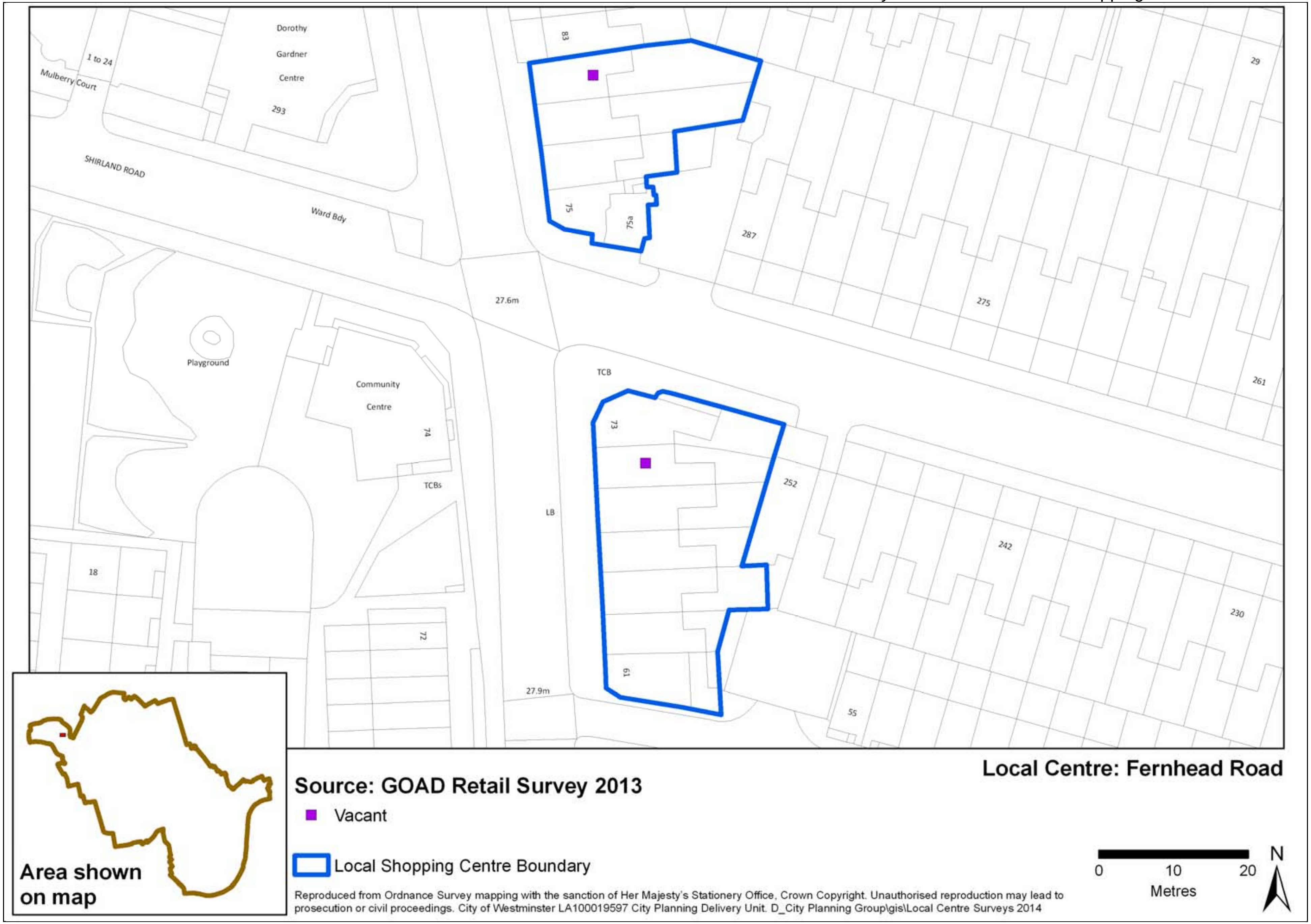


Source: GOAD Retail Survey 2013

Local Centre: Fernhead Road

Local Shopping Centre Boundary
A1: Retail
A3: Restaurant/Café
B1: Office

0 10 20
Metres
N



Local Centre: Fernhead Road

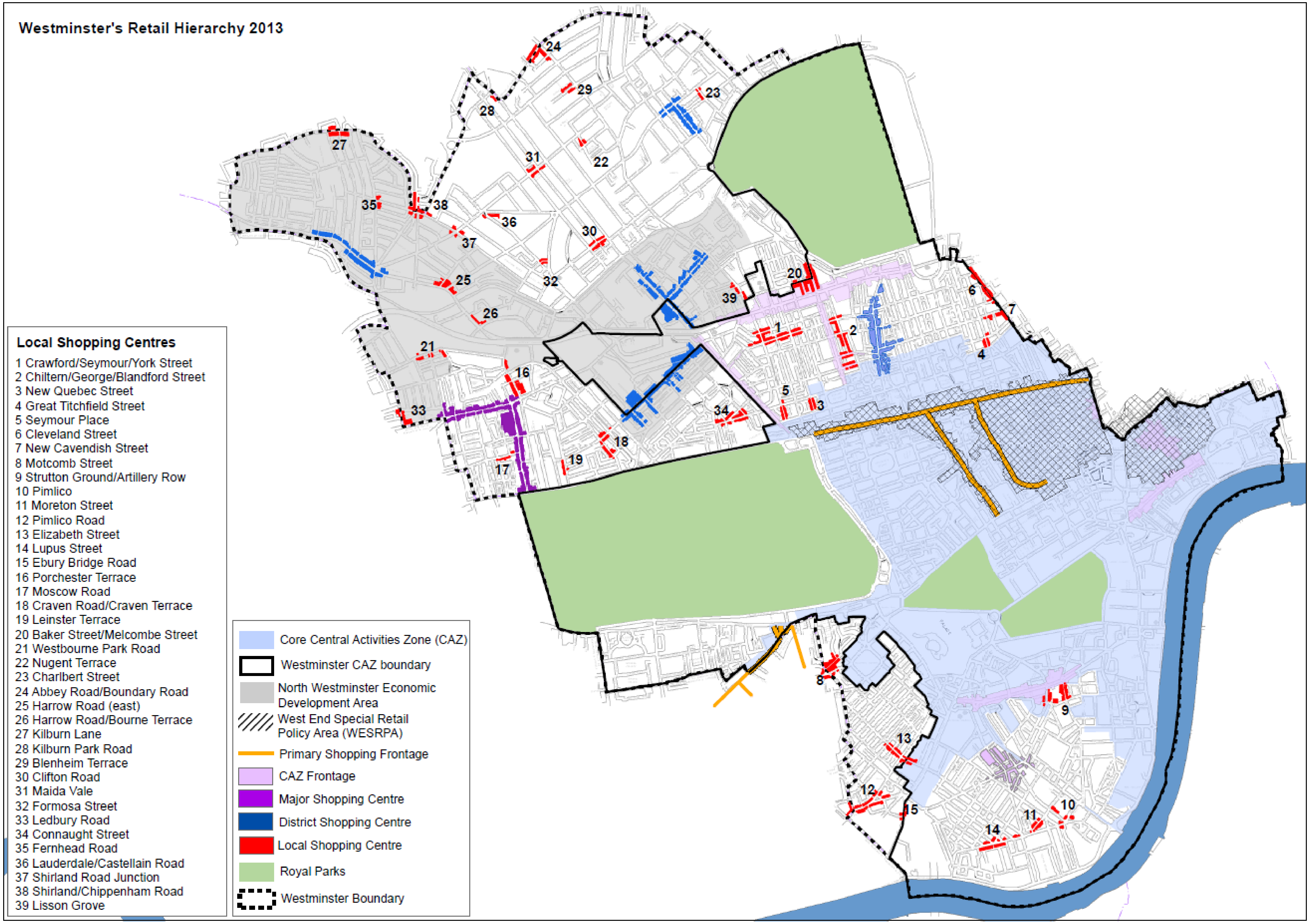
Source: GOAD Retail Survey 2013

Vacant

Local Shopping Centre Boundary

0 10 20
Metres
N

Figure 7 Westminster wide shopping centre boundaries plan



Health Checks - Glossary of terms

A1	**Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, dry cleaners, pet shops, sandwich bars, retail showrooms, and domestic hire shops.**
A1 café type uses	**Shops such as sandwich bars or coffee shops selling food and drinks to be consumed mainly off the premises, but not hot food takeaways. Examples include certain Pret a Manger shops, Costa Coffee and the Seattle Coffee Co. shops.**
A2	**Banks, building societies, bureau de change, estate and employment agencies, professional and financial services, telephone bureaux, betting offices and beauty salons (excluding hair).**
A3	**Food and drink uses such as restaurants, pubs, snack bars, cafés, wine bars and shops for the sale of hot food (hot food take-aways).**
A4	**Drinking Establishments: Premises where the primary purpose is the sale and consumption of alcoholic drinks on the premises.**
A5	**Hot Food Take-away: Premises where the primary purpose is the sale of hot food to take away.**
B1	**Business uses such as offices, research and development and industrial uses.**
CAZ	**Central Activities Zone (CAZ). The CAZ is an area of mixed uses, many of which contribute directly to the national, regional and local economy. It is this mix of activities and their supporting resources which underpins the success of London's economy.**
CAZ Frontages	**Mixed use areas usually with a predominant retail function. Appropriate areas for retail growth.**
Comparison	**A1 floor space selling predominantly durable items and not in convenience use.**
Convenience	**This is based on the classification provided by the unit for Retail Planning Information (URPI) set out in URPI brief 99/2. The classifications are: food, alcoholic drink, tobacco and other goods (newspapers and magazines, cleaning materials and matches). For the purposes of this assessment, convenience includes shops selling food or drink (excluding A1 café-type uses), newsagents, (including specialist tobacco stores), chemists (including Boots the Chemist stores) and post offices.**
Department/ principle store	**This includes the main department stores such as John Lewis, Liberty, and Selfridges, as well as variety stores such as Marks & Spencer and Virgin Mega-stores.**
District Centre	**Distributed more widely than Metropolitan and Major centres, they provide convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000-50,000 sqm of retail floor space. Some district centres have developed specialist shopping functions.**
Experian GOAD	**An independent retail data consultancy who provide maps of ground floor uses in shopping centres.**
F&B	**Food and beverage offer, covered by parts A3 (cafe's/restaurants), A4 (drinking establishments) and A5 (take aways) of the use classes order.**
Gross Floorspace	**Floorspace of buildings on all floors including external walls, half the thickness of parting walls and circulation areas.**
Independent store	**This includes non-convenience stores (see definition above) irrespective of size, that are not considered to be specialist retailers (see definition overleaf), that are operated by retailers that are not included within national retail chains or groups.**
Major Centre	**Typically found in inner and some parts of outer London with a borough-wide catchment. They generally contain over 50,000sqm of retail floor space and a relatively high proportion of comparison goods relative to convenience goods. They may also have significant employment, leisure, service and civic functions.**
NPPF	**National Planning Policy Framework. Central Government's key, revised guidance document driving planning policy in England, which compressed the**

	previous PPS documents and other guidance into a single document. It includes key guidance on town centres and health checks.
National retailers	This includes all retailers (Class A1 only) that operate within the context of a national retail chain or group, such as Next. A schedule of all national retail multiples can be found in Retail Directory of the UK 2002 (Hemming Information). Specialist shops that are part of a retail chain or group, such as Whittards and Thorntons, are classified as national retailers. Although there are national chains of food and drink uses and betting shops, such as Ladbrokes, these are classified based on the use class (e.g. betting shops as A2 uses) and not as national retailers.
Prestige international retailers	This includes prestigious retailers that operate in more than one country, such as Gucci, Gianni Versace, and Giorgio Armani. It also includes flagship stores that are only found in select town centres in Britain. National airline shops, such as British Airways, have also been classified as international retailers.
Primary Frontages	Internationally recognised shopping destinations. The Primary Frontages defined in Westminster's City Plan - Strategic Policies document are Oxford Street, Regent Street, Bond Street and Knightsbridge/Brompton Road.
Retail floorspace	This is all A1, A2, A3, A4, A5 and sui generis floorspace, and vacant floorspace of any of the aforementioned categories.
Shisha	Flavoured tobacco smoked through a water pipe or hookah. Smoke free legislation means that it cannot be smoked indoors in public places, and is often smoked at tables and chairs on the footway and in garden areas. There has been a rapid rise in shisha uses over the past five years, and there is concern over issues of health, residential amenity and other issues.
Specialist independent	Similar to an independent store, but this category reflects the quality and specialisation of the retailer so that a shopper may make a specific shopping trip to that shop. For example, The Pen Shop on Regent Street or antique shops.
Sui generis	Sui Generis is a term that refers to a use on its own. Any planning use not falling within a specific class within the Use Class Order falls within this category. Examples of sui generis uses in shopping centres are launderettes, mini cab offices, amusement centres and car showrooms.
UDP	Unitary Development Plan produced by Westminster City Council, with saved policies forming part of the statutory development plan for Westminster.
Vacancy	This category includes vacant street level units, as well as units that are under alteration. However, if at any time the survey was completed it was evident who the unit would be occupied by, the unit was treated as being occupied.
Zone A Rent	The rental level per square metre achieved on the first six metres of a shop unit.

Information Sources

Westminster's City Plan - Strategic Policies (adopted November 2013)
https://www.westminster.gov.uk/westminsters-city-plan-strategic-policies

Westminster's Unitary Development Plan (UDP, adopted January 2007)
https://www.westminster.gov.uk/unitary-development-plan-udp

The Mayor's London Plan (GLA, July 2011 as amended)
http://www.london.gov.uk/priorities/planning/london-plan

The National Planning Policy Framework (NPPF, DCLG 2012)
https://www.gov.uk/government/publications/national-planning-policy-framework--2

National Planning Practice Guidance (NPPG, March 2014)
http://planningguidance.planningportal.gov.uk/

Westminster High Street Health Checks 2013
https://www.westminster.gov.uk/high-street-health-checks

Westminster Health Check Archive
https://www.westminster.gov.uk/shopping-centre-health-checks

City of Westminster

If you would like to obtain further copies of this Health Check report, please:

Email: ldf@westminster.gov.uk
Or Telephone: 0207 641 2447

City of Westminster

Shopping Centre Health Check Survey 2014

Local Centre 31: Formosa Street

Contents

(i) Purpose of the Study

Former government guidance on Town Centres advised that 'health checks' be undertaken every five years to allow accurate and reasonable temporal analysis of the performance of town centres. This requirement has been superseded by more recent national and regional policy frameworks and guidance.

The National Planning Policy Framework (NPPF) (DCLG, 2012), states that when setting out requirements for Plan Making and using a proportionate evidence base, '*Local Planning Authorities should have a clear understanding of business needs within the economic markets operating in and across their area. To achieve this they should... assess... the role and function of town centres and the relationship between them, including any trends in the performance of centres, and the capacity of existing centres to accommodate new town centre development* (paragraphs 160, 161).'

The London Plan (2011) sets out strategic retail policy for Town Centres in London, as set out in more detail below. Paragraph 2.74 of the London Plan (July 2011) states that "*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 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.*"

This then forms the current national and regional planning policy framework for undertaking town centre health checks. The City Council is currently follow the former guidance and updating health checks every five years, as this is deemed to be a sensible and manageable time period for monitoring the viability and vitality of centres, given the extent of Westminster's town centre network.

(ii) Westminster's Local Centres and Planning Policy

Westminster's Local Centre Health Checks were last carried out in 2007, updating 2002 and 1997 surveys, and includes detailed analysis of Westminster's 39 Local Shopping Centres.

Local Centres normally have a purely local function and most are mainly comprised of convenience goods retailers with some food and drink and local service uses, mainly providing facilities for people living or working nearby (which the City Council wishes to safeguard in accordance with national guidance). However in Westminster some are also speciality centres which attract shoppers from a wider area.

Westminster's current local plan consists of the City Plan: Strategic Polices (adopted November 2013), and saved development management policies from the Unitary Development Plan (adopted January 2007). The local plan seek to protect and enhance the designated Local Shopping Centres for the service they provide to residents, visitors and workers, and because they reduce the need to travel.

Strategic policy CS21 is the general policy for retail across Westminster, seeking to protect existing A1 uses, direct new retail floor space to designated shopping centres, and to protect non-A1 retail and town centre uses in designated shopping centres from changes to uses that do not serve visiting members of the public and that do not have active shop fronts.

Saved UDP policy SS7 (Shopping and Services policy 7) is the detailed development management policy for local shopping centres. The policy covers the protection of shops and circumstances where changes of use away from shops may be permitted, taking into consideration the viability of units and the overall balance of uses in the centre.

(iii) Westminster's Retail Hierarchy

The City of Westminster is broadly divided into two zones in terms of retail policy, the Core Central Activities Zone (CAZ) and CAZ Frontages, and areas outside of this. The Core CAZ contains the two international shopping centres in London, the West End and Knightsbridge in addition to distinctive retail areas such as Covent Garden, Soho, Mayfair and St James's, as well as numerous small parades and individual shops. Outside the Core CAZ and CAZ Frontages there is one Major Shopping Centre, 4 District Centres (where previously there had been 7, 3 have subsequently been reclassified as CAZ Frontages and 1 as a Major Centre) and the 39 Local Centres which are designated to safeguard shopping facilities for local residents, and the retail character of local shopping areas.

In 2007, the District and Local Centres health check reports were all updated, as were 17 shopping areas inside the CAZ. More recently, reports for Westminster's high street shopping centres were updated in 2013.

(iv) Health Checks Methodology

As set out in the NPPF (DCLG, 2012) local planning authorities should recognise town centres as the heart of their communities and pursue policies to support their viability and vitality. Planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive.

Accessibility by public transport is considered to be excellent for all Westminster's larger shopping areas, and its Local Centres are accessible for people to walk to. The City Council wants to retain shops in Local Centres, in order to maintain a range of local convenience shops and protect the character and function of the centres. Local shops and services limit car trips, encourage walking, and make city life more practical and attractive.

The **National Planning Practice Guidance** was published in March 2014 by DCLG, several months after the field work for this project had commenced. It states that existing centres should be audited to assess their role, vitality, viability and their potential to accommodate new development and different types of development. It also sets out a series of indicators to determine the health of town centres, including:

- Diversity of use
- Vacant property
- Commercial yields on non-domestic property
- Customer views and behaviour
- Retailer representations
- Commercial rents
- Pedestrian flows and accessibility
- Perception of safety and crime
- State of environmental quality

Most of the above indicators will be assessed as part of this study, where data collection is available and reasonable. All of the above were included as part of the 2013 health checks for the larger high street type centres, where it is more appropriate to carry out consumer surveys, and where commercial data is more readily available. Given the size of this project, the indicators below are considered to be appropriate and comprehensive.

Land Use

(1) Diversity of town centre uses

This section considers the range of A1 uses, and compares the current diversity of land uses to previous Local Centre Health Check Surveys dated 1997, 2002 and 2007. It also includes the

proportion of vacant street level property and the amount of space used for different functions such as shopping, leisure, cultural and entertainment activities, pubs, cafes, and restaurants.

Accessibility

(2) **Pedestrian flows (footfall):**
Visual assessments were undertaken to measure pedestrian flows which contribute towards the vitality of the Local Centres. These were conducted on comparable days of the week and compared to the average for all of the Local Centres;

(3) **Accessibility:**
The whole of Westminster has a Public Transport Accessibility Level (PTAL) score of 6, the highest level achievable. This section therefore concentrates on ease and convenience of access;

Environment

(4) **State of the town centre environmental quality assessment:**
Includes a subjective assessment of indicators such as security, air pollution, noise, clutter, litter and graffiti, as well as positive factors such as trees, landscaping and open spaces. Each centre is assessed as per the Attractions Table 4, and the Daytime Amenity Table 5 in the 2007 Health Check Survey. A comparison is made between the 1997, 2002, 2007 and 2013 surveys.

(5) **Daytime amenity:**
A qualitative assessment of the amenity within the local centre, assessing its cleanliness, security, and identity.

(6) **Relative performance of the centre:**
Measures the performance of the centre compared to the Westminster Local Centre average in terms of land use, attractiveness, and daytime amenity, with graphs comparing the performance of centres relative to one another. The centre's strengths, weaknesses, opportunities and threats are highlighted in a SWOT analysis diagram at the end of this section.

(7) **The potential capacity for growth or change of centres in the network:** opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development is considered here. Based on levels of demand, assessments are made to ascertain how much capacity each Local Centre has to accommodate retail growth, looking at retail related planning applications in and around the Local Centres. Consideration is given to whether the current Local Centre boundaries and Core and Secondary Frontage designations are still valid. Consideration is also given to ways in which the vitality and viability of the centres could be enhanced.

(8) **Summary of health check:**
This section contains a comparison of the relative performance of this centre, and summary of land use assessment as per the 2007 Health Check reports. General comments and analysis of the centre are included, along with a summary of any problems/issues. A classification as 'in decline', 'neutral', or 'healthy' is included, plus comment on whether things have improved, deteriorated, or remained the same since 2007 (see 2007 Health Checks, Tables 6 and 7). Where a Local Centre is considered to be "in decline" or "neutral", consideration is made on ways to improve the vitality and viability of the Centre.

The results of this study will be used to inform planning policy development and the inception of other relevant interventions, and will be used to assess the success of previous initiatives such as any investment in public realm.

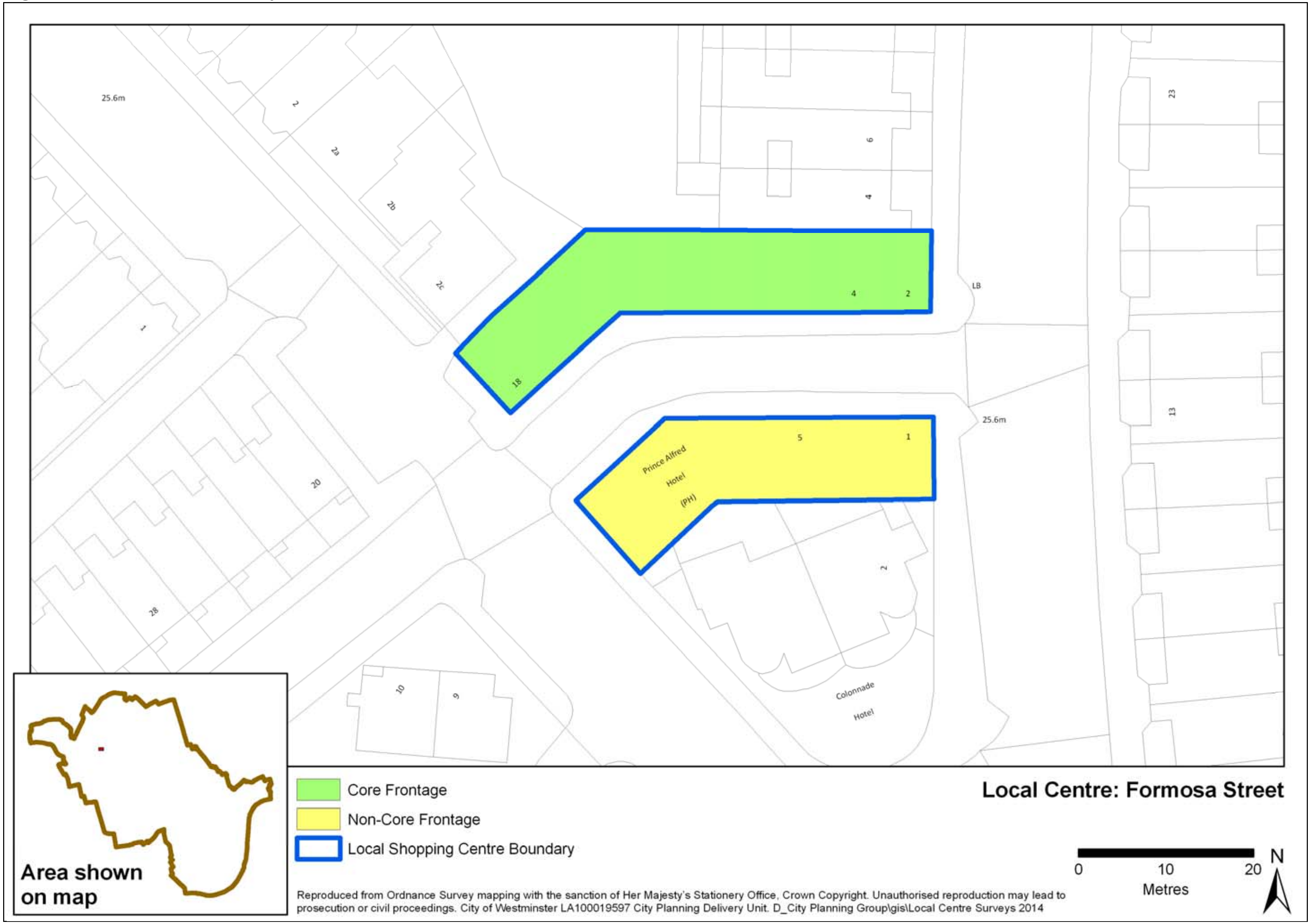
Local Centre **31: Formosa Street**

1. Introduction

1.1 Location

Formosa Street is a small, attractive Local Centre located in the north west of Westminster, serving residents in south Maida Vale, Warwick Avenue and Little Venice. The centre is close to Warwick Avenue London Underground station and the Regents Canal to the south. The catchment area is limited by Formosa Street's proximity to other Local Centres, such as Clifton Road and Lauderdale Road/Castellain Road, nearby larger district shopping centres and by physical severance by the way of the canal and the Westway (A40).

Figure 1: Local Centre Boundary 2013



2 Land Use

2.1 Range of Uses

Formosa Street comprises a range of shopping and other town centre uses. This is summarised in Table 1 below.

Table 1: Range of Town Centre Uses (1997-2013)

Use Class		No. of Units 1997	No. of Units 2002	No. of Units 2007	No. of Units 2013
Class A1 Retail		8	7	7	6
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*0*
	National retailers	*0*	*0*	*0*	*0*
	Specialist Independent	*1*	*3*	*3*	*3*
	Independent	*3*	*2*	*3*	*2*
	Convenience	*4*	*2*	*1*	*1*
Class A2	Financial & Professional	1	0	0	1
Food & Drink		0	4	4	5
Class A3	*Restaurant/Café*	*0*	*3*	*3*	*4*
Class A4	*Pubs/Bars*	*0*	*1*	*1*	*1*
Class A5	*Takeaway*	*0*	*0*	*0*	*0*
	Takeaway/Restaurant				*0*
Sui Generis		1	1	1	1
Vacant Units		1	1	1	0
Arts/Culture		0	0	0	0
Health uses		0	0	0	0
Hotels		0	0	0	0
TOTAL		**11**	**13**	**13**	**13**

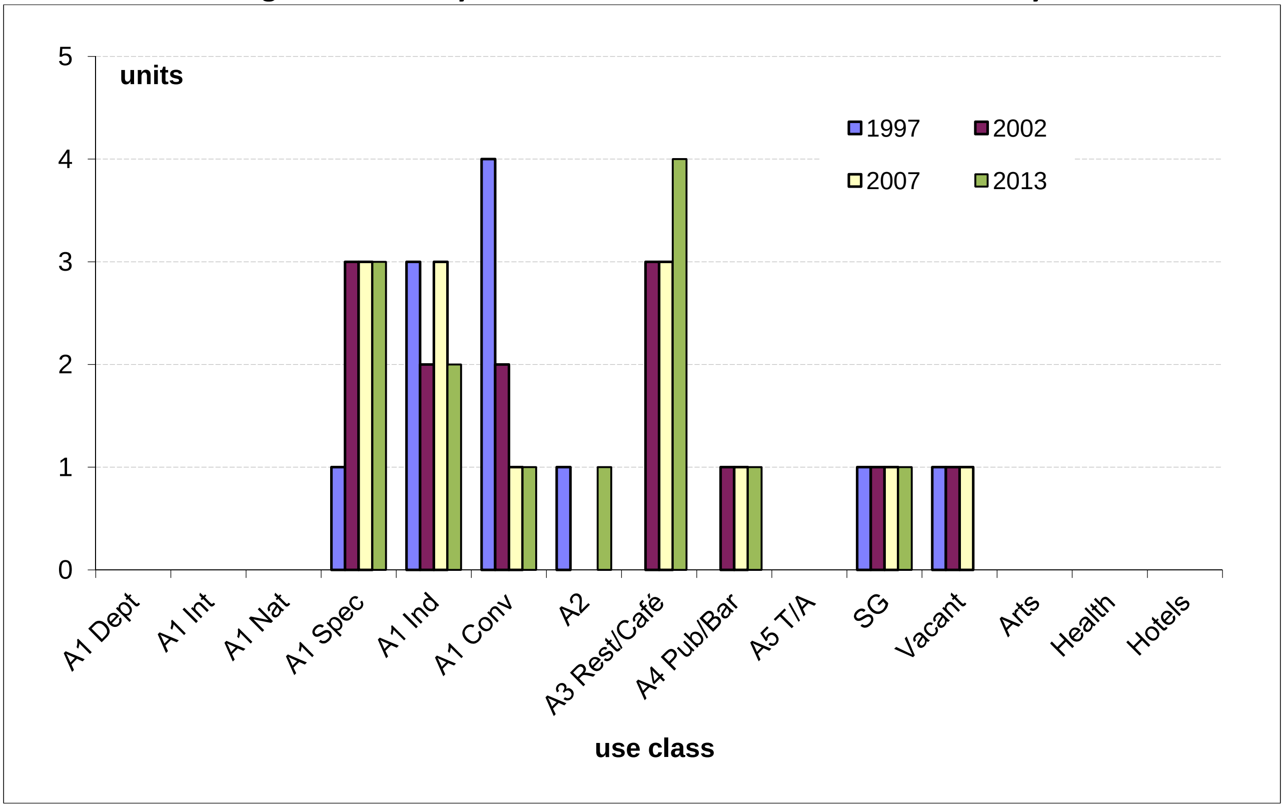
Source: WCC Site Survey December 2013

In total there are 13 units, the same number having been surveyed in 2002 and 2007, meaning this is a small local centre by average standards across Westminster. Shops and food and drink uses make up the vast majority of units in the centre.

The number of A1 retail uses in Formosa Street has declined by one since 2007 but there have been several internal shifts of use. An electrical shop and two furnishings outlets have disappeared, while a new furnishings shop (in premises that were previously vacant) and a women's/children's clothes shop have been established. There is one new A2 use in the centre (a beautician) and the number of Restaurant/Café uses has increased by one. There is still one A4 use (a public house) but there are no takeaways.

Outside of A-class uses there is one sui generis use in the centre (a laundrette), but Formosa Street does not contain any hotels, arts/culture or health uses. There are no longer any vacant units.

Figure 2: Units by use class within the Local Centre boundary



2.2 Range of A1 Uses

Formosa Street has six Class A1 retail units comprising one convenience store, two independent retailers and three specialist retailers. The specialist retailers include a clothes shop, a furnishings shop and a tailor. The independent stores include a hairdresser and a furniture repair shop. The high proportion of comparison shops and no multiple retailers suggests that Formosa Street serves local residents with a mix of convenience and comparison shopping facilities.

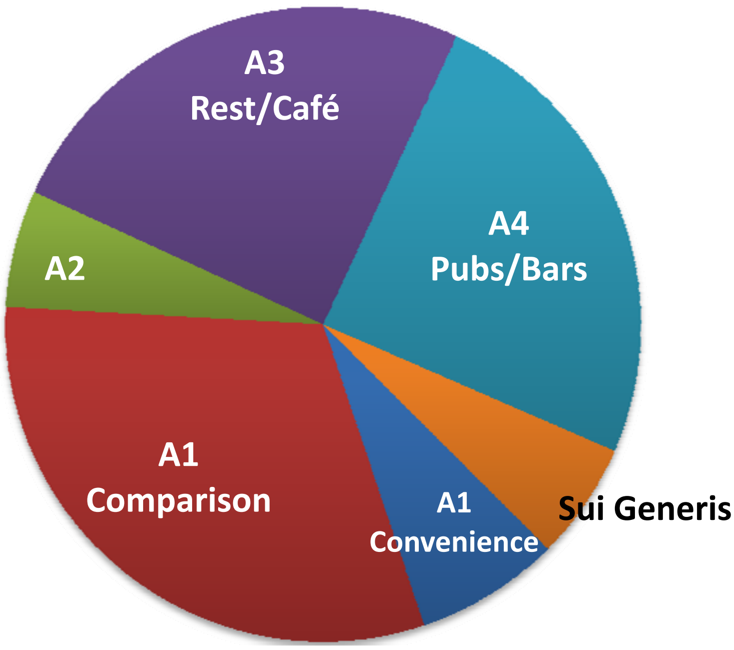
2.3 Total Retail Floor Space

Total retail floor space in Formosa Street is broken down in Table 2. It has 938 sqm of retail floor space, which is well below the average of 3,188 sqm for the 39 Local Centres in Westminster, but does not contain any vacant floor space. Formosa Street has comparable proportions of A1 independent, A1 specialist, A3 and A4 floor space, which together account for more than 80% of the total floor space in the centre, with comparison retail being the single most significant use type in terms of floor space. The centre also has one A4 public house, no A5 takeaways and a slightly lower than average proportion of A1 comparison floor space. Formosa Street is small and does not provide the same range and selection found in large Local Centres or District Centres.

Table 2: Total Retail Floor space 2013

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2013)
A1 Convenience	69	7.36%	14.9%
A1 Comparison	291	31.02%	35.2%
A2	56	5.97%	11.2%
A3 Rest/Café/TA	235	25.05%	17.4%
A4 Pub/Bar	231	24.63%	5.1%
Sui Generis	56	5.97%	3.9%
Vacant	0	0.00%	8.6%
Health	0	0.00%	2.0%
Hotels	0	0.00%	0.5%
Art	0	0.00%	1.3%
Leisure	0	0.00%	0.1%
Total	**938**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



Source: City of Westminster GIS System and site survey December 2013

2.4 Proportion of Vacant Street Level Property

The unit vacancy rate in Formosa Street is nil and is therefore lower than the average rate for Local Centres in Westminster, as shown in Table 3. The national average vacancy rate for shopping centres is more than 14.1%.

Table 3: Level of Vacant Street Level Property 2013

% Vacant Units				% Local Centre Average
1997	2002	2007	2013	2013
0.0% (0 units)	0.0% (0 unit)	5.3% (1 unit)	0.0% (0 units)	8% (1 units)

Source: City of Westminster GIS System and site survey December 2013

3. Accessibility

3.1 Pedestrian Flows (footfall)

The centre was found to be reasonably quiet in terms of pedestrian vibrancy when the Health Check Survey was carried out on a cold, rainy weekday afternoon in January 2014.

3.2 Accessibility on foot and by public transport

Formosa Street is a very accessible local centre, being located very close to Warwick Avenue London Underground station (Bakerloo line), only a few minutes' walk to the south of the centre. It is also served by several bus routes along Clifton Gardens to the south of the centre, including routes 6, 46, 187, 414, and many others which serve Maida Vale/Edgware Road (A5) – a 5-10 minute walk east of the centre.

4. Environmental Quality

4.1 State of the Centre's Attractions and Environmental Quality / Attractions

The attitudinal assessment of the attractions and amenity of the centre is summarised in Tables 4 and 5 below. The centre's overall score for attractions is 42.3%, higher than the Local Centre average of 31%, and ranks the centre =11th out of the 39 Local Centres in the City. Formosa Street is rated as good in terms of the provision of specialist shops and for the general quality of the retail environment. The centre is rated as poor for the provision of cultural/community events and sport/leisure facilities, owing to there being none, but good for the quality of its restaurants and pubs/bars.

4.2 Daytime Amenity

Formosa Street is an attractive Local Centre with a day time amenity rating of 84.8% compared with the average for all Local Centres of 68%, and is ranked =8th out of the 39 Local Centres in the City. The centre is only rated as being poor in one of the 23 categories assessed, which falls under the town centre identity category. Overall, the centre is rated favourably, with 'good' ratings in nine of the twelve security categories (the remaining three are rated as being average). All of the cleanliness categories are rated as being good, with the exception of special features (pedestrianisation, street furniture).

Table 4: Attractions within the Local Centre 2013

ATTRACTIONS	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Retail Provision									
Prominence of multiple retailers			x			x			x
Prominence of independent shops		x			x			x	
Availability of food shopping		x				x		x	
Prominence of specialist shops		x			x		x		
Quality of market (frequency, variety etc.)		-			-			-	
Quality of retail environment		x			x		x		
Art/Culture									
Quality of restaurants (availability, number etc.)		x			x		x		
Quality of pubs/clubs/bars			x			x	x		
Range of cultural/community events (theatre, concerts)			x			x			x
Availability of sports and leisure facilities			x			x			x
Service Provision									
Local services (information, library etc.)			x			x			x
Employment/office space			x		x			x	
Bank/building society provision			x			x			x
Total	5/26			5/26			11/26		
Percentage	19.23%			19.23%			42.31%		

Source: City of Westminster site survey December 2013

Table 5: Day Time Amenity within the Local Centre 2013

AMENITY – DAYTIME	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Overall environment of public areas in the centre									
General Cleanliness in Shopping Hours:									
Presence of litter		x			x		x		
Presence of refuse bags on the street	x				x		x		
Evidence of street fouling		x			x		x		
Presence of glass/glasses/other debris incl. food and food containers/wrapping	x			x			x		
Condition		x			x		x		
Quality of buildings	x			x			x		
Special features (pedestrianisation, street furniture, etc.)			x		x			x	
Impact of vacant sites	x				x		x		
Security									
Evidence of vandalism and graffiti (incl. on street furniture)	x				x		x		
Security during shopping hours (availability, access, security etc.)		x			x			x	
Ease of passage for pedestrians (incl. presence of obstacles e.g. illegally parked vehicles)			x		x			x	
Evidence of drunkenness, anti-social behaviour, rowdiness	x			x			x		
Presence of rough sleepers	x			x			x		
Presence of beggars	x			x			x		
Presence of street drinkers	x			x			x		
Evidence of touting (e.g. mini cabs, rickshaws, prostitution, drug dealing etc.)	x			x			x		
Presence of illegal street traders e.g. counterfeit goods, hotdogs, peanuts etc.	x			x			x		
Effectiveness of any deterrent measures (CCTV, police patrols, door security etc.)		x			x			x	
Quality of street lighting	x			x			x		
Safety perception in shopping hours	x			x			x		
Identity of town centre									
Features which identify the centre (e.g. flagship stores, buildings etc.)			x			x		x	
Promotion/Street events			x			x			x
'Feel good' factor of town centre	x				x		x		
Total	33/46			31/46			39/46		
Percentage	71.7%			67.4%			84.8%		

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2013

Figure 4: Deviation of centre from the mean for Local Centres 2013

Formosa Street is one of the smallest Local Centres and has a lower than average amount of retail floor space when compared with the overall average for the 39 local centres. This is also true for A1 convenience and comparison floor space figures, and for food and drink floor space figures (A3/A4/A5). In terms of the rating of the physical environment and daytime amenity, the centre has a higher than average attractiveness rating. Although there is a limited range of attractions in Formosa Street, it remains a good physical environment.

5.2 Strengths, Weaknesses, Opportunities and Threats

SWOT analysis

6. Future capacity

6.1 Potential Capacity for Growth

Between 2007 and 2013, there was one completed permission (09/07759/FULL) at 5 Formosa Street for change of use from A1 to mixed A1/A2.

7. Health of the Centre

Table 6: Summary of Health Check Assessment 2013

Subject	Subject Matter	Data	Number	Sq M
RETAILING	Floor space	Total Floor space		938
		Total Convenience (A1)		69
		Total Comparison (A1)		291
		Total Service (A2)		56
		Total A3		235
		Total A4		231
		Total A5		0
		Total Sui Generis		56
		Total Vacant		0
	Retail Offer	Total Number of Shop Units	13	
		Total Number of A1 Units	6	
		a) Convenience shops	1	
		b) Department/principal stores	0	
		c) Prestige international shops	0	
		d) National comparison retailers	0	
		e) Specialist Independent shops	3	
		f) Independent shops	2	
		Total Comparison Multiples	5	
		Total Number of A2 Units	1	
		Total Number of A3 Units	4	
		Total Number of A4 Units	1	
		Total Number of A5 Units	0	
		Total Number of Sui Generis	1	
		Total Number of Vacant	0	
	Market	Days of operation	0	
		Number of stalls	0	
	Proposals	Changes of use A1 to A2	0	
		Changes of use A1 to A3	0	
		Changes of use A1 to A4	0	
		Changes of use A1 to A5	0	
ARTS/CULTURE		(cinemas, galleries, theatres etc.)	0	
HEALTH USES		(clinics, surgeries etc.)	0	
HOTELS			**0**	

In terms of its vitality and viability, and general economic health, this centre is considered to be 'healthy'.

Appendices

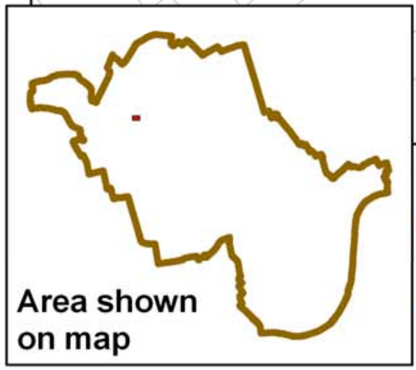
Views of Formosa Street Local Centre

The non-core frontage of Formosa Street, which is comprised of high quality buildings, includes a furniture repair shop, a furnishings shop and a café.

The core frontage of the Local Centre contains a women's/children's boutique-style clothes shop, a hairdresser, and a public house/restaurant.

The attractive exterior of the Prince Alfred public house in the core of the Local Centre.

					A1	A1	A1		A3	A4	S G	2007 Use
ADDRESS	**FASCIA**	**DESCRIPTION**	**USE**	**SQM**	**Conv.**	**Spec.**	**Ind**	**A2**	**Res/Caf**	**Pub/Bar**		
1FORMOSA STREET	PIPA	WOMEN'S/CHILDREN'S CLOTHES	A1 Spec	61		1						A1 Ind
2FORMOSA STREET	QUALITY COURTESY SERVICE	FURNITURE REPAIR	A1 Ind	56			1					A1 Ind
3FORMOSA STREET	SALI'S	HAIRDRESSER	A1 Ind	58			1					A1 Ind
4FORMOSA STREET	HANDMADE INTERIORS	FURNISHINGS	A1 Spec	59		1						Vacant
5A FORMOSA STREET	PRINCE ALFRED HOTEL & FORMOSA DINING ROOM	PUBLIC HOUSE & RESTAURANT	A4 Pub/Bar	231						1		A3 Pub/Bar
5FORMOSA STREET	TILLIE'S	BEAUTICIAN	A2	56				1				A1 Spec
6FORMOSA STREET	TOAST	CAFÉ	A3 Rest/Café	54					1			A1 Spec
8FORMOSA STREET	THE RED PEPPER	RESTAURANT	A3 Rest/Café	58					1			A3 Rest/Café
10FORMOSA STREET	THE LAUNDERETTE	LAUNDERETTE	SG	56							1	SG
12FORMOSA STREET		POST OFFICE/NEWSAGENT	A1 Conv	69	1							A1 Conv
14FORMOSA STREET	AMOUL	RESTAURANT	A3 Rest/Café	68					1			A3 Rest/Café
16FORMOSA STREET	DASINI	TAILOR	A1 Spec	57		1						A1 Spec
18FORMOSA STREET	FORMOSINA	CAFÉ/RESTAURANT	A3 Rest/Café	55					1			A3 Rest/Café



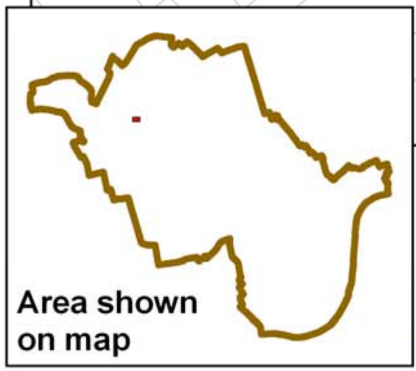
Source: GOAD Retail Survey 2013

Local Centre: Formosa Street

- Local Shopping Centre Boundary
- A3: Restaurant/Café
- ASG: Sui Generis
- A1: Retail

0 5 10
Metres

N



Source: GOAD Retail Survey 2013

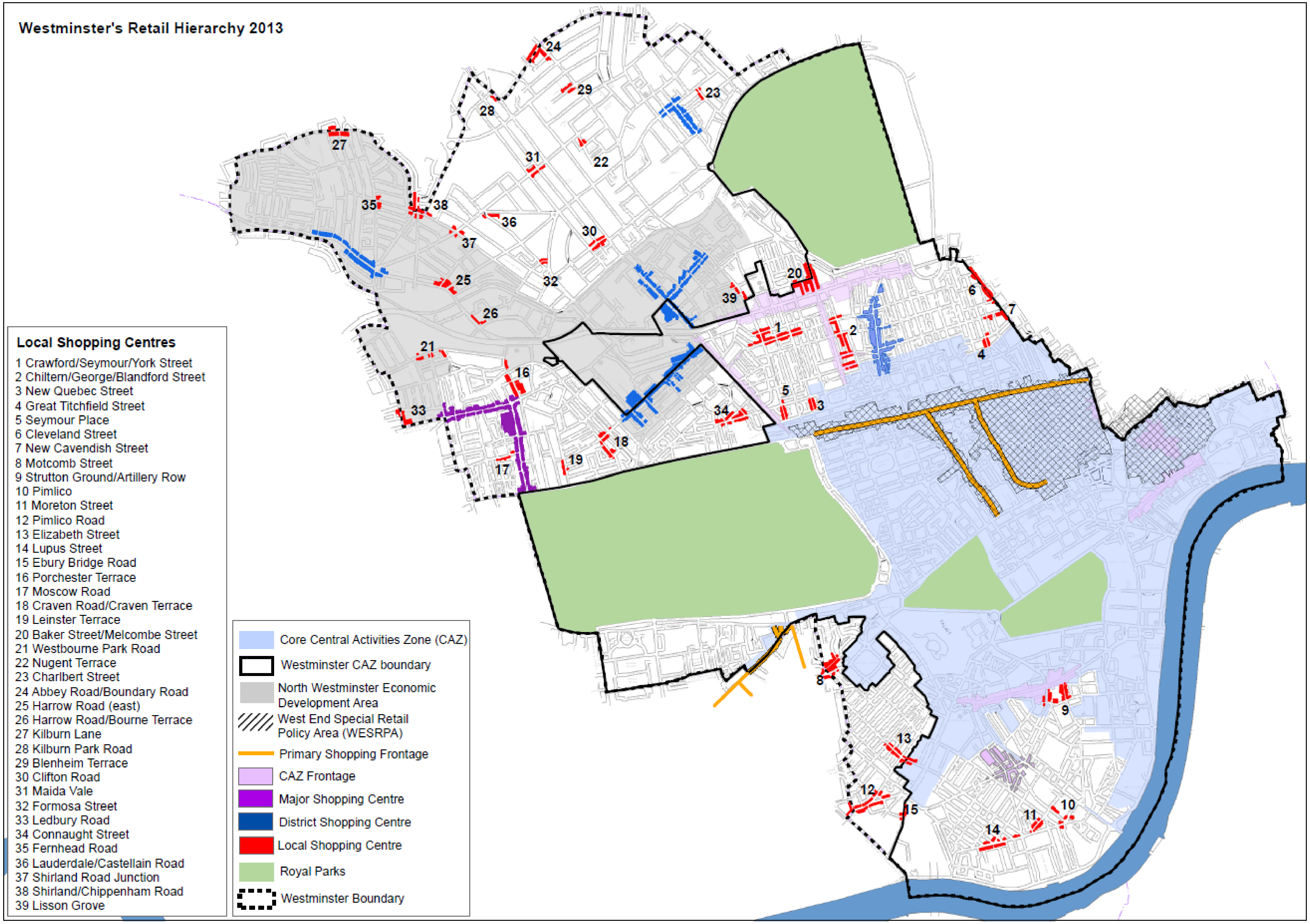
Local Centre: Formosa Street

Completed 2007-2013

Local Shopping Centre Boundary

0 10 20
Metres
N

Figure 7 Westminster wide shopping centre boundaries plan



Health Checks - Glossary of terms

A1	**Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, dry cleaners, pet shops, sandwich bars, retail showrooms, and domestic hire shops.**
A1 café type uses	**Shops such as sandwich bars or coffee shops selling food and drinks to be consumed mainly off the premises, but not hot food takeaways. Examples include certain Pret a Manger shops, Costa Coffee and the Seattle Coffee Co. shops.**
A2	**Banks, building societies, bureau de change, estate and employment agencies, professional and financial services, telephone bureaux, betting offices and beauty salons (excluding hair).**
A3	**Food and drink uses such as restaurants, pubs, snack bars, cafés, wine bars and shops for the sale of hot food (hot food take-aways).**
A4	**Drinking Establishments: Premises where the primary purpose is the sale and consumption of alcoholic drinks on the premises.**
A5	**Hot Food Take-away: Premises where the primary purpose is the sale of hot food to take away.**
B1	**Business uses such as offices, research and development and industrial uses.**
CAZ	**Central Activities Zone (CAZ). The CAZ is an area of mixed uses, many of which contribute directly to the national, regional and local economy. It is this mix of activities and their supporting resources which underpins the success of London's economy.**
CAZ Frontages	**Mixed use areas usually with a predominant retail function. Appropriate areas for retail growth.**
Comparison	**A1 floor space selling predominantly durable items and not in convenience use.**
Convenience	**This is based on the classification provided by the unit for Retail Planning Information (URPI) set out in URPI brief 99/2. The classifications are: food, alcoholic drink, tobacco and other goods (newspapers and magazines, cleaning materials and matches). For the purposes of this assessment, convenience includes shops selling food or drink (excluding A1 café-type uses), newsagents, (including specialist tobacco stores), chemists (including Boots the Chemist stores) and post offices.**
Department/ principle store	**This includes the main department stores such as John Lewis, Liberty, and Selfridges, as well as variety stores such as Marks & Spencer and Virgin Mega-stores.**
District Centre	**Distributed more widely than Metropolitan and Major centres, they provide convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000-50,000 sqm of retail floor space. Some district centres have developed specialist shopping functions.**
Experian GOAD	**An independent retail data consultancy who provide maps of ground floor uses in shopping centres.**
F&B	**Food and beverage offer, covered by parts A3 (cafe's/restaurants), A4 (drinking establishments) and A5 (take aways) of the use classes order.**
Gross Floorspace	**Floorspace of buildings on all floors including external walls, half the thickness of parting walls and circulation areas.**
Independent store	**This includes non-convenience stores (see definition above) irrespective of size, that are not considered to be specialist retailers (see definition overleaf), that are operated by retailers that are not included within national retail chains or groups.**
Major Centre	**Typically found in inner and some parts of outer London with a borough-wide catchment. They generally contain over 50,000sqm of retail floor space and a relatively high proportion of comparison goods relative to convenience goods. They may also have significant employment, leisure, service and civic functions.**
NPPF	**National Planning Policy Framework. Central Government's key, revised guidance document driving planning policy in England, which compressed the**

	previous PPS documents and other guidance into a single document. It includes key guidance on town centres and health checks.
National retailers	**This includes all retailers (Class A1 only) that operate within the context of a national retail chain or group, such as Next. A schedule of all national retail multiples can be found in Retail Directory of the UK 2002 (Hemming Information). Specialist shops that are part of a retail chain or group, such as Whittards and Thorntons, are classified as national retailers. Although there are national chains of food and drink uses and betting shops, such as Ladbrokes, these are classified based on the use class (e.g. betting shops as A2 uses) and not as national retailers.**
Prestige international retailers	**This includes prestigious retailers that operate in more than one country, such as Gucci, Gianni Versace, and Giorgio Armani. It also includes flagship stores that are only found in select town centres in Britain. National airline shops, such as British Airways, have also been classified as international retailers.**
Primary Frontages	**Internationally recognised shopping destinations. The Primary Frontages defined in Westminster's City Plan - Strategic Policies document are Oxford Street, Regent Street, Bond Street and Knightsbridge/Brompton Road.**
Retail floorspace	**This is all A1, A2, A3, A4, A5 and sui generis floorspace, and vacant floorspace of any of the aforementioned categories.**
Shisha	**Flavoured tobacco smoked through a water pipe or hookah. Smoke free legislation means that it cannot be smoked indoors in public places, and is often smoked at tables and chairs on the footway and in garden areas. There has been a rapid rise in shisha uses over the past five years, and there is concern over issues of health, residential amenity and other issues.**
Specialist independent	**Similar to an independent store, but this category reflects the quality and specialisation of the retailer so that a shopper may make a specific shopping trip to that shop. For example, The Pen Shop on Regent Street or antique shops.**
Sui generis	**Sui Generis is a term that refers to a use on its own. Any planning use not falling within a specific class within the Use Class Order falls within this category. Examples of sui generis uses in shopping centres are launderettes, mini cab offices, amusement centres and car showrooms.**
UDP	**Unitary Development Plan produced by Westminster City Council, with saved policies forming part of the statutory development plan for Westminster.**
Vacancy	**This category includes vacant street level units, as well as units that are under alteration. However, if at any time the survey was completed it was evident who the unit would be occupied by, the unit was treated as being occupied.**
Zone A Rent	**The rental level per square metre achieved on the first six metres of a shop unit.**

Information Sources

Westminster's City Plan - Strategic Policies (adopted November 2013)
https://www.westminster.gov.uk/westminsters-city-plan-strategic-policies

Westminster's Unitary Development Plan (UDP, adopted January 2007)
https://www.westminster.gov.uk/unitary-development-plan-udp

The Mayor's London Plan (GLA, July 2011 as amended)
http://www.london.gov.uk/priorities/planning/london-plan

The National Planning Policy Framework (NPPF, DCLG 2012)
https://www.gov.uk/government/publications/national-planning-policy-framework--2

National Planning Practice Guidance (NPPG, March 2014)
http://planningguidance.planningportal.gov.uk/

Westminster High Street Health Checks 2013
https://www.westminster.gov.uk/high-street-health-checks

Westminster Health Check Archive
https://www.westminster.gov.uk/shopping-centre-health-checks

City of Westminster

If you would like to obtain further copies of this Health Check report, please:

Email: ldf@westminster.gov.uk
Or Telephone: 0207 641 2447

City of Westminster

Shopping Centre Health Check Survey 2014

Local Centre 32: Harrow Road (East)

Contents

(i) Purpose of the Study

Former government guidance on Town Centres advised that 'health checks' be undertaken every five years to allow accurate and reasonable temporal analysis of the performance of town centres. This requirement has been superseded by more recent national and regional policy frameworks and guidance.

The National Planning Policy Framework (NPPF) (DCLG, 2012), states that when setting out requirements for Plan Making and using a proportionate evidence base, '*Local Planning Authorities should have a clear understanding of business needs within the economic markets operating in and across their area. To achieve this they should... assess... the role and function of town centres and the relationship between them, including any trends in the performance of centres, and the capacity of existing centres to accommodate new town centre development* (paragraphs 160, 161).'

The London Plan (2011) sets out strategic retail policy for Town Centres in London, as set out in more detail below. Paragraph 2.74 of the London Plan (July 2011) states that "*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 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.*"

This then forms the current national and regional planning policy framework for undertaking town centre health checks. The City Council is currently follow the former guidance and updating health checks every five years, as this is deemed to be a sensible and manageable time period for monitoring the viability and vitality of centres, given the extent of Westminster's town centre network.

(ii) Westminster's Local Centres and Planning Policy

Westminster's Local Centre Health Checks were last carried out in 2007, updating 2002 and 1997 surveys, and includes detailed analysis of Westminster's 39 Local Shopping Centres.

Local Centres normally have a purely local function and most are mainly comprised of convenience goods retailers with some food and drink and local service uses, mainly providing facilities for people living or working nearby (which the City Council wishes to safeguard in accordance with national guidance). However in Westminster some are also speciality centres which attract shoppers from a wider area.

Westminster's current local plan consists of the City Plan: Strategic Polices (adopted November 2013), and saved development management policies from the Unitary Development Plan (adopted January 2007). The local plan seek to protect and enhance the designated Local Shopping Centres for the service they provide to residents, visitors and workers, and because they reduce the need to travel.

Strategic policy CS21 is the general policy for retail across Westminster, seeking to protect existing A1 uses, direct new retail floor space to designated shopping centres, and to protect non-A1 retail and town centre uses in designated shopping centres from changes to uses that do not serve visiting members of the public and that do not have active shop fronts.

Saved UDP policy SS7 (Shopping and Services policy 7) is the detailed development management policy for local shopping centres. The policy covers the protection of shops and circumstances where changes of use away from shops may be permitted, taking into consideration the viability of units and the overall balance of uses in the centre.

(iii) Westminster's Retail Hierarchy

The City of Westminster is broadly divided into two zones in terms of retail policy, the Core Central Activities Zone (CAZ) and CAZ Frontages, and areas outside of this. The Core CAZ contains the two international shopping centres in London, the West End and Knightsbridge in addition to distinctive retail areas such as Covent Garden, Soho, Mayfair and St James's, as well as numerous small parades and individual shops. Outside the Core CAZ and CAZ Frontages there is one Major Shopping Centre, 4 District Centres (where previously there had been 7, 3 have subsequently been reclassified as CAZ Frontages and 1 as a Major Centre) and the 39 Local Centres which are designated to safeguard shopping facilities for local residents, and the retail character of local shopping areas.

In 2007, the District and Local Centres health check reports were all updated, as were 17 shopping areas inside the CAZ. More recently, reports for Westminster's high street shopping centres were updated in 2013.

(iv) Health Checks Methodology

As set out in the NPPF (DCLG, 2012) local planning authorities should recognise town centres as the heart of their communities and pursue policies to support their viability and vitality. Planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive.

Accessibility by public transport is considered to be excellent for all Westminster's larger shopping areas, and its Local Centres are accessible for people to walk to. The City Council wants to retain shops in Local Centres, in order to maintain a range of local convenience shops and protect the character and function of the centres. Local shops and services limit car trips, encourage walking, and make city life more practical and attractive.

The **National Planning Practice Guidance** was published in March 2014 by DCLG, several months after the field work for this project had commenced. It states that existing centres should be audited to assess their role, vitality, viability and their potential to accommodate new development and different types of development. It also sets out a series of indicators to determine the health of town centres, including:

- Diversity of use
- Vacant property
- Commercial yields on non-domestic property
- Customer views and behaviour
- Retailer representations
- Commercial rents
- Pedestrian flows and accessibility
- Perception of safety and crime
- State of environmental quality

Most of the above indicators will be assessed as part of this study, where data collection is available and reasonable. All of the above were included as part of the 2013 health checks for the larger high street type centres, where it is more appropriate to carry out consumer surveys, and where commercial data is more readily available. Given the size of this project, the indicators below are considered to be appropriate and comprehensive.

Land Use

(1) Diversity of town centre uses

This section considers the range of A1 uses, and compares the current diversity of land uses to previous Local Centre Health Check Surveys dated 1997, 2002 and 2007. It also includes the

proportion of vacant street level property and the amount of space used for different functions such as shopping, leisure, cultural and entertainment activities, pubs, cafes, and restaurants.

Accessibility

(2) **Pedestrian flows (footfall):**
Visual assessments were undertaken to measure pedestrian flows which contribute towards the vitality of the Local Centres. These were conducted on comparable days of the week and compared to the average for all of the Local Centres;

(3) **Accessibility:**
The whole of Westminster has a Public Transport Accessibility Level (PTAL) score of 6, the highest level achievable. This section therefore concentrates on ease and convenience of access;

Environment

(4) **State of the town centre environmental quality assessment:**
Includes a subjective assessment of indicators such as security, air pollution, noise, clutter, litter and graffiti, as well as positive factors such as trees, landscaping and open spaces. Each centre is assessed as per the Attractions Table 4, and the Daytime Amenity Table 5 in the 2007 Health Check Survey. A comparison is made between the 1997, 2002, 2007 and 2013 surveys.

(5) **Daytime amenity:**
A qualitative assessment of the amenity within the local centre, assessing its cleanliness, security, and identity.

(6) **Relative performance of the centre:**
Measures the performance of the centre compared to the Westminster Local Centre average in terms of land use, attractiveness, and daytime amenity, with graphs comparing the performance of centres relative to one another. The centre's strengths, weaknesses, opportunities and threats are highlighted in a SWOT analysis diagram at the end of this section.

(7) **The potential capacity for growth or change of centres in the network:** opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development is considered here. Based on levels of demand, assessments are made to ascertain how much capacity each Local Centre has to accommodate retail growth, looking at retail related planning applications in and around the Local Centres. Consideration is given to whether the current Local Centre boundaries and Core and Secondary Frontage designations are still valid. Consideration is also given to ways in which the vitality and viability of the centres could be enhanced.

(8) **Summary of health check:**
This section contains a comparison of the relative performance of this centre, and summary of land use assessment as per the 2007 Health Check reports. General comments and analysis of the centre are included, along with a summary of any problems/issues. A classification as 'in decline', 'neutral', or 'healthy' is included, plus comment on whether things have improved, deteriorated, or remained the same since 2007 (see 2007 Health Checks, Tables 6 and 7). Where a Local Centre is considered to be "in decline" or "neutral", consideration is made on ways to improve the vitality and viability of the Centre.

The results of this study will be used to inform planning policy development and the inception of other relevant interventions, and will be used to assess the success of previous initiatives such as any investment in public realm.

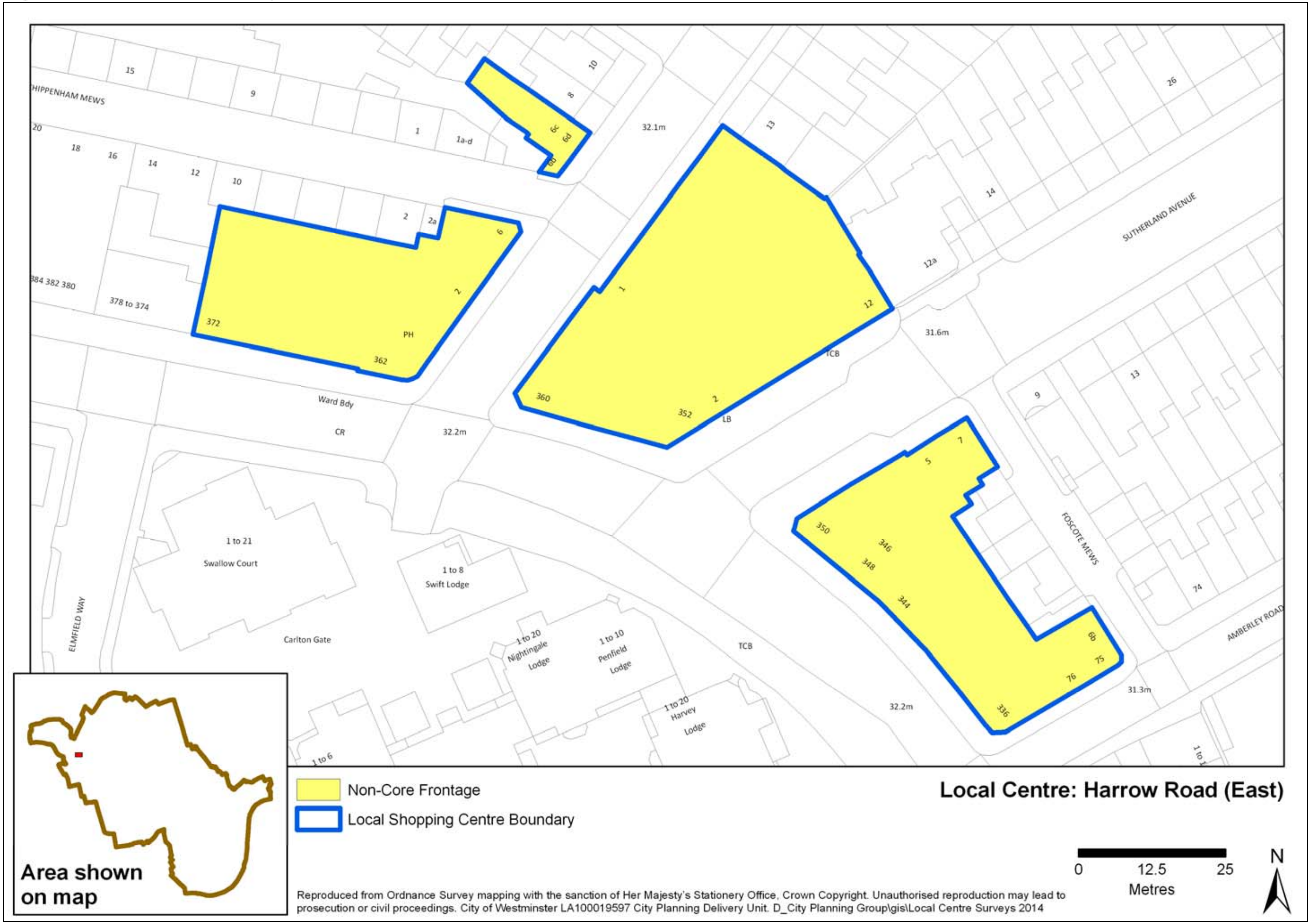
Local Centre **32: Harrow Road (East)**

1. Introduction

1.1 Location

Harrow Road (east) is a medium sized local centre serving residents in the north west area of the City. The designated shopping area covers roughly 200 meters, and is in close proximity to Paddington Community Hospital, the Westminster Academy on Harrow Road, and and the A40 (M) Westway. The catchment area of the centre is limited by the proximity of the Westway and by other centres, for example the larger Harrow Road district centre to the west, and the small Harrow Road/Bourne Terrace local centre to the east.

Figure 1: Local Centre Boundary 2013



2 Land Use

2.1 Range of Uses

This centre comprises a range of shopping and other town centre uses. The diversity of uses represented in the centre is summarised in Table 1 below.

Table 1: Range of Town Centre Uses (1997-2013)

Use Class		No. of Units 1997	No. of Units 2002	No. of Units 2007	No. of Units 2013
Class A1 Retail		24	19	22	19
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*0*
	National retailers	*0*	*0*	*0*	*0*
	Specialist Independent	*1*	*2*	*5*	*3*
	Independent	*14*	*10*	*10*	*9*
	Convenience	*9*	*7*	*7*	*7*
Class A2	Financial & Professional	6	5	5	4
Food & Drink		0	9	10	10
Class A3	*Restaurant/Café*	*0*	*3*	*4*	*4*
Class A4	*Pubs/Bars*	*0*	*1*	*1*	*1*
Class A5	*Takeaway*	*0*	*5*	*5*	*5*
	Takeaway/Restaurant				*0*
Sui Generis		3	1	1	1
Vacant Units		10	7	3	6
Arts/Culture		0	0	0	0
Health uses		0	0	0	0
Hotels		0	0	0	0
TOTAL		**43**	**41**	**41**	**40**

Source: WCC Land Use Survey December 2013

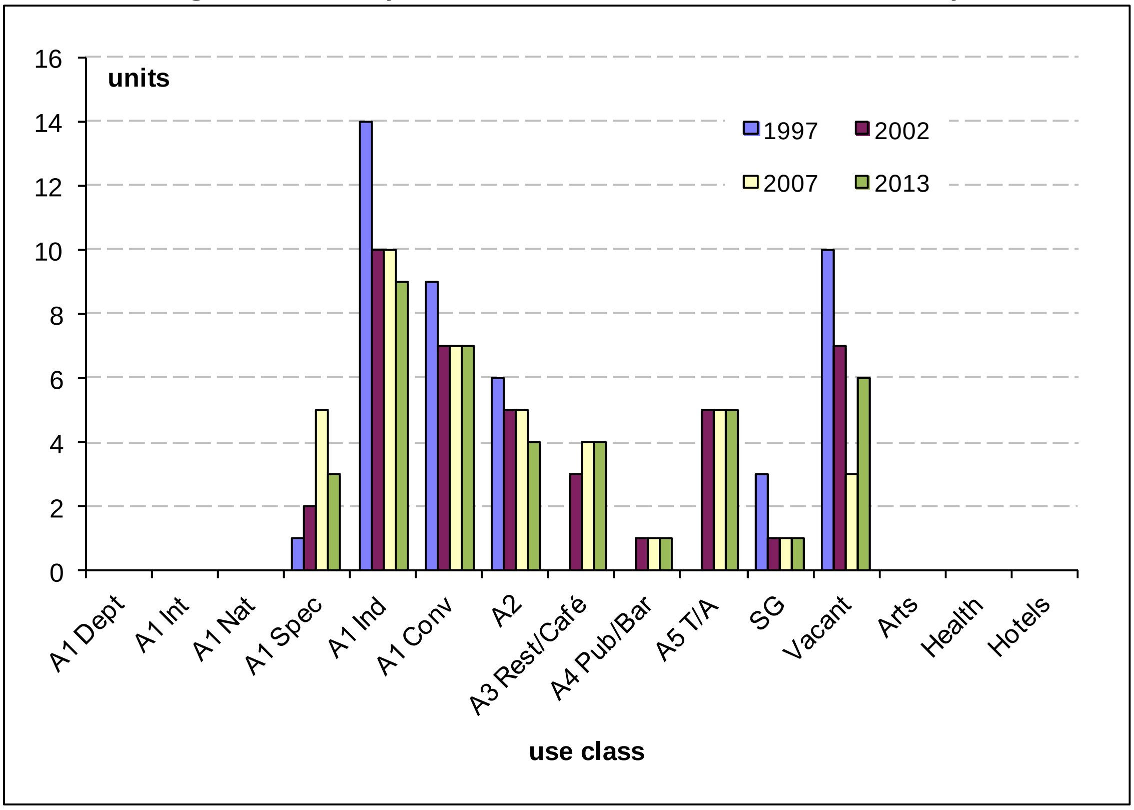
In total there are 40 units, which is a decrease of one unit from the previous survey in 2007, however this remains a sizeable local centre.

The number of A1 retail uses has decreased by three units since 2007 due to three closures, this therefore has meant the vacant units have increased by three to 6. However shops (A1) remain the dominant use class in the centre, accounting for nearly half of all occupied units. The number of Class A2 uses has decreased by one, which was replaced by a Muslim Centre (D1). The A1 uses structure has remained proportionally similar with independent and convenience shopping being the main sub uses.

There are a good number of food and drink uses in the centre, although there are a high number of takeaways present, a much higher number than found in many other shopping centres in Westminster.

In terms of non A-class uses, the centre does not contain any hotels, arts or health uses, and contains one sui generis use, a minicab office.

Figure 2: Units by use class within the local centre boundary



2.2 Range of A1 Uses

Harrow Road (east) has 19 Class A1 retail units including 7 convenience stores, 3 specialist retailers and 9 independent retailers. The specialist retailers include a curtain shop and a wine shop. The independent stores include several hairdressers and dry cleaners. The high proportion of comparison shops and no multiple retailers suggests that Harrow Road (east) serves local residents with a mix of convenience and comparison shopping facilities, and local service retailers.

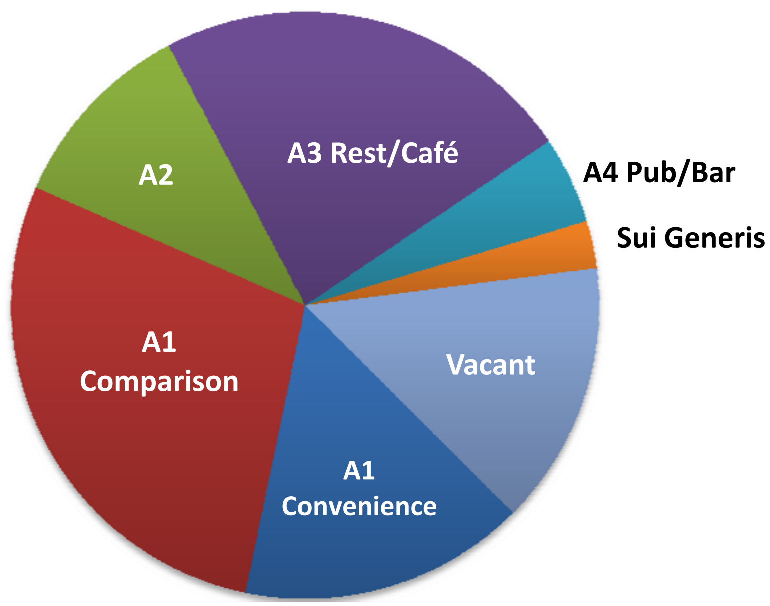
2.3 Total Retail Floor space

Total retail floor space in Harrow Road (east) is broken down in Table 2. In total, Harrow Road (east) has 4,136 sqm of retail floor space, which is above the average of 3,188 sqm for the 39 Local Centres in the City. Floor space is fairly evenly spread between the different use classes, and the centre has comparable proportions of A1 convenience, A1 independent, A1 specialist, A2 and A5 Take-Away floor space, showing that the floor space is spread between uses and not concentrated in one class. The centre has a lower than average proportion of A1 comparison floor space, 28% compared to the overall average of 35%, however this remains the largest single use in the centre, with A1 overall accounting for nearly 44% of all floor space in the centre.

Table 2: Total Retail Floor space 2013

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2013)
A1 Convenience	652	15.76%	14.9%
A1 Comparison	1171	28.31%	35.2%
A2	444	10.74%	11.2%
A3 Rest/Café/TA	961	23.24%	17.4%
A4 Pub/Bar	199	4.81%	5.1%
Sui Generis	108	2.61%	3.9%
Vacant	601	14.53%	8.6%
Health	0	0.00%	2.0%
Hotels	0	0.00%	0.5%
Art	0	0.00%	1.3%
Leisure	0	0.00%	0.1%
Total	**4,136**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



Source: City of Westminster GIS System and site survey December 2013

Harrow Road (east) is a Local Centre with a selection of local services and food shops. There are no banks or building societies, and most of the Class A2 uses are estate agents or betting shops. The Local Centre does not provide a good, balanced range of shops and services compared to other local centres.

2.4 Proportion of Vacant Street Level Property

The unit vacancy rate is higher than the average rate for Local Centres in the City, as shown in Table 3. There are currently six vacant units in Harrow Road (east) shopping area. The national average vacancy rate for shopping centres is over 14.1%.

Table 3: Level of Vacant Street Level Property 2013

% Vacant Units				% Local Centre Average
1997	2002	2007	2013	2013
0.00% (10) units	17.07% (7) units	7.32% (3) units	15.00% (6) units	8% (3 units)

Source: City of Westminster GIS System and site survey December 2013

3. Accessibility

3.1 Pedestrian Flows (footfall)

The centre was found to be high in terms of pedestrian vibrancy when the Health Check Survey was carried out on a weekday afternoon in December 2013.

3.2 Accessibility on foot and by public transport

Harrow Road (east) is not in the direct vicinity of any London Underground Stations. The closest are over ten minutes walk from the centre, Warwick Avenue, Westbourne Park and Royal Oak. However the centre is more accessible by bus, as several routes run along Harrow Road, including routes 18 and 36, and other routes that serve nearby Shirland Road to the north east of the centre. There are bus stops within the centre boundary on Harrow Road. The Harrow Road (A404) itself is also a main traffic route through the north west of London, linking up with the A40 (M) Westway.

4. Environmental Quality

4.1 State of the Centre's Attractions and Environmental Quality / Attractions

The attitudinal assessment of the attractions and amenity of the centre is summarised in Table 4 below. The centre's overall score for attractions is 31%, the same as the Local Centre average of 31%, and means the centre is ranked =19th out of the 39 Local Centres in the City. The centre's main strength is the selection of convenience and other retailing, while the weaknesses mainly concern the evening economy and other services, such as arts and culture and community services and leisure facilities.

4.2 Daytime Amenity

Harrow Road (east) is one of the most poorly rated local centres in Westminster, with a daytime amenity rating of 41.3% compared with the average for all Local Centres of 68%, and is ranked 37th out of the 39 Local Centres in the City. The main strength of the centre is around security, where all of the twelve categories are rated as being average, including evidence of drunkenness, rough sleepers, beggars, touting and illegal street trading. Conversely the centre is rated as being poor in terms of the impact of vacant buildings and the condition of the buildings. The local centre is also poor in all three of the town centre identity categories including the overall 'feel good factor' of the centre.

Table 4: Attractions within the Local Centre 2013

ATTRACTIONS	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Retail Provision									
Prominence of multiple retailers			X			X			X
Prominence of independent shops	X			X			X		
Availability of food shopping		X			X		X		
Prominence of specialist shops		X			X			X	
Quality of market (frequency, variety etc)	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Quality of retail environment			X			X		X	
Art/Culture									
Quality of restaurants (availability, number etc)			X		X			X	
Quality of pub/club/bars			X			X			X
Range of cultural/ community events (theatre, concerts)			X			X			X
Availability of sports and leisure facilities			X			X			X
Service Provision									
Local services (information, library etc)			X			X			X
Employment/ office space		X				X		X	
Bank/ building society provision			X			X			X
Total	5/26			5/26			8/26		
Percentage	19.23%			19.23%			30.77%		

Source: City of Westminster site survey December 2013

Table 5: Day Time Amenity within the Local Centre 2013

AMENITY – DAYTIME	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Overall environment of public areas in the centre									
General Cleanliness in Shopping Hours:									
Presence of litter			X		X			X	
Presence of refuse bags on the street		X				X		X	
Evidence of street fouling		X			X		X		
Presence of glass/glasses/other debris incl. Food and food containers/wrapping			X		X			X	
Condition		X			X			X	
Quality of buildings		X			X				X
Special features (pedestrianisation, Street furniture, etc)			X			X		X	
Impact of vacant sites		X				X			X
Security									
Evidence of Vandalism and Graffiti (incl. on street furniture)		X			X			X	
Security during shopping hours (availability, access, security etc)		X			X			X	
Ease of passage for pedestrians (incl. presence of obstacles eg illegally parked vehicles)		X			X			X	
Evidence of drunkenness, anti-social Behaviour, rowdiness	X			X				X	
Presence of rough sleepers	X			X				X	
Presence of beggars	X			X				X	
Presence of street drinkers	X				X			X	
Evidence of touting (e.g. mini cabs, ricksaws, Prostitution, drug dealing etc.)	X			X				X	
Presence of illegal street traders e.g counterfeit goods, hot dogs, peanuts etc.	X			X				X	
Effectiveness of any deterrent measures (CCTV, police patrols, door security etc)		X			X			X	
Quality of street lighting		X			X			X	
Safety perception in shopping hours			X		X			X	
Identity of town centre									
Features which identify the centre (eg flagship stores, buildings etc)			X			X			X
Promotion/ Street events			X			X			X
'Feel good' factor of town centre			X			X			X
Total	22/46			22/46			19/46		
Percentage	47.8%			47.8%			41.3%		

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2013

Figure 4: Deviation of centre from the mean for Local Centres 2013

Harrow Road (east) is a large Local Centre that has a higher than average amount of retail floor space when compared to the overall average for the 39 local centres. Within this, the centre contains above average amount of A1 convenience floor space, food and drink floor space (A3/A4/A5) floor space, and a slightly above average amount of A1 comparison. In terms of the rating of the physical environment, the centre has an average attractiveness rating, and a below average daytime amenity rating.

5.2 Strengths, Weaknesses, Opportunities and Threats

SWOT analysis

6. Future capacity

6.1 Potential Capacity for Growth

Between 2007 and 2013, there were three permitted planning applications in the local centre, A shop was converted into an office (B1) which lost 96sqm. A shop was converted into residential (C3) which lost 34sqm and a shop was converted into a Volunteer centre (A2/B1) which lost 48sqm.

7. Health of the Centre

Table 6: Summary of Health Check Assessment 2013

Subject	Subject Matter	Data	Number	Sq M
RETAILING	**Floor space**	**Total Floor space**		**4,136**
		Total Convenience (A1)		**652**
		Total Comparison (A1)		**1,171**
		Total Service (A2)		**444**
		Total A3		**432**
		Total A4		**199**
		Total A5		**529**
		Total Sui Generis		**108**
		Total Vacant		**601**
	Retail Offer	**Total Number of Shop Units**	**40**	
		Total Number of A1 Units	**19**	
		a) Convenience shops	**7**	
		b) Department/principal stores	**0**	
		c) Prestige international shops	**0**	
		d) National comparison retailers	**0**	
		e) Specialist Independent shops	**3**	
		f) Independent shops	**9**	
		Total Comparison Multiples	**12**	
		Total Number of A2 Units	**4**	
		Total Number of A3 Units	**4**	
		Total Number of A4 Units	**1**	
		Total Number of A5 Units	**5**	
		Total Number of Sui Generis	**1**	
		Total Number of Vacant	**6**	
	Market	**Days of operation**	**0**	
		Number of stalls	**0**	
	Proposals	**Changes of use A1 to A2**	**1**	**48**
		Changes of use A1 to A3	**0**	
		Changes of use A1 to A4	**0**	
		Changes of use A1 to A5	**0**	
ARTS/CULTURE		**(cinemas, galleries, theatres etc.)**	**0**	
HEALTH USES		**(clinics, surgeries etc.)**	**0**	
HOTELS			**0**	

In terms of its vitality and viability, and general economic health this centre is considered to be 'in decline', as it was when last surveyed in 2007.

Appendices

Appendix 1: Views of Local Centre

Appendix 2: Land Use Table (Westminster land use survey 2013)

Appendix 3: Land Use Map (GOAD 2012 retail data and Westminster land use survey 2013)

Appendix 4: Planning permissions Map (Westminster land use survey 2013)

Appendix 5: Location map of all local centres

Appendix 6: Glossary of Terms

Views of Harrow Road (East) local centre

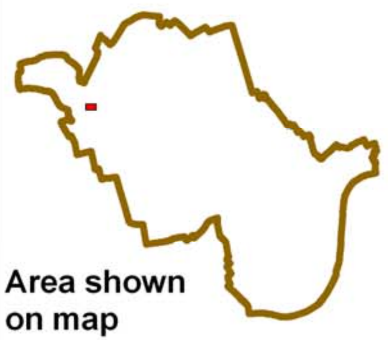
The east- end of the local centre, with various shop frontages and refuse on the pavement at the foot of the lamp post.

Vacant property in the local centre, along with various uses such as a take away and a convenience store.

A well kept frontage on Sutherland Avenue, with mature trees and reasonably attractive shop fronts.

					A1	A1	A1		A3	A3	A3	S G	Vacant	2007 Use
ADDRESS	**FASCIA**	**DESCRIPTION**	**USE**	**SQM**	**Conv.**	**Spec.**	**Ind**	**A2**	**Res/Caf**	**Pub/Bar**	**Takeaw.**			
AMBERLEY ROAD	NEW VENTURE TECHNOLOGY	INTERNET CAFÉ	A1 Spec	117		1								A1 Spec
336HARROW ROAD	LONDON FOOD & WINE	CONVENIENCE STORE	A1 Conv	104	1									A1 Ind
338HARROW ROAD	THE GOURMET ORIENT	TAKE AWAY	A3 T/A	101							1			A3 T/A
340HARROW ROAD	SUMAR PHARMACY	CHEMIST	A1 Conv	106	1									A1 Conv
342HARROW ROAD	SMART TOUCH	HAIRDRESSERS	A1 Ind	116			1							A1 Ind
344HARROW ROAD		VACANT	Vacant	112					1					A3 Rest/Café
346HARROW ROAD	BETFRED	BETTING OFFICE	A2	98				1						A2
348AHARROW ROAD	MUSLIM CENTRE		D1	62										A1 Ind
348BHARROW ROAD	AL RAYEN	CONVENIENCE STORE	A1 Conv	70	1									A1 Conv
350HARROW ROAD	WEST 9	GENERAL STORE	A1 Conv	128	1									A1 Conv
352HARROW ROAD	CHAMPERS	OFF LICENCE	A1 Conv	65	1									A1 Conv
354HARROW ROAD	GOLDEN SISSORS	HAIRDRESSERS	A1 Ind	86			1							A1 Ind
356HARROW ROAD	MINI CAB OFFICE	MINI CAB OFFICE	SG	108								1		A1 Conv
358HARROW ROAD		VACANT	Vacant	110									1	A3 T/A
360HARROW ROAD	CHICKEN COTTAGE	TAKE AWAY	A3 T/A	135							1			Vacant
362HARROW ROAD	THE NEELD ARMS	PUBLIC HOUSE	A3 Pub/Bar	199						1				A3 Pub/Bar
364HARROW ROAD	WILLIAM HILL	BETTING OFFICE	A2	127				1						A2
366HARROW ROAD	J PETERS	GENERAL STORE	A1 Conv	122	1									A1 Conv
368HARROW ROAD	KEBAB CENTRE	TAKE AWAY	A3 T/A	131							1			A3 T/A
370HARROW ROAD	PARS	RESTAURANT	A3 Rest/Café	130					1					A3 Rest/Café
372HARROW ROAD	COSTAS	HAIRDRESSERS	A1 Ind	128			1							A1 Ind
1MARYLANDS ROAD		VACANT	Vacant	81									1	A2
2MARYLANDS ROAD	PADDINGTON FISH BAR	TAKE AWAY	A3 T/A	60							1			A3 T/A
3MARYLANDS ROAD		VACANT	Vacant	95									1	A1 Spec
4MARYLANDS ROAD	THE BEAUTY NEST	HAIRDRESSERS	A1 Ind	93			1							Vacant
5MARYLANDS ROAD	T'SIAKKOS	TAKE AWAY	A3 T/A	102							1			A3 T/A
6MARYLANDS ROAD			Vacant	73									1	A1 Ind
6BMARYLANDS ROAD	ANDYS	HAIRDRESSERS	A1 Ind	15			1							A1 Ind
6CMARYLANDS ROAD		VACANT	Vacant	129									1	Vacant
7MARYLANDS ROAD		VACANT	Vacant	113									1	A3 Rest/Café
9MARYLANDS ROAD	MOONLIGHT	CURTAINS & INTERIORS	A1 Spec	118		1								A1 Spec

11MARYLANDS ROAD	MORENO WINES LTD	WINE STORE	A1 Spec	124		1								A1 Spec
1-3SUTHERLAND AVENUE	CAFÉ NOUR	CAFÉ	A3 Rest/Café	47					1					A3 Rest/Café
2SUTHERLAND AVENUE	SMART TOUCH	HAIR & BEAUTY	A1 Ind	78			1							A1 Ind
4SUTHERLAND AVENUE	VOLUNTEER CENTRE	CENTRE	A2	102				1						A2
5SUTHERLAND AVENUE	FAICHOURI	PATISSERIE	A1 Ind	75			1							SG
6SUTHERLAND AVENUE	SPARROW	DRY CLEANERS	A1 Ind	100			1							A1 Ind
7SUTHERLAND AVENUE	ZAIYTOUN SUPERMARKET	GENERAL STORE	A1 Conv	57	1									A1 Conv
8SUTHERLAND AVENUE	THE REAL ART ESTATES	ESTATE AGENT	A2	117				1						A2
10SUTHERLAND AVENUE	GLAUGA ROSSI	MAKE-UP TRAINING SCHOOL	A1 Ind	121			1							A1 Ind
12SUTHERLAND AVENUE	LE TRESOR DU MAROC	BAZZAR & CAFE	A3 Rest/Café	143					1					A1 Spec



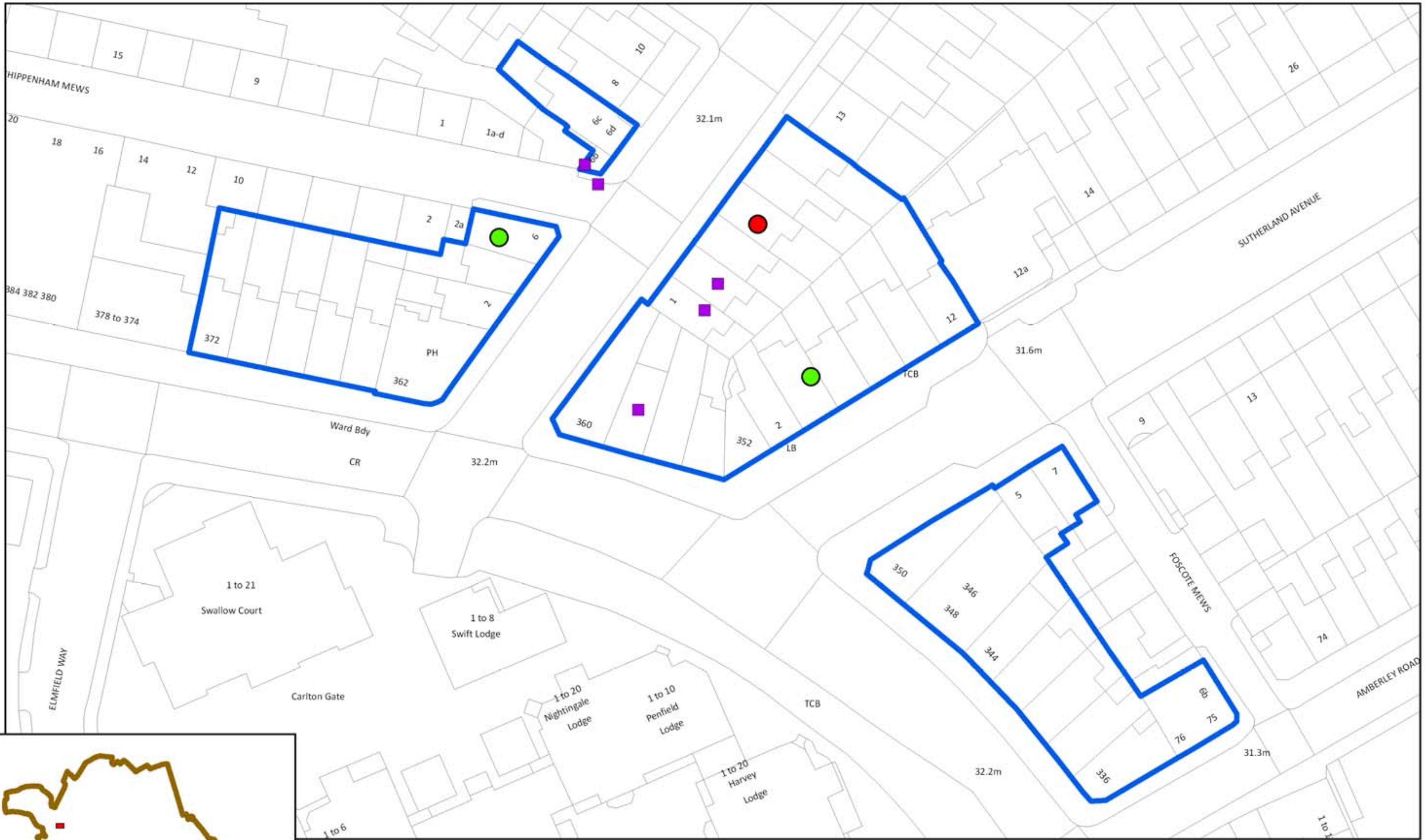
Area shown on map

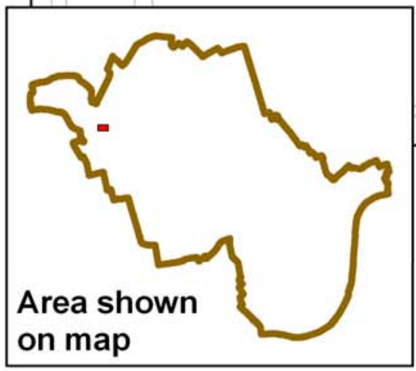
Source: GOAD Retail Survey 2013

Local Centre: Harrow Road (East)

Local Shopping Centre Boundary
A1: Retail
A2: Financial & Professional
A3: Restaurant/Café
A4: Pub/Bar
A5: Take Away
B1: Office
UC: Unclassified

0 12.5 25
Metres
N





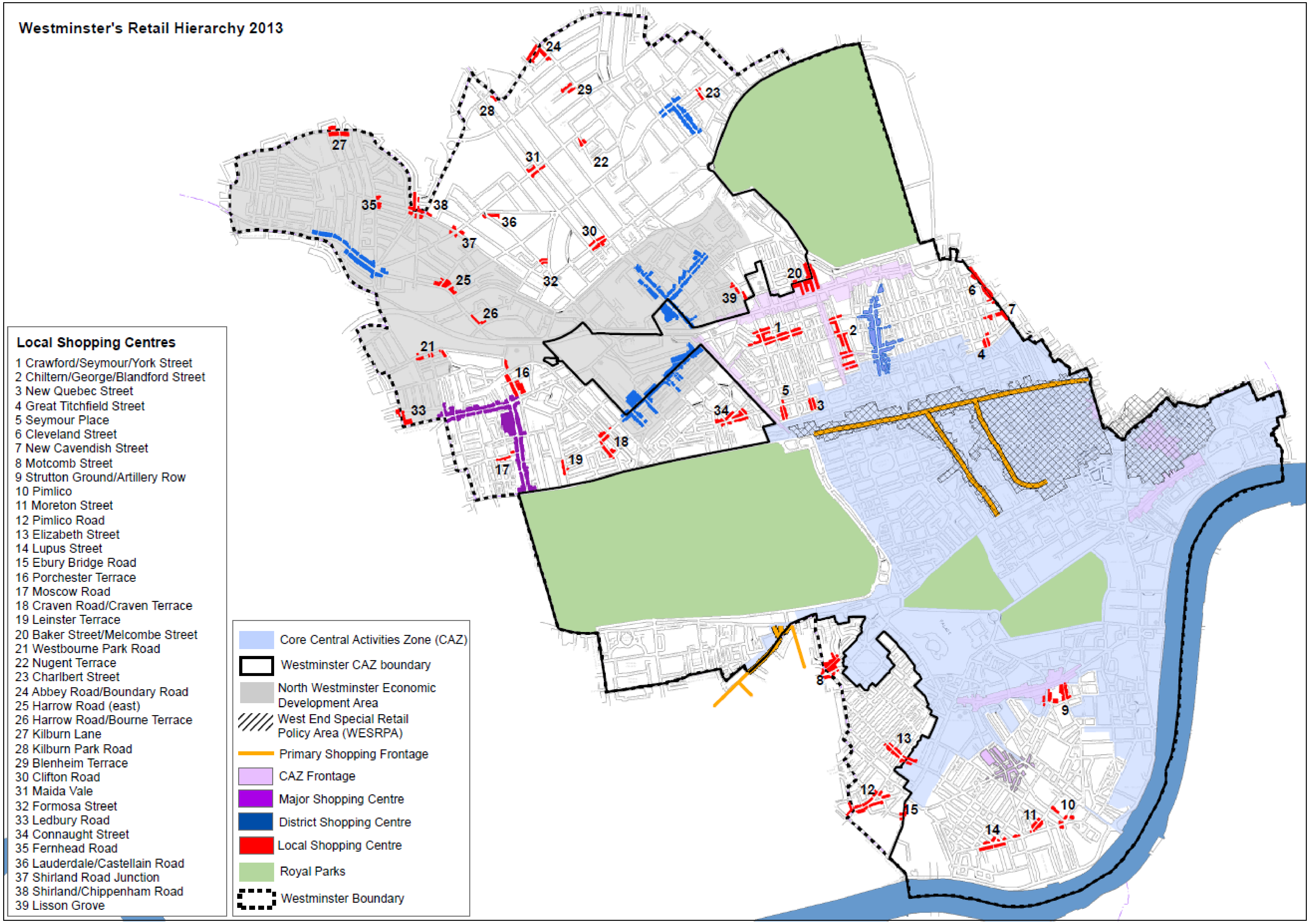
Source: GOAD Retail Survey 2013

Local Centre: Harrow Road (East)

- Completed 2007-2013
- Under Permission
- Vacant
- Local Shopping Centre Boundary

0 12.5 25
Metres
N

Figure 7 Westminster wide shopping centre boundaries plan



Health Checks - Glossary of terms

A1	**Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, dry cleaners, pet shops, sandwich bars, retail showrooms, and domestic hire shops.**
A1 café type uses	**Shops such as sandwich bars or coffee shops selling food and drinks to be consumed mainly off the premises, but not hot food takeaways. Examples include certain Pret a Manger shops, Costa Coffee and the Seattle Coffee Co. shops.**
A2	**Banks, building societies, bureau de change, estate and employment agencies, professional and financial services, telephone bureaux, betting offices and beauty salons (excluding hair).**
A3	**Food and drink uses such as restaurants, pubs, snack bars, cafés, wine bars and shops for the sale of hot food (hot food take-aways).**
A4	**Drinking Establishments: Premises where the primary purpose is the sale and consumption of alcoholic drinks on the premises.**
A5	**Hot Food Take-away: Premises where the primary purpose is the sale of hot food to take away.**
B1	**Business uses such as offices, research and development and industrial uses.**
CAZ	**Central Activities Zone (CAZ). The CAZ is an area of mixed uses, many of which contribute directly to the national, regional and local economy. It is this mix of activities and their supporting resources which underpins the success of London's economy.**
CAZ Frontages	**Mixed use areas usually with a predominant retail function. Appropriate areas for retail growth.**
Comparison	**A1 floor space selling predominantly durable items and not in convenience use.**
Convenience	**This is based on the classification provided by the unit for Retail Planning Information (URPI) set out in URPI brief 99/2. The classifications are: food, alcoholic drink, tobacco and other goods (newspapers and magazines, cleaning materials and matches). For the purposes of this assessment, convenience includes shops selling food or drink (excluding A1 café-type uses), newsagents, (including specialist tobacco stores), chemists (including Boots the Chemist stores) and post offices.**
Department/ principle store	**This includes the main department stores such as John Lewis, Liberty, and Selfridges, as well as variety stores such as Marks & Spencer and Virgin Mega-stores.**
District Centre	**Distributed more widely than Metropolitan and Major centres, they provide convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000-50,000 sqm of retail floor space. Some district centres have developed specialist shopping functions.**
Experian GOAD	**An independent retail data consultancy who provide maps of ground floor uses in shopping centres.**
F&B	**Food and beverage offer, covered by parts A3 (cafe's/restaurants), A4 (drinking establishments) and A5 (take aways) of the use classes order.**
Gross Floorspace	**Floorspace of buildings on all floors including external walls, half the thickness of parting walls and circulation areas.**
Independent store	**This includes non-convenience stores (see definition above) irrespective of size, that are not considered to be specialist retailers (see definition overleaf), that are operated by retailers that are not included within national retail chains or groups.**
Major Centre	**Typically found in inner and some parts of outer London with a borough-wide catchment. They generally contain over 50,000sqm of retail floor space and a relatively high proportion of comparison goods relative to convenience goods. They may also have significant employment, leisure, service and civic functions.**
NPPF	**National Planning Policy Framework. Central Government's key, revised guidance document driving planning policy in England, which compressed the**

	previous PPS documents and other guidance into a single document. It includes key guidance on town centres and health checks.
National retailers	This includes all retailers (Class A1 only) that operate within the context of a national retail chain or group, such as Next. A schedule of all national retail multiples can be found in Retail Directory of the UK 2002 (Hemming Information). Specialist shops that are part of a retail chain or group, such as Whittards and Thorntons, are classified as national retailers. Although there are national chains of food and drink uses and betting shops, such as Ladbrokes, these are classified based on the use class (e.g. betting shops as A2 uses) and not as national retailers.
Prestige international retailers	This includes prestigious retailers that operate in more than one country, such as Gucci, Gianni Versace, and Giorgio Armani. It also includes flagship stores that are only found in select town centres in Britain. National airline shops, such as British Airways, have also been classified as international retailers.
Primary Frontages	Internationally recognised shopping destinations. The Primary Frontages defined in Westminster's City Plan - Strategic Policies document are Oxford Street, Regent Street, Bond Street and Knightsbridge/Brompton Road.
Retail floorspace	This is all A1, A2, A3, A4, A5 and sui generis floorspace, and vacant floorspace of any of the aforementioned categories.
Shisha	Flavoured tobacco smoked through a water pipe or hookah. Smoke free legislation means that it cannot be smoked indoors in public places, and is often smoked at tables and chairs on the footway and in garden areas. There has been a rapid rise in shisha uses over the past five years, and there is concern over issues of health, residential amenity and other issues.
Specialist independent	Similar to an independent store, but this category reflects the quality and specialisation of the retailer so that a shopper may make a specific shopping trip to that shop. For example, The Pen Shop on Regent Street or antique shops.
Sui generis	Sui Generis is a term that refers to a use on its own. Any planning use not falling within a specific class within the Use Class Order falls within this category. Examples of sui generis uses in shopping centres are launderettes, mini cab offices, amusement centres and car showrooms.
UDP	Unitary Development Plan produced by Westminster City Council, with saved policies forming part of the statutory development plan for Westminster.
Vacancy	This category includes vacant street level units, as well as units that are under alteration. However, if at any time the survey was completed it was evident who the unit would be occupied by, the unit was treated as being occupied.
Zone A Rent	The rental level per square metre achieved on the first six metres of a shop unit.

Information Sources

Westminster's City Plan - Strategic Policies (adopted November 2013)
https://www.westminster.gov.uk/westminsters-city-plan-strategic-policies

Westminster's Unitary Development Plan (UDP, adopted January 2007)
https://www.westminster.gov.uk/unitary-development-plan-udp

The Mayor's London Plan (GLA, July 2011 as amended)
http://www.london.gov.uk/priorities/planning/london-plan

The National Planning Policy Framework (NPPF, DCLG 2012)
https://www.gov.uk/government/publications/national-planning-policy-framework--2

National Planning Practice Guidance (NPPG, March 2014)
http://planningguidance.planningportal.gov.uk/

Westminster High Street Health Checks 2013
https://www.westminster.gov.uk/high-street-health-checks

Westminster Health Check Archive
https://www.westminster.gov.uk/shopping-centre-health-checks

City of Westminster

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City of Westminster

Shopping Centre Health Check Survey 2014

Local Centre 33: Kilburn Lane

Contents

(i) Purpose of the Study

Former government guidance on Town Centres advised that 'health checks' be undertaken every five years to allow accurate and reasonable temporal analysis of the performance of town centres. This requirement has been superseded by more recent national and regional policy frameworks and guidance.

The National Planning Policy Framework (NPPF) (DCLG, 2012), states that when setting out requirements for Plan Making and using a proportionate evidence base, '*Local Planning Authorities should have a clear understanding of business needs within the economic markets operating in and across their area. To achieve this they should... assess... the role and function of town centres and the relationship between them, including any trends in the performance of centres, and the capacity of existing centres to accommodate new town centre development* (paragraphs 160, 161).'

The London Plan (2011) sets out strategic retail policy for Town Centres in London, as set out in more detail below. Paragraph 2.74 of the London Plan (July 2011) states that "*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 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.*"

This then forms the current national and regional planning policy framework for undertaking town centre health checks. The City Council is currently follow the former guidance and updating health checks every five years, as this is deemed to be a sensible and manageable time period for monitoring the viability and vitality of centres, given the extent of Westminster's town centre network.

(ii) Westminster's Local Centres and Planning Policy

Westminster's Local Centre Health Checks were last carried out in 2007, updating 2002 and 1997 surveys, and includes detailed analysis of Westminster's 39 Local Shopping Centres.

Local Centres normally have a purely local function and most are mainly comprised of convenience goods retailers with some food and drink and local service uses, mainly providing facilities for people living or working nearby (which the City Council wishes to safeguard in accordance with national guidance). However in Westminster some are also speciality centres which attract shoppers from a wider area.

Westminster's current local plan consists of the City Plan: Strategic Polices (adopted November 2013), and saved development management policies from the Unitary Development Plan (adopted January 2007). The local plan seek to protect and enhance the designated Local Shopping Centres for the service they provide to residents, visitors and workers, and because they reduce the need to travel.

Strategic policy CS21 is the general policy for retail across Westminster, seeking to protect existing A1 uses, direct new retail floor space to designated shopping centres, and to protect non-A1 retail and town centre uses in designated shopping centres from changes to uses that do not serve visiting members of the public and that do not have active shop fronts.

Saved UDP policy SS7 (Shopping and Services policy 7) is the detailed development management policy for local shopping centres. The policy covers the protection of shops and circumstances where changes of use away from shops may be permitted, taking into consideration the viability of units and the overall balance of uses in the centre.

(iii) Westminster's Retail Hierarchy

The City of Westminster is broadly divided into two zones in terms of retail policy, the Core Central Activities Zone (CAZ) and CAZ Frontages, and areas outside of this. The Core CAZ contains the two international shopping centres in London, the West End and Knightsbridge in addition to distinctive retail areas such as Covent Garden, Soho, Mayfair and St James's, as well as numerous small parades and individual shops. Outside the Core CAZ and CAZ Frontages there is one Major Shopping Centre, 4 District Centres (where previously there had been 7, 3 have subsequently been reclassified as CAZ Frontages and 1 as a Major Centre) and the 39 Local Centres which are designated to safeguard shopping facilities for local residents, and the retail character of local shopping areas.

In 2007, the District and Local Centres health check reports were all updated, as were 17 shopping areas inside the CAZ. More recently, reports for Westminster's high street shopping centres were updated in 2013.

(iv) Health Checks Methodology

As set out in the NPPF (DCLG, 2012) local planning authorities should recognise town centres as the heart of their communities and pursue policies to support their viability and vitality. Planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive.

Accessibility by public transport is considered to be excellent for all Westminster's larger shopping areas, and its Local Centres are accessible for people to walk to. The City Council wants to retain shops in Local Centres, in order to maintain a range of local convenience shops and protect the character and function of the centres. Local shops and services limit car trips, encourage walking, and make city life more practical and attractive.

The **National Planning Practice Guidance** was published in March 2014 by DCLG, several months after the field work for this project had commenced. It states that existing centres should be audited to assess their role, vitality, viability and their potential to accommodate new development and different types of development. It also sets out a series of indicators to determine the health of town centres, including:

- Diversity of use
- Vacant property
- Commercial yields on non-domestic property
- Customer views and behaviour
- Retailer representations
- Commercial rents
- Pedestrian flows and accessibility
- Perception of safety and crime
- State of environmental quality

Most of the above indicators will be assessed as part of this study, where data collection is available and reasonable. All of the above were included as part of the 2013 health checks for the larger high street type centres, where it is more appropriate to carry out consumer surveys, and where commercial data is more readily available. Given the size of this project, the indicators below are considered to be appropriate and comprehensive.

Land Use

(1) Diversity of town centre uses

This section considers the range of A1 uses, and compares the current diversity of land uses to previous Local Centre Health Check Surveys dated 1997, 2002 and 2007. It also includes the

proportion of vacant street level property and the amount of space used for different functions such as shopping, leisure, cultural and entertainment activities, pubs, cafes, and restaurants.

Accessibility

(2) **Pedestrian flows (footfall):**
Visual assessments were undertaken to measure pedestrian flows which contribute towards the vitality of the Local Centres. These were conducted on comparable days of the week and compared to the average for all of the Local Centres;

(3) **Accessibility:**
The whole of Westminster has a Public Transport Accessibility Level (PTAL) score of 6, the highest level achievable. This section therefore concentrates on ease and convenience of access;

Environment

(4) **State of the town centre environmental quality assessment:**
Includes a subjective assessment of indicators such as security, air pollution, noise, clutter, litter and graffiti, as well as positive factors such as trees, landscaping and open spaces. Each centre is assessed as per the Attractions Table 4, and the Daytime Amenity Table 5 in the 2007 Health Check Survey. A comparison is made between the 1997, 2002, 2007 and 2013 surveys.

(5) **Daytime amenity:**
A qualitative assessment of the amenity within the local centre, assessing its cleanliness, security, and identity.

(6) **Relative performance of the centre:**
Measures the performance of the centre compared to the Westminster Local Centre average in terms of land use, attractiveness, and daytime amenity, with graphs comparing the performance of centres relative to one another. The centre's strengths, weaknesses, opportunities and threats are highlighted in a SWOT analysis diagram at the end of this section.

(7) **The potential capacity for growth or change of centres in the network:** opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development is considered here. Based on levels of demand, assessments are made to ascertain how much capacity each Local Centre has to accommodate retail growth, looking at retail related planning applications in and around the Local Centres. Consideration is given to whether the current Local Centre boundaries and Core and Secondary Frontage designations are still valid. Consideration is also given to ways in which the vitality and viability of the centres could be enhanced.

(8) **Summary of health check:**
This section contains a comparison of the relative performance of this centre, and summary of land use assessment as per the 2007 Health Check reports. General comments and analysis of the centre are included, along with a summary of any problems/issues. A classification as 'in decline', 'neutral', or 'healthy' is included, plus comment on whether things have improved, deteriorated, or remained the same since 2007 (see 2007 Health Checks, Tables 6 and 7). Where a Local Centre is considered to be "in decline" or "neutral", consideration is made on ways to improve the vitality and viability of the Centre.

The results of this study will be used to inform planning policy development and the inception of other relevant interventions, and will be used to assess the success of previous initiatives such as any investment in public realm.

Local Centre **33: Fernhead Road**

1. Introduction

1.1 Location

Kilburn Lane is a medium sized, linear Local Centre in the north west of Westminster, on the boundary with the London Borough of Brent. (Some of the shop units are located in Brent.) It is close to Queen’s Park London Overground and London Underground station, and mainly serves residents in Queen’s Park. The catchment area is limited by the Kilburn railway line to the north, which acts as a barrier.

Figure 1: Local Centre Boundary 2013

2 Land Use

2.1 Range of Uses

Kilburn Lane comprises a range of shopping and other town centre uses. This diversity is summarised in Table 1 below.

Table 1: Range of Town Centre Uses (1997-2013)

Use Class		No. of Units 1997	No. of Units 2002	No. of Units 2007	No. of Units 2013
Class A1 Retail		14	11	15	14
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*0*
	National retailers	*0*	*0*	*0*	*0*
	Specialist Independent	*1*	*1*	*4*	*2*
	Independent	*5*	*4*	*5*	*5*
	Convenience	*8*	*6*	*6*	*7*
Class A2	Financial & Professional	3	5	4	2
Food & Drink		0	4	4	6
Class A3	*Restaurant/Café*	*0*	*2*	*2*	*4*
Class A4	*Pubs/Bars*	*0*	*0*	*0*	*0*
Class A5	*Takeaway*	*0*	*2*	*2*	*2*
	Takeaway/Restaurant				*0*
Sui Generis		2	3	3	3
Vacant Units		4	3	1	2
Arts/Culture		0	0	0	0
Health uses		1	1	1	1
Hotels		0	0	0	0
TOTAL		**24**	**27**	**28**	**28**

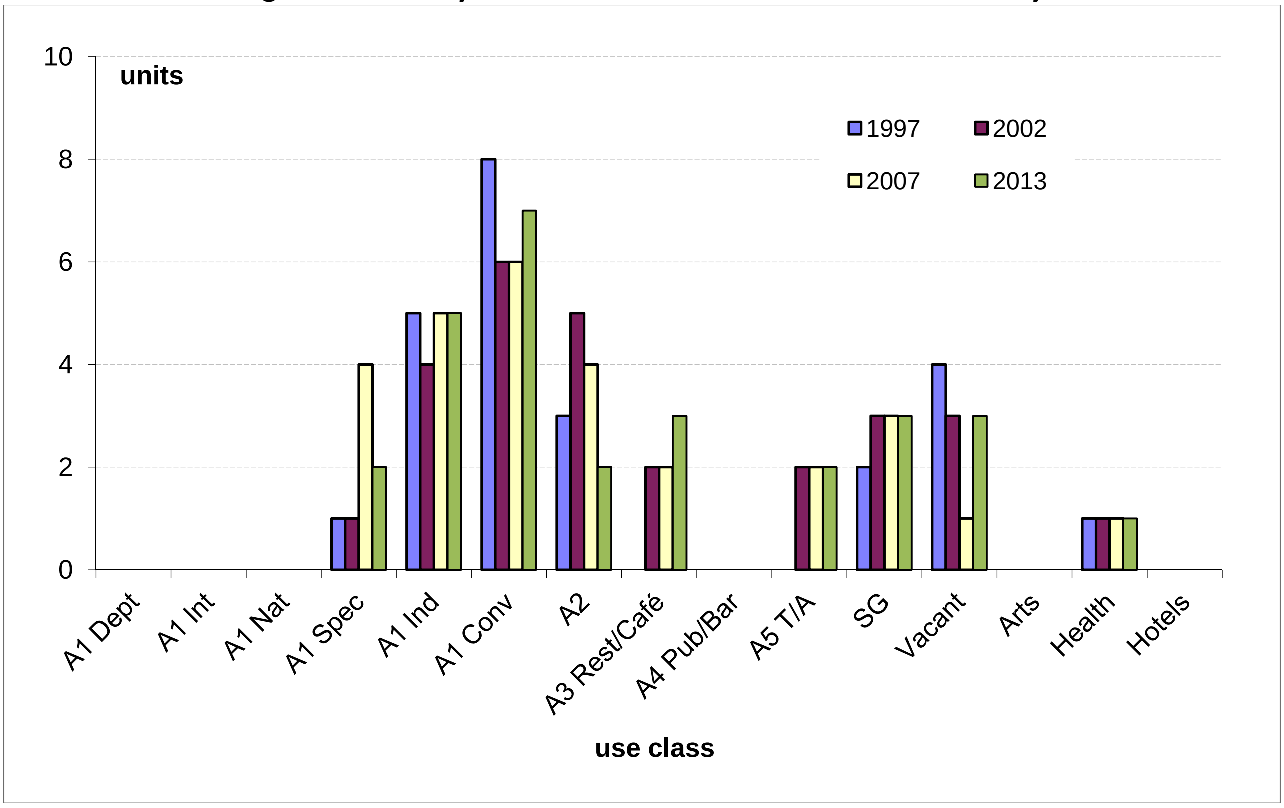
Source: WCC Site Survey December 2013

In total there are 28 units in Kilburn Lane, the same number as was recorded in the 2007 survey.

The number of A1 retail uses has decreased by one since 2007, due to various changes of use and an increase in vacant units, however A1 uses still account for half of the units in the centre. After a significant increase in A1 specialist uses in 2007, there has been a decline in specialist units since (an internet café has been replaced with a gift shop, while there is a vacant unit where in 2007 there was an antiques dealer). The number of Class A2 uses has decreased by two as a solicitor and an estate agent have been replaced with a café and a barber, respectively. The number of restaurant/café uses has increased by one, while the number of takeaways has remained constant with two present in the centre.

Outside of A-class retail uses, the centre contains one health use (a dental surgery) and three sui generis units (a launderette, a car repair centre, and a minibus and coach hire outlet). The centre does not contain any hotels or arts/culture uses.

Figure 2: Units by use class within the Local Centre boundary



2.2 Range of A1 Uses

Kilburn Lane has 14 Class A1 retail units including seven convenience stores, two specialist retailers and five independent retailers. The specialist retailers comprise a security systems shop and a jeweller. The independent stores include an electrical store, a barber, two hairdressers and a craft/gift shop. The high proportion of convenience shops and local focus of the comparison retailers suggests that Kilburn Lane serves local residents with a mix of convenience and comparison shopping facilities.

2.3 Total Retail Floor Space

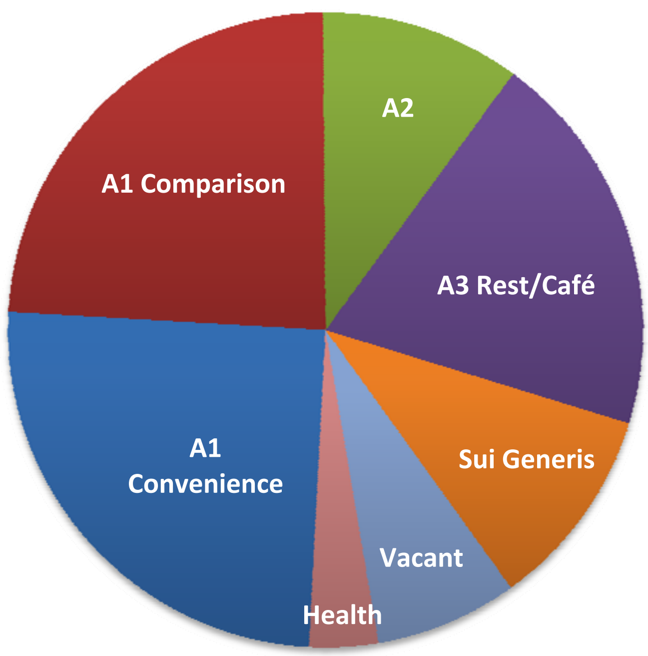
Total retail floor space in Kilburn Lane is broken down in Table 2. It has 4,023 sqm of retail floor space, which is above the average of 3,188 sqm for the 39 Local Centres in Westminster. Nearly half of the floor space in the centre is A1 class shops. Within this Kilburn Lane has comparable proportions of A1 convenience and comparison floor space, which together account for almost half of the total. Food and drink uses account for nearly 20% of the floor space with other uses including vacant units and sui generis uses accounting for the remainder of the floor space.

Kilburn Lane is a reasonably large Local Centre with a selection of local services and food shops. There are no banks or building societies, and the Class A2 uses are an estate agent and a betting office. The Local Centre provides a broad range of shops compared with other centres but there is less choice outside of the A1 uses.

Table 2: Total Retail Floor space 2013

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2013)
A1 Convenience	1009	25.08%	14.9%
A1 Comparison	964	23.96%	35.2%
A2	410	10.19%	11.2%
A3 Rest/Café/TA	792	19.69%	17.4%
A4 Pub/Bar	0	0.00%	5.1%
Sui Generis	415	10.32%	3.9%
Vacant	292	7.26%	8.6%
Health	141	3.50%	2.0%
Hotels	0	0.00%	0.5%
Art	0	0.00%	1.3%
Leisure	0	0.00%	0.1%
Total	**4,023**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



Source: City of Westminster GIS System and site survey December 2013

2.4 Proportion of Vacant Street Level Property

The unit vacancy rate in Kilburn Lane is slightly higher than the average rate for Local Centres in Westminster (8%), as shown in Table 3. Vacancies have increased since 2007 by two units, now representing over ten percent of units, and 7% of floor space in the centre.

Table 3: Level of Vacant Street Level Property 2013

% Vacant Units				% Local Centre Average
1997	2002	2007	2013	2013
0.0% (0 units)	**11.1% (3 units)**	**3.6% (1 units)**	**10.7% (3 units)**	**8% (2 units)**

Source: City of Westminster GIS System and site survey December 2013

3. Accessibility

3.1 Pedestrian Flows (footfall)

The centre was found to be reasonably busy in terms of pedestrian vibrancy when the Health Check Survey was carried out on a cold, overcast weekday afternoon in February 2014.

3.2 Accessibility on foot and by public transport

Kilburn Lane is located approximately five minutes' walk from Queen's Park station which is served by both London Overground and the London Underground (Bakerloo Line). The centre is also served by several bus routes, including numbers 6, 187 and 316. To the west of the centre is the A5 which runs north towards the M1.

4. Environmental Quality

4.1 State of the Centre's Attractions and Environmental Quality / Attractions

The attitudinal assessment of the attractions and amenity of the centre is summarised in Tables 4 and 5 below. Kilburn Lane's overall score for attractions is 7.7%, a decrease since the previous survey and evidence of the relative unattractiveness of the centre. The rating is significantly lower than the Local Centre average of 31%, and ranks the centre = 37th out of the 39 Local Centres in the City. It is only rated as average in two categories (prominence of independent shops and availability of food shopping); the remaining categories are all rated as poor, including all of the categories in the arts/culture section and service provision.

4.2 Daytime Amenity

Kilburn Lane is an unattractive Local Centre, with a day time amenity rating of 37% compared with the average for all Local Centres of 68%, and is ranked last of the 39 Local Centres in the City. The centre is not rated as being good in any of the 23 categories assessed. However, the centre is only rated as being poor in five of the 23 categories, including all of the town centre identity categories, evidence of beggars and the presence of refuse bags in the street. The remaining 17 categories are all rated as being average, including seven of the eight general cleanliness categories and 11 of the 12 security categories. With the absence of any good ratings, it is the worst rated centre in Westminster in terms of daytime amenity.

Table 4: Attractions within the Local Centre 2013

ATTRACTIONS	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Retail Provision									
Prominence of multiple retailers			x			x			x
Prominence of independent shops		x			x			x	
Availability of food shopping		x			x			x	
Prominence of specialist shops			x		x				x
Quality of market (frequency, variety etc.)	-	-	-	-	-	-	-	-	-
Quality of retail environment			x			x			x
Art/Culture									
Quality of restaurants (availability, number etc.)			x			x			x
Quality of pubs/clubs/bars			x			x			x
Range of cultural/community events (theatre, concerts)			x			x			x
Availability of sports and leisure facilities			x			x			x
Service Provision									
Local services (information, library etc.)			x			x			x
Employment/office space			x			x			x
Bank/building society provision			x			x			x
Total	2/26			3/26			2/26		
Percentage	7.69%			11.54%			7.69%		

Source: City of Westminster site survey December 2013

Table 5: Day Time Amenity within the Local Centre 2013

AMENITY – DAYTIME	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Overall environment of public areas in the centre									
General Cleanliness in Shopping Hours:									
Presence of litter		x			x			x	
Presence of refuse bags on the street			x		x				x
Evidence of street fouling		x			x			x	
Presence of glass/glasses/other debris incl. food and food containers/wrapping		x			x			x	
Condition		x			x			x	
Quality of buildings		x			x			x	
Special features (pedestrianisation, street furniture, etc.)			x			x			
Impact of vacant sites		x			x			x	
Security									
Evidence of vandalism and graffiti (incl. on street furniture)			x			x		x	
Security during shopping hours (availability, access, security etc.)			x		x			x	
Ease of passage for pedestrians (incl. presence of obstacles e.g. illegally parked vehicles)		x			x			x	
Evidence of drunkenness, anti-social behaviour, rowdiness		x			x			x	
Presence of rough sleepers	x				x			x	
Presence of beggars	x				x				x
Presence of street drinkers			x			x		x	
Evidence of touting (e.g. mini cabs, rickshaws, prostitution, drug dealing etc.)	x				x			x	
Presence of illegal street traders e.g. counterfeit goods, hot dogs, peanuts etc.	x				x			x	
Effectiveness of any deterrent measures (CCTV, police patrols, door security etc.)			x		x			x	
Quality of street lighting			x		x			x	
Safety perception in shopping hours		x			x			x	
Identity of town centre									
Features which identify the centre (e.g. flagship stores, buildings etc.)			x			x			x
Promotion/Street events			x			x			x
‘Feel good’ factor of town centre		x				x			x
Total	18/46			17/46			17/46		
Percentage	39.1%			37.0%			37.0%		

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2013

Figure 4: Deviation of centre from the mean for Local Centres 2013

Kilburn Lane is a relatively large Local Centre with a lower than average amount of retail floor space when compared with the overall average for the 39 local centres. The retail A1 Convenience floorspace is much larger than the local centre average. The centre as mentioned in the previous section has a very bad ranking for amenity and attractiveness.

5.2 Strengths, Weaknesses, Opportunities and Threats

SWOT analysis

6. Future capacity

6.1 Potential Capacity for Growth

One residential extension is under construction, resulting in a loss of 33 sqm of shop floor space. Other than this, there were no permitted planning applications in the Local Centre between 2007 and 2013 involving A-class uses. Additional capacity could be accommodated in the vacant retail units.

7. Health of the Centre

Table 6: Summary of Health Check Assessment 2013

Subject	Subject Matter	Data	Number	Sq M
RETAILING	Floor space	Total Floor space		4,023
		Total Convenience (A1)		1009
		Total Comparison (A1)		964
		Total Service (A2)		410
		Total A3		388
		Total A4		0
		Total A5		272
		Total Sui Generis		415
		Total Vacant		424
	Retail Offer	Total Number of Shop Units	28	
		Total Number of A1 Units	14	
		a) Convenience shops	7	
		b) Department/principal stores	0	
		c) Prestige international shops	0	
		d) National comparison retailers	0	
		e) Specialist Independent shops	2	
		f) Independent shops	5	
		Total Comparison Multiples	7	
		Total Number of A2 Units	2	
		Total Number of A3 Units	3	
		Total Number of A4 Units	0	
		Total Number of A5 Units	2	
		Total Number of Sui Generis	3	
		Total Number of Vacant	3	
	Market	Days of operation	0	
		Number of stalls	0	
	Proposals	Changes of use A1 to A2	0	
		Changes of use A1 to A3	0	
		Changes of use A1 to A4	0	
		Changes of use A1 to A5	0	
ARTS/CULTURE		(cinemas, galleries, theatres etc.)	0	
HEALTH USES		(clinics, surgeries etc.)	0	
HOTELS			0	

In terms of its general economic health and physical environment, Kilburn Lane is considered to be ‘in decline’ and remains one of the least attractive Local Centres in Westminster.

Appendices

Appendix 1: Views of Local Centre

Appendix 2: Land Use Table (Westminster land use survey 2013)

Appendix 3: Land Use Map (GOAD 2012 retail data and Westminster land use survey 2013)

Appendix 4: Planning permissions Map (Westminster land use survey 2013)

Appendix 5: Location map of all local centres

Appendix 6: Glossary of Terms

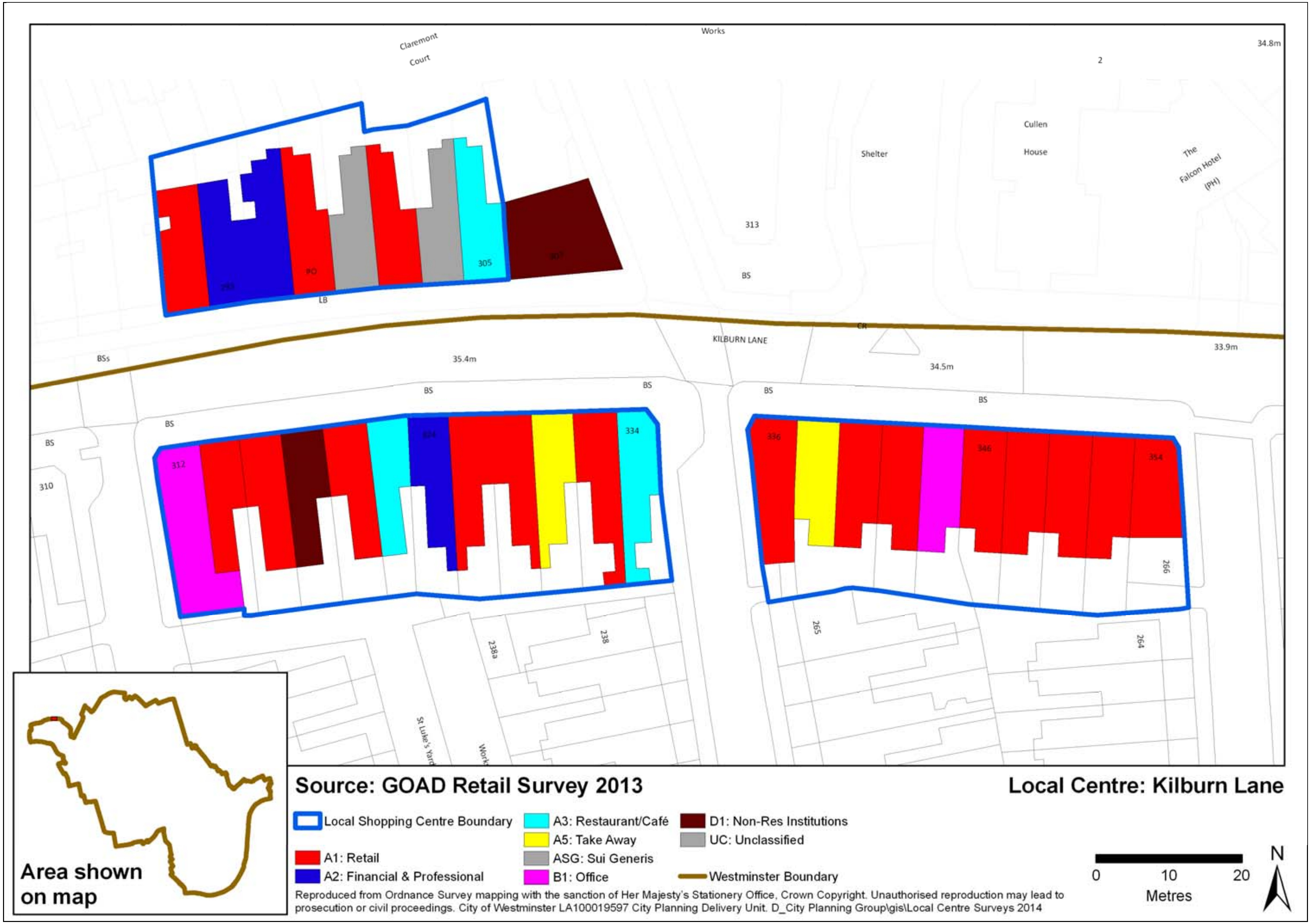
Views of Kilburn Lane Local Centre

The core shopping frontage at the eastern end of the Local Centre, with a well kept pavement and trees.

The secondary shopping frontage at the western end of the Local Centre, with refuse bags on the pavement.

The western end of the Local Centre, with a mechanic's workshop intruding onto the pavement.

					A1	A1	A1		A3	A5	SG	Vacant	Health	2007 Use
ADDRESS	**FASCIA**	**DESCRIPTION**	**USE**	**SQM**	**Conv.**	**Spec.**	**Ind**	**A2**	**Res/Caf**	**Takeaw.**				
291 KILBURN LANE	BARGEN	GENERAL STORE	A1 Conv	132	1									A1 Ind
293-295 KILBURN LANE	LADBROKES	BETTING OFFICE	A2	268				1						A2
297 KILBURN LANE	POST OFFICE	POST OFFICE	A1 Conv	140	1									A1 Conv
299 KILBURN LANE	QUEEN'S PARK LAUNDERETTE	LAUNDERETTE	SG	149							1			SG
301 KILBURN LANE	SYSTEMATIC SERVICES	ELECTRICAL STORE	A1 Ind	129			1							A1 Ind
303 KILBURN LANE		RESIDENTIAL		135										
305 KILBURN LANE	THE STAR CAFÉ	CAFÉ	A3 Rest/Café	136					1					A3 Rest/Café
312 KILBURN LANE	T. M. MOTORS	CAR REPAIR CENTRE	SG	156							1			SG
314 KILBURN LANE	GARCIA TOURS	MINIBUS AND COACH HIRE	SG	110							1			SG
316 KILBURN LANE	LOOK	HAIRDRESSER	A1 Ind	142			1							A1 Ind
318 KILBURN LANE	DENTAL SURGERY	DENTIST	Health	141									1	Health
320 KILBURN LANE		VACANT	Vacant	147								1		A1 Spec
322 KILBURN LANE	DARNA	CAFÉ	A3 Rest/Café	118					1					A3 Rest/Café
324 KILBURN LANE	RICHARD BRUCE	ESTATE AGENT	A2	142				1						A2
326 KILBURN LANE	LEBANON GATE	GENERAL STORE	A1 Conv	144	1									A1 Conv
328 KILBURN LANE	LEBANON GATE	GENERAL STORE	A1 Conv	142	1									A1 Conv
330 KILBURN LANE	ALI BABA	TAKEAWAY	A3 Take	139						1				A3 T/A
332 KILBURN LANE	ONE NATION FOOD AND WINE	GENERAL STORE	A1 Conv	145	1									A1 Conv
334 KILBURN LANE	CREAM	CAFÉ	A3 Rest/Café	134					1					A2
336 KILBURN LANE	HILTON FOOD AND WINE	GENERAL STORE	A1 Conv	132	1									A1 Conv
338 KILBURN LANE	CHICKEN COTTAGE	TAKEAWAY	A3 Take	133						1				A3 T/A
340 KILBURN LANE	ALMO	BARBER	A1 Ind	132			1							A2
342 KILBURN LANE	THE DELI AT QUEEN'S PARK	DELICATESSEN/CAFÉ	A1 Ind	132					1					Vacant
344 KILBURN LANE	SPY STORE	SECURITY SYSTEMS	A1 Spec	142		1								A1 Spec
346 KILBURN LANE	ISHTAR JEWELLRY	JEWELLER	A1 Spec	134		1								A1 Spec
348 KILBURN LANE	IZZY JONES	CRAFT/GIFT SHOP	A1 Ind	141			1							A1 Spec
350 KILBURN LANE		VACANT	Vacant	145								1		A1 Ind
352 KILBURN LANE	DIVINE HAIR & BEAUTY	HAIRDRESSER	A1 Ind	144			1							A1 Ind
354 KILBURN LANE	KILBURN WINE STORE	GENERAL STORE	A1 Conv	174	1									A1 Conv


Claremont Court
Works
34.8m
2
Cullen House
Shelter
The Falcon Hotel (PH)
313
305
PO
LB
BS
KILBURN LANE
CR
BSs
35.4m
34.5m
33.9m
BS
BS
BS
BS
BS
BS
310
312
334
336
346
354
266
265
264
238a
238
St Luke's Yard
Area shown on map
Source: GOAD Retail Survey 2013
Local Centre: Kilburn Lane
Local Shopping Centre Boundary
A1: Retail
A2: Financial & Professional
A3: Restaurant/Café
A5: Take Away
ASG: Sui Generis
B1: Office
D1: Non-Res Institutions
UC: Unclassified
Westminster Boundary
0
10
20
Metres
N
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Claremont Court
Works
34.8m
2
Cullen House
Shelter
The Falcon Hotel (PH)
313
307
305
PO
293
LB
BS
KILBURN LANE
CR
BSs
35.4m
34.5m
33.9m
324
334
312
310
336
346
354
266
265
264
238a
238
St Luke's Yard
Works
Area shown on map
Source: GOAD Retail Survey 2013
Local Centre: Kilburn Lane
Under Construction
Vacant
Local Shopping Centre Boundary
Westminster Boundary
0
10
20
Metres
N
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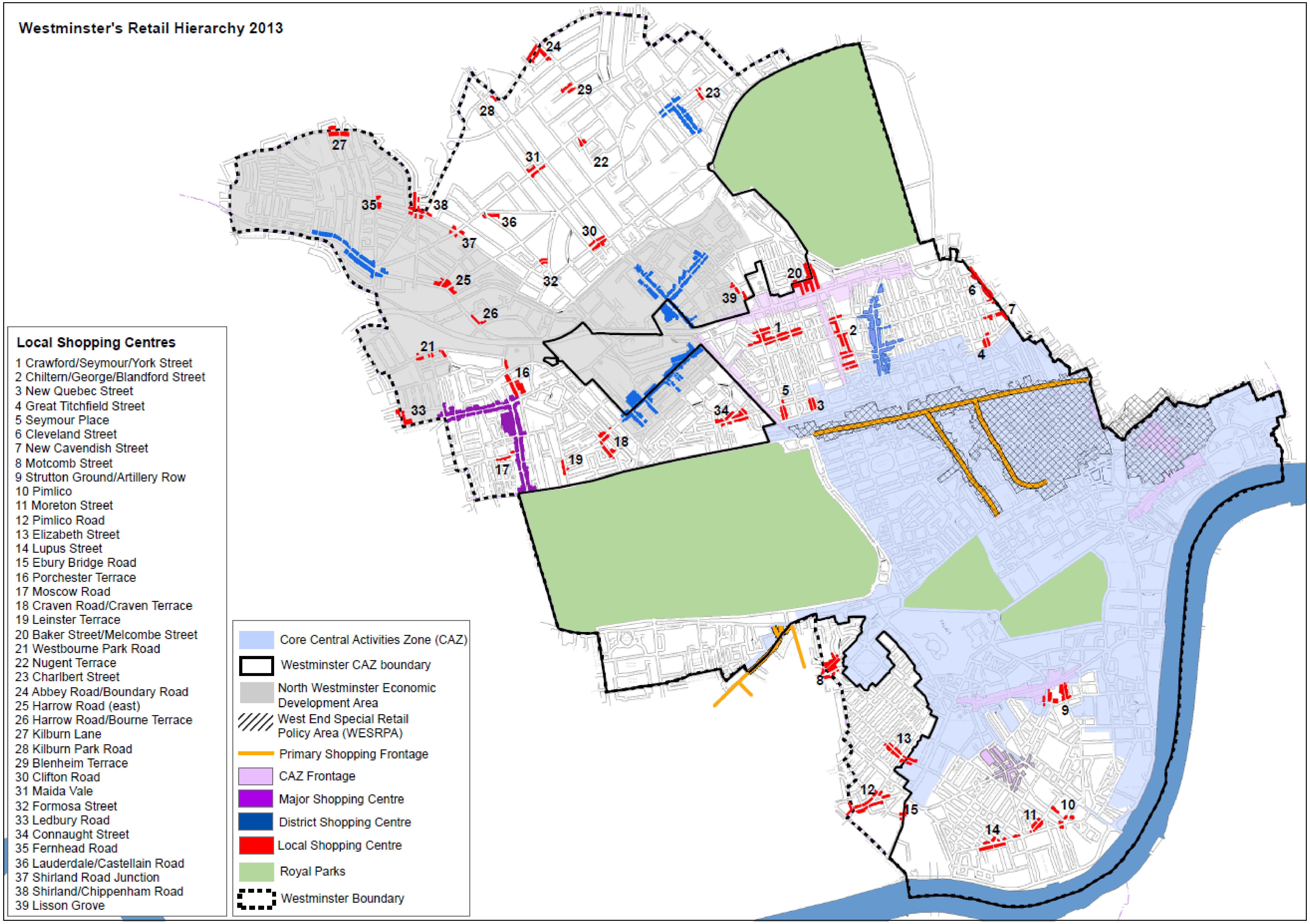
Figure 7 Westminster wide shopping centre boundaries plan



Health Checks - Glossary of terms

A1	**Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, dry cleaners, pet shops, sandwich bars, retail showrooms, and domestic hire shops.**
A1 café type uses	**Shops such as sandwich bars or coffee shops selling food and drinks to be consumed mainly off the premises, but not hot food takeaways. Examples include certain Pret a Manger shops, Costa Coffee and the Seattle Coffee Co. shops.**
A2	**Banks, building societies, bureau de change, estate and employment agencies, professional and financial services, telephone bureaux, betting offices and beauty salons (excluding hair).**
A3	**Food and drink uses such as restaurants, pubs, snack bars, cafés, wine bars and shops for the sale of hot food (hot food take-aways).**
A4	**Drinking Establishments: Premises where the primary purpose is the sale and consumption of alcoholic drinks on the premises.**
A5	**Hot Food Take-away: Premises where the primary purpose is the sale of hot food to take away.**
B1	**Business uses such as offices, research and development and industrial uses.**
CAZ	**Central Activities Zone (CAZ). The CAZ is an area of mixed uses, many of which contribute directly to the national, regional and local economy. It is this mix of activities and their supporting resources which underpins the success of London's economy.**
CAZ Frontages	**Mixed use areas usually with a predominant retail function. Appropriate areas for retail growth.**
Comparison	**A1 floor space selling predominantly durable items and not in convenience use.**
Convenience	**This is based on the classification provided by the unit for Retail Planning Information (URPI) set out in URPI brief 99/2. The classifications are: food, alcoholic drink, tobacco and other goods (newspapers and magazines, cleaning materials and matches). For the purposes of this assessment, convenience includes shops selling food or drink (excluding A1 café-type uses), newsagents, (including specialist tobacco stores), chemists (including Boots the Chemist stores) and post offices.**
Department/ principle store	**This includes the main department stores such as John Lewis, Liberty, and Selfridges, as well as variety stores such as Marks & Spencer and Virgin Mega-stores.**
District Centre	**Distributed more widely than Metropolitan and Major centres, they provide convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000-50,000 sqm of retail floor space. Some district centres have developed specialist shopping functions.**
Experian GOAD	**An independent retail data consultancy who provide maps of ground floor uses in shopping centres.**
F&B	**Food and beverage offer, covered by parts A3 (cafe's/restaurants), A4 (drinking establishments) and A5 (take aways) of the use classes order.**
Gross Floorspace	**Floorspace of buildings on all floors including external walls, half the thickness of parting walls and circulation areas.**
Independent store	**This includes non-convenience stores (see definition above) irrespective of size, that are not considered to be specialist retailers (see definition overleaf), that are operated by retailers that are not included within national retail chains or groups.**
Major Centre	**Typically found in inner and some parts of outer London with a borough-wide catchment. They generally contain over 50,000sqm of retail floor space and a relatively high proportion of comparison goods relative to convenience goods. They may also have significant employment, leisure, service and civic functions.**
NPPF	**National Planning Policy Framework. Central Government's key, revised guidance document driving planning policy in England, which compressed the**

	previous PPS documents and other guidance into a single document. It includes key guidance on town centres and health checks.
National retailers	**This includes all retailers (Class A1 only) that operate within the context of a national retail chain or group, such as Next. A schedule of all national retail multiples can be found in Retail Directory of the UK 2002 (Hemming Information). Specialist shops that are part of a retail chain or group, such as Whittards and Thorntons, are classified as national retailers. Although there are national chains of food and drink uses and betting shops, such as Ladbrokes, these are classified based on the use class (e.g. betting shops as A2 uses) and not as national retailers.**
Prestige international retailers	**This includes prestigious retailers that operate in more than one country, such as Gucci, Gianni Versace, and Giorgio Armani. It also includes flagship stores that are only found in select town centres in Britain. National airline shops, such as British Airways, have also been classified as international retailers.**
Primary Frontages	**Internationally recognised shopping destinations. The Primary Frontages defined in Westminster's City Plan - Strategic Policies document are Oxford Street, Regent Street, Bond Street and Knightsbridge/Brompton Road.**
Retail floorspace	**This is all A1, A2, A3, A4, A5 and sui generis floorspace, and vacant floorspace of any of the aforementioned categories.**
Shisha	**Flavoured tobacco smoked through a water pipe or hookah. Smoke free legislation means that it cannot be smoked indoors in public places, and is often smoked at tables and chairs on the footway and in garden areas. There has been a rapid rise in shisha uses over the past five years, and there is concern over issues of health, residential amenity and other issues.**
Specialist independent	**Similar to an independent store, but this category reflects the quality and specialisation of the retailer so that a shopper may make a specific shopping trip to that shop. For example, The Pen Shop on Regent Street or antique shops.**
Sui generis	**Sui Generis is a term that refers to a use on its own. Any planning use not falling within a specific class within the Use Class Order falls within this category. Examples of sui generis uses in shopping centres are launderettes, mini cab offices, amusement centres and car showrooms.**
UDP	**Unitary Development Plan produced by Westminster City Council, with saved policies forming part of the statutory development plan for Westminster.**
Vacancy	**This category includes vacant street level units, as well as units that are under alteration. However, if at any time the survey was completed it was evident who the unit would be occupied by, the unit was treated as being occupied.**
Zone A Rent	**The rental level per square metre achieved on the first six metres of a shop unit.**

Information Sources

Westminster's City Plan - Strategic Policies (adopted November 2013)
https://www.westminster.gov.uk/westminsters-city-plan-strategic-policies

Westminster's Unitary Development Plan (UDP, adopted January 2007)
https://www.westminster.gov.uk/unitary-development-plan-udp

The Mayor's London Plan (GLA, July 2011 as amended)
http://www.london.gov.uk/priorities/planning/london-plan

The National Planning Policy Framework (NPPF, DCLG 2012)
https://www.gov.uk/government/publications/national-planning-policy-framework--2

National Planning Practice Guidance (NPPG, March 2014)
http://planningguidance.planningportal.gov.uk/

Westminster High Street Health Checks 2013
https://www.westminster.gov.uk/high-street-health-checks

Westminster Health Check Archive
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City of Westminster

Shopping Centre Health Check Survey 2014

Local Centre 34: Lauderdale Road & Castellain Road

Contents

(i) Purpose of the Study

Former government guidance on Town Centres advised that 'health checks' be undertaken every five years to allow accurate and reasonable temporal analysis of the performance of town centres. This requirement has been superseded by more recent national and regional policy frameworks and guidance.

The National Planning Policy Framework (NPPF) (DCLG, 2012), states that when setting out requirements for Plan Making and using a proportionate evidence base, '*Local Planning Authorities should have a clear understanding of business needs within the economic markets operating in and across their area. To achieve this they should... assess... the role and function of town centres and the relationship between them, including any trends in the performance of centres, and the capacity of existing centres to accommodate new town centre development* (paragraphs 160, 161).'

The London Plan (2011) sets out strategic retail policy for Town Centres in London, as set out in more detail below. Paragraph 2.74 of the London Plan (July 2011) states that "*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 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.*"

This then forms the current national and regional planning policy framework for undertaking town centre health checks. The City Council is currently follow the former guidance and updating health checks every five years, as this is deemed to be a sensible and manageable time period for monitoring the viability and vitality of centres, given the extent of Westminster's town centre network.

(ii) Westminster's Local Centres and Planning Policy

Westminster's Local Centre Health Checks were last carried out in 2007, updating 2002 and 1997 surveys, and includes detailed analysis of Westminster's 39 Local Shopping Centres.

Local Centres normally have a purely local function and most are mainly comprised of convenience goods retailers with some food and drink and local service uses, mainly providing facilities for people living or working nearby (which the City Council wishes to safeguard in accordance with national guidance). However in Westminster some are also speciality centres which attract shoppers from a wider area.

Westminster's current local plan consists of the City Plan: Strategic Polices (adopted November 2013), and saved development management policies from the Unitary Development Plan (adopted January 2007). The local plan seek to protect and enhance the designated Local Shopping Centres for the service they provide to residents, visitors and workers, and because they reduce the need to travel.

Strategic policy CS21 is the general policy for retail across Westminster, seeking to protect existing A1 uses, direct new retail floor space to designated shopping centres, and to protect non-A1 retail and town centre uses in designated shopping centres from changes to uses that do not serve visiting members of the public and that do not have active shop fronts.

Saved UDP policy SS7 (Shopping and Services policy 7) is the detailed development management policy for local shopping centres. The policy covers the protection of shops and circumstances where changes of use away from shops may be permitted, taking into consideration the viability of units and the overall balance of uses in the centre.

(iii) Westminster's Retail Hierarchy

The City of Westminster is broadly divided into two zones in terms of retail policy, the Core Central Activities Zone (CAZ) and CAZ Frontages, and areas outside of this. The Core CAZ contains the two international shopping centres in London, the West End and Knightsbridge in addition to distinctive retail areas such as Covent Garden, Soho, Mayfair and St James's, as well as numerous small parades and individual shops. Outside the Core CAZ and CAZ Frontages there is one Major Shopping Centre, 4 District Centres (where previously there had been 7, 3 have subsequently been reclassified as CAZ Frontages and 1 as a Major Centre) and the 39 Local Centres which are designated to safeguard shopping facilities for local residents, and the retail character of local shopping areas.

In 2007, the District and Local Centres health check reports were all updated, as were 17 shopping areas inside the CAZ. More recently, reports for Westminster's high street shopping centres were updated in 2013.

(iv) Health Checks Methodology

As set out in the NPPF (DCLG, 2012) local planning authorities should recognise town centres as the heart of their communities and pursue policies to support their viability and vitality. Planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive.

Accessibility by public transport is considered to be excellent for all Westminster's larger shopping areas, and its Local Centres are accessible for people to walk to. The City Council wants to retain shops in Local Centres, in order to maintain a range of local convenience shops and protect the character and function of the centres. Local shops and services limit car trips, encourage walking, and make city life more practical and attractive.

The **National Planning Practice Guidance** was published in March 2014 by DCLG, several months after the field work for this project had commenced. It states that existing centres should be audited to assess their role, vitality, viability and their potential to accommodate new development and different types of development. It also sets out a series of indicators to determine the health of town centres, including:

- Diversity of use
- Vacant property
- Commercial yields on non-domestic property
- Customer views and behaviour
- Retailer representations
- Commercial rents
- Pedestrian flows and accessibility
- Perception of safety and crime
- State of environmental quality

Most of the above indicators will be assessed as part of this study, where data collection is available and reasonable. All of the above were included as part of the 2013 health checks for the larger high street type centres, where it is more appropriate to carry out consumer surveys, and where commercial data is more readily available. Given the size of this project, the indicators below are considered to be appropriate and comprehensive.

Land Use

(1) Diversity of town centre uses

This section considers the range of A1 uses, and compares the current diversity of land uses to previous Local Centre Health Check Surveys dated 1997, 2002 and 2007. It also includes the

proportion of vacant street level property and the amount of space used for different functions such as shopping, leisure, cultural and entertainment activities, pubs, cafes, and restaurants.

Accessibility

(2) **Pedestrian flows (footfall):**
Visual assessments were undertaken to measure pedestrian flows which contribute towards the vitality of the Local Centres. These were conducted on comparable days of the week and compared to the average for all of the Local Centres;

(3) **Accessibility:**
The whole of Westminster has a Public Transport Accessibility Level (PTAL) score of 6, the highest level achievable. This section therefore concentrates on ease and convenience of access;

Environment

(4) **State of the town centre environmental quality assessment:**
Includes a subjective assessment of indicators such as security, air pollution, noise, clutter, litter and graffiti, as well as positive factors such as trees, landscaping and open spaces. Each centre is assessed as per the Attractions Table 4, and the Daytime Amenity Table 5 in the 2007 Health Check Survey. A comparison is made between the 1997, 2002, 2007 and 2013 surveys.

(5) **Daytime amenity:**
A qualitative assessment of the amenity within the local centre, assessing its cleanliness, security, and identity.

(6) **Relative performance of the centre:**
Measures the performance of the centre compared to the Westminster Local Centre average in terms of land use, attractiveness, and daytime amenity, with graphs comparing the performance of centres relative to one another. The centre's strengths, weaknesses, opportunities and threats are highlighted in a SWOT analysis diagram at the end of this section.

(7) **The potential capacity for growth or change of centres in the network:** opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development is considered here. Based on levels of demand, assessments are made to ascertain how much capacity each Local Centre has to accommodate retail growth, looking at retail related planning applications in and around the Local Centres. Consideration is given to whether the current Local Centre boundaries and Core and Secondary Frontage designations are still valid. Consideration is also given to ways in which the vitality and viability of the centres could be enhanced.

(8) **Summary of health check:**
This section contains a comparison of the relative performance of this centre, and summary of land use assessment as per the 2007 Health Check reports. General comments and analysis of the centre are included, along with a summary of any problems/issues. A classification as 'in decline', 'neutral', or 'healthy' is included, plus comment on whether things have improved, deteriorated, or remained the same since 2007 (see 2007 Health Checks, Tables 6 and 7). Where a Local Centre is considered to be "in decline" or "neutral", consideration is made on ways to improve the vitality and viability of the Centre.

The results of this study will be used to inform planning policy development and the inception of other relevant interventions, and will be used to assess the success of previous initiatives such as any investment in public realm.

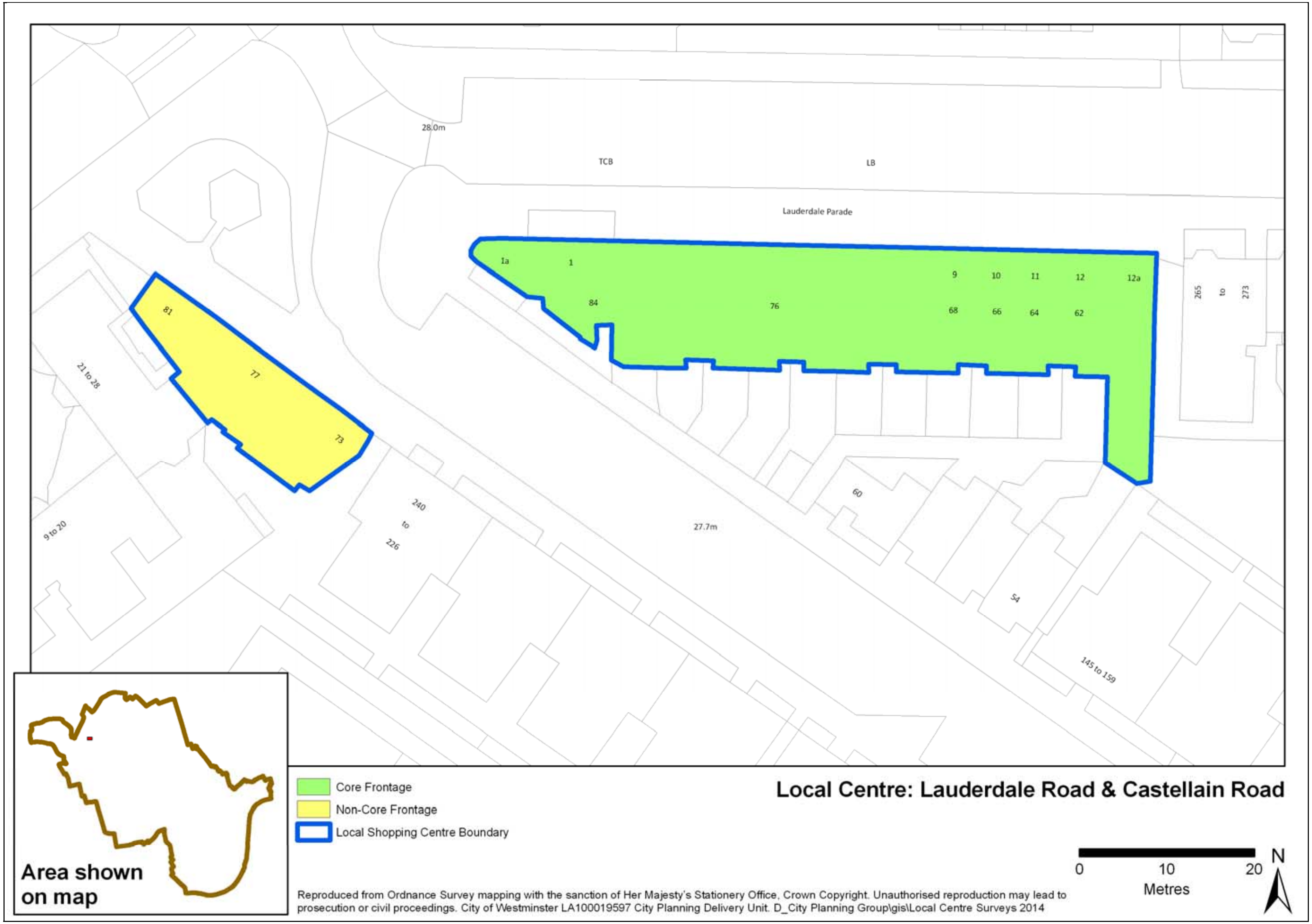
Local Centre **34: Lauderdale Road & Castellain Road**

1. Introduction

1.1 Location

Lauderdale Road/Castellain Road is a small Local Centre set around a road junction serving residents in the central Maida Vale area of north Westminster. The centre is close to Paddington Recreation Ground and the A5 Maida Vale to the east. Its catchment area is limited by the proximity of other Local Centres, such as Maida Vale to the east and Shirland Road Junction to the west.

Figure 1: Local Centre Boundary 2013



2 Land Use

2.1 Range of Uses

Lauderdale Road/Castellain Road comprises a range of shopping and other town centre uses. This diversity is summarised in Table 1 below.

Table 1: Range of Town Centre Uses (2002-2013)

Use Class		No. of Units 2002	No. of Units 2007	No. of Units 2013
Class A1 Retail		9	10	10
	Department/principle stores	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*
	National retailers	*0*	*0*	*0*
	Specialist Independent	*0*	*1*	*1*
	Independent	*5*	*6*	*6*
	Convenience	*4*	*3*	*3*
Class A2	Financial & Professional	3	2	2
Food & Drink		5	5	6
Class A3	*Restaurant/Café*	*5*	*5*	*6*
Class A4	*Pubs/Bars*	*0*	*0*	*0*
Class A5	*Takeaway*	*0*	*0*	*0*
	Takeaway/Restaurant			*0*
Sui Generis		0	0	0
Vacant Units		0	1	0
Arts/Culture		0	0	0
Health uses		0	0	0
Hotels		0	0	0
TOTAL		**17**	**18**	**18**

Source: WCC Site Survey December 2013

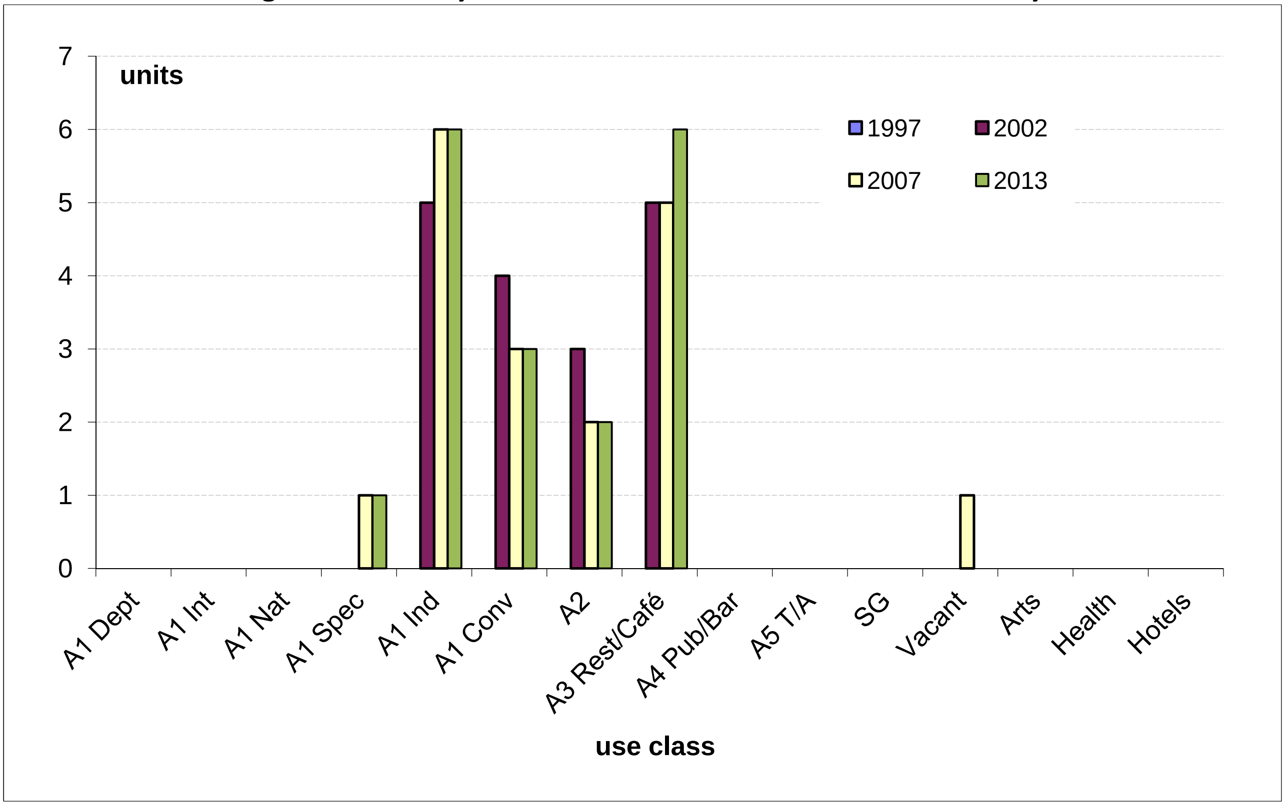
In total there are eighteen units, the same as the number recorded in the 2007 survey.

The number of A1 retail uses in Lauderdale Road/Castellain Road has remained constant since 2007 and there have been no internal shifts of use. A number of businesses have changed name/ownership but have remained within the same use class. A1 uses account for over half of the units in the centre, with a majority of these being independent retailers.

The number of Class A2 uses has remained constant at two units (both estate agents), and restaurant/café uses have increased from five to six since 2007, representing a third of the units in the centre. This includes the establishment of a café in a property that was vacant in 2007. There are no longer any vacant units in Lauderdale Road/Castellain Road. There are no other uses present in the centre outside of A1, A2 and A3 uses, including no pubs/bars or take aways.

Outside of the A-class uses, there are no arts/culture, health, hotel or sui generis uses.

Figure 2: Units by use class within the Local Centre boundary



2.2 Range of A1 Uses

Lauderdale Road/Castellain Road has ten Class A1 retail units comprising six independent retailers, three convenience stores and one specialist retailer. The specialist retailer is an interior design shop, while the independent stores include a hairdresser, a florist and a travel agent. The high proportion of comparison shops and no multiple retailers suggests that Lauderdale Road/Castellain Road serves local residents with a mix of convenience and comparison shopping facilities.

2.3 Total Retail Floor Space

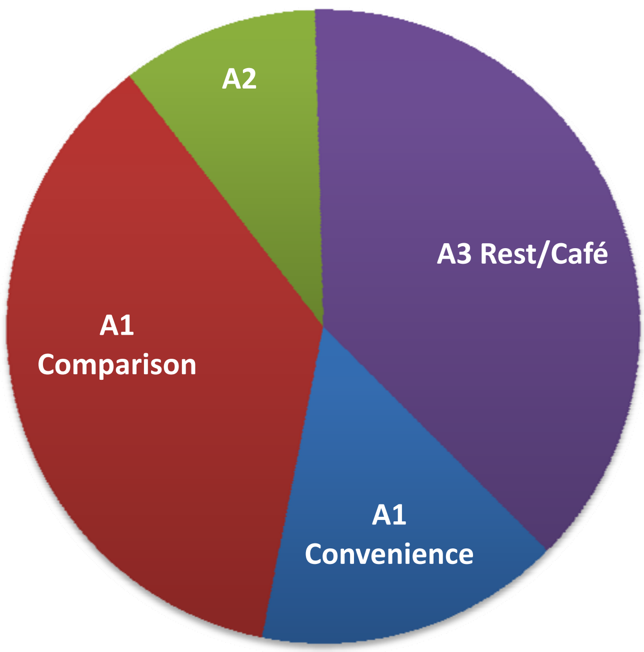
Total retail floor space in Lauderdale Road/Castellain Road is broken down in Table 2. In total, the Local Centre has 1,313 sqm of retail floor space, which is below the average of 3,188 sqm for the 39 Local Centres in the City. A1 floor space makes up over 50% of all floor space in the centre. It has a comparable proportion of A1 comparison and A3 Restaurant/Café floor space, which together account for nearly three quarters of the total floor space. There is also a significant proportion of A1 convenience floor space, with the remaining three use classes accounting for relatively little. The proportion of A3 floor space is above the overall Local Centre average at nearly 38% within the centre, though A1 comparison floor space is below (36% compared to the overall average of 41%).

Lauderdale Road/Castellain Road is a small Local Centre with a limited selection of local services and food shops, mostly due to the size of the centre. There are no banks or building societies, and the single A2 use is an estate agent. It does not provide the same range and selection found in larger Local Centres or District Centres.

Table 2: Total Retail Floor space 2013

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2013)
A1 Convenience	205	15.61%	14.9%
A1 Comparison	478	36.41%	35.2%
A2	132	10.05%	11.2%
A3 Rest/Café/TA	498	37.93%	17.4%
A4 Pub/Bar	0	0.00%	5.1%
Sui Generis	0	0.00%	3.9%
Vacant	0	0.00%	8.6%
Health	0	0.00%	2.0%
Hotels	0	0.00%	0.5%
Art	0	0.00%	1.3%
Leisure	0	0.00%	0.1%
Total	**1,313**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



Source: City of Westminster GIS System and site survey December 2013

2.4 Proportion of Vacant Street Level Property

There are no vacant properties in Lauderdale Road/Castellain Road, illustrating the vitality of the centre. The unit vacancy rate in Lauderdale Road/Castellain Road is therefore below the average rate for Local Centres in Westminster, as shown in Table 3, and below the national average vacancy rate (more than 14.1%) for shopping centres. The rate has also improved from 2007 when there was a vacant unit present in the centre, which is now an occupied restaurant.

Table 3: Level of Vacant Street Level Property 2013

% Vacant Units				% Local Centre Average
1997	2002	2007	2013	2013
0.0% (0 units)	0.0% (0 units)	5.56% (1 unit)	0.0% (0 units)	8% (1 units)

Source: City of Westminster GIS System and site survey December 2013

3. Accessibility

3.1 Pedestrian Flows (footfall)

The centre was found to be moderately busy in terms of pedestrian vibrancy when the Health Check Survey was carried out on a bright but cold weekday afternoon in January 2014.

3.2 Accessibility on foot and by public transport

Lauderdale Road/Castellain Road is located roughly 5-10 minutes' walk from both Maida Vale London Underground Station (Bakerloo Line) and Warwick Avenue London Underground Station (Bakerloo Line). Although no bus routes run through the Local Centre itself, several routes serve neighbouring Maida Vale to the east and Shirland Road to the west, both of which are located roughly five minutes' walk away. Lauderdale Road/Castellain Road is located to the west of the A5 Maida Vale, which runs through to north London and joins the A40 (M) Westway to the south.

4. Environmental Quality

4.1 State of the Centre's Attractions and Environmental Quality / Attractions

The attitudinal assessment of the attractions and amenity of the centre is summarised in Tables 4 and 5 below. Lauderdale Road/Castellain Road's overall score for attractions is 26.9%, the same as that of the 2007 survey. This is slightly lower than the Local Centre average of 31%, and ranks the centre = 26th out of the 39 Local Centres in the City. It is rated as being good in three categories (prominence of independent shops, quality of retail environment, and quality of restaurants), average in one category (availability of food shopping), and poor in the rest, reflecting the limited range of shops and services in the centre.

4.2 Daytime Amenity

Lauderdale Road/Castellain Road is an attractive Local Centre, with a day time amenity rating of 84.8% compared with the average for all Local Centres of 68%, and is ranked =7th out of the 39 Local Centres in Westminster. It is only rated as being poor in two categories, both of which fall under the town centre identity heading. The overall 'feel good factor' of the centre is rated as good. In the security section, nine of the twelve categories are rated as good (including evidence of vandalism, drunkenness, rough sleeping and street drinking), with the other three categories rated as average. The centre is also rated as being good in all eight of the general cleanliness categories, and is rated positively overall.

Table 4: Attractions within the Local Centre 2013

ATTRACTIONS	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Retail Provision									
Prominence of multiple retailers			x			x			x
Prominence of independent shops		x		x			x		
Availability of food shopping		x			x			x	
Prominence of specialist shops			x			x			x
Quality of market (frequency, variety etc.)	-	-	-	-	-	-	-	-	-
Quality of retail environment		x		x			x		
Art/Culture									
Quality of restaurants (availability, number etc.)	x			x			x		
Quality of pubs/clubs/bars			x			x			x
Range of cultural/community events (theatre, concerts)			x			x			x
Availability of sports and leisure facilities			x			x			x
Service Provision									
Local services (information, library etc.)			x			x			x
Employment/office space			x			x			x
Bank/building society provision			x			x			x
Total	5/26			7/26			7/26		
Percentage	19.23%			26.92%			26.92%		

Source: City of Westminster site survey December 2013

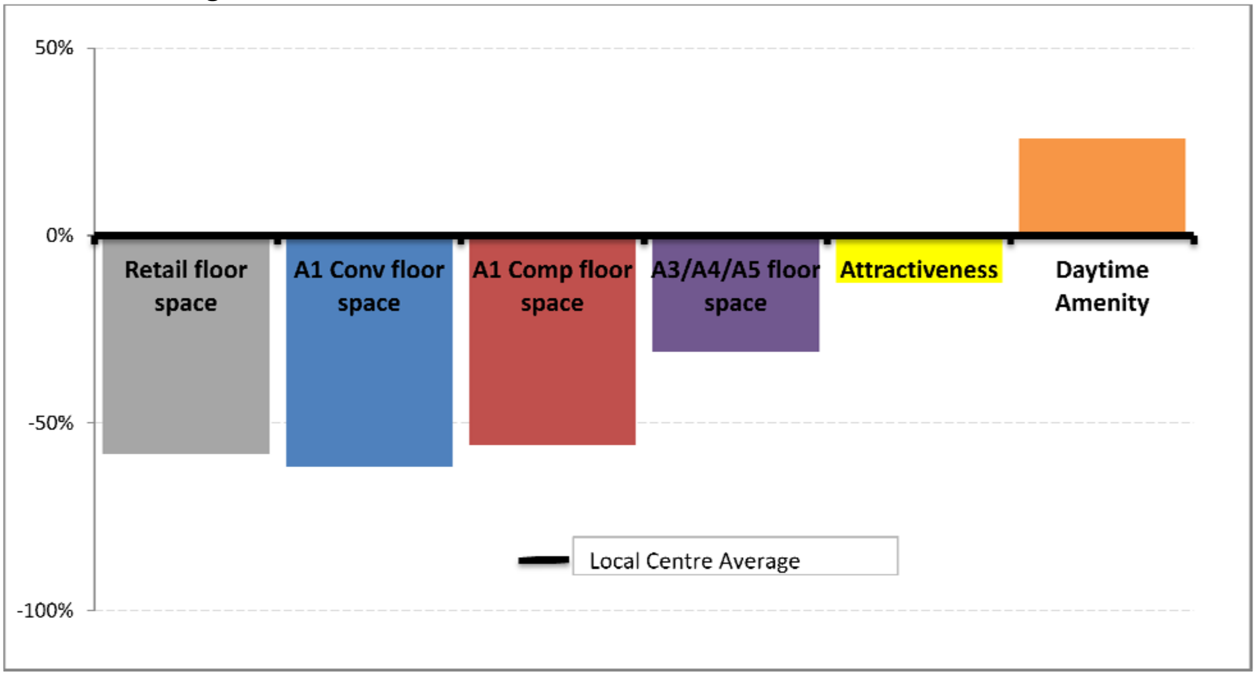
Table 5: Day Time Amenity within the Local Centre 2013

AMENITY – DAYTIME	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Overall environment of public areas in the centre									
General Cleanliness in Shopping Hours:									
Presence of litter		x			x		x		
Presence of refuse bags on the street	x				x		x		
Evidence of street fouling	x			x			x		
Presence of glass/glasses/other debris incl. food and food containers/wrapping		x			x		x		
Condition		x			x		x		
Quality of buildings	x			x			x		
Special features (pedestrianisation, street furniture, etc.)	x			x			x		
Impact of vacant sites	x			x			x		
Security									
Evidence of vandalism and graffiti (incl. on street furniture)	x			x			x		
Security during shopping hours (availability, access, security etc.)		x			x			x	
Ease of passage for pedestrians (incl. presence of obstacles eg illegally parked vehicles)	x			x			x		
Evidence of drunkenness, anti-social behaviour, rowdiness	x			x			x		
Presence of rough sleepers	x			x			x		
Presence of beggars	x			x			x		
Presence of street drinkers	x			x			x		
Evidence of touting (e.g. mini cabs, rickshaws, prostitution, drug dealing etc.)	x			x			x		
Presence of illegal street traders e.g. counterfeit goods, hot dogs, peanuts etc.	x			x			x		
Effectiveness of any deterrent measures (CCTV, police patrols, door security etc.)		x			x			x	
Quality of street lighting		x			x			x	
Safety perception in shopping hours	x			x			x		
Identity of town centre									
Features which identify the centre (e.g. flagship stores, buildings etc.)			x			x			x
Promotion/Street events			x			x			x
'Feel good' factor of town centre	x			x			x		
Total	36/46			35/46			39/46		
Percentage	78.3%			76.1%			84.8%		

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2013

Figure 4: Deviation of centre from the mean for Local Centres 2013



Lauderdale Road/Castellain Road is a small Local Centre with a lower than average amount of retail floor space when compared with the overall average for the 39 local centres. The centre has specifically a below average amount of A1 convenience floor space. The centre also performs poorly in terms of its rating for attractions, with above average ratings for the daytime amenity, one of the centre's strengths.

5.2 Strengths, Weaknesses, Opportunities and Threats

SWOT analysis

6. Future capacity

6.1 Potential Capacity for Growth

Between 2007 and 2013, there were no permitted planning applications in the Local Centre involving A-class uses.

7. Health of the Centre

Table 6: Summary of Health Check Assessment 2013

Subject	Subject Matter	Data	Number	Sq M
RETAILING	Floor space	Total Floor space		1,313
		Total Convenience (A1)		205
		Total Comparison (A1)		478
		Total Service (A2)		132
		Total A3		498
		Total A4		0
		Total A5		0
		Total Sui Generis		0
		Total Vacant		0
	Retail Offer	Total Number of Shop Units	18	
		Total Number of A1 Units	10	
		a) Convenience shops	3	
		b) Department/principal stores	0	
		c) Prestige international shops	0	
		d) National comparison retailers	0	
		e) Specialist Independent shops	1	
		f) Independent shops	6	
		Total Comparison Multiples	7	
		Total Number of A2 Units	2	
		Total Number of A3 Units	6	
		Total Number of A4 Units	0	
		Total Number of A5 Units	0	
		Total Number of Sui Generis	0	
		Total Number of Vacant	0	
	Market	Days of operation	0	
		Number of stalls	0	
	Proposals	Changes of use A1 to A2	0	
		Changes of use A1 to A3	0	
		Changes of use A1 to A4	0	
		Changes of use A1 to A5	0	
ARTS/CULTURE		(cinemas, galleries, theatres etc.)	0	
HEALTH USES		(clinics, surgeries etc.)	0	
HOTELS			0	

In terms of its vitality, viability and general economic health, this centre is considered to be ‘healthy’, as it was when last surveyed in 2007.

Appendices

Appendix 1: Views of Local Centre

Appendix 2: Land Use Table (Westminster land use survey 2013)

Appendix 3: Land Use Map (GOAD 2012 retail data and Westminster land use survey 2013)

Appendix 4: Planning permissions Map (Westminster land use survey 2013)

Appendix 5: Location map of all local centres

Appendix 6: Glossary of Terms

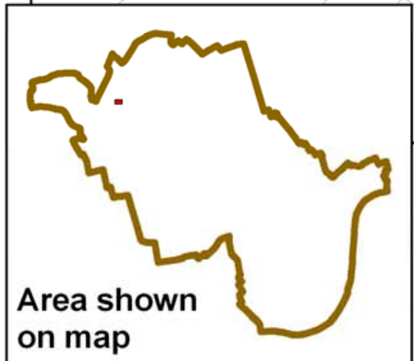
Views of Lauderdale Road/Castellain Road Local Centre

The east end of the Local Centre, with wide clear pavements, mature trees and reasonably well kept shop fronts.

The western end of the Local Centre, with mature trees and evidence of accessibility for those travelling on buses.

The east end of the Local Centre viewed from Elgin Avenue, with a wide, clear pavement, mature trees and bicycle parking facilities.

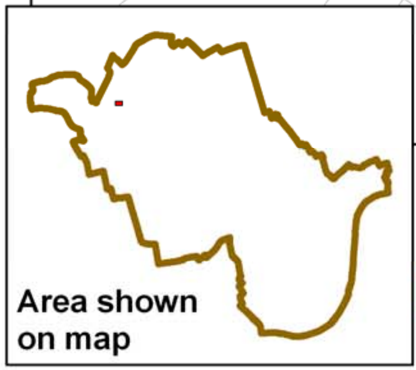
					A1	A1	A1		A3	2007 Use
ADDRESS	**FASCIA**	**DESCRIPTION**	**USE**	**SQM**	**Conv.**	**Spec.**	**Ind**	**A2**	**Res/Caf**	
73 CASTELLAIN ROAD	BON APPETIT	RESTAURANT	A3 Rest/Café	53					1	A3 Rest/Café
75 CASTELLAIN ROAD	COMPTON REEBACK	ESTATE AGENT	A2	60				1		A2
77 CASTELLAIN ROAD	HAMISH 2	NEWSAGENT	A1 Conv	59	1					A1 Conv
79 CASTELLAIN ROAD	NEW TAXIN THAI	RESTAURANT	A3 Rest/Café	54					1	A3 Rest/Café
81 CASTELLAIN ROAD	PETIT CAFÉ	CAFÉ	A3 Rest/Café	42					1	Vacant A2
1A LAUDERDALE PARADE	AVALON FLOWERS	FLORIST	A1 Ind	51			1			A1 Ind
1 LAUDERDALE PARADE	LE COCHONNET	RESTAURANT	A3 Rest/Café	70					1	A3 Rest/Café
2 LAUDERDALE PARADE	LE COCHONNET	RESTAURANT	A3 Rest/Café	75					1	A3 Rest/Café
3 LAUDERDALE PARADE	VITALITY HAIR AND BEAUTY	HAIRDRESSER	A1 Ind	73			1			A1 Ind
4 LAUDERDALE PARADE	SPIRITED WINES OF MAIDA VALE	OFF LICENCE	A1 Conv	74	1					A1 Conv
5 LAUDERDALE PARADE	W9 DRY CLEANERS	DRY CLEANER	A1 Ind	69			1			A1 Ind
6 LAUDERDALE PARADE	LA PICCOLA DELI	DELICATESSAN/CAFÉ	A1 Ind	73			1			A1 Ind
7 LAUDERDALE PARADE	GREENE AND CO	ESTATE AGENT	A2	72				1		A2
8 LAUDERDALE PARADE	TUTUN SPECIALIST TOBACCONIST	TOBACCONIST	A1 Conv	72	1					A1 Conv
9 LAUDERDALE PARADE	STEAMOND TRAVEL	TRAVEL AGENT	A1 Ind	70			1			A1 Ind
10 LAUDERDALE PARADE	THE DRY GOODS STORE	DELICATESSAN/CAFÉ	A1 Ind	71			1			A1 Ind
11 LAUDERDALE PARADE	RANGE DESIGN	INTERIOR DESIGN	A1 Spec	71		1				A1 Spec
12-12A LAUDERDALE PARADE	IBUKI SUSHI	RESTAURANT	A3 Rest/Café	204					1	A3 Rest/Café



Source: GOAD Retail Survey 2013 **Local Centre: Lauderdale Road & Castellain Road**

- Local Shopping Centre Boundary
- A1: Retail
- A2: Financial & Professional
- A3: Restaurant/Café

0 10 20
Metres
N



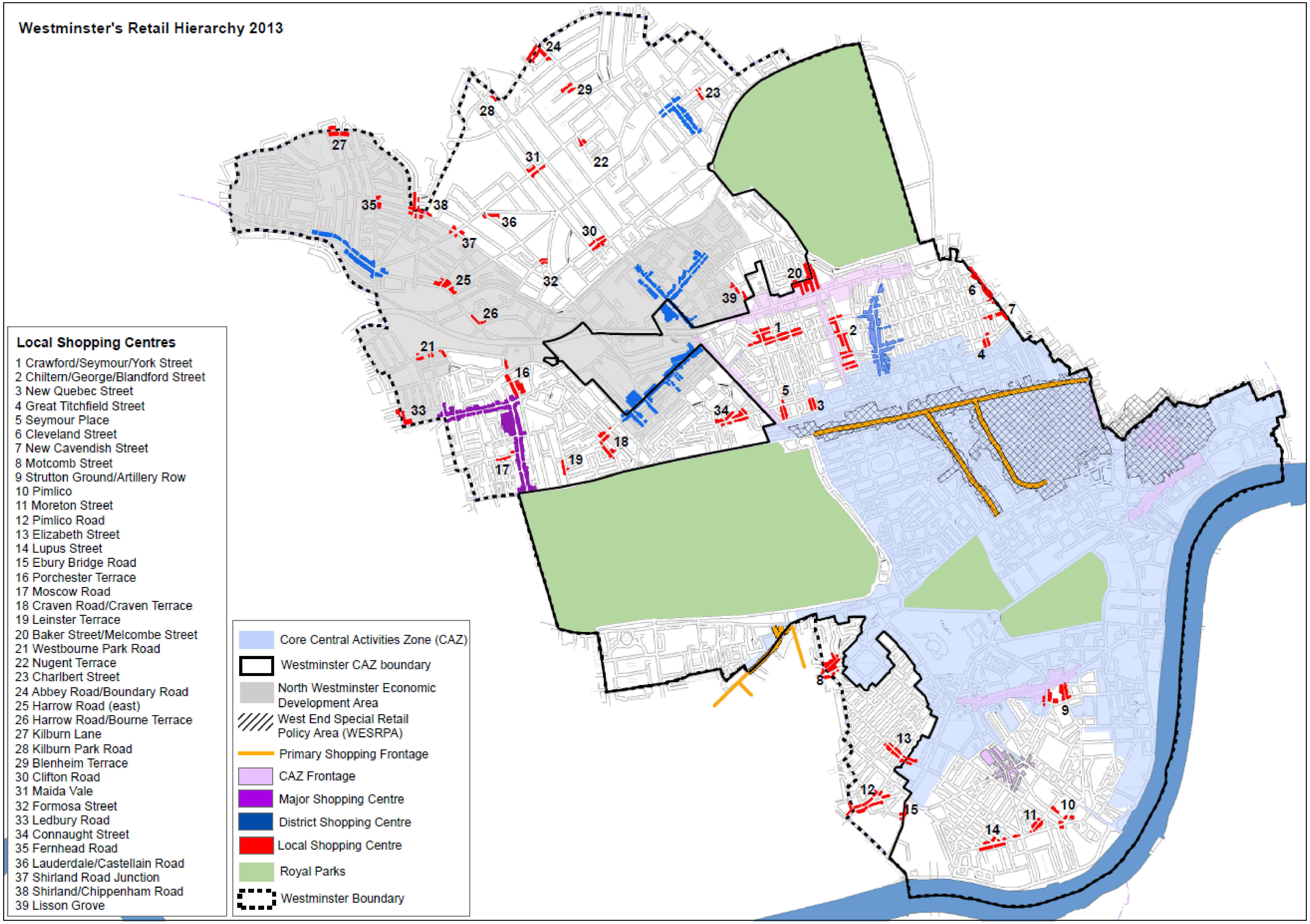
Source: GOAD Retail Survey 2013

Local Centre: Lauderdale Road & Castellain Road

Local Shopping Centre Boundary

0 10 20
Metres
N

Figure 7 Westminster wide shopping centre boundaries plan



Health Checks - Glossary of terms

A1	**Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, dry cleaners, pet shops, sandwich bars, retail showrooms, and domestic hire shops.**
A1 café type uses	**Shops such as sandwich bars or coffee shops selling food and drinks to be consumed mainly off the premises, but not hot food takeaways. Examples include certain Pret a Manger shops, Costa Coffee and the Seattle Coffee Co. shops.**
A2	**Banks, building societies, bureau de change, estate and employment agencies, professional and financial services, telephone bureaux, betting offices and beauty salons (excluding hair).**
A3	**Food and drink uses such as restaurants, pubs, snack bars, cafés, wine bars and shops for the sale of hot food (hot food take-aways).**
A4	**Drinking Establishments: Premises where the primary purpose is the sale and consumption of alcoholic drinks on the premises.**
A5	**Hot Food Take-away: Premises where the primary purpose is the sale of hot food to take away.**
B1	**Business uses such as offices, research and development and industrial uses.**
CAZ	**Central Activities Zone (CAZ). The CAZ is an area of mixed uses, many of which contribute directly to the national, regional and local economy. It is this mix of activities and their supporting resources which underpins the success of London's economy.**
CAZ Frontages	**Mixed use areas usually with a predominant retail function. Appropriate areas for retail growth.**
Comparison	**A1 floor space selling predominantly durable items and not in convenience use.**
Convenience	**This is based on the classification provided by the unit for Retail Planning Information (URPI) set out in URPI brief 99/2. The classifications are: food, alcoholic drink, tobacco and other goods (newspapers and magazines, cleaning materials and matches). For the purposes of this assessment, convenience includes shops selling food or drink (excluding A1 café-type uses), newsagents, (including specialist tobacco stores), chemists (including Boots the Chemist stores) and post offices.**
Department/ principle store	**This includes the main department stores such as John Lewis, Liberty, and Selfridges, as well as variety stores such as Marks & Spencer and Virgin Mega-stores.**
District Centre	**Distributed more widely than Metropolitan and Major centres, they provide convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000-50,000 sqm of retail floor space. Some district centres have developed specialist shopping functions.**
Experian GOAD	**An independent retail data consultancy who provide maps of ground floor uses in shopping centres.**
F&B	**Food and beverage offer, covered by parts A3 (cafe's/restaurants), A4 (drinking establishments) and A5 (take aways) of the use classes order.**
Gross Floorspace	**Floorspace of buildings on all floors including external walls, half the thickness of parting walls and circulation areas.**
Independent store	**This includes non-convenience stores (see definition above) irrespective of size, that are not considered to be specialist retailers (see definition overleaf), that are operated by retailers that are not included within national retail chains or groups.**
Major Centre	**Typically found in inner and some parts of outer London with a borough-wide catchment. They generally contain over 50,000sqm of retail floor space and a relatively high proportion of comparison goods relative to convenience goods. They may also have significant employment, leisure, service and civic functions.**
NPPF	**National Planning Policy Framework. Central Government's key, revised guidance document driving planning policy in England, which compressed the**

	previous PPS documents and other guidance into a single document. It includes key guidance on town centres and health checks.
National retailers	**This includes all retailers (Class A1 only) that operate within the context of a national retail chain or group, such as Next. A schedule of all national retail multiples can be found in Retail Directory of the UK 2002 (Hemming Information). Specialist shops that are part of a retail chain or group, such as Whittards and Thorntons, are classified as national retailers. Although there are national chains of food and drink uses and betting shops, such as Ladbrokes, these are classified based on the use class (e.g. betting shops as A2 uses) and not as national retailers.**
Prestige international retailers	**This includes prestigious retailers that operate in more than one country, such as Gucci, Gianni Versace, and Giorgio Armani. It also includes flagship stores that are only found in select town centres in Britain. National airline shops, such as British Airways, have also been classified as international retailers.**
Primary Frontages	**Internationally recognised shopping destinations. The Primary Frontages defined in Westminster's City Plan - Strategic Policies document are Oxford Street, Regent Street, Bond Street and Knightsbridge/Brompton Road.**
Retail floorspace	**This is all A1, A2, A3, A4, A5 and sui generis floorspace, and vacant floorspace of any of the aforementioned categories.**
Shisha	**Flavoured tobacco smoked through a water pipe or hookah. Smoke free legislation means that it cannot be smoked indoors in public places, and is often smoked at tables and chairs on the footway and in garden areas. There has been a rapid rise in shisha uses over the past five years, and there is concern over issues of health, residential amenity and other issues.**
Specialist independent	**Similar to an independent store, but this category reflects the quality and specialisation of the retailer so that a shopper may make a specific shopping trip to that shop. For example, The Pen Shop on Regent Street or antique shops.**
Sui generis	**Sui Generis is a term that refers to a use on its own. Any planning use not falling within a specific class within the Use Class Order falls within this category. Examples of sui generis uses in shopping centres are launderettes, mini cab offices, amusement centres and car showrooms.**
UDP	**Unitary Development Plan produced by Westminster City Council, with saved policies forming part of the statutory development plan for Westminster.**
Vacancy	**This category includes vacant street level units, as well as units that are under alteration. However, if at any time the survey was completed it was evident who the unit would be occupied by, the unit was treated as being occupied.**
Zone A Rent	**The rental level per square metre achieved on the first six metres of a shop unit.**

Information Sources

Westminster's City Plan - Strategic Policies (adopted November 2013)
https://www.westminster.gov.uk/westminsters-city-plan-strategic-policies

Westminster's Unitary Development Plan (UDP, adopted January 2007)
https://www.westminster.gov.uk/unitary-development-plan-udp

The Mayor's London Plan (GLA, July 2011 as amended)
http://www.london.gov.uk/priorities/planning/london-plan

The National Planning Policy Framework (NPPF, DCLG 2012)
https://www.gov.uk/government/publications/national-planning-policy-framework--2

National Planning Practice Guidance (NPPG, March 2014)
http://planningguidance.planningportal.gov.uk/

Westminster High Street Health Checks 2013
https://www.westminster.gov.uk/high-street-health-checks

Westminster Health Check Archive
https://www.westminster.gov.uk/shopping-centre-health-checks

City of Westminster

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City of Westminster

Shopping Centre Health Check Survey 2014

Local Centre 35: Maida Vale

Contents

(i) Purpose of the Study

Former government guidance on Town Centres advised that 'health checks' be undertaken every five years to allow accurate and reasonable temporal analysis of the performance of town centres. This requirement has been superseded by more recent national and regional policy frameworks and guidance.

The National Planning Policy Framework (NPPF) (DCLG, 2012), states that when setting out requirements for Plan Making and using a proportionate evidence base, '*Local Planning Authorities should have a clear understanding of business needs within the economic markets operating in and across their area. To achieve this they should... assess... the role and function of town centres and the relationship between them, including any trends in the performance of centres, and the capacity of existing centres to accommodate new town centre development* (paragraphs 160, 161).'

The London Plan (2011) sets out strategic retail policy for Town Centres in London, as set out in more detail below. Paragraph 2.74 of the London Plan (July 2011) states that "*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 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.*"

This then forms the current national and regional planning policy framework for undertaking town centre health checks. The City Council is currently follow the former guidance and updating health checks every five years, as this is deemed to be a sensible and manageable time period for monitoring the viability and vitality of centres, given the extent of Westminster's town centre network.

(ii) Westminster's Local Centres and Planning Policy

Westminster's Local Centre Health Checks were last carried out in 2007, updating 2002 and 1997 surveys, and includes detailed analysis of Westminster's 39 Local Shopping Centres.

Local Centres normally have a purely local function and most are mainly comprised of convenience goods retailers with some food and drink and local service uses, mainly providing facilities for people living or working nearby (which the City Council wishes to safeguard in accordance with national guidance). However in Westminster some are also speciality centres which attract shoppers from a wider area.

Westminster's current local plan consists of the City Plan: Strategic Polices (adopted November 2013), and saved development management policies from the Unitary Development Plan (adopted January 2007). The local plan seek to protect and enhance the designated Local Shopping Centres for the service they provide to residents, visitors and workers, and because they reduce the need to travel.

Strategic policy CS21 is the general policy for retail across Westminster, seeking to protect existing A1 uses, direct new retail floor space to designated shopping centres, and to protect non-A1 retail and town centre uses in designated shopping centres from changes to uses that do not serve visiting members of the public and that do not have active shop fronts.

Saved UDP policy SS7 (Shopping and Services policy 7) is the detailed development management policy for local shopping centres. The policy covers the protection of shops and circumstances where changes of use away from shops may be permitted, taking into consideration the viability of units and the overall balance of uses in the centre.

(iii) Westminster's Retail Hierarchy

The City of Westminster is broadly divided into two zones in terms of retail policy, the Core Central Activities Zone (CAZ) and CAZ Frontages, and areas outside of this. The Core CAZ contains the two international shopping centres in London, the West End and Knightsbridge in addition to distinctive retail areas such as Covent Garden, Soho, Mayfair and St James's, as well as numerous small parades and individual shops. Outside the Core CAZ and CAZ Frontages there is one Major Shopping Centre, 4 District Centres (where previously there had been 7, 3 have subsequently been reclassified as CAZ Frontages and 1 as a Major Centre) and the 39 Local Centres which are designated to safeguard shopping facilities for local residents, and the retail character of local shopping areas.

In 2007, the District and Local Centres health check reports were all updated, as were 17 shopping areas inside the CAZ. More recently, reports for Westminster's high street shopping centres were updated in 2013.

(iv) Health Checks Methodology

As set out in the NPPF (DCLG, 2012) local planning authorities should recognise town centres as the heart of their communities and pursue policies to support their viability and vitality. Planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive.

Accessibility by public transport is considered to be excellent for all Westminster's larger shopping areas, and its Local Centres are accessible for people to walk to. The City Council wants to retain shops in Local Centres, in order to maintain a range of local convenience shops and protect the character and function of the centres. Local shops and services limit car trips, encourage walking, and make city life more practical and attractive.

The **National Planning Practice Guidance** was published in March 2014 by DCLG, several months after the field work for this project had commenced. It states that existing centres should be audited to assess their role, vitality, viability and their potential to accommodate new development and different types of development. It also sets out a series of indicators to determine the health of town centres, including:

- Diversity of use
- Vacant property
- Commercial yields on non-domestic property
- Customer views and behaviour
- Retailer representations
- Commercial rents
- Pedestrian flows and accessibility
- Perception of safety and crime
- State of environmental quality

Most of the above indicators will be assessed as part of this study, where data collection is available and reasonable. All of the above were included as part of the 2013 health checks for the larger high street type centres, where it is more appropriate to carry out consumer surveys, and where commercial data is more readily available. Given the size of this project, the indicators below are considered to be appropriate and comprehensive.

Land Use

(1) Diversity of town centre uses

This section considers the range of A1 uses, and compares the current diversity of land uses to previous Local Centre Health Check Surveys dated 1997, 2002 and 2007. It also includes the

proportion of vacant street level property and the amount of space used for different functions such as shopping, leisure, cultural and entertainment activities, pubs, cafes, and restaurants.

Accessibility

(2) **Pedestrian flows (footfall):**
Visual assessments were undertaken to measure pedestrian flows which contribute towards the vitality of the Local Centres. These were conducted on comparable days of the week and compared to the average for all of the Local Centres;

(3) **Accessibility:**
The whole of Westminster has a Public Transport Accessibility Level (PTAL) score of 6, the highest level achievable. This section therefore concentrates on ease and convenience of access;

Environment

(4) **State of the town centre environmental quality assessment:**
Includes a subjective assessment of indicators such as security, air pollution, noise, clutter, litter and graffiti, as well as positive factors such as trees, landscaping and open spaces. Each centre is assessed as per the Attractions Table 4, and the Daytime Amenity Table 5 in the 2007 Health Check Survey. A comparison is made between the 1997, 2002, 2007 and 2013 surveys.

(5) **Daytime amenity:**
A qualitative assessment of the amenity within the local centre, assessing its cleanliness, security, and identity.

(6) **Relative performance of the centre:**
Measures the performance of the centre compared to the Westminster Local Centre average in terms of land use, attractiveness, and daytime amenity, with graphs comparing the performance of centres relative to one another. The centre's strengths, weaknesses, opportunities and threats are highlighted in a SWOT analysis diagram at the end of this section.

(7) **The potential capacity for growth or change of centres in the network:** opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development is considered here. Based on levels of demand, assessments are made to ascertain how much capacity each Local Centre has to accommodate retail growth, looking at retail related planning applications in and around the Local Centres. Consideration is given to whether the current Local Centre boundaries and Core and Secondary Frontage designations are still valid. Consideration is also given to ways in which the vitality and viability of the centres could be enhanced.

(8) **Summary of health check:**
This section contains a comparison of the relative performance of this centre, and summary of land use assessment as per the 2007 Health Check reports. General comments and analysis of the centre are included, along with a summary of any problems/issues. A classification as 'in decline', 'neutral', or 'healthy' is included, plus comment on whether things have improved, deteriorated, or remained the same since 2007 (see 2007 Health Checks, Tables 6 and 7). Where a Local Centre is considered to be "in decline" or "neutral", consideration is made on ways to improve the vitality and viability of the Centre.

The results of this study will be used to inform planning policy development and the inception of other relevant interventions, and will be used to assess the success of previous initiatives such as any investment in public realm.

Local Centre **35: Maida Vale**

1. Introduction

1.1 Location

Maida Vale is a small linear local centre serving residents in the Maida Vale area of north Westminster. The centre was previously called Maida Vale north, and contains Maida Vale London Underground station within the centre boundary. The centre is adjacent to the A5 Maida Vale, one of the main arterial roads connecting Central London to the north of the city, which also has several bus routes running along it.

The centre is located in a predominantly residential area, but is located next to the Paddington Recreation Ground and in the vicinity of several schools and other facilities. The catchment area of the local centre is restricted by the proximity to other local centres such as Nugent Terrace to the east and Lauderdale Road/Castellain Road to the west, Kilburn Park Road to the north and Clifton Road to the south.

Figure 1: Local Centre Boundary 2013

2 Land Use

2.1 Range of Uses

This centre comprises a range of shopping and other town centre uses. The diversity of uses represented in the centre is summarised in Table 1 below.

Table 1: Range of Town Centre Uses (1997-2013)

Use Class		No. of Units 1997	No. of Units 2002	No. of Units 2007	No. of Units 2013
Class A1 Retail		15	16	15	15
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*0*
	National retailers	*0*	*0*	*0*	*0*
	Specialist Independent	*1*	*2*	*1*	*2*
	Independent	*6*	*6*	*6*	*5*
	Convenience	*8*	*8*	*8*	*8*
Class A2	Financial & Professional	4	4	4	4
Food & Drink		0	4	5	5
Class A3	*Restaurant/Café*	*0*	*3*	*4*	*4*
Class A4	*Pubs/Bars*	*0*	*1*	*1*	*1*
Class A5	*Takeaway*	*0*	*0*	*0*	*0*
	Takeaway/Restaurant				*0*
Sui Generis		0	0	0	0
Vacant Units		1	0	0	0
Arts/Culture		0	0	0	0
Health uses		0	0	0	0
Hotels		0	0	0	0
TOTAL		**20**	**24**	**24**	**24**

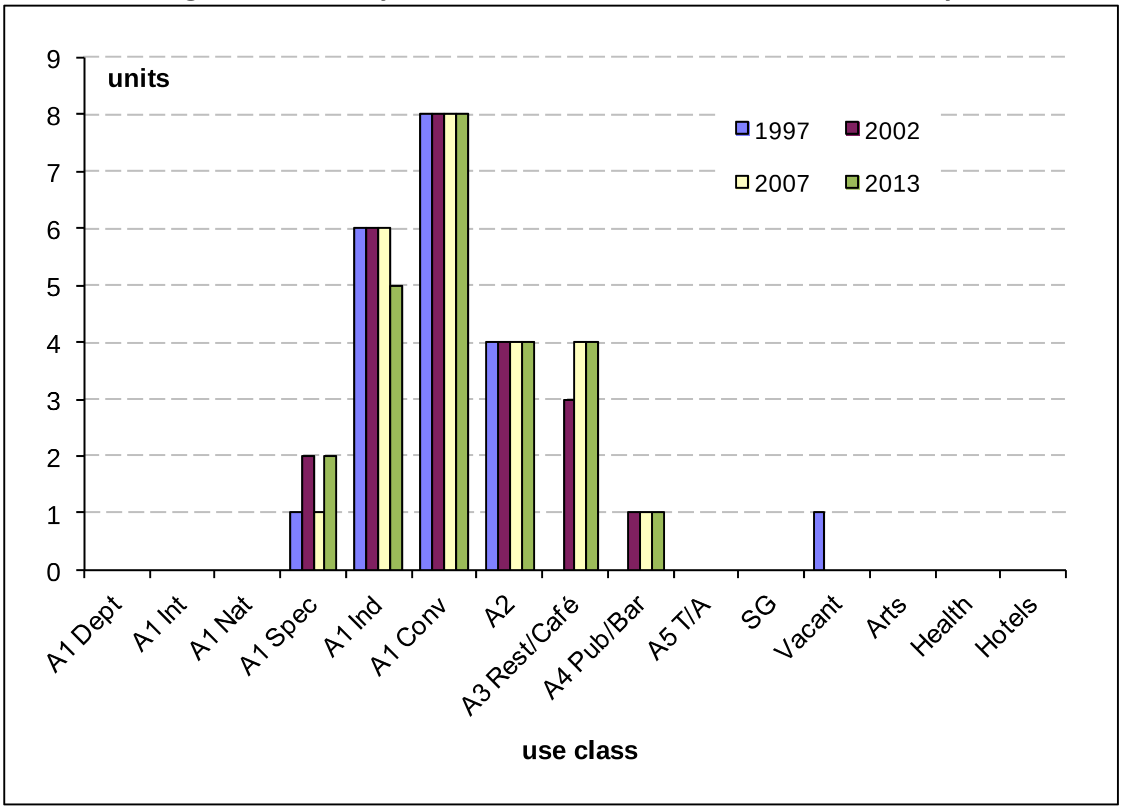
Source: WCC Land Use Survey December 2013

In total there are 24 units, the same number as recorded in the 2007 survey. The general picture is one of stability between 2007 and 2012.

The number of A1 retail uses in Maida Vale has remained the same since 2007, accounting for around two thirds of the units in the centre, with a majority of these being local convenience retailers. The mix of specialist and independent retailers has changed slightly with one independent changing to a specialist independent retailer. The number of Class A2 uses and the number of Class A3 Restaurant/café's uses have stayed the same, and are both reasonably well represented within the centre.

Outside of A-class uses the centre does not contain any Sui Generis uses, vacant units, hotels, or arts or health uses, meaning the centre is totally retail focussed.

Figure 2: Units by use class within the local centre boundary



2.2 Range of A1 Uses

Maida Vale has 15 Class A1 retail units including 8 convenience stores, 2 specialist retailers and 5 independent retailers. The specialist retailers are an antiques shop and a fashion retailer, while the independent stores include a hairdresser, a florist, and a travel agent. This mix suggests that Maida Vale serves local residents with a mix of convenience top up shops, and a small amount of comparison shopping facilities.

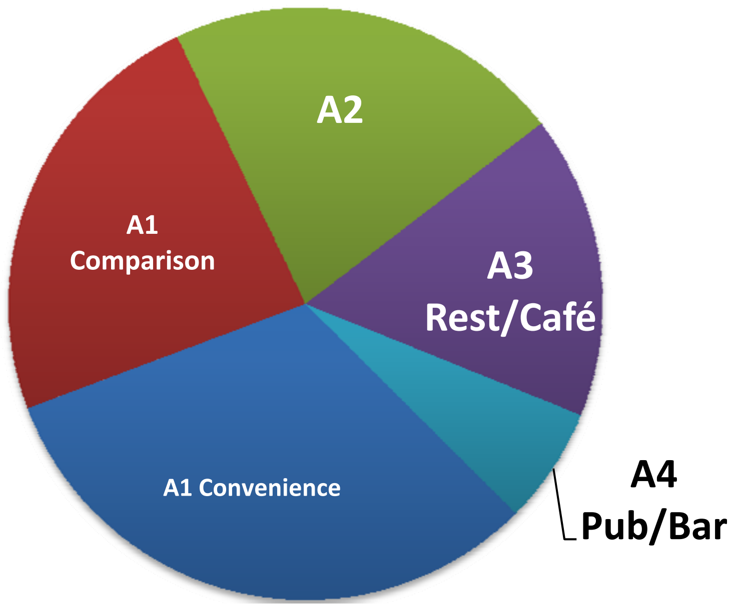
2.3 Total Retail Floor space

Total retail floor space in Maida Vale is broken down in Table 2. In total, Maida Vale has 2,024 sqm of retail floor space, which is below the average of 3,188 sqm for the 39 Local Centres in the City. Maida Vale has a high proportion of A1 convenience floor space, accounting for nearly a third of the total in the centre, and significant comparable proportions of A1 independent, A2 and A3 Restaurant/Café. The centre contains one A4 pub/bars but does not contain any A5 take away's, which is lower than the Local Centre average. The centre has a lower than average proportion of A1 comparison floor space, 24% compared to the overall average of 35% for all local centres. A1 uses as a whole account for around 55% of all floor space in the centre.

Table 2: Total Retail Floor space 2013

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2013)
A1 Convenience	643	31.77%	14.9%
A1 Comparison	478	23.62%	35.2%
A2	439	21.69%	11.2%
A3 Rest/Café/TA	335	16.55%	17.4%
A4 Pub/Bar	129	6.37%	5.1%
Sui Generis	0	0.00%	3.9%
Vacant	0	0.00%	8.6%
Health	0	0.00%	2.0%
Hotels	0	0.00%	0.5%
Art	0	0.00%	1.3%
Leisure	0	0.00%	0.1%
Total	**2,024**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



Source: City of Westminster GIS System and site survey December 2013

Maida Vale is a Local Centre with a selection of local services and food shops. There are two banks in the centre, and the other A2 uses are estate agents. The Local Centre provides a good range and selection of services compared to other Local Centres or District Centres, with a retail focus.

2.4 Proportion of Vacant Street Level Property

There are no vacant units in Maida Vale illustrating the health of the centre, and the unit vacancy rate in Maida Vale is lower than the average rate for Local Centres in the City. This was the same in 2007, illustrating the long term health of the centre when compared to the overall local centre vacancy average of 8%. The national average vacancy rate for shopping centres is over 14.1%.

Table 3: Level of Vacant Street Level Property 2013

% Vacant Units				% Local Centre Average
1997	2002	2007	2013	2013
0.00% (1) units	0.00% (0) units	0.00% (0) units	0.00% (0) units	8% (2 units)

Source: City of Westminster GIS System and site survey December 2013

3. Accessibility

3.1 Pedestrian Flows (footfall)

The centre was found to be average in terms of pedestrian vibrancy when the Health Check Survey was carried out on a weekday morning in December 2013.

3.2 Accessibility on foot and by public transport

Accessibility is one of the greater strengths of Maida Vale local centre. Maida Vale London Underground station (Bakerloo Line) is located in the local centre, and several bus routes serve Maida Vale including routes 16, 98 and 332. Also, Maida Vale/Edgware Road (A5) is one of the main arterial roads through north- west London, and links to the A40 (M) Westway to the south.

Table 4: Maida Vale Underground annual entries & exits

Station	Entry	Exit
Maida Vale	11,480	10,185

Source: London Underground Limited, 2013

4. Environmental Quality

4.1 State of the Centre's Attractions and Environmental Quality / Attractions

The attitudinal assessment of the attractions and amenity of the centre is summarised in Table 4 below. The centre's overall score for attractions is 46%, meaning that this is one of the most attractive local centres in Westminster. The rating is much higher than the Local Centre average of 31%, and means the centre is ranked =7th out of the 39 Local Centres in the City. The centre has a poor provision of multiple retailers, cultural/community events, sport and leisure facilities, local services and employment space. Maida Vale's main strengths are the provision of independent and food shops, and the number of banks in the centre.

4.2 Daytime Amenity

Maida Vale is a very attractive Local Centre, with a day time amenity rating of 74% compared with the average for all Local Centres of 68%, and is ranked 14th out of the 39 Local Centres in the City. The centre is only rated as being poor in two categories, both of which are in the town centre identity category. The centre is rated as being good in 9 of the 12 security categories, including evidence of drunkenness, rough sleepers, street drinkers and illegal street trading. The centre is rated less well in the general category, with 4 of the 8 categories rated as being average, with the other four categories rated as good, which are the presence of street debris, special street features and refuse bags on the street.

Table 5: Attractions within the Local Centre 2013

ATTRACTIONS	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Retail Provision									
Prominence of multiple retailers			X			X			X
Prominence of independent shops		X		X			X		
Availability of food shopping	X			X			X		
Prominence of specialist shops		X			X			X	
Quality of market (frequency, variety etc)	-	-	-	-	-	-	-	-	-
Quality of retail environment		X			X			X	
Art/Culture									
Quality of restaurants (availability, number etc)		X			X			X	
Quality of pub/club/bars			X		X			X	
Range of cultural/ community events (theatre, concerts)			X			X			X
Availability of sports and leisure facilities			X			X			X
Service Provision									
Local services (information, library etc)			X			X		X	
Employment/ office space			X			X		X	
Bank/ building society provision	X			X			X		
Total	8/26			10/26			12/26		
Percentage	30.77%			38.46%			46.15%		

Source: City of Westminster site survey December 2013

Table 6: Day Time Amenity within the Local Centre 2013

AMENITY – DAYTIME	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Overall environment of public areas in the centre									
General Cleanliness in Shopping Hours:									
Presence of litter		X			x		X		
Presence of refuse bags on the street			X		x			X	
Evidence of street fouling	X				x		X		
Presence of glass/glasses/other debris incl. Food and food containers/wrapping	X			x			X		
Condition		X			x			X	
Quality of buildings		X			x			X	
Special features (pedestrianisation, Street furniture, etc)			X	x				X	
Impact of vacant sites		X			x		X		
Security									
Evidence of Vandalism and Graffiti (incl. on street furniture)		X			x		X		
Security during shopping hours (availability, access, security etc)		X			x		X		
Ease of passage for pedestrians (incl. presence of obstacles eg illegally parked vehicles)	X			x				X	
Evidence of drunkenness, anti-social Behaviour, rowdiness	X			x			X		
Presence of rough sleepers	X			x			X		
Presence of beggars	X			x			X		
Presence of street drinkers	X			x			X		
Evidence of touting (e.g. mini cabs, ricksaws, Prostitution, drug dealing etc.)	X			x			X		
Presence of illegal street traders e.g counterfeit goods, hot dogs, peanuts etc.	X			x			X		
Effectiveness of any deterrent measures (CCTV, police patrols, door security etc)		X			x		X		
Quality of street lighting		X			x			X	
Safety perception in shopping hours		X			x			X	
Identity of town centre									
Features which identify the centre (eg flagship stores, buildings etc)			X			x			X
Promotion/ Street events			X			x			X
'Feel good' factor of town centre		X			x			X	
Total	28/46			30/46			34/46		
Percentage	60.9%			65.2%			73.9%		

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2013

Figure 4: Deviation of centre from the mean for Local Centres 2013

Maida Vale is a reasonably small Local Centre with a lower than average amount of retail floor space when compared to the overall average for the 39 local centres. This is also true for A1 comparison floor space figures, and for food and drink floor space figures (A3/A4/A5). However the centre compares favourably to the average in terms of A1 convenience floor space, which is above the average. In terms of the rating of the physical environment, the centre has above average ratings for attractiveness and daytime amenity.

5.2 Strengths, Weaknesses, Opportunities and Threats

SWOT analysis

6. Future capacity

6.1 Potential Capacity for Growth

Between 2007 and 2013, there was one permitted planning applications in Maida Vale shopping centre involving changing 48 sqm of A2 space to extend the neighbouring pharmacy (A1).

7. Health of the Centre

Table 7: Summary of Health Check Assessment 2013

Subject	Subject Matter	Data	Number	Sq M
RETAILING	**Floor space**	**Total Floor space**		**2,024**
		Total Convenience (A1)		**643**
		Total Comparison (A1)		**478**
		Total Service (A2)		**439**
		Total A3		**335**
		Total A4		**129**
		Total A5		**0**
		Total Arts		**0**
		Total Vacant		**0**
	Retail Offer	**Total Number of Shop Units**	**24**	
		Total Number of A1 Units	**15**	
		a) Convenience shops	**8**	
		b) Department/principal stores	**0**	
		c) Prestige international shops	**0**	
		d) National comparison retailers	**0**	
		e) Specialist Independent shops	**2**	
		f) Independent shops	**5**	
		Total Comparison Multiples	**7**	
		Total Number of A2 Units	**4**	
		Total Number of A3 Units	**4**	
		Total Number of A4 Units	**1**	
		Total Number of A5 Units	**0**	
		Total Number of Sui Generis	**0**	
		Total Number of Vacant	**0**	
	Market	**Days of operation**	**0**	
		Number of stalls	**0**	
	Proposals	**Changes of use A1 to A2**	**0**	
		Changes of use A1 to A3	**0**	
		Changes of use A1 to A4	**0**	
		Changes of use A1 to A5	**0**	
ARTS/CULTURE		**(cinemas, galleries, theatres etc.)**	**0**	
HEALTH USES		**(clinics, surgeries etc.)**	**0**	
HOTELS			**0**	

In terms of its vitality and viability, and general economic health this centre is considered to be ‘in decline’, as it was when last surveyed in 2007.

Appendices

Appendix 1: Views of Local Centre

Appendix 2: Land Use Table (Westminster land use survey 2013)

Appendix 3: Land Use Map (GOAD 2012 retail data and Westminster land use survey 2013)

Appendix 4: Planning permissions Map (Westminster land use survey 2013)

Appendix 5: Location map of all local centres

Appendix 6: Glossary of Terms

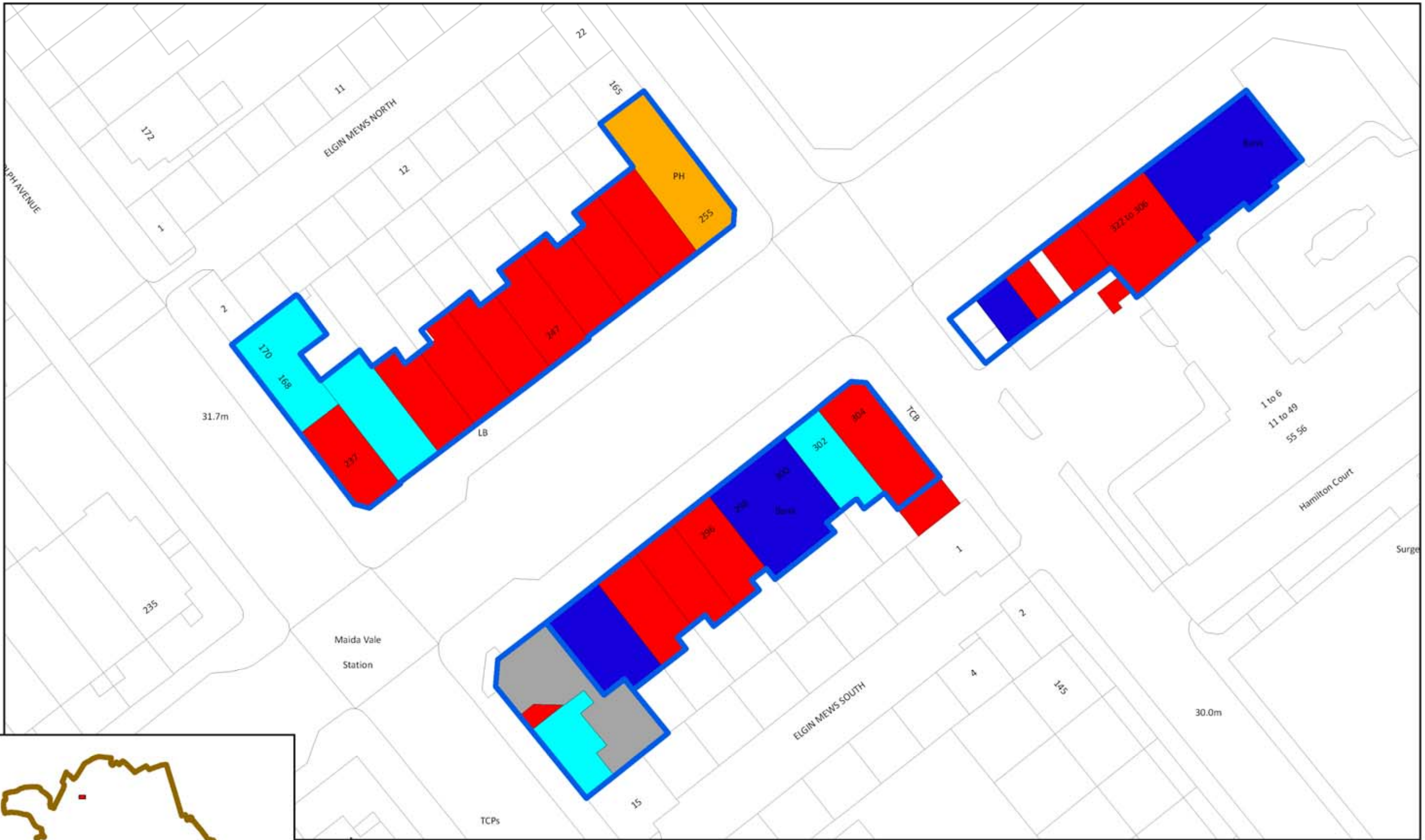
Views of Maida Vale local centre

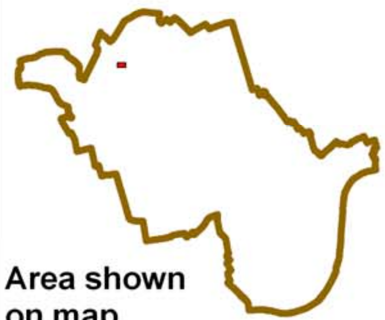
The core shopping frontage on the south side of the local centre, containing important local services such as the convenience store and one of the two banks in the centre.

The secondary shopping frontage at the eastern end of the local centre, containing the second bank in the centre.

The core frontage on the north side of the local centre, with a lot of clutter on the street outside of the bookshop, and other shops.

					A1	A1	A1		A3	A4	2007 Use
ADDRESS	**FASCIA**	**DESCRIPTION**	**USE**	**SQM**	**Conv.**	**Spec.**	**Ind**	**A2**	**Res/Caf**	**Pub/Bar**	
237ELGIN AVENUE	Wine Rack	OFF LICENCE	A1 Conv	72	1						A1 Conv
239ELGIN AVENUE	Thai Rice	RESTAURANT	A3 Rest/Café	95					1		A3 Rest/Café
241ELGIN AVENUE	VINEYARD CHEMIST	CHEMIST	A1 Conv	69	1						A1 Conv
243ELGIN AVENUE	PERSIS HAIR & BEAUTY	HAIRDRESSERS	A1 Ind	73			1				A1 Ind
245ELGIN AVENUE	VALE ANTIQUES	ANTIQUES	A1 Spec	71		1					A1 Spec
247ELGIN AVENUE	SOLOMON SUPERMARKET	GROCERS	A1 Conv	73	1						A1 Conv
249ELGIN AVENUE	Solomons News	NEWSAGENT	A1 Conv	72	1						A1 Conv
251ELGIN AVENUE	Bride and Fashionville	Ladiesware	A1 Spec	69		1					A1 Ind
253ELGIN AVENUE	Adam SUPERMARKET	GENERAL STORE	A1 Conv	72	1						A1 Conv
255ELGIN AVENUE	THE ELGIN	PUBLIC HOUSE	A3 Pub/Bar	129						1	A3 Pub/Bar
288ELGIN AVENUE		LONDON UNDERGROUND STATION		143							
290ELGIN AVENUE	ASHLEY MILTON	ESTATE AGENTS	A2	96				1			A2
292ELGIN AVENUE	SUPERSAVE	GENERAL STORE	A1 Conv	73	1						A1 Conv
294ELGIN AVENUE	CHANNEL FILMS.COM	VIDEO STORE	A1 Ind	70			1				A1 Ind
296ELGIN AVENUE	HARLEQUIN	DRYCLEANERS	A1 Ind	71			1				A1 Ind
298-300ELGIN AVENUE	NATIONAL WESTMINSTER	BANK	A2	149				1			A2
302ELGIN AVENUE	CAFÉ ROMA	RESTAURANT	A3 Rest/Café	66					1		A3 Rest/Café
304ELGIN AVENUE	FOOD CORNER	SUPERMARKET	A1 Conv	102	1						A1 Conv
306ELGIN AVENUE	SALES AND LETTINGS	ESTATE AGENTS	A2	62				1			A2
308ELGIN AVENUE	HAJ AND UMRA	TRAVEL AGENT	A1 Ind	58			1				A1 Ind
310ELGIN AVENUE	*Boomerang*	DELI/CAFÉ	A1 Ind	66			1				A1 Ind
312-314ELGIN AVENUE	CHEMIST	CHEMIST	A1 Conv	110	1						A1 Conv
316-318ELGIN AVENUE	BARCLAYS	BANK	A2	132				1			A2
166-166ARANDOLPH AVENUE	Bananna Tree Express	RESTAURANT	A3 Rest/Café	69					1		A3 Rest/Café
168-170RANDOLPH AVENUE	STARBUCKS	CAFÉ	A3 Rest/Café	105					1		A3 Rest/Café





Area shown on map

Source: GOAD Retail Survey 2013

Local Centre: Maida Vale

Local Shopping Centre Boundary
A1: Retail
A2: Financial & Professional
A3: Restaurant/Café
A4: Pub/Bar
UC: Unclassified

0 10 20
Metres

N

Source: GOAD Retail Survey 2013

Local Centre: Maida Vale

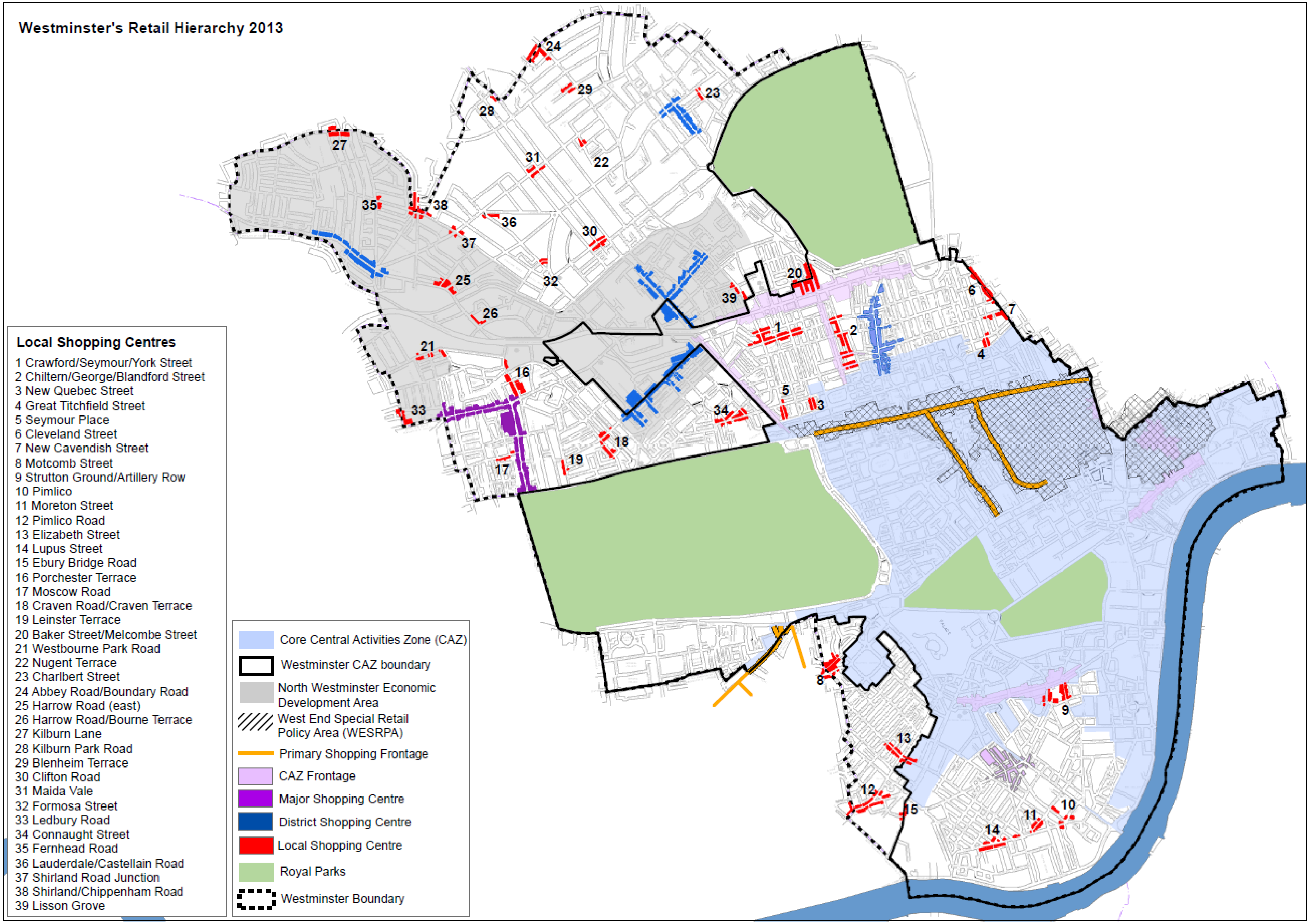
Completed 2007-2013

Local Shopping Centre Boundary

0 10 20
Metres

N

Figure 7 Westminster wide shopping centre boundaries plan



Health Checks - Glossary of terms

A1	**Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, dry cleaners, pet shops, sandwich bars, retail showrooms, and domestic hire shops.**
A1 café type uses	**Shops such as sandwich bars or coffee shops selling food and drinks to be consumed mainly off the premises, but not hot food takeaways. Examples include certain Pret a Manger shops, Costa Coffee and the Seattle Coffee Co. shops.**
A2	**Banks, building societies, bureau de change, estate and employment agencies, professional and financial services, telephone bureaux, betting offices and beauty salons (excluding hair).**
A3	**Food and drink uses such as restaurants, pubs, snack bars, cafés, wine bars and shops for the sale of hot food (hot food take-aways).**
A4	**Drinking Establishments: Premises where the primary purpose is the sale and consumption of alcoholic drinks on the premises.**
A5	**Hot Food Take-away: Premises where the primary purpose is the sale of hot food to take away.**
B1	**Business uses such as offices, research and development and industrial uses.**
CAZ	**Central Activities Zone (CAZ). The CAZ is an area of mixed uses, many of which contribute directly to the national, regional and local economy. It is this mix of activities and their supporting resources which underpins the success of London's economy.**
CAZ Frontages	**Mixed use areas usually with a predominant retail function. Appropriate areas for retail growth.**
Comparison	**A1 floor space selling predominantly durable items and not in convenience use.**
Convenience	**This is based on the classification provided by the unit for Retail Planning Information (URPI) set out in URPI brief 99/2. The classifications are: food, alcoholic drink, tobacco and other goods (newspapers and magazines, cleaning materials and matches). For the purposes of this assessment, convenience includes shops selling food or drink (excluding A1 café-type uses), newsagents, (including specialist tobacco stores), chemists (including Boots the Chemist stores) and post offices.**
Department/ principle store	**This includes the main department stores such as John Lewis, Liberty, and Selfridges, as well as variety stores such as Marks & Spencer and Virgin Mega-stores.**
District Centre	**Distributed more widely than Metropolitan and Major centres, they provide convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000-50,000 sqm of retail floor space. Some district centres have developed specialist shopping functions.**
Experian GOAD	**An independent retail data consultancy who provide maps of ground floor uses in shopping centres.**
F&B	**Food and beverage offer, covered by parts A3 (cafe's/restaurants), A4 (drinking establishments) and A5 (take aways) of the use classes order.**
Gross Floorspace	**Floorspace of buildings on all floors including external walls, half the thickness of parting walls and circulation areas.**
Independent store	**This includes non-convenience stores (see definition above) irrespective of size, that are not considered to be specialist retailers (see definition overleaf), that are operated by retailers that are not included within national retail chains or groups.**
Major Centre	**Typically found in inner and some parts of outer London with a borough-wide catchment. They generally contain over 50,000sqm of retail floor space and a relatively high proportion of comparison goods relative to convenience goods. They may also have significant employment, leisure, service and civic functions.**
NPPF	**National Planning Policy Framework. Central Government's key, revised guidance document driving planning policy in England, which compressed the**

	previous PPS documents and other guidance into a single document. It includes key guidance on town centres and health checks.
National retailers	**This includes all retailers (Class A1 only) that operate within the context of a national retail chain or group, such as Next. A schedule of all national retail multiples can be found in Retail Directory of the UK 2002 (Hemming Information). Specialist shops that are part of a retail chain or group, such as Whittards and Thorntons, are classified as national retailers. Although there are national chains of food and drink uses and betting shops, such as Ladbrokes, these are classified based on the use class (e.g. betting shops as A2 uses) and not as national retailers.**
Prestige international retailers	**This includes prestigious retailers that operate in more than one country, such as Gucci, Gianni Versace, and Giorgio Armani. It also includes flagship stores that are only found in select town centres in Britain. National airline shops, such as British Airways, have also been classified as international retailers.**
Primary Frontages	**Internationally recognised shopping destinations. The Primary Frontages defined in Westminster's City Plan - Strategic Policies document are Oxford Street, Regent Street, Bond Street and Knightsbridge/Brompton Road.**
Retail floorspace	**This is all A1, A2, A3, A4, A5 and sui generis floorspace, and vacant floorspace of any of the aforementioned categories.**
Shisha	**Flavoured tobacco smoked through a water pipe or hookah. Smoke free legislation means that it cannot be smoked indoors in public places, and is often smoked at tables and chairs on the footway and in garden areas. There has been a rapid rise in shisha uses over the past five years, and there is concern over issues of health, residential amenity and other issues.**
Specialist independent	**Similar to an independent store, but this category reflects the quality and specialisation of the retailer so that a shopper may make a specific shopping trip to that shop. For example, The Pen Shop on Regent Street or antique shops.**
Sui generis	**Sui Generis is a term that refers to a use on its own. Any planning use not falling within a specific class within the Use Class Order falls within this category. Examples of sui generis uses in shopping centres are launderettes, mini cab offices, amusement centres and car showrooms.**
UDP	**Unitary Development Plan produced by Westminster City Council, with saved policies forming part of the statutory development plan for Westminster.**
Vacancy	**This category includes vacant street level units, as well as units that are under alteration. However, if at any time the survey was completed it was evident who the unit would be occupied by, the unit was treated as being occupied.**
Zone A Rent	**The rental level per square metre achieved on the first six metres of a shop unit.**

Information Sources

Westminster's City Plan - Strategic Policies (adopted November 2013)
https://www.westminster.gov.uk/westminsters-city-plan-strategic-policies

Westminster's Unitary Development Plan (UDP, adopted January 2007)
https://www.westminster.gov.uk/unitary-development-plan-udp

The Mayor's London Plan (GLA, July 2011 as amended)
http://www.london.gov.uk/priorities/planning/london-plan

The National Planning Policy Framework (NPPF, DCLG 2012)
https://www.gov.uk/government/publications/national-planning-policy-framework--2

National Planning Practice Guidance (NPPG, March 2014)
http://planningguidance.planningportal.gov.uk/

Westminster High Street Health Checks 2013
https://www.westminster.gov.uk/high-street-health-checks

Westminster Health Check Archive
https://www.westminster.gov.uk/shopping-centre-health-checks

City of Westminster

If you would like to obtain further copies of this Health Check report, please:

Email: ldf@westminster.gov.uk
Or Telephone: 0207 641 2447

City of Westminster

Shopping Centre Health Check Survey 2014

Local Centre 36: Nugent Terrace

Contents

(i) Purpose of the Study

Former government guidance on Town Centres advised that 'health checks' be undertaken every five years to allow accurate and reasonable temporal analysis of the performance of town centres. This requirement has been superseded by more recent national and regional policy frameworks and guidance.

The National Planning Policy Framework (NPPF) (DCLG, 2012), states that when setting out requirements for Plan Making and using a proportionate evidence base, '*Local Planning Authorities should have a clear understanding of business needs within the economic markets operating in and across their area. To achieve this they should... assess... the role and function of town centres and the relationship between them, including any trends in the performance of centres, and the capacity of existing centres to accommodate new town centre development* (paragraphs 160, 161).'

The London Plan (2011) sets out strategic retail policy for Town Centres in London, as set out in more detail below. Paragraph 2.74 of the London Plan (July 2011) states that "*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 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.*"

This then forms the current national and regional planning policy framework for undertaking town centre health checks. The City Council is currently follow the former guidance and updating health checks every five years, as this is deemed to be a sensible and manageable time period for monitoring the viability and vitality of centres, given the extent of Westminster's town centre network.

(ii) Westminster's Local Centres and Planning Policy

Westminster's Local Centre Health Checks were last carried out in 2007, updating 2002 and 1997 surveys, and includes detailed analysis of Westminster's 39 Local Shopping Centres.

Local Centres normally have a purely local function and most are mainly comprised of convenience goods retailers with some food and drink and local service uses, mainly providing facilities for people living or working nearby (which the City Council wishes to safeguard in accordance with national guidance). However in Westminster some are also speciality centres which attract shoppers from a wider area.

Westminster's current local plan consists of the City Plan: Strategic Polices (adopted November 2013), and saved development management policies from the Unitary Development Plan (adopted January 2007). The local plan seek to protect and enhance the designated Local Shopping Centres for the service they provide to residents, visitors and workers, and because they reduce the need to travel.

Strategic policy CS21 is the general policy for retail across Westminster, seeking to protect existing A1 uses, direct new retail floor space to designated shopping centres, and to protect non-A1 retail and town centre uses in designated shopping centres from changes to uses that do not serve visiting members of the public and that do not have active shop fronts.

Saved UDP policy SS7 (Shopping and Services policy 7) is the detailed development management policy for local shopping centres. The policy covers the protection of shops and circumstances where changes of use away from shops may be permitted, taking into consideration the viability of units and the overall balance of uses in the centre.

(iii) Westminster's Retail Hierarchy

The City of Westminster is broadly divided into two zones in terms of retail policy, the Core Central Activities Zone (CAZ) and CAZ Frontages, and areas outside of this. The Core CAZ contains the two international shopping centres in London, the West End and Knightsbridge in addition to distinctive retail areas such as Covent Garden, Soho, Mayfair and St James's, as well as numerous small parades and individual shops. Outside the Core CAZ and CAZ Frontages there is one Major Shopping Centre, 4 District Centres (where previously there had been 7, 3 have subsequently been reclassified as CAZ Frontages and 1 as a Major Centre) and the 39 Local Centres which are designated to safeguard shopping facilities for local residents, and the retail character of local shopping areas.

In 2007, the District and Local Centres health check reports were all updated, as were 17 shopping areas inside the CAZ. More recently, reports for Westminster's high street shopping centres were updated in 2013.

(iv) Health Checks Methodology

As set out in the NPPF (DCLG, 2012) local planning authorities should recognise town centres as the heart of their communities and pursue policies to support their viability and vitality. Planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive.

Accessibility by public transport is considered to be excellent for all Westminster's larger shopping areas, and its Local Centres are accessible for people to walk to. The City Council wants to retain shops in Local Centres, in order to maintain a range of local convenience shops and protect the character and function of the centres. Local shops and services limit car trips, encourage walking, and make city life more practical and attractive.

The **National Planning Practice Guidance** was published in March 2014 by DCLG, several months after the field work for this project had commenced. It states that existing centres should be audited to assess their role, vitality, viability and their potential to accommodate new development and different types of development. It also sets out a series of indicators to determine the health of town centres, including:

- Diversity of use
- Vacant property
- Commercial yields on non-domestic property
- Customer views and behaviour
- Retailer representations
- Commercial rents
- Pedestrian flows and accessibility
- Perception of safety and crime
- State of environmental quality

Most of the above indicators will be assessed as part of this study, where data collection is available and reasonable. All of the above were included as part of the 2013 health checks for the larger high street type centres, where it is more appropriate to carry out consumer surveys, and where commercial data is more readily available. Given the size of this project, the indicators below are considered to be appropriate and comprehensive.

Land Use

(1) Diversity of town centre uses

This section considers the range of A1 uses, and compares the current diversity of land uses to previous Local Centre Health Check Surveys dated 1997, 2002 and 2007. It also includes the

proportion of vacant street level property and the amount of space used for different functions such as shopping, leisure, cultural and entertainment activities, pubs, cafes, and restaurants.

Accessibility

(2) **Pedestrian flows (footfall):**
Visual assessments were undertaken to measure pedestrian flows which contribute towards the vitality of the Local Centres. These were conducted on comparable days of the week and compared to the average for all of the Local Centres;

(3) **Accessibility:**
The whole of Westminster has a Public Transport Accessibility Level (PTAL) score of 6, the highest level achievable. This section therefore concentrates on ease and convenience of access;

Environment

(4) **State of the town centre environmental quality assessment:**
Includes a subjective assessment of indicators such as security, air pollution, noise, clutter, litter and graffiti, as well as positive factors such as trees, landscaping and open spaces. Each centre is assessed as per the Attractions Table 4, and the Daytime Amenity Table 5 in the 2007 Health Check Survey. A comparison is made between the 1997, 2002, 2007 and 2013 surveys.

(5) **Daytime amenity:**
A qualitative assessment of the amenity within the local centre, assessing its cleanliness, security, and identity.

(6) **Relative performance of the centre:**
Measures the performance of the centre compared to the Westminster Local Centre average in terms of land use, attractiveness, and daytime amenity, with graphs comparing the performance of centres relative to one another. The centre's strengths, weaknesses, opportunities and threats are highlighted in a SWOT analysis diagram at the end of this section.

(7) **The potential capacity for growth or change of centres in the network:** opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development is considered here. Based on levels of demand, assessments are made to ascertain how much capacity each Local Centre has to accommodate retail growth, looking at retail related planning applications in and around the Local Centres. Consideration is given to whether the current Local Centre boundaries and Core and Secondary Frontage designations are still valid. Consideration is also given to ways in which the vitality and viability of the centres could be enhanced.

(8) **Summary of health check:**
This section contains a comparison of the relative performance of this centre, and summary of land use assessment as per the 2007 Health Check reports. General comments and analysis of the centre are included, along with a summary of any problems/issues. A classification as 'in decline', 'neutral', or 'healthy' is included, plus comment on whether things have improved, deteriorated, or remained the same since 2007 (see 2007 Health Checks, Tables 6 and 7). Where a Local Centre is considered to be "in decline" or "neutral", consideration is made on ways to improve the vitality and viability of the Centre.

The results of this study will be used to inform planning policy development and the inception of other relevant interventions, and will be used to assess the success of previous initiatives such as any investment in public realm.

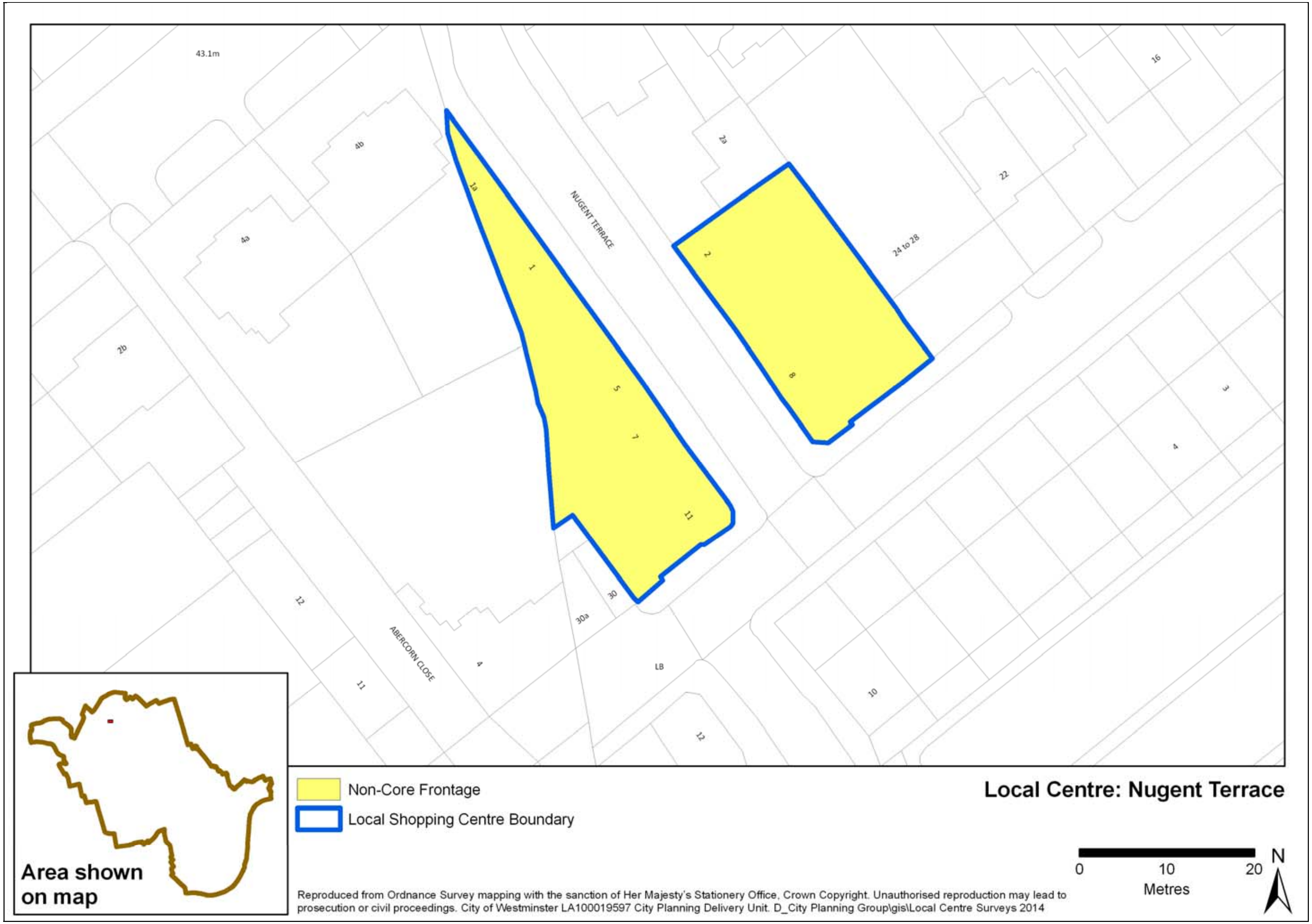
Local Centre **36: Nugent Terrace**

1. Introduction

1.1 Location

This small linear local centre is located in the north of Westminster in between Maida Vale local centre to the west and St John's Wood District Centre to the east, a few minutes walk from the Abbey Road music studios in a very residential part of the City. The centre therefore serves residents in the Maida Vale/St John's Wood area. The centre runs parallel to the A5 (Maida Vale), and the catchment area of the centre is limited by the proximity of the aforementioned shopping centres, in addition to Blenheim Terrace local centre to the north.

Figure 1: Local Centre Boundary 2013



2 Land Use

2.1 Range of Uses

This centre comprises a range of shopping and other town centre uses. The diversity of uses represented in the centre is summarised in Table 1 below.

Table 1: Range of Town Centre Uses (1997-2013)

Use Class		No. of Units 1997	No. of Units 2002	No. of Units 2007	No. of Units 2013
Class A1 Retail		6	7	6	6
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*0*
	National retailers	*0*	*0*	*0*	*0*
	Specialist Independent	*1*	*1*	*1*	*2*
	Independent	*1*	*2*	*2*	*1*
	Convenience	*4*	*4*	*3*	*3*
Class A2	Financial & Professional	1	1	0	1
Food & Drink		0	0	1	1
Class A3	*Restaurant/Café*	*0*	*0*	*1*	*1*
Class A4	*Pubs/Bars*	*0*	*0*	*0*	*0*
Class A5	*Takeaway*	*0*	*0*	*0*	*0*
	Takeaway/Restaurant				*0*
Sui Generis		1	1	1	1
Vacant Units		2	0	4	3
Arts/Culture		0	0	0	0
Health uses		0	0	0	0
Hotels		0	0	0	0
TOTAL		**10**	**9**	**12**	**12**

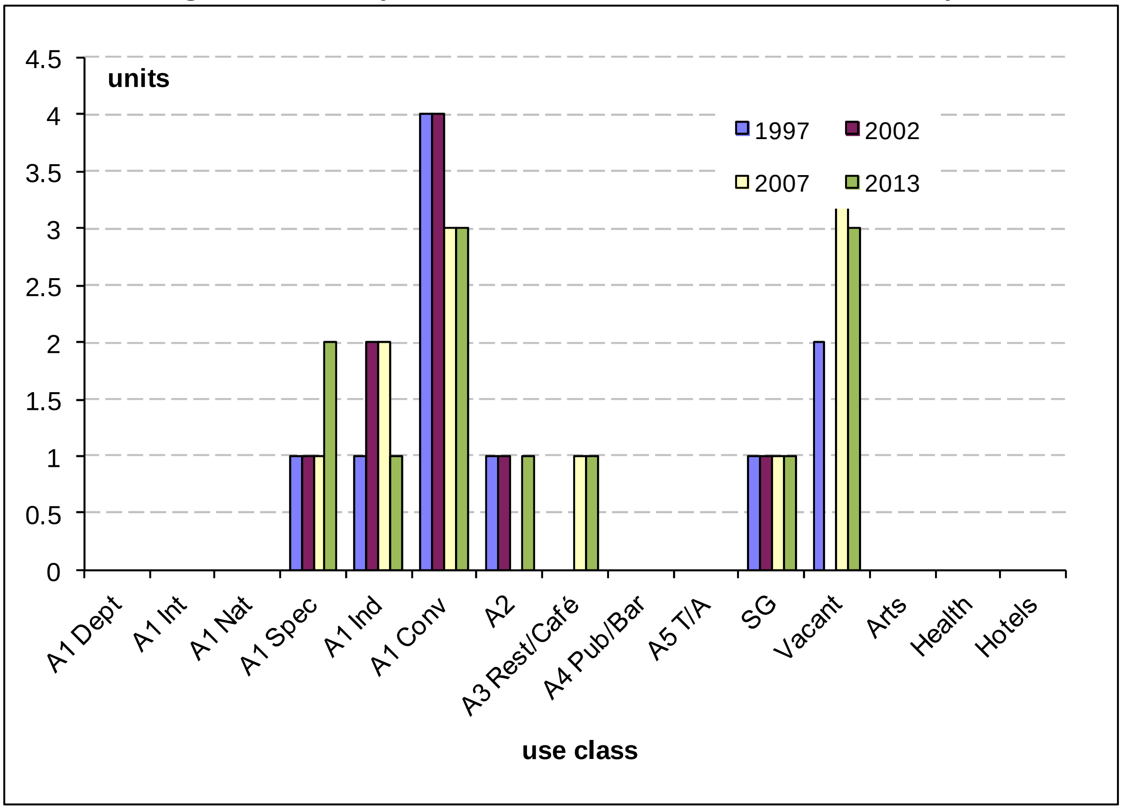
Source: WCC Land Use Survey December 2013

In total there are 12 units, this has remained stable since 2007.

The number of A1 retail uses in Nugent Terrace has remained the same, accounting for half of the units in the centre, however one independent retailer has closed and a specialist retailer has opened. The number of Class A2 uses has increased (none previously present in the centre) as there is now an Estate Agent in the centre. The vacant units have decreased from 4 to 3 with the opening of an A2 unit.

Outside of A-class uses, the centre contains one sui generis use, which is a laundrette, but the centre does not contain any hotels, health or arts uses.

Figure 2: Units by use class within the local centre boundary



2.2 Range of A1 Uses

Nugent Terrace has 6 Class A1 retail units including 3 convenience stores, 2 specialist retailers and one independent retailer. The specialist retailers are a furniture restoration shop and a shop that sells home furnishings. The independent store is a hairdresser. The high proportion of convenience retailers suggests that Nugent Terrace serves local residents with a mix of convenience and some local service facilities.

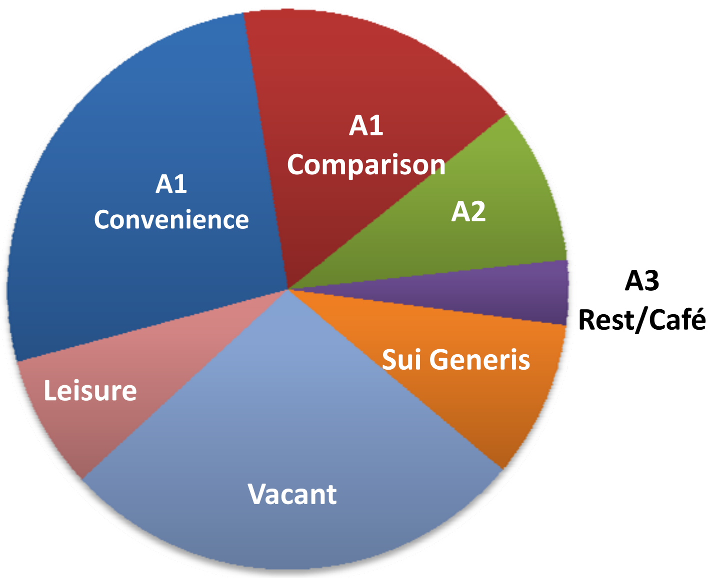
2.3 Total Retail Floor space

Total retail floor space in Nugent Terrace is broken down in Table 2. In total, Nugent Terrace has 1,014 sqm of retail floor space, which is well below the average of 3,188 sqm for the 39 Local Centres in the City, however Nugent Terrace is one of the smallest centres. Vacant floor space is the single largest 'use' in the centre, as a quarter of all units in the centre are vacant, but convenience retail accounts for nearly 27% of the total floor space in the centre, with A1 overall accounting for around 44% of all floor space. Outside of this, A2 uses account for 9%, as do sui generis uses.

Table 2: Total Retail Floor space 2013

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2013)
A1 Convenience	270	26.63%	14.9%
A1 Comparison	170	16.77%	35.2%
A2	92	9.07%	11.2%
A3 Rest/Café/TA	38	3.75%	17.4%
A4 Pub/Bar	0	0.00%	5.1%
Sui Generis	92	9.07%	3.9%
Vacant	274	27.02%	8.6%
Health	0	0.00%	2.0%
Hotels	0	0.00%	0.5%
Art	0	0.00%	1.3%
Leisure	78	7.69%	0.1%
Total	**1,014**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



Source: City of Westminster GIS System and site survey December 2013

Nugent Terrace is a Local Centre with a selection of local services and food shops. There are no banks or building societies, and the one A2 use is an estate agent. The Local Centre does not provide the same range and selection found in large Local Centres or District Centres, however this is in part due to its very small size.

2.4 Proportion of Vacant Street Level Property

The unit vacancy rate in Nugent Terrace is higher than the average rate for Local Centres in the City, as shown in Table 3. There are currently three vacant units in Nugent Terrace which is one less than in 2007. The national average vacancy rate for shopping centres is over 14.1%.

Table 3: Level of Vacant Street Level Property 2013

% Vacant Units				% Local Centre Average
1997	2002	2007	2013	2013
0.00% (2) units	0.00% (0) units	33.33% (4) units	25.00% (3) units	8% (1 units)

Source: City of Westminster GIS System and site survey December 2013

3. Accessibility

3.1 Pedestrian Flows (footfall)

The centre was found to be low in terms of pedestrian vibrancy when the Health Check Survey was carried out on a weekday morning in December 2013. The centre is reasonably isolated and located in a very residential part of the city.

3.2 Accessibility on foot and by public transport

Nugent Terrace is located five mins walk from Maida Vale Underground Station (Bakerloo Line), to the west and St John's Wood Underground Station (Jubilee Line), 5-10 mins to the east. The centre is reasonably well served by bus routes although no buses run directly through the centre many routes run along neighbouring Grove End Road to the east and along Maida Vale to the west. The centre is also close to a main arterial road running through the north west of London (A5).

4. Environmental Quality

4.1 State of the Centre's Attractions and Environmental Quality / Attractions

The attitudinal assessment of the attractions and amenity of the centre is summarised in Table 4 below. The centre's overall score for attractions is 15%, meaning that this centre has a limited range of attractions. The rating is much lower than the Local Centre average of 31%, and means the centre is ranked =34th out of the 39 Local Centres in the City. Nugent Terrace only has an average rating in four categories, including in three of the six retail provision categories. The remaining categories are all rated as being poor. However the small size of the centre should be considered when looking at the results.

4.2 Daytime Amenity

Nugent Terrace is a very attractive Local Centre, with a day time amenity rating of 87% compared with the average for all Local Centres of 68%, and is ranked 6th out of the 39 Local Centres in the City. The centre is only rated poor in the promotion of street events and rated average in security, street lighting, safety and identifying features.

Table 4: Attractions within the Local Centre 2013

ATTRACTIONS	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Retail Provision									
Prominence of multiple retailers			X			X			X
Prominence of independent shops		X			X				X
Availability of food shopping	X				X			X	
Prominence of specialist shops			X			X		X	
Quality of market (frequency, variety etc)									
Quality of retail environment		X			X			X	
Art/Culture									
Quality of restaurants (availability, number etc)			X		X			X	
Quality of pub/club/bars			X			X			X
Range of cultural/ community events (theatre, concerts)			X			X			X
Availability of sports and leisure facilities			X			X			X
Service Provision									
Local services (information, library etc)			X			X			X
Employment/ office space			X			X			X
Bank/ building society provision			X			X			X
Total	4/26			4/26			4/26		
Percentage	15.38%			15.38%			15.38%		

Source: City of Westminster site survey December 2013

Table 5: Day Time Amenity within the Local Centre 2013

AMENITY – DAYTIME	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Overall environment of public areas in the centre									
General Cleanliness in Shopping Hours:									
Presence of litter	X			X			X		
Presence of refuse bags on the street		X		X			X		
Evidence of street fouling	X			X			X		
Presence of glass/glasses/other debris incl. Food and food containers/wrapping	X			X			X		
Condition		X		X			X		
Quality of buildings	X			X			X		
Special features (pedestrianisation, Street furniture, etc)		X			X		X		
Impact of vacant sites	X					X	X		
Security									
Evidence of Vandalism and Graffiti (incl. on street furniture)		X		X			X		
Security during shopping hours (availability, access, security etc)		X			X			X	
Ease of passage for pedestrians (incl. presence of obstacles eg illegally parked vehicles)		X			X		X		
Evidence of drunkenness, anti-social Behaviour, rowdiness	X			X			X		
Presence of rough sleepers	X			X			X		
Presence of beggars	X			X			X		
Presence of street drinkers	X			X			X		
Evidence of touting (e.g. mini cabs, ricksaws, Prostitution, drug dealing etc.)	X			X			X		
Presence of illegal street traders e.g counterfeit goods, hot dogs, peanuts etc.	X			X			X		
Effectiveness of any deterrent measures (CCTV, police patrols, door security etc)		X			X			X	
Quality of street lighting		X			X			X	
Safety perception in shopping hours	X			X			X		
Identity of town centre									
Features which identify the centre (eg flagship stores, buildings etc)			X			X		X	
Promotion/ Street events			X			X			X
'Feel good' factor of town centre		X			X		X		
Total	33/46			34/46			40/46		
Percentage	71.7%			73.9%			87.0%		

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2013

Figure 4: Deviation of centre from the mean for Local Centres 2013

Nugent Terrace is a very small Local Centre with an overall retail floor space well below the overall average for the 39 local centres. This is also true for A1 convenience and comparison floor space figures, and for food and drink floor space figures (A3/A4/A5). In terms of the rating of the physical environment, the centre has a higher than average daytime amenity rating, but a below average score for attractions.

5.2 Strengths, Weaknesses, Opportunities and Threats

SWOT analysis

6. Future capacity

6.1 Potential Capacity for Growth

Between 2007 and 2013, there was one permitted planning application in Nugent Terrace which was to retain 96 sqm of A2 retail use. The unit was being used as A1.

7. Health of the Centre

Table 6: Summary of Health Check Assessment 2013

Subject	Subject Matter	Data	Number	Sq M
RETAILING	**Floor space**	**Total Floor space**		**936**
		Total Convenience (A1)		**270**
		Total Comparison (A1)		**170**
		Total Service (A2)		**92**
		Total A3		**38**
		Total A4		**0**
		Total A5		**0**
		Total Arts		**92**
		Total Vacant		**274**
	Retail Offer	**Total Number of Shop Units**	**12**	
		Total Number of A1 Units	**6**	
		a) Convenience shops	**3**	
		b) Department/principal stores	**0**	
		c) Prestige international shops	**0**	
		d) National comparison retailers	**0**	
		e) Specialist Independent shops	**2**	
		f) Independent shops	**1**	
		Total Comparison Multiples	**3**	
		Total Number of A2 Units	**1**	
		Total Number of A3 Units	**1**	
		Total Number of A4 Units	**0**	
		Total Number of A5 Units	**0**	
		Total Number of Sui Generis	**1**	
		Total Number of Vacant	**3**	
	Market	**Days of operation**	**0**	
		Number of stalls	**0**	
	Proposals	**Changes of use A1 to A2**	**1**	**96**
		Changes of use A1 to A3	**0**	
		Changes of use A1 to A4	**0**	
		Changes of use A1 to A5	**0**	
ARTS/CULTURE		**(cinemas, galleries, theatres etc.)**	**0**	
HEALTH USES		**(clinics, surgeries etc.)**	**0**	
HOTELS			**0**	

In terms of its vitality and viability, and general economic health this centre is considered to be ’in decline’, compared to the ‘neutral’ rating from the 2002 survey. This is due to a sharp rise in unit vacancies in the centre.

Appendices

Appendix 1: Views of Local Centre

Appendix 2: Land Use Table (Westminster land use survey 2013)

Appendix 3: Land Use Map (GOAD 2012 retail data and Westminster land use survey 2013)

Appendix 4: Planning permissions Map (Westminster land use survey 2013)

Appendix 5: Location map of all local centres

Appendix 6: Glossary of Terms

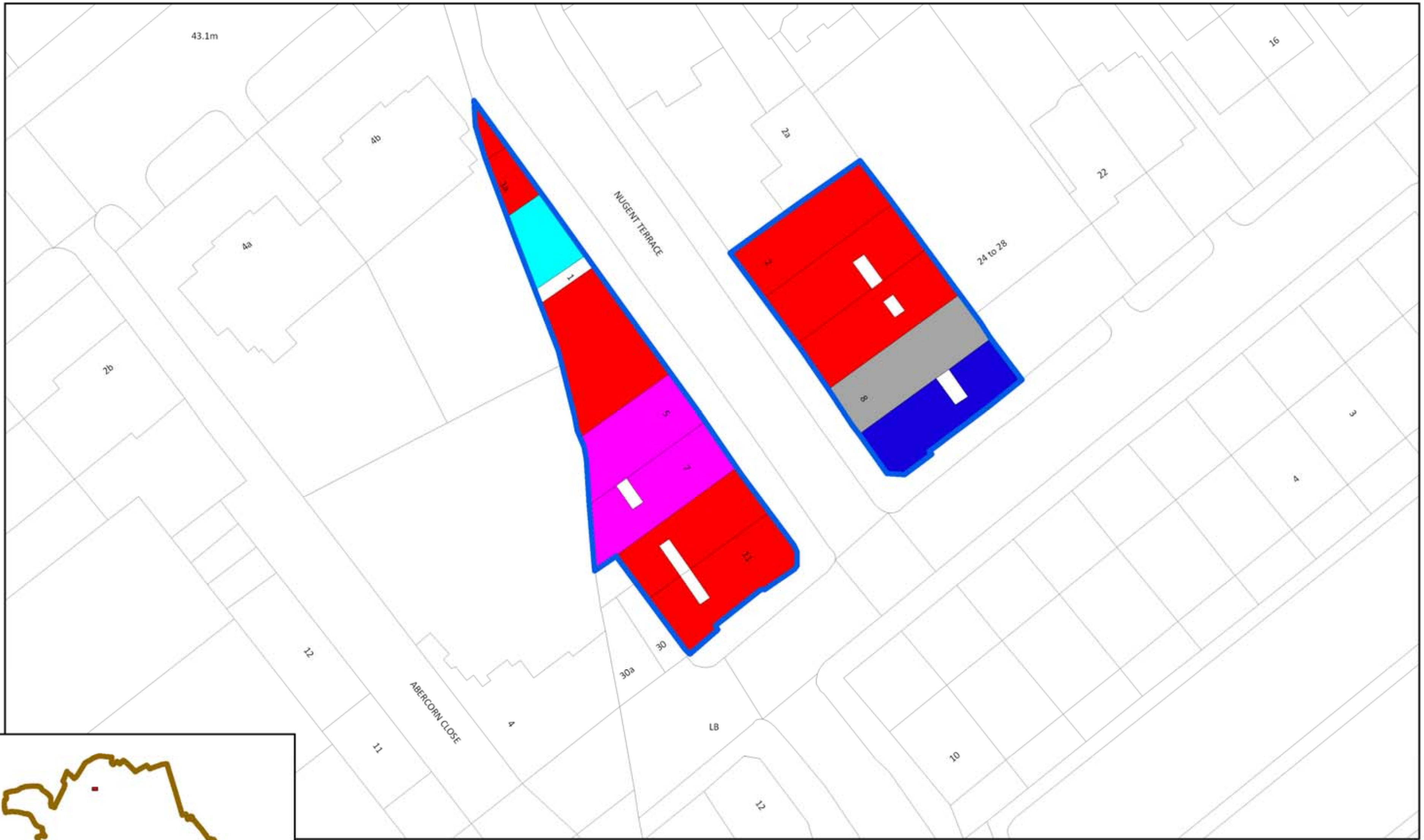
Views of Nugent Terrace local centre

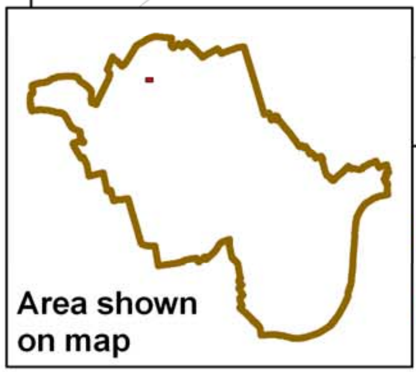
The western side of the local centre, containing convenience shopping, café's and other uses.

The eastern side of the local centre, containing important services such as the pharmacy.

The local centre looking down from the north end of the centre, with vacant units to the immediate right of the picture.

					A1	A1	A1		A3	B1	S G	Vacant	Leisure	2007 Use
ADDRESS	**FASCIA**	**DESCRIPTION**	**USE**	**SQM**	**Conv.**	**Spec.**	**Ind**	**A2**	**Res/Caf**					
1NUGENT TERRACE	ABBEY HAIR SALON	HAIRDRESSERS	A1 Ind	38			1							A1 Ind
1NUGENT TERRACE	Abbey Café	Café	A3 Rest/Café	38					1					A3 Rest/Café
1ANUGENT TERRACE	Pappillon	FURNITURE	A1 Spec	39		1								Vacant A1
2NUGENT TERRACE	VACANT A1	Hairdresser	Vacant	91								1		A1 Ind
3NUGENT TERRACE	Exercise Shop	Studio	D2 Gym	78									1	Vacant A1
4NUGENT TERRACE	20TH CENTURY DESIGN	FURNITURE RESTORATION	A1 Spec	93		1								A1 Spec
5NUGENT TERRACE	Endershams	OFFICE	B1	79						1				Vacant A1
6NUGENT TERRACE	GRAEME HOLMES	CHEMIST	A1 Conv	92	1									A1 Conv
7NUGENT TERRACE	Vacant	OFFICE	Vacant	92								1		B1
8NUGENT TERRACE	MAYFAIR LAUNDRY SERVICES	LAUNDERETTE	SG	91								1		SG
9NUGENT TERRACE	LEAMYS	NEWSAGENTS	A1 Conv	84	1									A1 Conv
10NUGENT TERRACE	Global Reailty	Estate Agents	A2	92				1			1			
11NUGENT TERRACE	CORNER SHOP	GROCERS	A1 Conv	94	1									A1 Conv



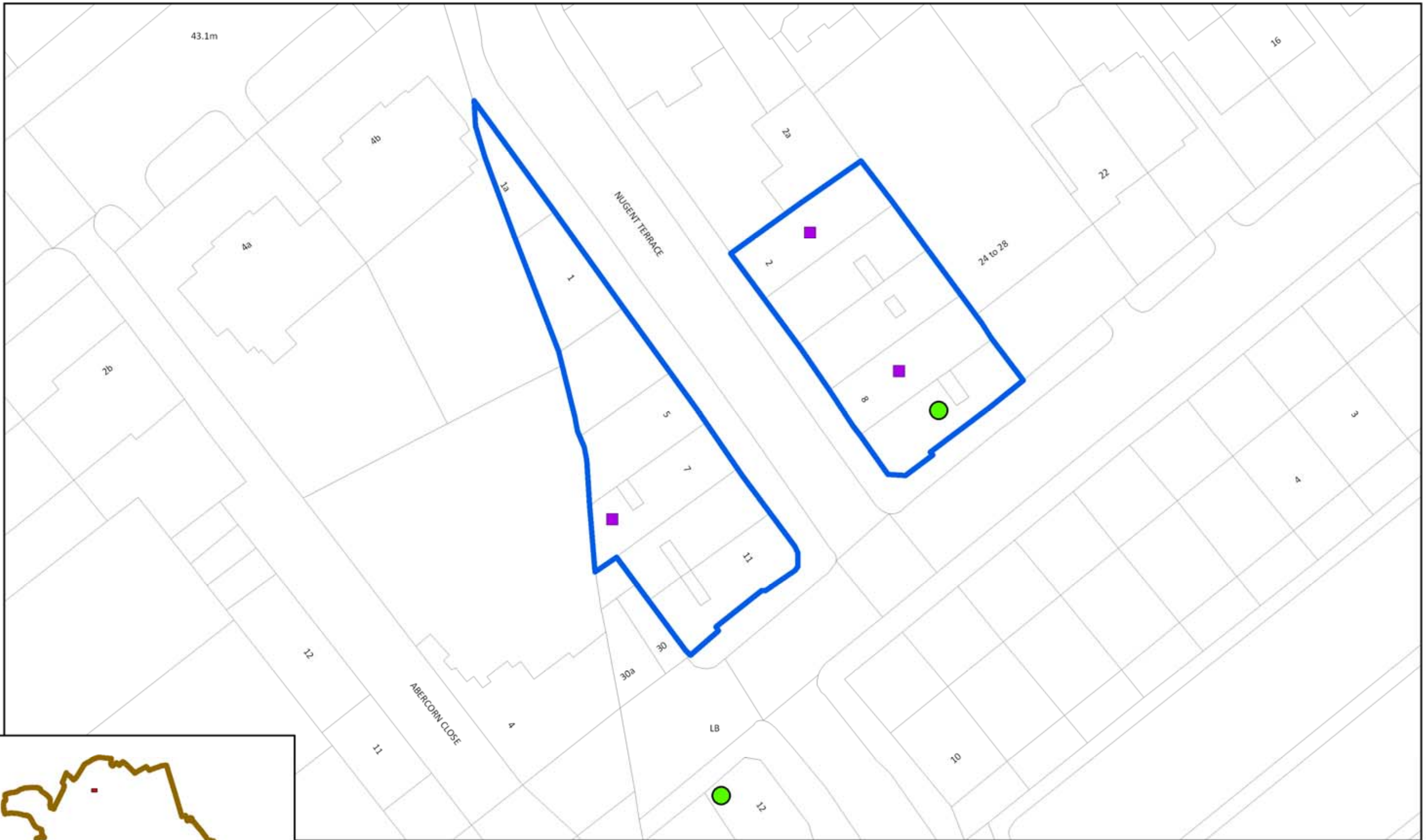


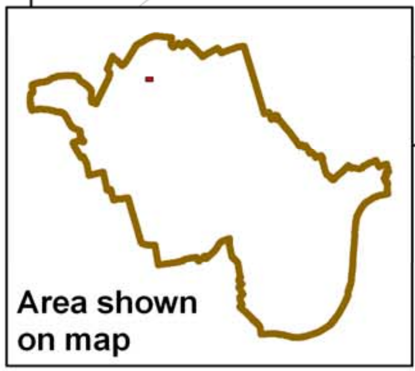
Source: GOAD Retail Survey 2013

Local Centre: Nugent Terrace

Local Shopping Centre Boundary
A1: Retail
A2: Financial & Professional
A3: Restaurant/Café
ASG: Sui Generis
B1: Office

0 10 20
Metres
N





Source: GOAD Retail Survey 2013

Local Centre: Nugent Terrace

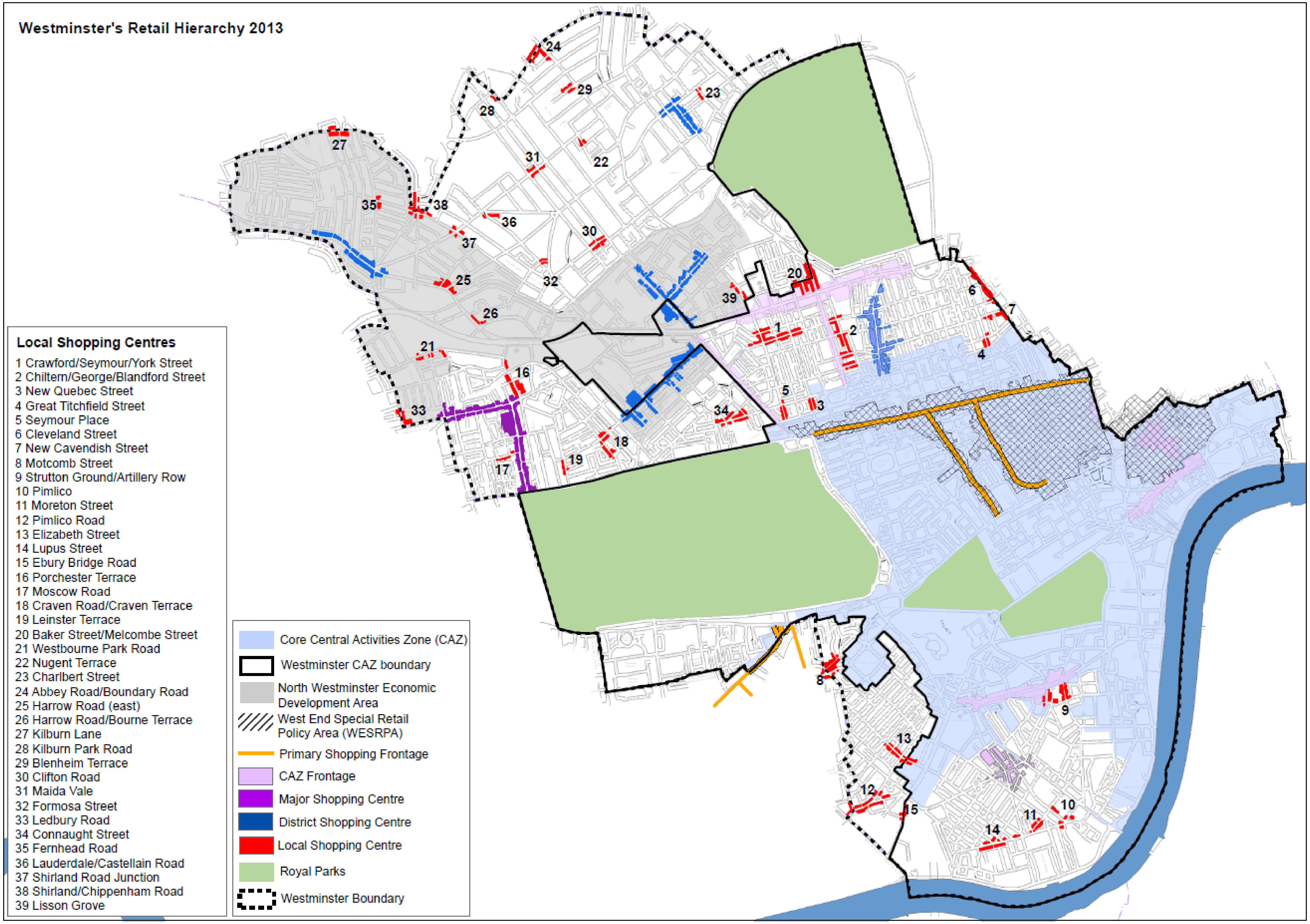
Completed 2007-2013

Vacant

Local Shopping Centre Boundary

0 10 20 Metres N

Figure 7 Westminster wide shopping centre boundaries plan



Health Checks - Glossary of terms

A1	**Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, dry cleaners, pet shops, sandwich bars, retail showrooms, and domestic hire shops.**
A1 café type uses	**Shops such as sandwich bars or coffee shops selling food and drinks to be consumed mainly off the premises, but not hot food takeaways. Examples include certain Pret a Manger shops, Costa Coffee and the Seattle Coffee Co. shops.**
A2	**Banks, building societies, bureau de change, estate and employment agencies, professional and financial services, telephone bureaux, betting offices and beauty salons (excluding hair).**
A3	**Food and drink uses such as restaurants, pubs, snack bars, cafés, wine bars and shops for the sale of hot food (hot food take-aways).**
A4	**Drinking Establishments: Premises where the primary purpose is the sale and consumption of alcoholic drinks on the premises.**
A5	**Hot Food Take-away: Premises where the primary purpose is the sale of hot food to take away.**
B1	**Business uses such as offices, research and development and industrial uses.**
CAZ	**Central Activities Zone (CAZ). The CAZ is an area of mixed uses, many of which contribute directly to the national, regional and local economy. It is this mix of activities and their supporting resources which underpins the success of London's economy.**
CAZ Frontages	**Mixed use areas usually with a predominant retail function. Appropriate areas for retail growth.**
Comparison	**A1 floor space selling predominantly durable items and not in convenience use.**
Convenience	**This is based on the classification provided by the unit for Retail Planning Information (URPI) set out in URPI brief 99/2. The classifications are: food, alcoholic drink, tobacco and other goods (newspapers and magazines, cleaning materials and matches). For the purposes of this assessment, convenience includes shops selling food or drink (excluding A1 café-type uses), newsagents, (including specialist tobacco stores), chemists (including Boots the Chemist stores) and post offices.**
Department/ principle store	**This includes the main department stores such as John Lewis, Liberty, and Selfridges, as well as variety stores such as Marks & Spencer and Virgin Mega-stores.**
District Centre	**Distributed more widely than Metropolitan and Major centres, they provide convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000-50,000 sqm of retail floor space. Some district centres have developed specialist shopping functions.**
Experian GOAD	**An independent retail data consultancy who provide maps of ground floor uses in shopping centres.**
F&B	**Food and beverage offer, covered by parts A3 (cafe's/restaurants), A4 (drinking establishments) and A5 (take aways) of the use classes order.**
Gross Floorspace	**Floorspace of buildings on all floors including external walls, half the thickness of parting walls and circulation areas.**
Independent store	**This includes non-convenience stores (see definition above) irrespective of size, that are not considered to be specialist retailers (see definition overleaf), that are operated by retailers that are not included within national retail chains or groups.**
Major Centre	**Typically found in inner and some parts of outer London with a borough-wide catchment. They generally contain over 50,000sqm of retail floor space and a relatively high proportion of comparison goods relative to convenience goods. They may also have significant employment, leisure, service and civic functions.**
NPPF	**National Planning Policy Framework. Central Government's key, revised guidance document driving planning policy in England, which compressed the**

	previous PPS documents and other guidance into a single document. It includes key guidance on town centres and health checks.
National retailers	**This includes all retailers (Class A1 only) that operate within the context of a national retail chain or group, such as Next. A schedule of all national retail multiples can be found in Retail Directory of the UK 2002 (Hemming Information). Specialist shops that are part of a retail chain or group, such as Whittards and Thorntons, are classified as national retailers. Although there are national chains of food and drink uses and betting shops, such as Ladbrokes, these are classified based on the use class (e.g. betting shops as A2 uses) and not as national retailers.**
Prestige international retailers	**This includes prestigious retailers that operate in more than one country, such as Gucci, Gianni Versace, and Giorgio Armani. It also includes flagship stores that are only found in select town centres in Britain. National airline shops, such as British Airways, have also been classified as international retailers.**
Primary Frontages	**Internationally recognised shopping destinations. The Primary Frontages defined in Westminster's City Plan - Strategic Policies document are Oxford Street, Regent Street, Bond Street and Knightsbridge/Brompton Road.**
Retail floorspace	**This is all A1, A2, A3, A4, A5 and sui generis floorspace, and vacant floorspace of any of the aforementioned categories.**
Shisha	**Flavoured tobacco smoked through a water pipe or hookah. Smoke free legislation means that it cannot be smoked indoors in public places, and is often smoked at tables and chairs on the footway and in garden areas. There has been a rapid rise in shisha uses over the past five years, and there is concern over issues of health, residential amenity and other issues.**
Specialist independent	**Similar to an independent store, but this category reflects the quality and specialisation of the retailer so that a shopper may make a specific shopping trip to that shop. For example, The Pen Shop on Regent Street or antique shops.**
Sui generis	**Sui Generis is a term that refers to a use on its own. Any planning use not falling within a specific class within the Use Class Order falls within this category. Examples of sui generis uses in shopping centres are launderettes, mini cab offices, amusement centres and car showrooms.**
UDP	**Unitary Development Plan produced by Westminster City Council, with saved policies forming part of the statutory development plan for Westminster.**
Vacancy	**This category includes vacant street level units, as well as units that are under alteration. However, if at any time the survey was completed it was evident who the unit would be occupied by, the unit was treated as being occupied.**
Zone A Rent	**The rental level per square metre achieved on the first six metres of a shop unit.**

Information Sources

Westminster's City Plan - Strategic Policies (adopted November 2013)
https://www.westminster.gov.uk/westminsters-city-plan-strategic-policies

Westminster's Unitary Development Plan (UDP, adopted January 2007)
https://www.westminster.gov.uk/unitary-development-plan-udp

The Mayor's London Plan (GLA, July 2011 as amended)
http://www.london.gov.uk/priorities/planning/london-plan

The National Planning Policy Framework (NPPF, DCLG 2012)
https://www.gov.uk/government/publications/national-planning-policy-framework--2

National Planning Practice Guidance (NPPG, March 2014)
http://planningguidance.planningportal.gov.uk/

Westminster High Street Health Checks 2013
https://www.westminster.gov.uk/high-street-health-checks

Westminster Health Check Archive
https://www.westminster.gov.uk/shopping-centre-health-checks

City of Westminster

If you would like to obtain further copies of this Health Check report, please:

Email: ldf@westminster.gov.uk
Or Telephone: 0207 641 2447

City of Westminster

Shopping Centre Health Check Survey 2014

Local Centre 37: Shirland Road & Chippenham Road

Contents

(i) Purpose of the Study

Former government guidance on Town Centres advised that 'health checks' be undertaken every five years to allow accurate and reasonable temporal analysis of the performance of town centres. This requirement has been superseded by more recent national and regional policy frameworks and guidance.

The National Planning Policy Framework (NPPF) (DCLG, 2012), states that when setting out requirements for Plan Making and using a proportionate evidence base, '*Local Planning Authorities should have a clear understanding of business needs within the economic markets operating in and across their area. To achieve this they should... assess... the role and function of town centres and the relationship between them, including any trends in the performance of centres, and the capacity of existing centres to accommodate new town centre development* (paragraphs 160, 161).'

The London Plan (2011) sets out strategic retail policy for Town Centres in London, as set out in more detail below. Paragraph 2.74 of the London Plan (July 2011) states that "*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 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.*"

This then forms the current national and regional planning policy framework for undertaking town centre health checks. The City Council is currently follow the former guidance and updating health checks every five years, as this is deemed to be a sensible and manageable time period for monitoring the viability and vitality of centres, given the extent of Westminster's town centre network.

(ii) Westminster's Local Centres and Planning Policy

Westminster's Local Centre Health Checks were last carried out in 2007, updating 2002 and 1997 surveys, and includes detailed analysis of Westminster's 39 Local Shopping Centres.

Local Centres normally have a purely local function and most are mainly comprised of convenience goods retailers with some food and drink and local service uses, mainly providing facilities for people living or working nearby (which the City Council wishes to safeguard in accordance with national guidance). However in Westminster some are also speciality centres which attract shoppers from a wider area.

Westminster's current local plan consists of the City Plan: Strategic Polices (adopted November 2013), and saved development management policies from the Unitary Development Plan (adopted January 2007). The local plan seek to protect and enhance the designated Local Shopping Centres for the service they provide to residents, visitors and workers, and because they reduce the need to travel.

Strategic policy CS21 is the general policy for retail across Westminster, seeking to protect existing A1 uses, direct new retail floor space to designated shopping centres, and to protect non-A1 retail and town centre uses in designated shopping centres from changes to uses that do not serve visiting members of the public and that do not have active shop fronts.

Saved UDP policy SS7 (Shopping and Services policy 7) is the detailed development management policy for local shopping centres. The policy covers the protection of shops and circumstances where changes of use away from shops may be permitted, taking into consideration the viability of units and the overall balance of uses in the centre.

(iii) Westminster's Retail Hierarchy

The City of Westminster is broadly divided into two zones in terms of retail policy, the Core Central Activities Zone (CAZ) and CAZ Frontages, and areas outside of this. The Core CAZ contains the two international shopping centres in London, the West End and Knightsbridge in addition to distinctive retail areas such as Covent Garden, Soho, Mayfair and St James's, as well as numerous small parades and individual shops. Outside the Core CAZ and CAZ Frontages there is one Major Shopping Centre, 4 District Centres (where previously there had been 7, 3 have subsequently been reclassified as CAZ Frontages and 1 as a Major Centre) and the 39 Local Centres which are designated to safeguard shopping facilities for local residents, and the retail character of local shopping areas.

In 2007, the District and Local Centres health check reports were all updated, as were 17 shopping areas inside the CAZ. More recently, reports for Westminster's high street shopping centres were updated in 2013.

(iv) Health Checks Methodology

As set out in the NPPF (DCLG, 2012) local planning authorities should recognise town centres as the heart of their communities and pursue policies to support their viability and vitality. Planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive.

Accessibility by public transport is considered to be excellent for all Westminster's larger shopping areas, and its Local Centres are accessible for people to walk to. The City Council wants to retain shops in Local Centres, in order to maintain a range of local convenience shops and protect the character and function of the centres. Local shops and services limit car trips, encourage walking, and make city life more practical and attractive.

The **National Planning Practice Guidance** was published in March 2014 by DCLG, several months after the field work for this project had commenced. It states that existing centres should be audited to assess their role, vitality, viability and their potential to accommodate new development and different types of development. It also sets out a series of indicators to determine the health of town centres, including:

- Diversity of use
- Vacant property
- Commercial yields on non-domestic property
- Customer views and behaviour
- Retailer representations
- Commercial rents
- Pedestrian flows and accessibility
- Perception of safety and crime
- State of environmental quality

Most of the above indicators will be assessed as part of this study, where data collection is available and reasonable. All of the above were included as part of the 2013 health checks for the larger high street type centres, where it is more appropriate to carry out consumer surveys, and where commercial data is more readily available. Given the size of this project, the indicators below are considered to be appropriate and comprehensive.

Land Use

(1) Diversity of town centre uses

This section considers the range of A1 uses, and compares the current diversity of land uses to previous Local Centre Health Check Surveys dated 1997, 2002 and 2007. It also includes the

proportion of vacant street level property and the amount of space used for different functions such as shopping, leisure, cultural and entertainment activities, pubs, cafes, and restaurants.

Accessibility

(2) **Pedestrian flows (footfall):**
Visual assessments were undertaken to measure pedestrian flows which contribute towards the vitality of the Local Centres. These were conducted on comparable days of the week and compared to the average for all of the Local Centres;

(3) **Accessibility:**
The whole of Westminster has a Public Transport Accessibility Level (PTAL) score of 6, the highest level achievable. This section therefore concentrates on ease and convenience of access;

Environment

(4) **State of the town centre environmental quality assessment:**
Includes a subjective assessment of indicators such as security, air pollution, noise, clutter, litter and graffiti, as well as positive factors such as trees, landscaping and open spaces. Each centre is assessed as per the Attractions Table 4, and the Daytime Amenity Table 5 in the 2007 Health Check Survey. A comparison is made between the 1997, 2002, 2007 and 2013 surveys.

(5) **Daytime amenity:**
A qualitative assessment of the amenity within the local centre, assessing its cleanliness, security, and identity.

(6) **Relative performance of the centre:**
Measures the performance of the centre compared to the Westminster Local Centre average in terms of land use, attractiveness, and daytime amenity, with graphs comparing the performance of centres relative to one another. The centre's strengths, weaknesses, opportunities and threats are highlighted in a SWOT analysis diagram at the end of this section.

(7) **The potential capacity for growth or change of centres in the network:** opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development is considered here. Based on levels of demand, assessments are made to ascertain how much capacity each Local Centre has to accommodate retail growth, looking at retail related planning applications in and around the Local Centres. Consideration is given to whether the current Local Centre boundaries and Core and Secondary Frontage designations are still valid. Consideration is also given to ways in which the vitality and viability of the centres could be enhanced.

(8) **Summary of health check:**
This section contains a comparison of the relative performance of this centre, and summary of land use assessment as per the 2007 Health Check reports. General comments and analysis of the centre are included, along with a summary of any problems/issues. A classification as 'in decline', 'neutral', or 'healthy' is included, plus comment on whether things have improved, deteriorated, or remained the same since 2007 (see 2007 Health Checks, Tables 6 and 7). Where a Local Centre is considered to be "in decline" or "neutral", consideration is made on ways to improve the vitality and viability of the Centre.

The results of this study will be used to inform planning policy development and the inception of other relevant interventions, and will be used to assess the success of previous initiatives such as any investment in public realm.

Local Centre **37: Shirland Road & Chippenham Road**

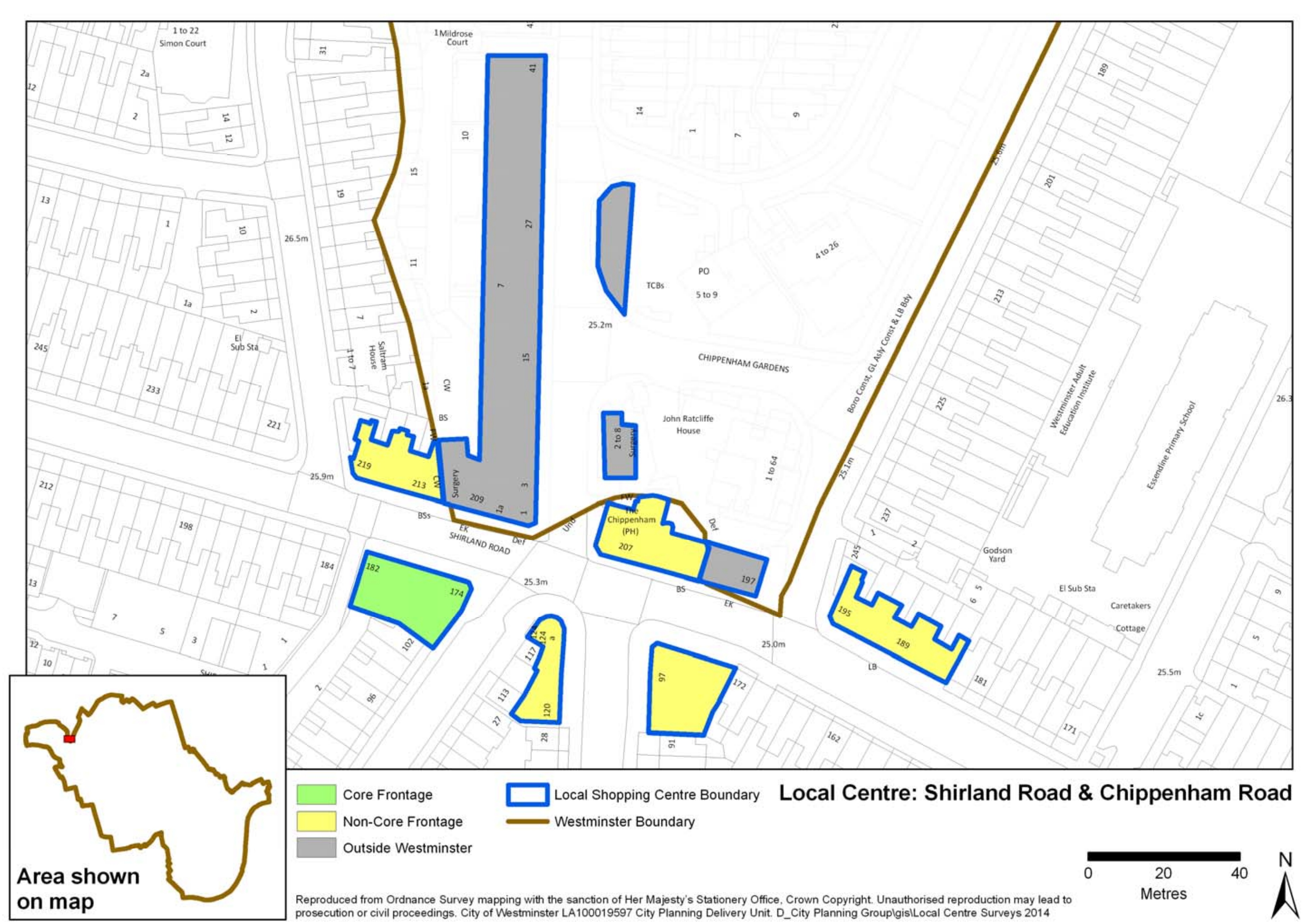
1. Introduction

1.1 Location

Shirland Road/Chippenham Road is a large Local Centre in the north west of Westminster, on the boundary with the London Borough of Brent (Some of the shop units are located in Brent.), set around a junction of several main roads. The centre is north of the A404 and the nearest major public transport links are found on the Harrow Road to the south, or the London Underground Stations at Maida Vale, Kilburn Park Road or Queens Park (also London Overground), which are all roughly 10-15 minutes walk from the centre.

The catchment area is limited by the proximity of Shirland Road/Chippenham Road to other Local Centres, such as Fernhead Road to the west and Lauderdale Road/Castellain Road and Shirland Road Junction to the east.

Figure 1: Local Centre Boundary 2013



2 Land Use

2.1 Range of Uses

Shirland Road/Chippenham Road comprises a range of shopping and other town centre uses. This diversity is summarised in Table 1 below.

Table 1: Range of Town Centre Uses (1997-2013)

Use Class		**No. of Units 1997**	**No. of Units 2002**	**No. of Units 2007**	**No. of Units 2013**
Class A1 Retail		21	16	19	21
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*0*
	National retailers	*0*	*0*	*0*	*0*
	Specialist Independent	*2*	*2*	*6*	*6*
	Independent	*9*	*6*	*5*	*8*
	Convenience	*10*	*8*	*8*	*7*
Class A2	Financial & Professional	2	3	5	4
Food & Drink		0	17	15	16
Class A3	*Restaurant/Café*	*0*	*9*	*7*	*8*
Class A4	*Pubs/Bars*	*0*	*2*	*2*	*2*
Class A5	*Takeaway*	*0*	*6*	*6*	*6*
	Takeaway/Restaurant				*0*
Sui Generis		2	2	1	1
Vacant Units		6	8	7	5
Arts/Culture		0	0	0	0
Health uses		0	2	3	3
Hotels		0	0	0	0
TOTAL		**31**	**48**	**50**	**50**

Source: WCC Site Survey December 2013

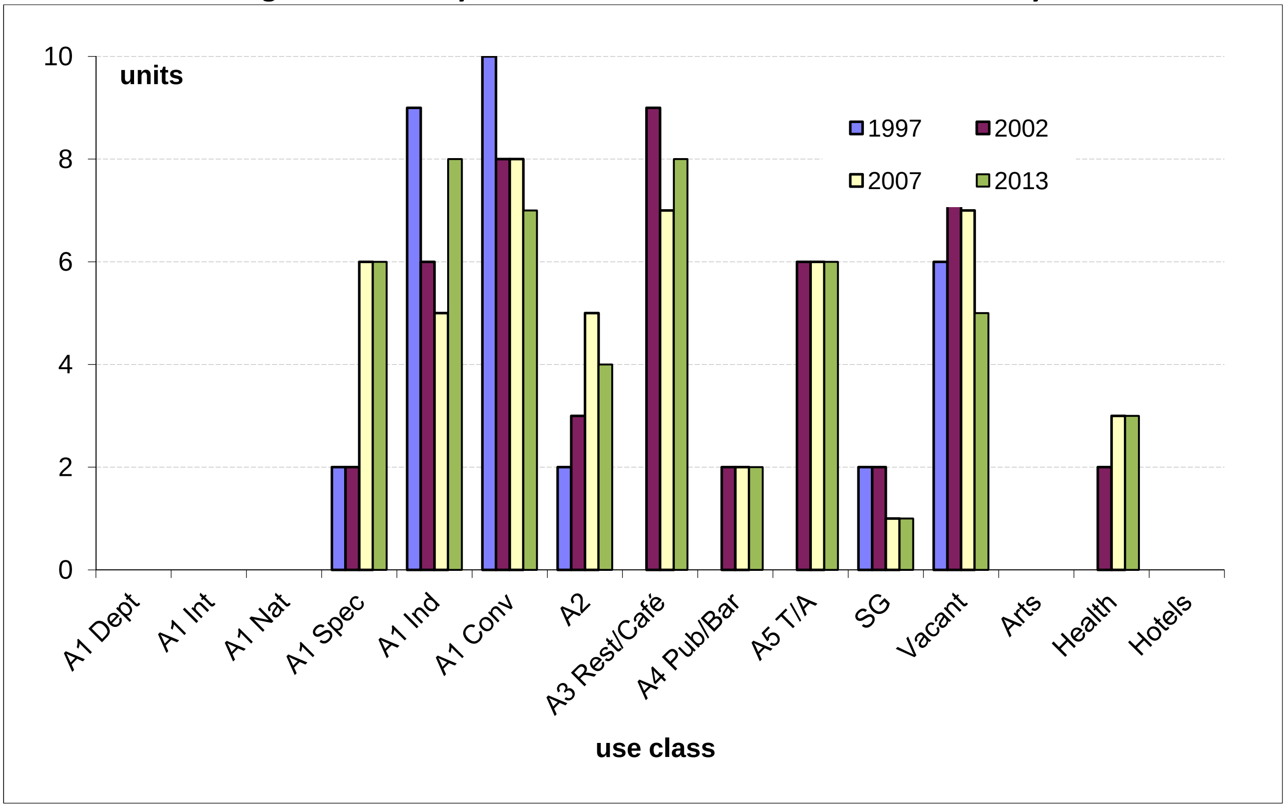
In total there are 50 units in Shirland Road/Chippenham Road, the same number as was recorded in the 2007 survey.

The number of A1 retail uses has increased by two since 2007, owing to various changes of use and a decrease in vacant units, with A1 uses accounting for two fifths of units in the centre. After a significant increase in A1 specialist uses in 2007, the number has remained the same (six) this time. Independent retail uses have increased by three and the Local Centre now has two dry cleaners, three hairdressers, an electrical/plumbing merchant, a tailor and a hardware shop. Convenience stores have decreased by one (to seven). The number of Class A2 uses has also decreased by one due to the loss of an estate agent.

Food and drink uses are also a major presence in the centre accounting for over a third of the uses. The number of restaurant/café uses has increased by one, while the number of pubs and takeaways have remained constant, the latter of which are a significant presence in the centre accounting for ten percent of units in the centre, a much higher proportion than most local centres, and in fact a higher number than most larger district centres and CAZ frontages.

Outside of A-class retail uses, the centre contains three health uses (two dental surgeries and a medical surgery) and one sui generis unit (a mini cab office). Vacancies have decreased from seven to five units. The centre does not contain any hotels or arts/culture uses.

Figure 2: Units by use class within the Local Centre boundary



2.2 Range of A1 Uses

Shirland Road/Chippenham Road has 21 Class A1 retail units, comprising eight independent retailers, seven convenience stores and six specialist retailers. The specialist retailers include a carpet shop, a fittings shop, a pet shop and a funeral director, while the independent retailers include drycleaners and hairdressers amongst other uses. The high proportion of A1 uses with a good mix of convenience and comparison shops and no multiple retailers suggests that Shirland Road/Chippenham Road serves local residents with a mix of convenience and comparison shopping facilities, and local retail services.

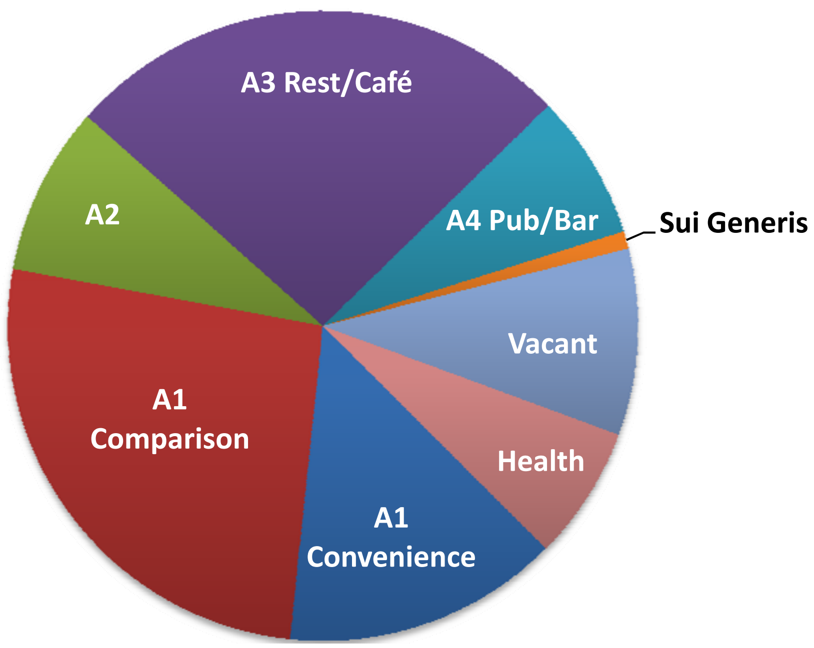
2.3 Total Retail Floor Space

Total retail floor space in Shirland Road/Chippenham Road is broken down in Table 2. It has 4,461 sqm of retail floor space, which is above the average of 3,188 sqm for the 39 Local Centres in the city. In general, floor space is fairly evenly distributed among the different use classes. A1 accounts for just over 40% of all floor space in the centre, and comparison retail alone accounts for the single largest proportion (26.2%) of floor space in the centre, followed by A3 restaurant/café (26.1%). The other use classes each account for 7% to 14% of the total, with sui generis accounting for only 0.9%. The centre has a lower than average proportion of A1 comparison floor space, 26.2% compared with a city average of 35%, but comparable proportions of most other uses.

Table 2: Total Retail Floor space 2013

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2013)
A1 Convenience	632	14.17%	14.9%
A1 Comparison	1170	26.23%	35.2%
A2	387	8.68%	11.2%
A3 Rest/Café/TA	1165	26.12%	17.4%
A4 Pub/Bar	333	7.46%	5.1%
Sui Generis	40	0.90%	3.9%
Vacant	427	9.57%	8.6%
Health	307	6.88%	2.0%
Hotels	0	0.00%	0.5%
Art	0	0.00%	1.3%
Leisure	0	0.00%	0.1%
Total	**4,461**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



Source: City of Westminster GIS System and site survey December 2013

2.4 Proportion of Vacant Street Level Property

The unit vacancy rate in Shirland Road/Chippenham Road (10%) is higher than the average rate for Local Centres in Westminster (8%), as shown in Table 3. However vacancies have decreased since 2007, and the rate remains well below the national average vacancy rate (more than 14.1%) for shopping centres illustrating positive movement in terms of vibrancy and vi

Table 3: Level of Vacant Street Level Property 2013

% Vacant Units				% Local Centre Average
1997	2002	2007	2013	2013
0.0% (0 units)	16.7% (8 units)	14.0% (7 units)	10.0% (5 units)	8% (4 units)

Source: City of Westminster GIS System and site survey December 2013

3. Accessibility

3.1 Pedestrian Flows (footfall)

The centre was found to be reasonably quiet in terms of pedestrian vibrancy when the Health Check Survey was carried out on a cold, wet weekday afternoon in February 2014.

3.2 Accessibility on foot and by public transport

Shirland Road/Chippenham Road is not particularly close to a London Underground Station, the nearest being Maida Vale (Bakerloo Line) to the east, Kilburn Park Road to the north east or Queens Park to the north, all of which are at least ten to fifteen minutes walk away. The centre is more accessible by bus, with routes 6, 187 and 414 running along Shirland Road and routes 31, 36 and 328 serving Chippenham Road. The centre is also close to Maida Vale (A5), one of the main arterial routes through north west London and one which connects to the A40 (M) Westway to the south.

4. Environmental Quality

4.1 State of the Centre's Attractions and Environmental Quality / Attractions

The attitudinal assessment of the attractions and amenity of Shirland Road/Chippenham Road is summarised in Tables 4 and 5 below. The centre's overall score for attractions is 23.1%, meaning that there is limited offer in terms of attractions or reasons for visiting the centre. This rating is lower than the Local Centre average of 31%, and ranks Shirland Road/Chippenham Road =29th out of the 39 Local Centres in the City. It has a poor provision of multiple retailers, cultural events, sports facilities, and is rated poorly in all three service provision categories. The Local Centre is rated more positively in terms of the prominence of specialist shops and other retail uses.

4.2 Daytime Amenity

Shirland Road/Chippenham Road is a relatively unattractive Local Centre, with a day time amenity rating of 54.3%. This compares with an average for all Local Centres of 68% and ranks the area =32nd out of the 39 Local Centres in the city. It is rated as being poor in terms of the presence of refuse bags on the street, special street features, and in two of the three town centre identity categories. Shirland Road/Chippenham Road is rated as good in six of the 12 security categories but average in the remaining 13 categories, including the overall 'feel good' factor of the centre.

Table 4: Attractions within the Local Centre 2013

ATTRACTIONS	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Retail Provision									
Prominence of multiple retailers			x			x			x
Prominence of independent shops		x			x			x	
Availability of food shopping		x			x			x	
Prominence of specialist shops			x	x			x		
Quality of market (frequency, variety etc.)	-	-	-	-	-	-	-	-	-
Quality of retail environment			x			x			x
Art/Culture									
Quality of restaurants (availability, number etc.)		x			x			x	
Quality of pubs/clubs/bars			x		x			x	
Range of cultural/community events (theatre, concerts)			x			x			x
Availability of sports and leisure facilities			x			x			x
Service Provision									
Local services (information, library etc.)			x			x			x
Employment/office space			x			x			x
Bank/building society provision			x			x			x
Total	3/26			6/26			6/26		
Percentage	11.54%			23.08%			23.08%		

Source: City of Westminster site survey December 2013

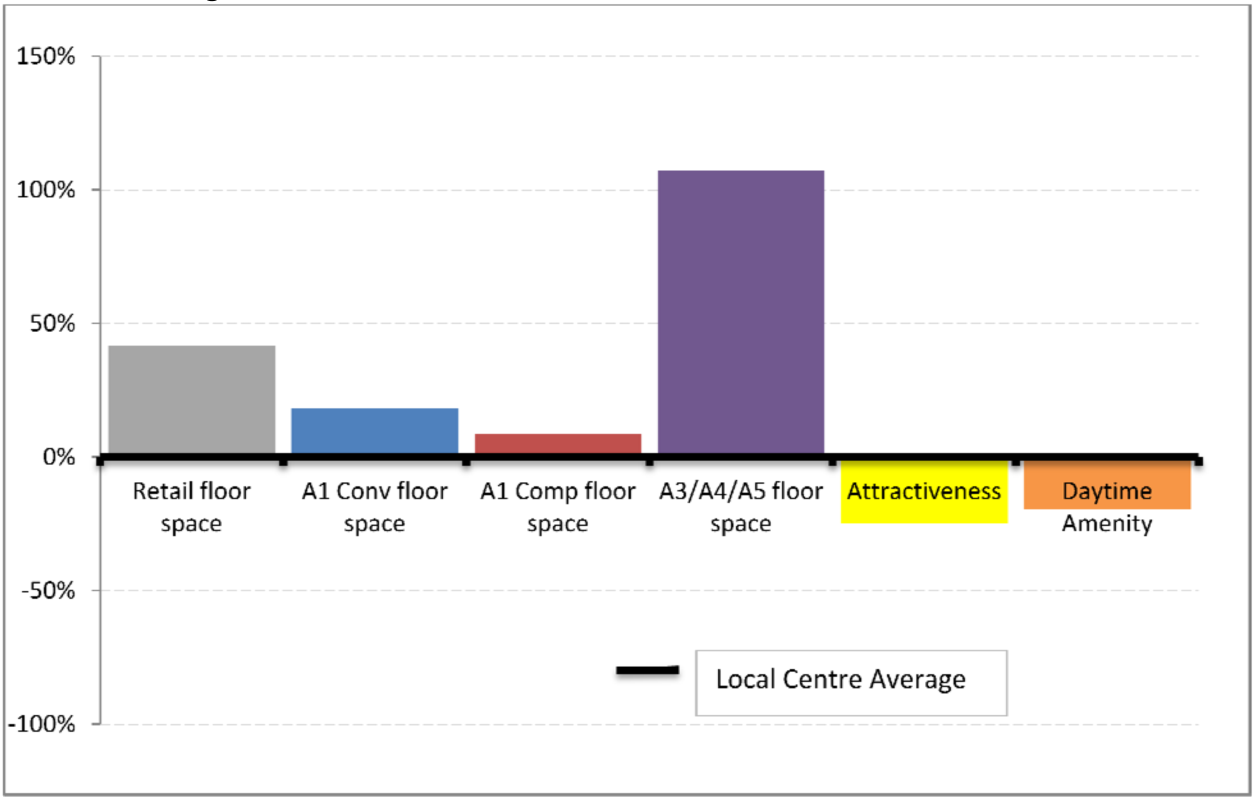
Table 5: Day Time Amenity within the Local Centre 2013

AMENITY – DAYTIME	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Overall environment of public areas in the centre									
General Cleanliness in Shopping Hours:									
Presence of litter		x			x			x	
Presence of refuse bags on the street		x			x				x
Evidence of street fouling		x			x			x	
Presence of glass/glasses/other debris incl. food and food containers/wrapping			x		x			x	
Condition		x			x			x	
Quality of buildings		x			x			x	
Special features (pedestrianisation, street furniture, etc.)			x			x			x
Impact of vacant sites		x			x			x	
Security									
Evidence of vandalism and graffiti (incl. on street furniture)		x			x			x	
Security during shopping hours (availability, access, security etc.)			x			x		x	
Ease of passage for pedestrians (incl. presence of obstacles e.g. illegally parked vehicles)		x			x			x	
Evidence of drunkenness, anti-social behaviour, rowdiness	x			x			x		
Presence of rough sleepers	x			x			x		
Presence of beggars	x			x			x		
Presence of street drinkers	x			x			x		
Evidence of touting (e.g. mini cabs, rickshaws, prostitution, drug dealing etc.)	x			x			x		
Presence of illegal street traders e.g. counterfeit goods, hot dogs, peanuts etc.	x			x			x		
Effectiveness of any deterrent measures (CCTV, police patrols, door security etc.)			x			x		x	
Quality of street lighting		x			x			x	
Safety perception in shopping hours		x			x			x	
Identity of town centre									
Features which identify the centre (e.g. flagship stores, buildings etc.)			x			x			x
Promotion/Street events			x			x			x
'Feel good' factor of town centre		x			x			x	
Total	23/46			24/46			25/46		
Percentage	50.0%			52.2%			54.3%		

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2013

Figure 4: Deviation of centre from the mean for Local Centres 2013



Shirland Road/Chippenham Road is a relatively large Local Centre with a higher than average amount of retail floor space when compared with the overall average for the 39 local centres. The A1 Convenience and A1 Comparison floorspace is above the average however the A3 / A4 / A5 floorspace is over double the local centre average. The centre is let down by its amenity and attractiveness ratings which are both below the local centre average.

5.2 Strengths, Weaknesses, Opportunities and Threats

SWOT analysis

6. Future capacity

6.1 Potential Capacity for Growth

There was one permitted planning application in the Local Centre between 2007 and 2013. This concerned the conversion of a shop basement into a flat at 215 Shirland Road, resulting in the loss of 44 sqm of retail space. However, the basement was previously being used for storage only. Additional capacity could be accommodated in the vacant retail units.

7. Health of the Centre

Table 6: Summary of Health Check Assessment 2013

Subject	Subject Matter	Data	Number	Sq M
RETAILING	Floor space	Total Floor space		4,461
		Total Convenience (A1)		632
		Total Comparison (A1)		1,170
		Total Service (A2)		387
		Total A3		689
		Total A4		333
		Total A5		476
		Total Sui Generis		40
		Total Vacant		427
	Retail Offer	Total Number of Shop Units	50	
		Total Number of A1 Units	21	
		a) Convenience shops	7	
		b) Department/principal stores	0	
		c) Prestige international shops	0	
		d) National comparison retailers	0	
		e) Specialist Independent shops	6	
		f) Independent shops	8	
		Total Comparison Multiples	14	
		Total Number of A2 Units	4	
		Total Number of A3 Units	8	
		Total Number of A4 Units	2	
		Total Number of A5 Units	6	
		Total Number of Sui Generis	1	
		Total Number of Vacant	5	
	Market	Days of operation	0	
		Number of stalls	0	
	Proposals	Changes of use A1 to A2	0	
		Changes of use A1 to A3	0	
		Changes of use A1 to A4	0	
		Changes of use A1 to A5	0	
ARTS/CULTURE		(cinemas, galleries, theatres etc.)	0	
HEALTH USES		(clinics, surgeries etc.)	0	
HOTELS			0	

In terms of its general economic health and physical environment, Shirland Road/Chippenham Road is considered to be 'in decline' (as it was in 2007) and remains one of the least attractive Local Centres.

Appendices

Appendix 1: Views of Local Centre

Appendix 2: Land Use Table (Westminster land use survey 2013)

Appendix 3: Land Use Map (GOAD 2012 retail data and Westminster land use survey 2013)

Appendix 4: Planning permissions Map (Westminster land use survey 2013)

Appendix 5: Location map of all local centres

Appendix 6: Glossary of Terms

Views of Shirland Road/Chippenham Road Local Centre

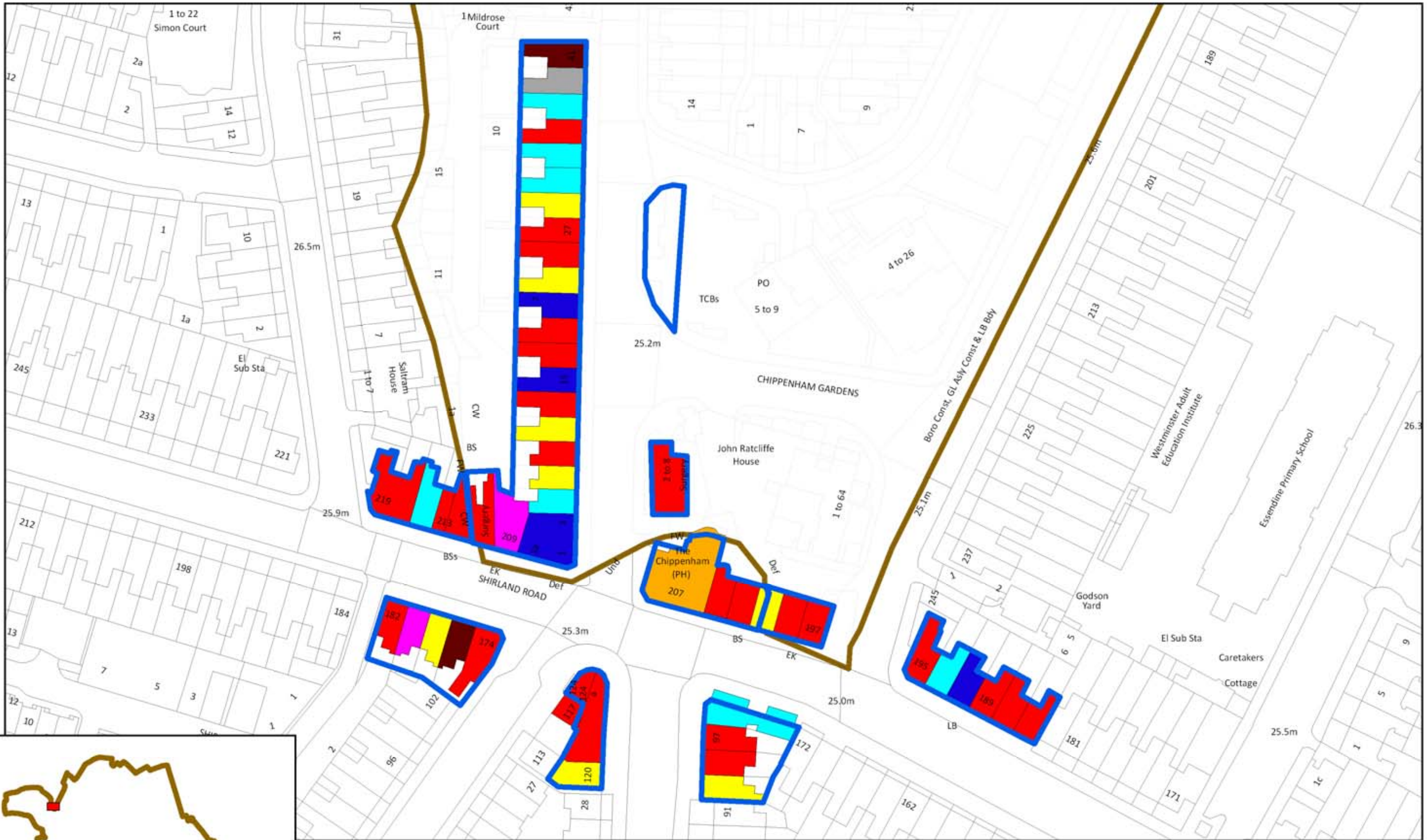
The north west section of the Local Centre, with some of the units in the Borough of Brent. The core frontage can be seen to the left of the picture.

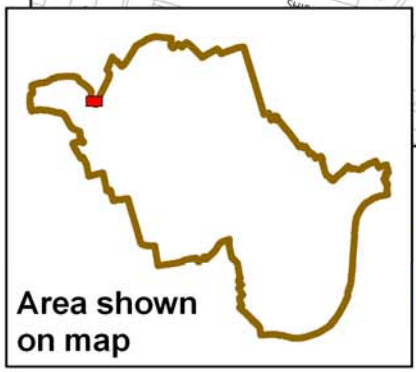
Litter on the pavement outside The Chippenham public house in the centre of Shirland Road/Chippenham Road.

A view from the north west of the Shirland Road/Chippenham Road Local Centre.

ADDRESS	FASCIA	DESCRIPTION	USE	SQ M	A1 Conv.	A1 Spec.	A1 Ind	A2	A3 Res/Caf	A3 Takeaw.	A4 Pub/Bar	B1	SG	Vacant	Health	2007 Use
93 CHIPPENHAM ROAD	BIG FRIED CHICKEN	TAKEAWAY	A3 T/A	92						1						A3 T/A
95 CHIPPENHAM ROAD	NOUR	GENERAL STORE	A1 Conv	106	1											A1 Spec
97 CHIPPENHAM ROAD	W9 CARPETS	CARPET SHOP	A1 Spec	104		1										A1 Spec
99 CHIPPENHAM ROAD	MOMTAZ	CAFÉ/RESTAURANT	A3 Rest/Café	95					1							A3 Rest/Café
120 CHIPPENHAM ROAD	TALK OF THE TOWN	TAKEAWAY	A3 T/A	70						1						A3 T/A
122-124A CHIPPENHAM ROAD	AM TO PM	RESTAURANT	A1 Conv	158					1							A1 Conv
1-3 MALVERN ROAD	LADBROKES	BETTING OFFICE	A2	142				1								A2
2-8 MALVERN ROAD	SURGERY	SURGERY	Health	123											1	Health
5 MALVERN ROAD	ALBA	RESTAURANT	A3 Rest/Café	75					1							A3 Rest/Café
7 MALVERN ROAD	HOT HOT PIZZA	TAKEAWAY	A3 T/A	83						1						A3 T/A
9 MALVERN ROAD	NEWTON BATHROOMS	FITTINGS	A1 Spec	87		1										Vacant
11 MALVERN ROAD		VACANT	Vacant	86										1		A3 T/A
13 MALVERN ROAD		VACANT	Vacant	90										1		A1 Conv
15 MALVERN ROAD	MANAGEMENT PROPERTIES	ESTATE AGENT	A2	84				1								A2
17 MALVERN ROAD	ARADA	GENERAL STORE	A1 Conv	174	1											A1 Conv
18 MALVERN ROAD	BEAUTY BY TINA	BEAUTICIAN	A2	74				1								A2
21 MALVERN ROAD	MAIDA VALE INSURANCE	INSURANCE SERVICES	A2	87				1								A2
23 MALVERN ROAD	SUN SINGING	RESTAURANT	A3 Rest/Café	91					1							A3 Rest/Café
25 MALVERN ROAD	STARSHINE DRY CLEAN	DRY CLEANER	A1 Ind	75			1									Vacant
27 MALVERN ROAD	LIA HAIR SALON	HAIRDRESSER	A1 Ind	84			1									A1 Ind
29 MALVERN ROAD	SECRET RECIPE	TAKEAWAY	A3 T/A	90						1						A3 T/A
31 MALVERN ROAD	PANSHI	RESTAURANT	A3 Rest/Café	88					1							A3 Rest/Café
33 MALVERN ROAD	MESON BILBAO	BAR	A3 Pub/Bar	87							1					A3 Pub/Bar
35 MALVERN ROAD	J H KENYON	FUNERAL DIRECTOR	A1 Spec	83		1										A1 Spec
37 MALVERN ROAD	MAYFLOWER	RESTAURANT	A3 Rest/Café	88					1							A3 Rest/Café
39 MALVERN ROAD		VACANT	Vacant	93										1		Vacant
41 MALVERN ROAD	DENTAL SURGERY	DENTIST	Health	90											1	Health
174 SHIRLAND ROAD	GRAND UNION PETS	PET SHOP	A1 Spec	105		1										Vacant
176 SHIRLAND ROAD	DENTAL HEALTH	DENTIST	Health	94											1	Vacant

178 SHIRLAND ROAD	PIZZA ZAZU	TAKEAWAY	A3 T/A	84						1						Health
180 SHIRLAND ROAD	NAVTON	ELECTRICAL & PLUMBING MERCHANT	A1 Ind	81			1									A1 Ind
182 SHIRLAND ROAD	BRANDON TOOL HIRE	HIRE SHOP	A1 Spec	84		1										A1 Spec
185 SHIRLAND ROAD	JAMALOUKI	HAIRDRESSER	A1 Ind	62			1									A1 Spec
187 SHIRLAND ROAD	STITCHING ROOM	TAILOR	A1 Ind	66			1									A2
189 SHIRLAND ROAD	WEST 9 HAIR DRESSER	HAIRDRESSER	A1 Ind	65			1									A1 Ind
191 SHIRLAND ROAD		VACANT	Vacant	67										1		Vacant
193A SHIRLAND ROAD	CARLTON MINI CABS	MINI CAB OFFICE	SG	40									1			SG
193B SHIRLAND ROAD	NOAMAS	CAFE	A3 Rest/Café	23					1							A3 Rest/Café
195 SHIRLAND ROAD	BROWNS	CHEMIST	A1 Conv	84	1											A1 Conv
197 SHIRLAND ROAD	AL GHADIR MARKET	GENERAL STORE	A1 Conv	57	1											A1 Conv
199 SHIRLAND ROAD	NEWS AND WINE	NEWSAGENT	A1 Conv	57	1											A1 Conv
201 SHIRLAND ROAD	GEORGE'S FISH BAR	TAKEAWAY	A3 T/A	57						1						A3 T/A
203 SHIRLAND ROAD	PAUL TREGRESSER	BAKERS	A1 Conv	56	1											A1 Conv
205 SHIRLAND ROAD	ORANGE	DRY CLEANER	A1 Ind	59			1									A1 Ind
207 SHIRLAND ROAD	THE CHIPPENHAM	PUBLIC HOUSE	A3 Pub/Bar	246							1					A3 Pub/Bar
209 SHIRLAND ROAD	THE CONSERVATIVES	OFFICE	B1	100								1				B1
213 SHIRLAND ROAD		VACANT	Vacant	91										1		Vacant
213A SHIRLAND ROAD	SHIRLAND NEWS	NEWSAGENT	A1 Conv	98	1											A1 Conv
215 SHIRLAND ROAD	THE COFFEE TREE CAFÉ	CAFÉ	A3 Rest/Café	71					1							A3 Rest/Café
215A SHIRLAND ROAD	INTERNET & CHEAP CALLS	PHONE SHOP	A1 Spec	71		1										A1 Spec
217-219 SHIRLAND ROAD	KENNEDYS OF WEST 9	HARDWARE SHOP	A1 Ind	144			1									A1 Ind





Source: GOAD Retail Survey 2013

Local Centre: Shirland Road & Chippenham Road

- Local Shopping Centre Boundary
- A1: Retail
- A2: Financial & Professional
- A3: Restaurant/Café
- A4: Pub/Bar
- A5: Take Away
- B1: Office
- D1: Non-Res Institutions
- UC: Unclassified
- Westminster Boundary

0 20 40
Metres

N

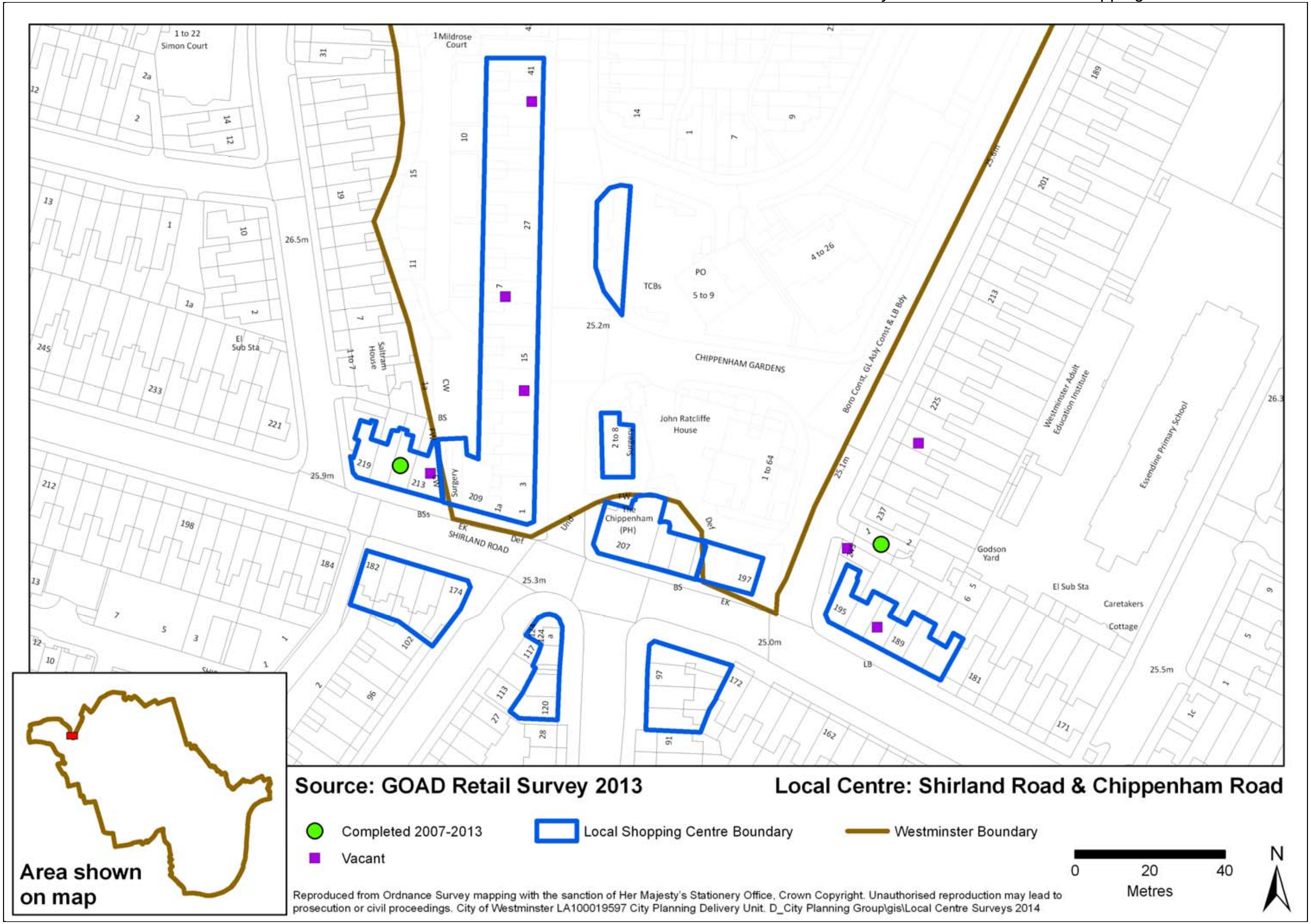
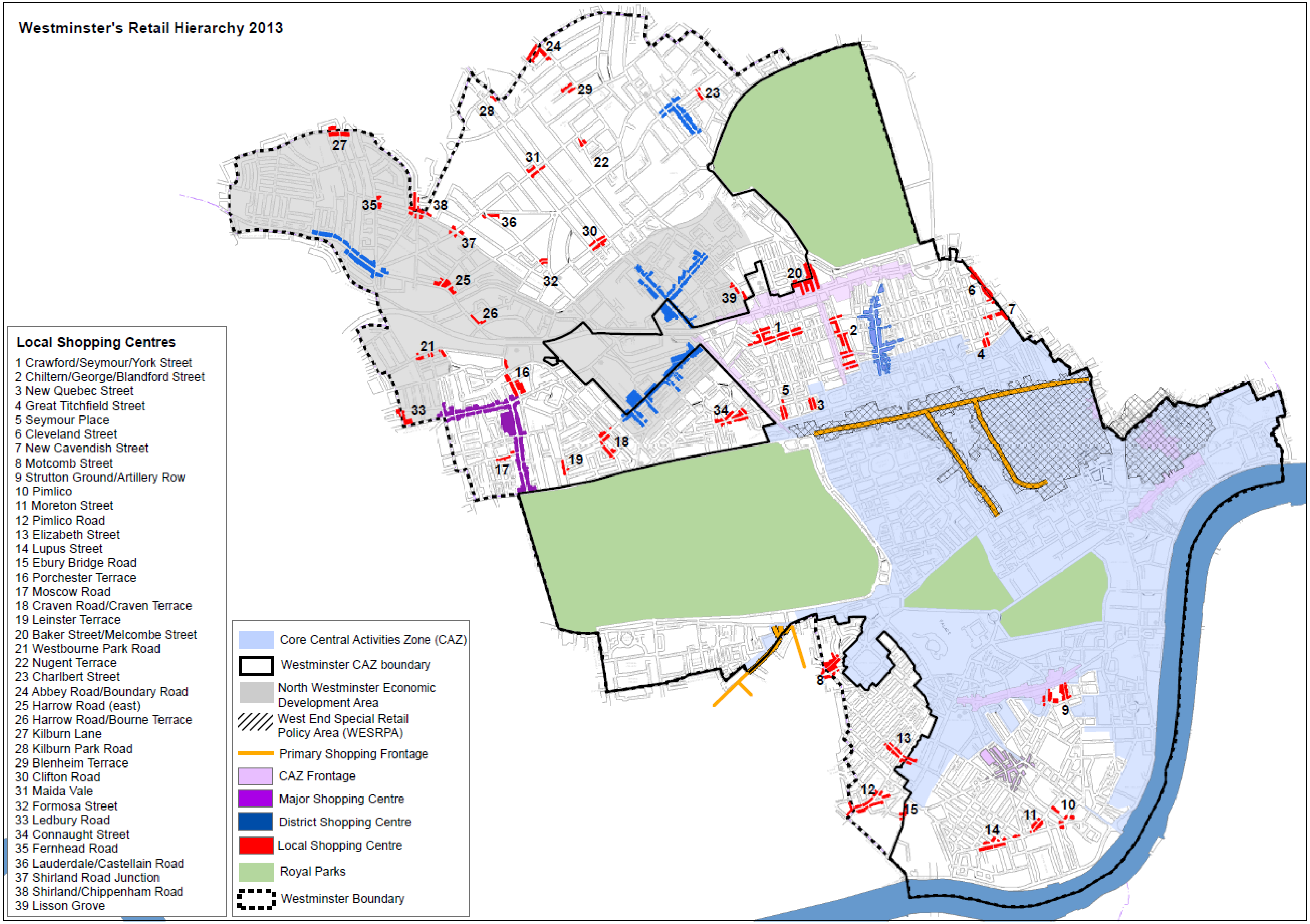

Source: GOAD Retail Survey 2013
Local Centre: Shirland Road & Chippenham Road
Completed 2007-2013
Vacant
Local Shopping Centre Boundary
Westminster Boundary
0
20
40
Metres
N
Area shown on map
SHIRLAND ROAD
CHIPPENHAM GARDENS
John Ratcliffe House
The Chippenham (PH)
Godson Yard
Essendine Primary School
Westminster Adult Education Institute
Saltram House
Simon Court
Mildrose Court
Caretakers Cottage

Figure 7 Westminster wide shopping centre boundaries plan



A1	**Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, dry cleaners, pet shops, sandwich bars, retail showrooms, and domestic hire shops.**
A1 café type uses	**Shops such as sandwich bars or coffee shops selling food and drinks to be consumed mainly off the premises, but not hot food takeaways. Examples include certain Pret a Manger shops, Costa Coffee and the Seattle Coffee Co. shops.**
A2	**Banks, building societies, bureau de change, estate and employment agencies, professional and financial services, telephone bureaux, betting offices and beauty salons (excluding hair).**
A3	**Food and drink uses such as restaurants, pubs, snack bars, cafés, wine bars and shops for the sale of hot food (hot food take-aways).**
A4	**Drinking Establishments: Premises where the primary purpose is the sale and consumption of alcoholic drinks on the premises.**
A5	**Hot Food Take-away: Premises where the primary purpose is the sale of hot food to take away.**
B1	**Business uses such as offices, research and development and industrial uses.**
CAZ	**Central Activities Zone (CAZ). The CAZ is an area of mixed uses, many of which contribute directly to the national, regional and local economy. It is this mix of activities and their supporting resources which underpins the success of London's economy.**
CAZ Frontages	**Mixed use areas usually with a predominant retail function. Appropriate areas for retail growth.**
Comparison	**A1 floor space selling predominantly durable items and not in convenience use.**
Convenience	**This is based on the classification provided by the unit for Retail Planning Information (URPI) set out in URPI brief 99/2. The classifications are: food, alcoholic drink, tobacco and other goods (newspapers and magazines, cleaning materials and matches). For the purposes of this assessment, convenience includes shops selling food or drink (excluding A1 café-type uses), newsagents, (including specialist tobacco stores), chemists (including Boots the Chemist stores) and post offices.**
Department/ principle store	**This includes the main department stores such as John Lewis, Liberty, and Selfridges, as well as variety stores such as Marks & Spencer and Virgin Mega-stores.**
District Centre	**Distributed more widely than Metropolitan and Major centres, they provide convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000-50,000 sqm of retail floor space. Some district centres have developed specialist shopping functions.**
Experian GOAD	**An independent retail data consultancy who provide maps of ground floor uses in shopping centres.**
F&B	**Food and beverage offer, covered by parts A3 (cafe's/restaurants), A4 (drinking establishments) and A5 (take aways) of the use classes order.**
Gross Floorspace	**Floorspace of buildings on all floors including external walls, half the thickness of parting walls and circulation areas.**
Independent store	**This includes non-convenience stores (see definition above) irrespective of size, that are not considered to be specialist retailers (see definition overleaf), that are operated by retailers that are not included within national retail chains or groups.**
Major Centre	**Typically found in inner and some parts of outer London with a borough-wide catchment. They generally contain over 50,000sqm of retail floor space and a relatively high proportion of comparison goods relative to convenience goods. They may also have significant employment, leisure, service and civic functions.**
NPPF	**National Planning Policy Framework. Central Government's key, revised guidance document driving planning policy in England, which compressed the**

	previous PPS documents and other guidance into a single document. It includes key guidance on town centres and health checks.
National retailers	**This includes all retailers (Class A1 only) that operate within the context of a national retail chain or group, such as Next. A schedule of all national retail multiples can be found in Retail Directory of the UK 2002 (Hemming Information). Specialist shops that are part of a retail chain or group, such as Whittards and Thorntons, are classified as national retailers. Although there are national chains of food and drink uses and betting shops, such as Ladbrokes, these are classified based on the use class (e.g. betting shops as A2 uses) and not as national retailers.**
Prestige international retailers	**This includes prestigious retailers that operate in more than one country, such as Gucci, Gianni Versace, and Giorgio Armani. It also includes flagship stores that are only found in select town centres in Britain. National airline shops, such as British Airways, have also been classified as international retailers.**
Primary Frontages	**Internationally recognised shopping destinations. The Primary Frontages defined in Westminster's City Plan - Strategic Policies document are Oxford Street, Regent Street, Bond Street and Knightsbridge/Brompton Road.**
Retail floorspace	**This is all A1, A2, A3, A4, A5 and sui generis floorspace, and vacant floorspace of any of the aforementioned categories.**
Shisha	**Flavoured tobacco smoked through a water pipe or hookah. Smoke free legislation means that it cannot be smoked indoors in public places, and is often smoked at tables and chairs on the footway and in garden areas. There has been a rapid rise in shisha uses over the past five years, and there is concern over issues of health, residential amenity and other issues.**
Specialist independent	**Similar to an independent store, but this category reflects the quality and specialisation of the retailer so that a shopper may make a specific shopping trip to that shop. For example, The Pen Shop on Regent Street or antique shops.**
Sui generis	**Sui Generis is a term that refers to a use on its own. Any planning use not falling within a specific class within the Use Class Order falls within this category. Examples of sui generis uses in shopping centres are launderettes, mini cab offices, amusement centres and car showrooms.**
UDP	**Unitary Development Plan produced by Westminster City Council, with saved policies forming part of the statutory development plan for Westminster.**
Vacancy	**This category includes vacant street level units, as well as units that are under alteration. However, if at any time the survey was completed it was evident who the unit would be occupied by, the unit was treated as being occupied.**
Zone A Rent	**The rental level per square metre achieved on the first six metres of a shop unit.**

Information Sources

Westminster's City Plan - Strategic Policies (adopted November 2013)
https://www.westminster.gov.uk/westminsters-city-plan-strategic-policies

Westminster's Unitary Development Plan (UDP, adopted January 2007)
https://www.westminster.gov.uk/unitary-development-plan-udp

The Mayor's London Plan (GLA, July 2011 as amended)
http://www.london.gov.uk/priorities/planning/london-plan

The National Planning Policy Framework (NPPF, DCLG 2012)
https://www.gov.uk/government/publications/national-planning-policy-framework--2

National Planning Practice Guidance (NPPG, March 2014)
http://planningguidance.planningportal.gov.uk/

Westminster High Street Health Checks 2013
https://www.westminster.gov.uk/high-street-health-checks

Westminster Health Check Archive
https://www.westminster.gov.uk/shopping-centre-health-checks

City of Westminster

If you would like to obtain further copies of this Health Check report, please:

Email: ldf@westminster.gov.uk
Or Telephone: 0207 641 2447

City of Westminster

Shopping Centre Health Check Survey 2014

Local Centre 38: Shirland Road Junction

Contents

(i) Purpose of the Study

Former government guidance on Town Centres advised that 'health checks' be undertaken every five years to allow accurate and reasonable temporal analysis of the performance of town centres. This requirement has been superseded by more recent national and regional policy frameworks and guidance.

The National Planning Policy Framework (NPPF) (DCLG, 2012), states that when setting out requirements for Plan Making and using a proportionate evidence base, '*Local Planning Authorities should have a clear understanding of business needs within the economic markets operating in and across their area. To achieve this they should... assess... the role and function of town centres and the relationship between them, including any trends in the performance of centres, and the capacity of existing centres to accommodate new town centre development* (paragraphs 160, 161).'

The London Plan (2011) sets out strategic retail policy for Town Centres in London, as set out in more detail below. Paragraph 2.74 of the London Plan (July 2011) states that "*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 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.*"

This then forms the current national and regional planning policy framework for undertaking town centre health checks. The City Council is currently follow the former guidance and updating health checks every five years, as this is deemed to be a sensible and manageable time period for monitoring the viability and vitality of centres, given the extent of Westminster's town centre network.

(ii) Westminster's Local Centres and Planning Policy

Westminster's Local Centre Health Checks were last carried out in 2007, updating 2002 and 1997 surveys, and includes detailed analysis of Westminster's 39 Local Shopping Centres.

Local Centres normally have a purely local function and most are mainly comprised of convenience goods retailers with some food and drink and local service uses, mainly providing facilities for people living or working nearby (which the City Council wishes to safeguard in accordance with national guidance). However in Westminster some are also speciality centres which attract shoppers from a wider area.

Westminster's current local plan consists of the City Plan: Strategic Polices (adopted November 2013), and saved development management policies from the Unitary Development Plan (adopted January 2007). The local plan seek to protect and enhance the designated Local Shopping Centres for the service they provide to residents, visitors and workers, and because they reduce the need to travel.

Strategic policy CS21 is the general policy for retail across Westminster, seeking to protect existing A1 uses, direct new retail floor space to designated shopping centres, and to protect non-A1 retail and town centre uses in designated shopping centres from changes to uses that do not serve visiting members of the public and that do not have active shop fronts.

Saved UDP policy SS7 (Shopping and Services policy 7) is the detailed development management policy for local shopping centres. The policy covers the protection of shops and circumstances where changes of use away from shops may be permitted, taking into consideration the viability of units and the overall balance of uses in the centre.

(iii) Westminster's Retail Hierarchy

The City of Westminster is broadly divided into two zones in terms of retail policy, the Core Central Activities Zone (CAZ) and CAZ Frontages, and areas outside of this. The Core CAZ contains the two international shopping centres in London, the West End and Knightsbridge in addition to distinctive retail areas such as Covent Garden, Soho, Mayfair and St James's, as well as numerous small parades and individual shops. Outside the Core CAZ and CAZ Frontages there is one Major Shopping Centre, 4 District Centres (where previously there had been 7, 3 have subsequently been reclassified as CAZ Frontages and 1 as a Major Centre) and the 39 Local Centres which are designated to safeguard shopping facilities for local residents, and the retail character of local shopping areas.

In 2007, the District and Local Centres health check reports were all updated, as were 17 shopping areas inside the CAZ. More recently, reports for Westminster's high street shopping centres were updated in 2013.

(iv) Health Checks Methodology

As set out in the NPPF (DCLG, 2012) local planning authorities should recognise town centres as the heart of their communities and pursue policies to support their viability and vitality. Planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive.

Accessibility by public transport is considered to be excellent for all Westminster's larger shopping areas, and its Local Centres are accessible for people to walk to. The City Council wants to retain shops in Local Centres, in order to maintain a range of local convenience shops and protect the character and function of the centres. Local shops and services limit car trips, encourage walking, and make city life more practical and attractive.

The **National Planning Practice Guidance** was published in March 2014 by DCLG, several months after the field work for this project had commenced. It states that existing centres should be audited to assess their role, vitality, viability and their potential to accommodate new development and different types of development. It also sets out a series of indicators to determine the health of town centres, including:

- Diversity of use
- Vacant property
- Commercial yields on non-domestic property
- Customer views and behaviour
- Retailer representations
- Commercial rents
- Pedestrian flows and accessibility
- Perception of safety and crime
- State of environmental quality

Most of the above indicators will be assessed as part of this study, where data collection is available and reasonable. All of the above were included as part of the 2013 health checks for the larger high street type centres, where it is more appropriate to carry out consumer surveys, and where commercial data is more readily available. Given the size of this project, the indicators below are considered to be appropriate and comprehensive.

Land Use

(1) Diversity of town centre uses

This section considers the range of A1 uses, and compares the current diversity of land uses to previous Local Centre Health Check Surveys dated 1997, 2002 and 2007. It also includes the

proportion of vacant street level property and the amount of space used for different functions such as shopping, leisure, cultural and entertainment activities, pubs, cafes, and restaurants.

Accessibility

(2) **Pedestrian flows (footfall):**
Visual assessments were undertaken to measure pedestrian flows which contribute towards the vitality of the Local Centres. These were conducted on comparable days of the week and compared to the average for all of the Local Centres;

(3) **Accessibility:**
The whole of Westminster has a Public Transport Accessibility Level (PTAL) score of 6, the highest level achievable. This section therefore concentrates on ease and convenience of access;

Environment

(4) **State of the town centre environmental quality assessment:**
Includes a subjective assessment of indicators such as security, air pollution, noise, clutter, litter and graffiti, as well as positive factors such as trees, landscaping and open spaces. Each centre is assessed as per the Attractions Table 4, and the Daytime Amenity Table 5 in the 2007 Health Check Survey. A comparison is made between the 1997, 2002, 2007 and 2013 surveys.

(5) **Daytime amenity:**
A qualitative assessment of the amenity within the local centre, assessing its cleanliness, security, and identity.

(6) **Relative performance of the centre:**
Measures the performance of the centre compared to the Westminster Local Centre average in terms of land use, attractiveness, and daytime amenity, with graphs comparing the performance of centres relative to one another. The centre's strengths, weaknesses, opportunities and threats are highlighted in a SWOT analysis diagram at the end of this section.

(7) **The potential capacity for growth or change of centres in the network:** opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development is considered here. Based on levels of demand, assessments are made to ascertain how much capacity each Local Centre has to accommodate retail growth, looking at retail related planning applications in and around the Local Centres. Consideration is given to whether the current Local Centre boundaries and Core and Secondary Frontage designations are still valid. Consideration is also given to ways in which the vitality and viability of the centres could be enhanced.

(8) **Summary of health check:**
This section contains a comparison of the relative performance of this centre, and summary of land use assessment as per the 2007 Health Check reports. General comments and analysis of the centre are included, along with a summary of any problems/issues. A classification as 'in decline', 'neutral', or 'healthy' is included, plus comment on whether things have improved, deteriorated, or remained the same since 2007 (see 2007 Health Checks, Tables 6 and 7). Where a Local Centre is considered to be "in decline" or "neutral", consideration is made on ways to improve the vitality and viability of the Centre.

The results of this study will be used to inform planning policy development and the inception of other relevant interventions, and will be used to assess the success of previous initiatives such as any investment in public realm.

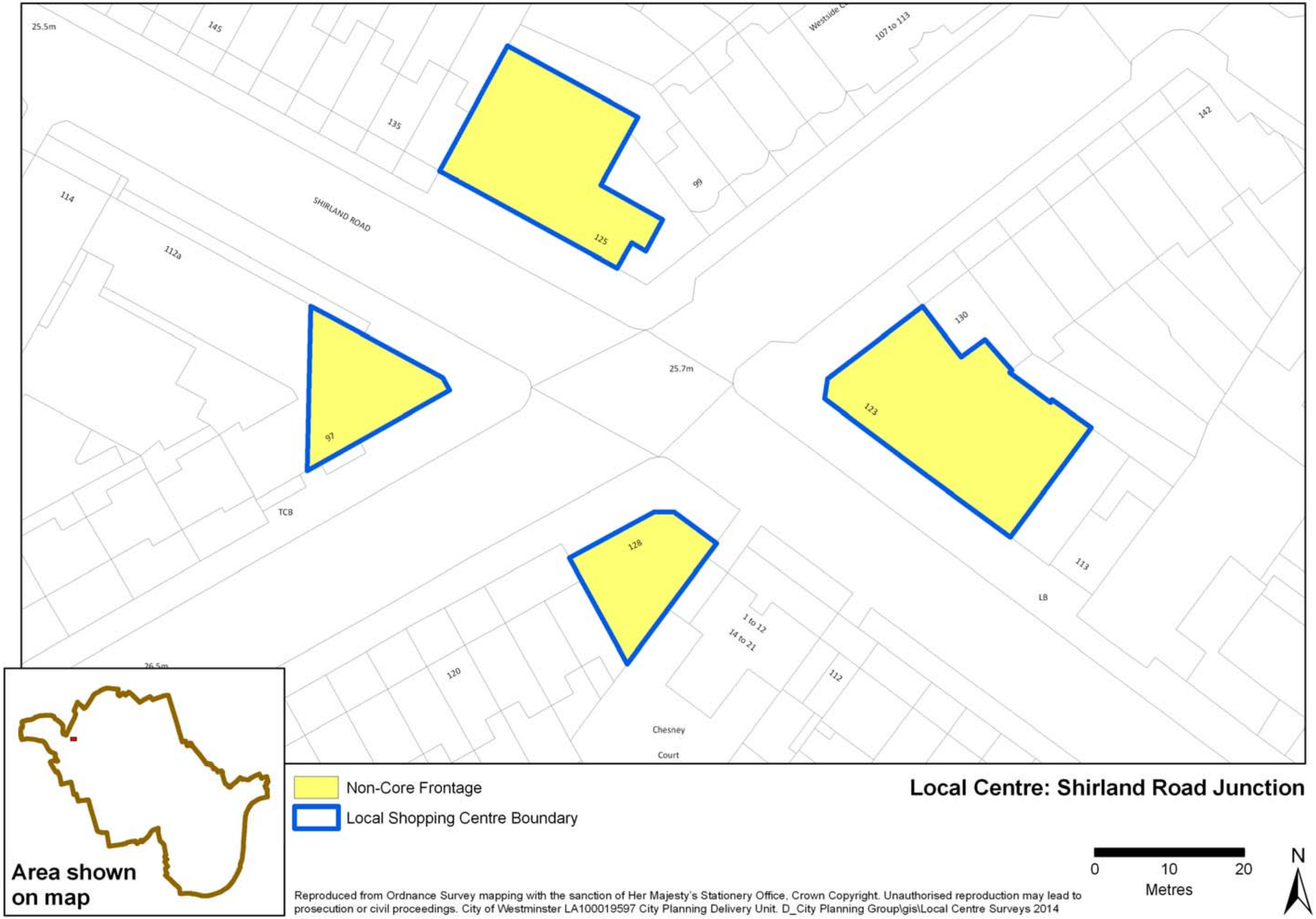
Local Centre **38: Shirland Road Junction**

1. Introduction

1.1 Location

Shirland Road Junction is a small Local Centre in the north west of Westminster, serving residents in the Maida Vale and Harrow Road area. It is located on the Shirland Road/Elgin Avenue junction, in close proximity to both Maida Vale and Warwick Avenue London underground stations. The catchment area is restricted by Harrow Road District Centre to the south, and Local Centres at Shirland Road/Chippenham Road to the north, Harrow Road (East) to the south, and Lauderdale Road/Castellain Road to the east.

Figure 1: Local Centre Boundary 2013



2 Land Use

2.1 Range of Uses

Shirland Road Junction comprises a range of shopping and other town centre uses. This diversity is summarised in Table 1 below.

Table 1: Range of Town Centre Uses (1997-2013)

Use Class		**No. of Units 1997**	**No. of Units 2002**	**No. of Units 2007**	**No. of Units 2013**
Class A1 Retail		5	8	7	6
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*0*
	National retailers	*0*	*0*	*0*	*0*
	Specialist Independent	*0*	*1*	*1*	*2*
	Independent	*2*	*4*	*3*	*3*
	Convenience	*3*	*3*	*3*	*1*
Class A2	Financial & Professional	1	1	1	1
Food & Drink		0	1	1	0
Class A3	*Restaurant/Café*	*0*	*1*	*1*	*0*
Class A4	*Pubs/Bars*	*0*	*0*	*0*	*0*
Class A5	*Takeaway*	*0*	*0*	*0*	*0*
	Takeaway/Restaurant				*0*
Sui Generis		0	1	1	1
Vacant Units		1	1	0	1
Arts/Culture		0	0	0	0
Health uses		1	0	0	0
Hotels		0	0	0	0
TOTAL		**8**	**12**	**10**	**9**

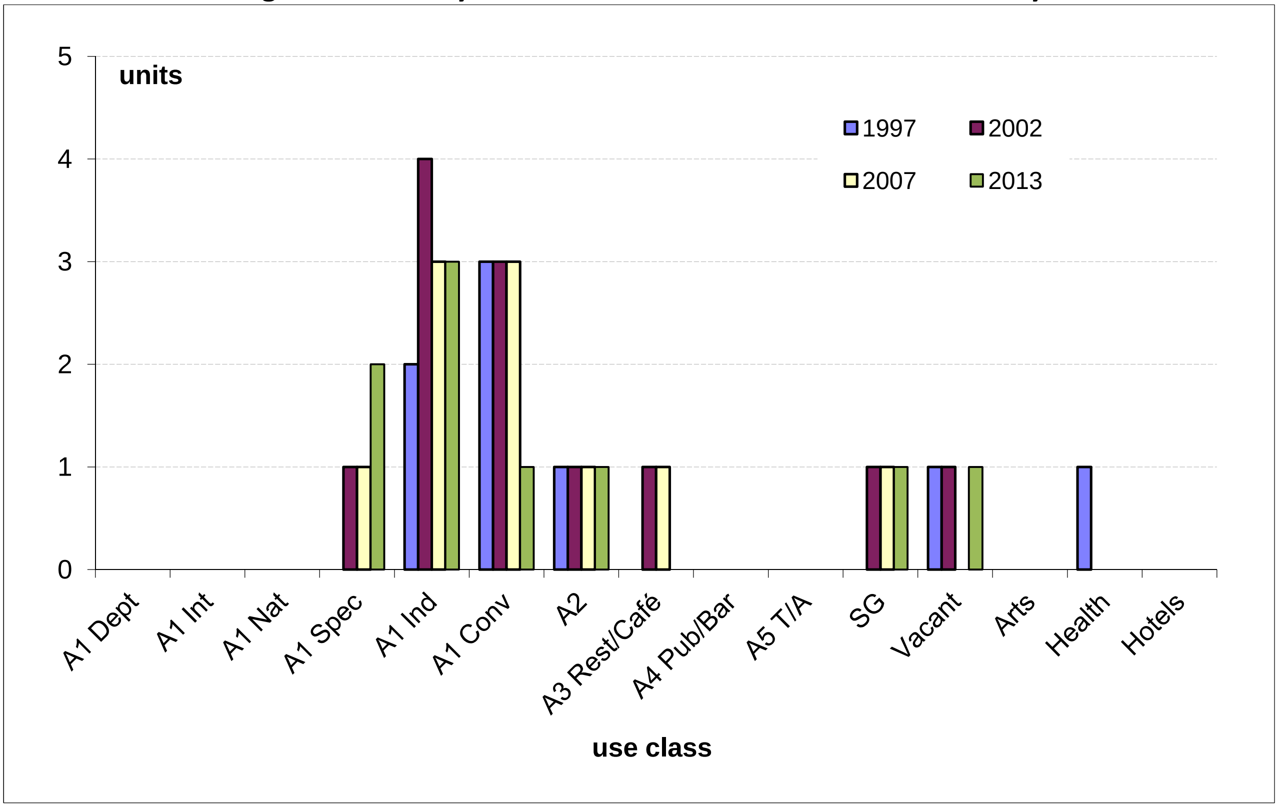
Source: WCC Site Survey December 2013

In total there are nine units, one fewer than the number recorded in the 2007 survey. This is due to the loss of a newsagent, the unit now serving as a residential property having been converted into seven flats.

The number of A1 retail uses in Shirland Road Junction has decreased by one since 2007 and there have also been internal shifts of use, however A1 accounts for two thirds of the units in the centre. The gain of one specialist independent retailer (an interior design shop) is set against the loss of two convenience shops (an off-licence and a newsagent, as described above). The number of Class A2 uses has remained constant at one unit (an estate agent), as has the lack of takeaways and pubs/bars, and the number of restaurant/café uses has also declined since 2007, and no longer have a presence in the Shirland Road Junction Local Centre.

Outside of the A-class uses, there is now a vacant unit for the first time since the 2002 survey. There remains one sui generis unit (a dry cleaners/launderette) but Shirland Road Junction does not have any arts/culture, health or hotel uses.

Figure 2: Units by use class within the Local Centre boundary



2.2 Range of A1 Uses

Shirland Road Junction has six Class A1 retail units comprising one convenience shop, three independent retailers (two hairdressers and a sandwich shop) and two specialist retailers (a carpet shop and an interior design shop). The independent units include two hairdressers and a sandwich shop. The high proportion of independent service based shops and lack of multiple retailers suggests that Shirland Road Junction serves local residents with a mix of convenience and service retail facilities.

2.3 Total Retail Floor Space

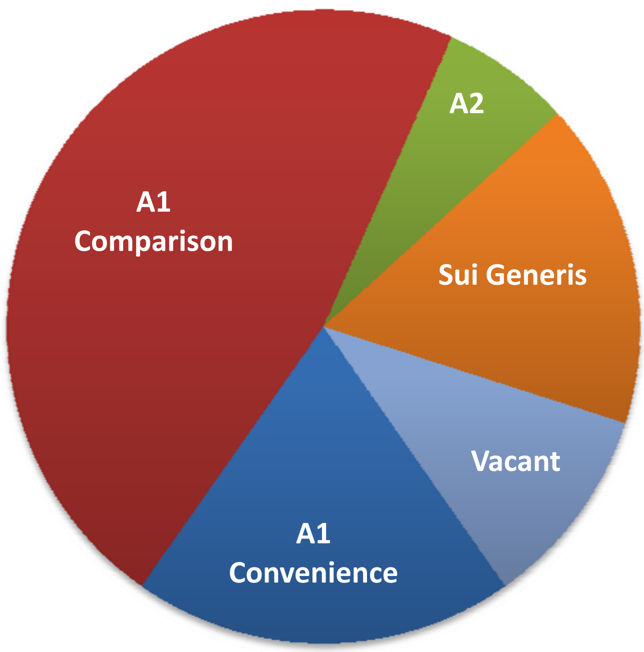
Total retail floor space in Shirland Road Junction is broken down in Table 2. It has 1,121 sqm of retail floor space, which is below the average of 3,188 sqm for the 39 Local Centres in Westminster. Shirland Road Junction has a high proportion of A1 comparison floor space, accounting for almost half of the total. The other use classes make smaller, more comparable contributions to the overall retail floor space total in the centre. The centre does not have any A3, A4 or A5 uses and also has a lower than average proportion of A1 convenience floor space (19% compared with the overall Local Centre average of 35%).

Shirland Road Junction is a Local Centre with a limited selection of local services and food shops, mostly due to the size of the centre. There are no banks or building societies, and the single A2 use is an estate agent. It does not provide the same range and selection found in larger Local Centres or District Centres.

Table 2: Total Retail Floor space 2013

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2013)
A1 Convenience	218	19.45%	14.9%
A1 Comparison	526	46.92%	35.2%
A2	74	6.60%	11.2%
A3 Rest/Café/TA	0	0.00%	17.4%
A4 Pub/Bar	0	0.00%	5.1%
Sui Generis	187	16.68%	3.9%
Vacant	116	10.35%	8.6%
Health	0	0.00%	2.0%
Hotels	0	0.00%	0.5%
Art	0	0.00%	1.3%
Leisure	0	0.00%	0.1%
Total	**1,121**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



Source: City of Westminster GIS System and site survey December 2013

2.4 Proportion of Vacant Street Level Property

The unit vacancy rate in Shirland Road Junction is slightly higher than the average rate for Local Centres in Westminster, as shown in Table 3, however the small size of the centre means that the figure is somewhat distorted. Vacancies have increased since 2007 but remain below the national average vacancy rate (more than 14.1%) for shopping centres. There is only one vacant unit, however, and vacancy rates are not affecting the centre's viability.

Table 3: Level of Vacant Street Level Property 2013

% Vacant Units				% Local Centre Average
1997	2002	2007	2013	2013
0.0% (1 unit)	8.3% (1 unit)	0.0% (0 units)	11.1% (1 unit)	8% (1 unit)

Source: City of Westminster GIS System and site survey December 2013

3. Accessibility

3.1 Pedestrian Flows (footfall)

The centre was found to be reasonably quiet in terms of pedestrian vibrancy when the Health Check Survey was carried out on a bright but cold weekday afternoon in January 2014.

3.2 Accessibility on foot and by public transport

Shirland Road Junction is mostly accessible by bus, with routes 6, 187 and 414 running along Shirland Road. It is reasonably close to several London Underground Stations, with Maida Vale (Bakerloo line) located to the east and Warwick Avenue (Bakerloo Line) to the south. The Local Centre is near Harrow Road (A404) and Maida Vale (A5), both of which join the A40 (M) Westway, one of the main arterial roads through central London.

4. Environmental Quality

4.1 State of the Centre's Attractions and Environmental Quality / Attractions

The attitudinal assessment of the attractions and amenity of the centre is summarised in Tables 4 and 5 below. Shirland Road Junction's overall score for attractions is 7.7%, the same as the previous survey from 2007. This is significantly lower than the Local Centre average of 31%, and ranks the centre last out of the 39 Local Centres in the City. It is only rated as being average in two categories (the prominence of independent shops and the general quality of the retail environment); the remaining categories are all rated as poor, reflecting the size, location and function of the centre.

4.2 Daytime Amenity

Shirland Road Junction is rated more positively in terms of daytime amenity and is a moderately attractive Local Centre. It has a day time amenity rating of 63% compared with the average for all Local Centres of 68%, and is ranked =29th out of the 39 Local Centres in the City. The centre is only rated as being poor in three categories, all relating to the identity of the town centre e.g. the absence of special street features, identifying features and street events. Shirland Road Junction is rated positively in terms of security, with six of the 12 categories rated as being good. The remaining six categories in the security sub section are all rated as average. The centre is also rated fairly positively in the general cleanliness sub section, where three of the eight categories are rated as good.

Table 4: Attractions within the Local Centre 2013

ATTRACTIONS	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Retail Provision									
Prominence of multiple retailers			x			x			x
Prominence of independent shops			x		x			x	
Availability of food shopping			x			x			x
Prominence of specialist shops			x			x			x
Quality of market (frequency, variety etc.)	-	-	-	-	-	-	-	-	-
Quality of retail environment		x			x			x	
Art/Culture									
Quality of restaurants (availability, number etc.)			x			x			x
Quality of pubs/clubs/bars			x			x			x
Range of cultural/community events (theatre, concerts)			x			x			x
Availability of sports and leisure facilities			x			x			x
Service Provision									
Local services (information, library etc.)			x			x			x
Employment/office space			x			x			x
Bank/building society provision			x			x			x
Total	1/26			2/26			2/26		
Percentage	3.85%			7.69%			7.69%		

Source: City of Westminster site survey December 2013

Table 5: Day Time Amenity within the Local Centre 2013

AMENITY – DAYTIME	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Overall environment of public areas in the centre									
General Cleanliness in Shopping Hours:									
Presence of litter	x			x			x		
Presence of refuse bags on the street	x			x			x		
Evidence of street fouling		x		x			x		
Presence of glass/glasses/other debris incl. food and food containers/wrapping	x				x			x	
Condition		x			x			x	
Quality of buildings		x			x			x	
Special features (pedestrianisation, street furniture, etc.)			x			x			x
Impact of vacant sites		x			x			x	
Security									
Evidence of vandalism and graffiti (incl. on street furniture)		x			x			x	
Security during shopping hours (availability, access, security etc.)		x			x			x	
Ease of passage for pedestrians (incl. presence of obstacles e.g. illegally parked vehicles)		x			x			x	
Evidence of drunkenness, anti-social behaviour, rowdiness	x			x			x		
Presence of rough sleepers	x			x			x		
Presence of beggars	x			x			x		
Presence of street drinkers	x			x			x		
Evidence of touting (e.g. mini cabs, rickshaws, prostitution, drug dealing etc.)	x			x			x		
Presence of illegal street traders e.g. counterfeit goods, hot dogs, peanuts etc.	x			x			x		
Effectiveness of any deterrent measures (CCTV, police patrols, door security etc.)		x			x			x	
Quality of street lighting		x			x			x	
Safety perception in shopping hours		x			x			x	
Identity of town centre									
Features which identify the centre (e.g. flagship stores, buildings etc.)			x			x			x
Promotion/Street events			X			x			x
'Feel good' factor of town centre		x			x			x	
Total	29/46			29/46			29/46		
Percentage	63.0%			63.0%			63.0%		

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2013

Figure 4: Deviation of centre from the mean for Local Centres 2013

Shirland Road Junction is a small Local Centre with a lower than average amount of retail floor space when compared with the overall average for the 39 local centres. This is also true for all retail uses and the attractiveness and amenity ratings when compared to the local centre average.

5.2 Strengths, Weaknesses, Opportunities and Threats

SWOT analysis

6. Future capacity

6.1 Potential Capacity for Growth

Between 2007 and 2013, there were no permitted planning applications in the Local Centre involving A-class uses.

Additional capacity could be accommodated in the vacant retail unit.

7. Health of the Centre

Table 6: Summary of Health Check Assessment 2013

Subject	Subject Matter	Data	Number	Sq M
RETAILING	Floor space	Total Floor space		1,121
		Total Convenience (A1)		218
		Total Comparison (A1)		526
		Total Service (A2)		74
		Total A3		0
		Total A4		0
		Total A5		0
		Total Sui Generis		187
		Total Vacant		116
	Retail Offer	Total Number of Shop Units	9	
		Total Number of A1 Units	6	
		a) Convenience shops	1	
		b) Department/principal stores	0	
		c) Prestige international shops	0	
		d) National comparison retailers	0	
		e) Specialist Independent shops	2	
		f) Independent shops	3	
		Total Comparison Multiples	5	
		Total Number of A2 Units	1	
		Total Number of A3 Units	0	
		Total Number of A4 Units	0	
		Total Number of A5 Units	0	
		Total Number of Sui Generis	1	
		Total Number of Vacant	1	
	Market	Days of operation	0	
		Number of stalls	0	
	Proposals	Changes of use A1 to A2	0	
		Changes of use A1 to A3	0	
		Changes of use A1 to A4	0	
		Changes of use A1 to A5	0	
ARTS/CULTURE		(cinemas, galleries, theatres etc.)	0	
HEALTH USES		(clinics, surgeries etc.)	0	
HOTELS			0	

In terms of its vitality, viability and general economic health, this centre is considered to be ‘neutral’, as it was when last surveyed in 2007.

Appendices

Appendix 1: Views of Local Centre

Appendix 2: Land Use Table (Westminster land use survey 2013)

Appendix 3: Land Use Map (GOAD 2012 retail data and Westminster land use survey 2013)

Appendix 4: Planning permissions Map (Westminster land use survey 2013)

Appendix 5: Location map of all local centres

Appendix 6: Glossary of Terms

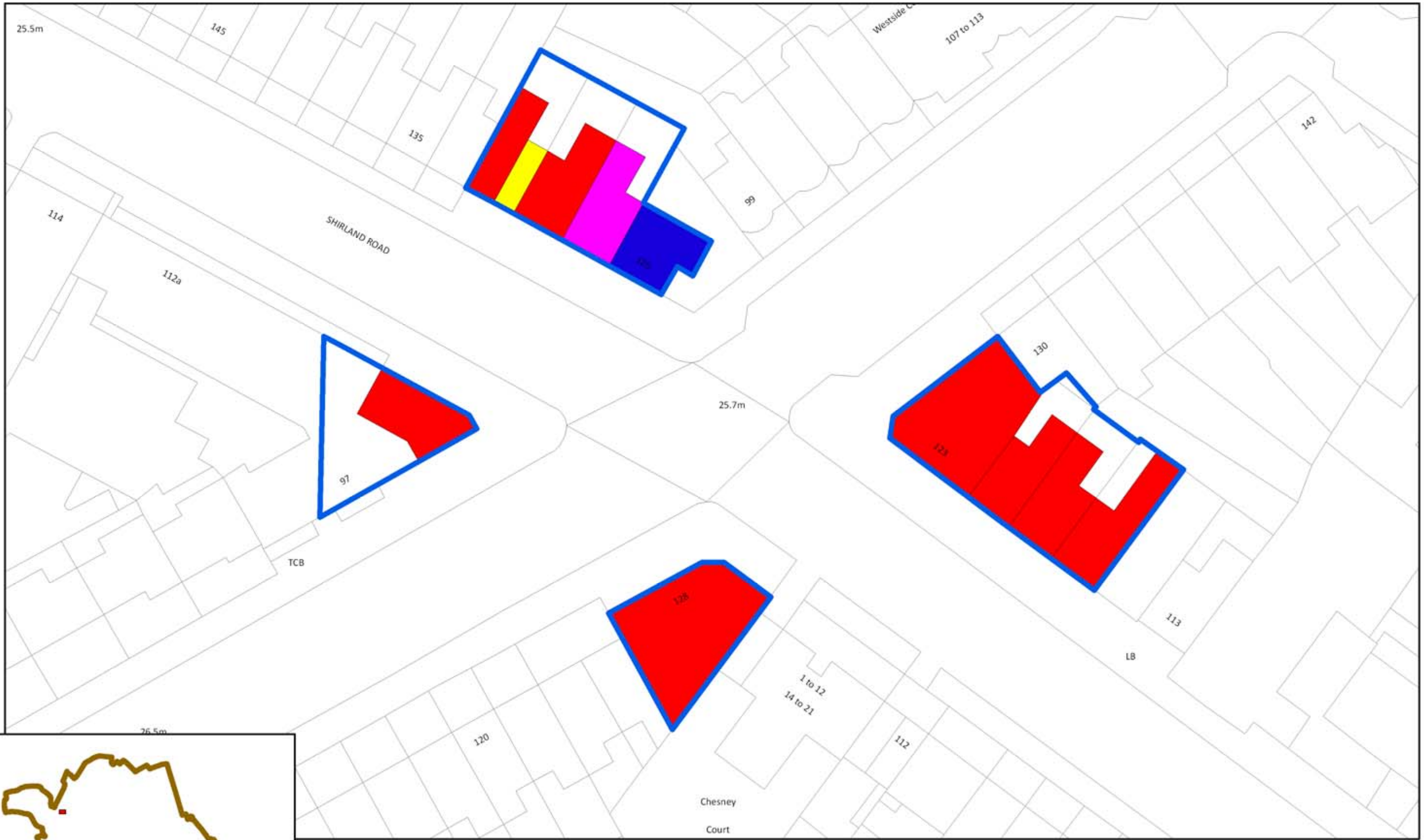
Views of Shirland Road Junction Local Centre

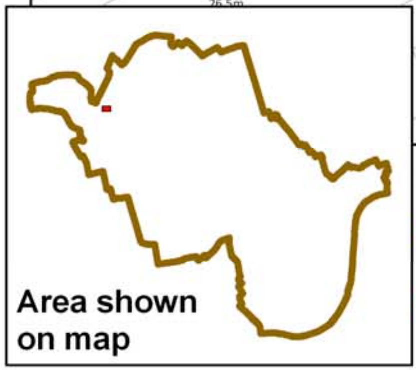
The east end of the local centre, with wide clear pavements, mature trees and reasonably well kept shop fronts.

The western end of the Local Centre, with mature trees and evidence of accessibility for those travelling on buses.

The east end of the Local Centre viewed from Elgin Avenue, with a wide, clear pavement, mature trees and bicycle parking facilities.

ADDRESS	FASCIA	DESCRIPTION	USE	SQM	A1 Conv.	A1 Spec.	A1 Ind	A2	SG	Vacant	2007 Use
117 SHIRLAND ROAD	DARREN SCOTT SALON	HAIRDRESSER	A1 Ind	118			1				A1 Ind
119 SHIRLAND ROAD		VACANT	Vacant	116						1	A3 Rest/Café
121A-G SHIRLAND ROAD		RESIDENTIAL		108							A1 Conv
123 SHIRLAND ROAD	123 CLEANERS	DRY CLEANERS/LAUNDERETTE	SG	187					1		SG
125 SHIRLAND ROAD	PEMBERTONS ESTATE AGENTS	ESTATE AGENT	A2	74				1			A2
127 SHIRLAND ROAD		RESIDENTIAL/OFFICE		124							
129 SHIRLAND ROAD	CARPET WORLD	CARPET SHOP	A1 Spec	128		1					A1 Spec
131 SHIRLAND ROAD		RESIDENTIAL		125							
131A SHIRLAND ROAD	CHECKERS UNISEX SALON	HAIRDRESSER	A1 Ind	54			1				A1 Ind
131B SHIRLAND ROAD	LE PETIT VENICE SANDWICH BAR	SANDWICH SHOP	A1 Ind	24			1				A1 Ind
97 ELGIN AVENUE	ELGIN FOOD & WINE	NEWSAGENT	A1 Conv	218	1						A1 Conv
128 ELGIN AVENUE	DAY TRUE	INTERIOR DESIGN SHOP	A1 Spec	202		1					A1 Conv





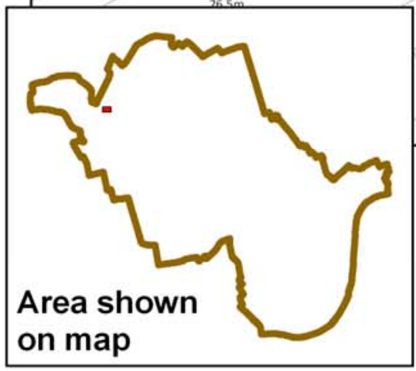
Source: GOAD Retail Survey 2013

Local Centre: Shirland Road Junction

- Local Shopping Centre Boundary
- A1: Retail
- A2: Financial & Professional
- A5: Take Away
- B1: Office

0 10 20
Metres

N



Source: GOAD Retail Survey 2013

Local Centre: Shirland Road Junction

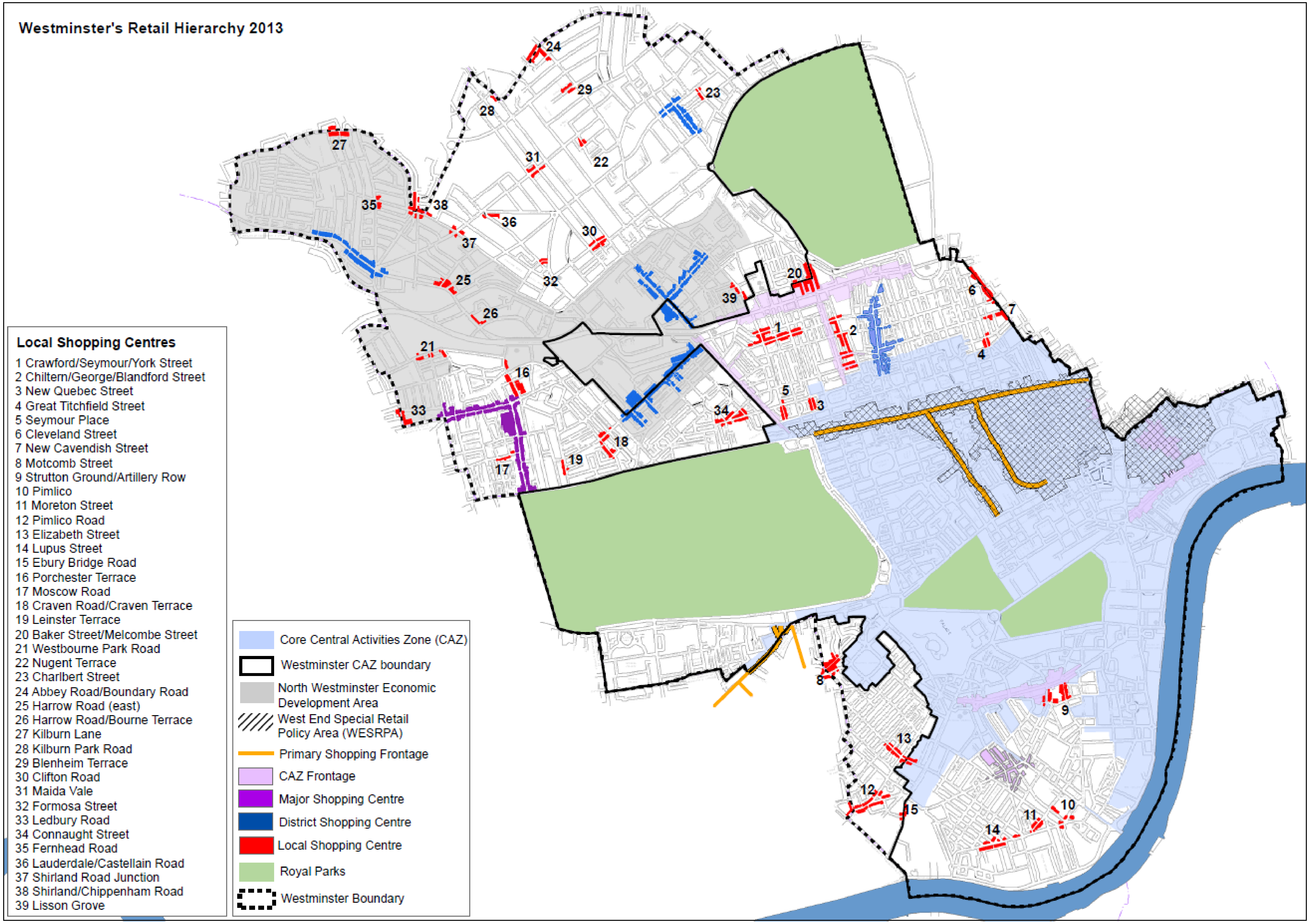
Vacant

Local Shopping Centre Boundary

0 10 20
Metres

N

Figure 7 Westminster wide shopping centre boundaries plan



A1	**Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, dry cleaners, pet shops, sandwich bars, retail showrooms, and domestic hire shops.**
A1 café type uses	**Shops such as sandwich bars or coffee shops selling food and drinks to be consumed mainly off the premises, but not hot food takeaways. Examples include certain Pret a Manger shops, Costa Coffee and the Seattle Coffee Co. shops.**
A2	**Banks, building societies, bureau de change, estate and employment agencies, professional and financial services, telephone bureaux, betting offices and beauty salons (excluding hair).**
A3	**Food and drink uses such as restaurants, pubs, snack bars, cafés, wine bars and shops for the sale of hot food (hot food take-aways).**
A4	**Drinking Establishments: Premises where the primary purpose is the sale and consumption of alcoholic drinks on the premises.**
A5	**Hot Food Take-away: Premises where the primary purpose is the sale of hot food to take away.**
B1	**Business uses such as offices, research and development and industrial uses.**
CAZ	**Central Activities Zone (CAZ). The CAZ is an area of mixed uses, many of which contribute directly to the national, regional and local economy. It is this mix of activities and their supporting resources which underpins the success of London's economy.**
CAZ Frontages	**Mixed use areas usually with a predominant retail function. Appropriate areas for retail growth.**
Comparison	**A1 floor space selling predominantly durable items and not in convenience use.**
Convenience	**This is based on the classification provided by the unit for Retail Planning Information (URPI) set out in URPI brief 99/2. The classifications are: food, alcoholic drink, tobacco and other goods (newspapers and magazines, cleaning materials and matches). For the purposes of this assessment, convenience includes shops selling food or drink (excluding A1 café-type uses), newsagents, (including specialist tobacco stores), chemists (including Boots the Chemist stores) and post offices.**
Department/ principle store	**This includes the main department stores such as John Lewis, Liberty, and Selfridges, as well as variety stores such as Marks & Spencer and Virgin Mega-stores.**
District Centre	**Distributed more widely than Metropolitan and Major centres, they provide convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000-50,000 sqm of retail floor space. Some district centres have developed specialist shopping functions.**
Experian GOAD	**An independent retail data consultancy who provide maps of ground floor uses in shopping centres.**
F&B	**Food and beverage offer, covered by parts A3 (cafe's/restaurants), A4 (drinking establishments) and A5 (take aways) of the use classes order.**
Gross Floorspace	**Floorspace of buildings on all floors including external walls, half the thickness of parting walls and circulation areas.**
Independent store	**This includes non-convenience stores (see definition above) irrespective of size, that are not considered to be specialist retailers (see definition overleaf), that are operated by retailers that are not included within national retail chains or groups.**
Major Centre	**Typically found in inner and some parts of outer London with a borough-wide catchment. They generally contain over 50,000sqm of retail floor space and a relatively high proportion of comparison goods relative to convenience goods. They may also have significant employment, leisure, service and civic functions.**
NPPF	**National Planning Policy Framework. Central Government's key, revised guidance document driving planning policy in England, which compressed the**

	previous PPS documents and other guidance into a single document. It includes key guidance on town centres and health checks.
National retailers	**This includes all retailers (Class A1 only) that operate within the context of a national retail chain or group, such as Next. A schedule of all national retail multiples can be found in Retail Directory of the UK 2002 (Hemming Information). Specialist shops that are part of a retail chain or group, such as Whittards and Thorntons, are classified as national retailers. Although there are national chains of food and drink uses and betting shops, such as Ladbrokes, these are classified based on the use class (e.g. betting shops as A2 uses) and not as national retailers.**
Prestige international retailers	**This includes prestigious retailers that operate in more than one country, such as Gucci, Gianni Versace, and Giorgio Armani. It also includes flagship stores that are only found in select town centres in Britain. National airline shops, such as British Airways, have also been classified as international retailers.**
Primary Frontages	**Internationally recognised shopping destinations. The Primary Frontages defined in Westminster's City Plan - Strategic Policies document are Oxford Street, Regent Street, Bond Street and Knightsbridge/Brompton Road.**
Retail floorspace	**This is all A1, A2, A3, A4, A5 and sui generis floorspace, and vacant floorspace of any of the aforementioned categories.**
Shisha	**Flavoured tobacco smoked through a water pipe or hookah. Smoke free legislation means that it cannot be smoked indoors in public places, and is often smoked at tables and chairs on the footway and in garden areas. There has been a rapid rise in shisha uses over the past five years, and there is concern over issues of health, residential amenity and other issues.**
Specialist independent	**Similar to an independent store, but this category reflects the quality and specialisation of the retailer so that a shopper may make a specific shopping trip to that shop. For example, The Pen Shop on Regent Street or antique shops.**
Sui generis	**Sui Generis is a term that refers to a use on its own. Any planning use not falling within a specific class within the Use Class Order falls within this category. Examples of sui generis uses in shopping centres are launderettes, mini cab offices, amusement centres and car showrooms.**
UDP	**Unitary Development Plan produced by Westminster City Council, with saved policies forming part of the statutory development plan for Westminster.**
Vacancy	**This category includes vacant street level units, as well as units that are under alteration. However, if at any time the survey was completed it was evident who the unit would be occupied by, the unit was treated as being occupied.**
Zone A Rent	**The rental level per square metre achieved on the first six metres of a shop unit.**

Information Sources

Westminster's City Plan - Strategic Policies (adopted November 2013)
https://www.westminster.gov.uk/westminsters-city-plan-strategic-policies

Westminster's Unitary Development Plan (UDP, adopted January 2007)
https://www.westminster.gov.uk/unitary-development-plan-udp

The Mayor's London Plan (GLA, July 2011 as amended)
http://www.london.gov.uk/priorities/planning/london-plan

The National Planning Policy Framework (NPPF, DCLG 2012)
https://www.gov.uk/government/publications/national-planning-policy-framework--2

National Planning Practice Guidance (NPPG, March 2014)
http://planningguidance.planningportal.gov.uk/

Westminster High Street Health Checks 2013
https://www.westminster.gov.uk/high-street-health-checks

Westminster Health Check Archive
https://www.westminster.gov.uk/shopping-centre-health-checks

City of Westminster

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City of Westminster

Shopping Centre Health Check Survey 2014

Local Centre 39: Ledbury Road

Contents

(i) Purpose of the Study

Former government guidance on Town Centres advised that 'health checks' be undertaken every five years to allow accurate and reasonable temporal analysis of the performance of town centres. This requirement has been superseded by more recent national and regional policy frameworks and guidance.

The National Planning Policy Framework (NPPF) (DCLG, 2012), states that when setting out requirements for Plan Making and using a proportionate evidence base, '*Local Planning Authorities should have a clear understanding of business needs within the economic markets operating in and across their area. To achieve this they should... assess... the role and function of town centres and the relationship between them, including any trends in the performance of centres, and the capacity of existing centres to accommodate new town centre development* (paragraphs 160, 161).'

The London Plan (2011) sets out strategic retail policy for Town Centres in London, as set out in more detail below. Paragraph 2.74 of the London Plan (July 2011) states that "*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 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.*"

This then forms the current national and regional planning policy framework for undertaking town centre health checks. The City Council is currently follow the former guidance and updating health checks every five years, as this is deemed to be a sensible and manageable time period for monitoring the viability and vitality of centres, given the extent of Westminster's town centre network.

(ii) Westminster's Local Centres and Planning Policy

Westminster's Local Centre Health Checks were last carried out in 2007, updating 2002 and 1997 surveys, and includes detailed analysis of Westminster's 39 Local Shopping Centres.

Local Centres normally have a purely local function and most are mainly comprised of convenience goods retailers with some food and drink and local service uses, mainly providing facilities for people living or working nearby (which the City Council wishes to safeguard in accordance with national guidance). However in Westminster some are also speciality centres which attract shoppers from a wider area.

Westminster's current local plan consists of the City Plan: Strategic Polices (adopted November 2013), and saved development management policies from the Unitary Development Plan (adopted January 2007). The local plan seek to protect and enhance the designated Local Shopping Centres for the service they provide to residents, visitors and workers, and because they reduce the need to travel.

Strategic policy CS21 is the general policy for retail across Westminster, seeking to protect existing A1 uses, direct new retail floor space to designated shopping centres, and to protect non-A1 retail and town centre uses in designated shopping centres from changes to uses that do not serve visiting members of the public and that do not have active shop fronts.

Saved UDP policy SS7 (Shopping and Services policy 7) is the detailed development management policy for local shopping centres. The policy covers the protection of shops and circumstances where changes of use away from shops may be permitted, taking into consideration the viability of units and the overall balance of uses in the centre.

(iii) Westminster's Retail Hierarchy

The City of Westminster is broadly divided into two zones in terms of retail policy, the Core Central Activities Zone (CAZ) and CAZ Frontages, and areas outside of this. The Core CAZ contains the two international shopping centres in London, the West End and Knightsbridge in addition to distinctive retail areas such as Covent Garden, Soho, Mayfair and St James's, as well as numerous small parades and individual shops. Outside the Core CAZ and CAZ Frontages there is one Major Shopping Centre, 4 District Centres (where previously there had been 7, 3 have subsequently been reclassified as CAZ Frontages and 1 as a Major Centre) and the 39 Local Centres which are designated to safeguard shopping facilities for local residents, and the retail character of local shopping areas.

In 2007, the District and Local Centres health check reports were all updated, as were 17 shopping areas inside the CAZ. More recently, reports for Westminster's high street shopping centres were updated in 2013.

(iv) Health Checks Methodology

As set out in the NPPF (DCLG, 2012) local planning authorities should recognise town centres as the heart of their communities and pursue policies to support their viability and vitality. Planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive.

Accessibility by public transport is considered to be excellent for all Westminster's larger shopping areas, and its Local Centres are accessible for people to walk to. The City Council wants to retain shops in Local Centres, in order to maintain a range of local convenience shops and protect the character and function of the centres. Local shops and services limit car trips, encourage walking, and make city life more practical and attractive.

The **National Planning Practice Guidance** was published in March 2014 by DCLG, several months after the field work for this project had commenced. It states that existing centres should be audited to assess their role, vitality, viability and their potential to accommodate new development and different types of development. It also sets out a series of indicators to determine the health of town centres, including:

- Diversity of use
- Vacant property
- Commercial yields on non-domestic property
- Customer views and behaviour
- Retailer representations
- Commercial rents
- Pedestrian flows and accessibility
- Perception of safety and crime
- State of environmental quality

Most of the above indicators will be assessed as part of this study, where data collection is available and reasonable. All of the above were included as part of the 2013 health checks for the larger high street type centres, where it is more appropriate to carry out consumer surveys, and where commercial data is more readily available. Given the size of this project, the indicators below are considered to be appropriate and comprehensive.

Land Use

(1) Diversity of town centre uses

This section considers the range of A1 uses, and compares the current diversity of land uses to previous Local Centre Health Check Surveys dated 1997, 2002 and 2007. It also includes the

proportion of vacant street level property and the amount of space used for different functions such as shopping, leisure, cultural and entertainment activities, pubs, cafes, and restaurants.

Accessibility

(2) **Pedestrian flows (footfall):**
Visual assessments were undertaken to measure pedestrian flows which contribute towards the vitality of the Local Centres. These were conducted on comparable days of the week and compared to the average for all of the Local Centres;

(3) **Accessibility:**
The whole of Westminster has a Public Transport Accessibility Level (PTAL) score of 6, the highest level achievable. This section therefore concentrates on ease and convenience of access;

Environment

(4) **State of the town centre environmental quality assessment:**
Includes a subjective assessment of indicators such as security, air pollution, noise, clutter, litter and graffiti, as well as positive factors such as trees, landscaping and open spaces. Each centre is assessed as per the Attractions Table 4, and the Daytime Amenity Table 5 in the 2007 Health Check Survey. A comparison is made between the 1997, 2002, 2007 and 2013 surveys.

(5) **Daytime amenity:**
A qualitative assessment of the amenity within the local centre, assessing its cleanliness, security, and identity.

(6) **Relative performance of the centre:**
Measures the performance of the centre compared to the Westminster Local Centre average in terms of land use, attractiveness, and daytime amenity, with graphs comparing the performance of centres relative to one another. The centre's strengths, weaknesses, opportunities and threats are highlighted in a SWOT analysis diagram at the end of this section.

(7) **The potential capacity for growth or change of centres in the network:** opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development is considered here. Based on levels of demand, assessments are made to ascertain how much capacity each Local Centre has to accommodate retail growth, looking at retail related planning applications in and around the Local Centres. Consideration is given to whether the current Local Centre boundaries and Core and Secondary Frontage designations are still valid. Consideration is also given to ways in which the vitality and viability of the centres could be enhanced.

(8) **Summary of health check:**
This section contains a comparison of the relative performance of this centre, and summary of land use assessment as per the 2007 Health Check reports. General comments and analysis of the centre are included, along with a summary of any problems/issues. A classification as 'in decline', 'neutral', or 'healthy' is included, plus comment on whether things have improved, deteriorated, or remained the same since 2007 (see 2007 Health Checks, Tables 6 and 7). Where a Local Centre is considered to be "in decline" or "neutral", consideration is made on ways to improve the vitality and viability of the Centre.

The results of this study will be used to inform planning policy development and the inception of other relevant interventions, and will be used to assess the success of previous initiatives such as any investment in public realm.

Local Centre **39: Ledbury Road**

1. Introduction

1.1 Location

This small, specialist Local Centre is located in the west of Westminster, to the north of Hyde Park and in the vicinity of Bayswater, and is located directly west of the large Queensway/Westbourne Grove major shopping centre. The centre is on the borough boundary with the Royal Borough of Kensington and Chelsea and forms part of a larger area of specialist retail outlets, particularly women's clothes shops.

The centre has a number of units on Westbourne Grove and is close to Westbourne Park London Underground station, and also Bayswater and Queensway stations located in the neighbouring Queensway/Westbourne Grove major shopping centre. The Ledbury Road catchment area is limited by its proximity to the Queensway/Westbourne Grove Major Centre to the east.

Figure 1: Local Centre Boundary 2013

2 Land Use

2.1 Range of Uses

Ledbury Road comprises a range of shopping and other town centre uses. This is summarised in Table 1 below.

Table 1: Range of Town Centre Uses (1997-2013)

Use Class		No. of Units 1997	No. of Units 2002	No. of Units 2007	No. of Units 2013
Class A1 Retail		0	17	17	11
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*1*	*0*
	National retailers	*0*	*0*	*0*	*0*
	Specialist Independent	*0*	*15*	*16*	*11*
	Independent	*0*	*1*	*0*	*0*
	Convenience	*0*	*1*	*0*	*0*
Class A2	Financial & Professional	0	0	0	1
Food & Drink		0	1	1	1
Class A3	*Restaurant/Café*	*0*	*0*	*0*	*0*
Class A4	*Pubs/Bars*	*0*	*1*	*1*	*1*
Class A5	*Takeaway*	*0*	*0*	*0*	*0*
	Takeaway/Restaurant				*0*
Sui Generis		0	0	0	1
Vacant Units		0	0	1	1
Arts/Culture		0	0	0	0
Health uses		0	0	0	0
Hotels		0	0	0	0
TOTAL		**0**	**18**	**19**	**15**

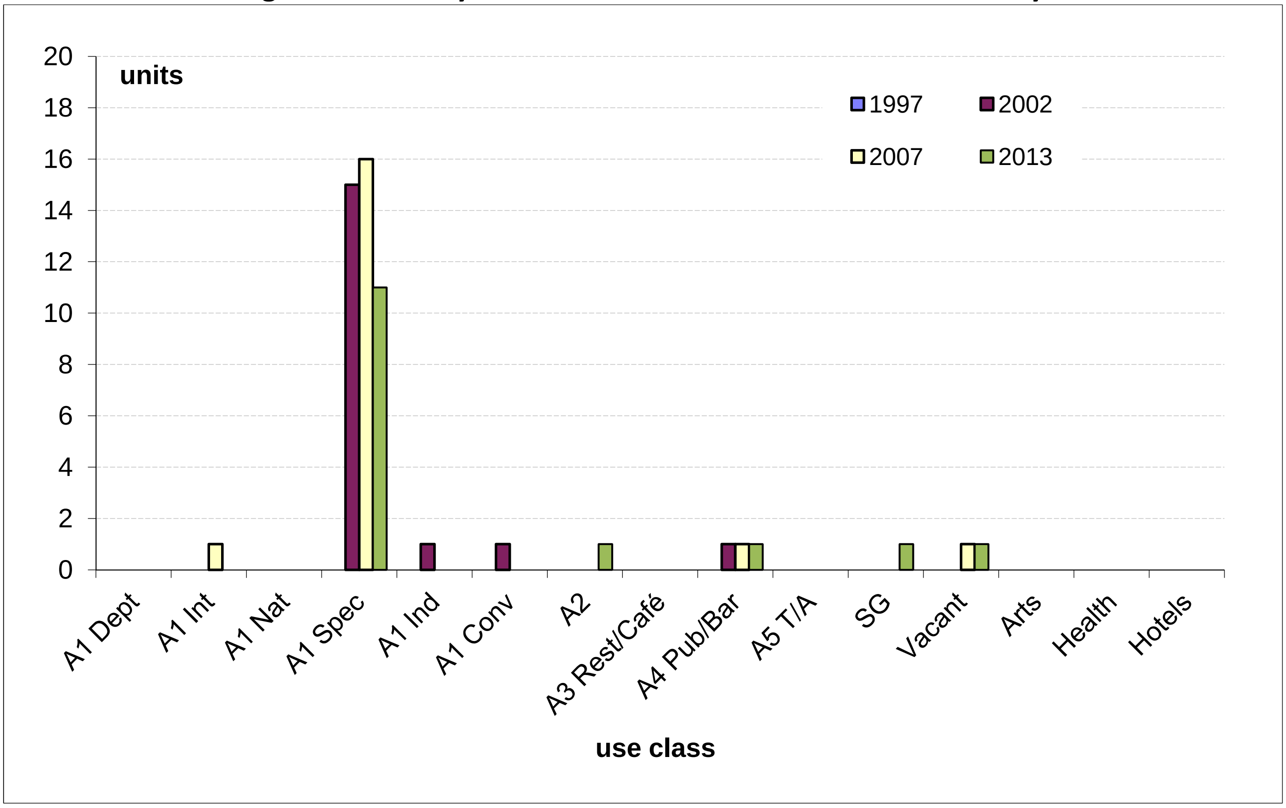
Source: WCC Site Survey December 2013

In total there are 15 units in the centre, four fewer than the number recorded in 2007. This is primarily because those units that come under the jurisdiction of the Royal Borough of Kensington and Chelsea have been excluded from this survey, having been included in previous years.

The number of A1 retail uses in Ledbury Road has declined since 2007, largely because of the exclusion of Royal Borough of Kensington and Chelsea units, however A1 is the dominant use in the centre, accounting for over two thirds of the units. There have been several changes of proprietor in Ledbury Road but few internal shifts of use. One international retailer has been lost (Pepe Jeans) but the remaining uses are specialist independent, as they were in 2007. These are dominated by exclusive boutique-style women's clothes shops. There is one pub and one new A2 unit (an estate agent), but there are no A3 or A5 uses in the centre.

Outside of the A-class uses, there is one vacant unit, as in 2007. The centre does not have any dedicated arts/culture, health or hotel uses but there is one sui generis unit (a church).

Figure 2: Units by use class within the Local Centre boundary



2.2 Range of A1 Uses

Ledbury Road has 11 Class A1 retail units, all of which are specialist retailers. There are nine boutique clothes shops, one furniture shop and a kitchenware shop. The dominance of the centre by a single use class illustrates that Ledbury Road serves a specialist clientele, further supported by the lack of convenience and food shopping, meaning that the centre does not necessarily serve local residents in the same way that most Local Centres do.

2.3 Total Retail Floor Space

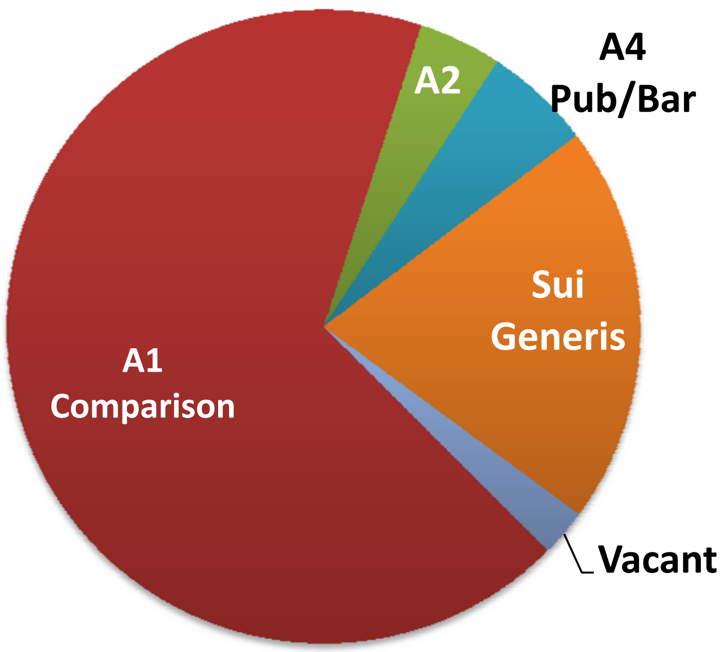
Total retail floor space in Ledbury Road is broken down in Table 2. It has 2,363 sqm of retail floor space, which is slightly below the average of 3,188 sqm for the 39 Local Centres in Westminster. Ledbury Road is dominated by A1 specialist floor space, accounting for almost 70% of the total retail floor space in the centre. As mentioned, other use classes are at a minimum, with only one A2 unit and one A4 pub/bar in the centre. As a result of the prevalence of A1 specialist retail in this centre, it has a much higher than average proportion of A1 comparison floor space: 67% compared to the overall Local Centre average of 35%.

Ledbury Road is a Local Centre with a limited selection of local services and does not contain any food shops. There are no Class A3 or A5 uses in the centre due to the predominance of specialist clothes shopping. The Local Centre does not provide the same range and selection found in large Local Centres or District Centres.

Table 2: Total Retail Floor space 2013

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2013)
A1 Convenience	0	0.00%	14.9%
A1 Comparison	1595	67.50%	35.2%
A2	100	4.23%	11.2%
A3 Rest/Café/TA	0	0.00%	17.4%
A4 Pub/Bar	129	5.46%	5.1%
Sui Generis	482	20.40%	3.9%
Vacant	57	2.41%	8.6%
Health	0	0.00%	2.0%
Hotels	0	0.00%	0.5%
Art	0	0.00%	1.3%
Leisure	0	0.00%	0.1%
Total	**2,363**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



Source: City of Westminster GIS System and site survey December 2013

2.4 Proportion of Vacant Street Level Property

The unit vacancy rate in Ledbury Road is lower than the average rate for Local Centres in Westminster, as shown in Table 3. There is only one vacant unit in the centre, the same as in 2002. The national average vacancy rate for shopping centres is over 14.1%.

Table 3: Level of Vacant Street Level Property 2013

% Vacant Units				% Local Centre Average
1997	2002	2007	2013	2013
0.0% (0 units)	0.0% (0 unit)	5.3% (1 unit)	6.7% (1 unit)	8% (1 units)

Source: City of Westminster GIS System and site survey December 2013

3. Accessibility

3.1 Pedestrian Flows (footfall)

The centre was found to be reasonably busy in terms of pedestrian vibrancy when the Health Check Survey was carried out on a weekday afternoon in January 2014.

3.2 Accessibility on foot and by public transport

Ledbury Road is not overly accessible. The closest London Underground stations are Notting Hill Gate (Central, District and Circle lines), located approximately ten minutes walk south of the centre, and Westbourne Park (Hammersmith & City Line), which is also served by mainline rail and located approximately ten minutes walk to the north, and both Queensway and Bayswater stations located in the neighbouring Queensway/Westbourne Grove Major Shopping Centre, roughly fifteen minutes walk away.

The centre is better served by buses with several routes running along Westbourne Grove, including numbers 7, 23, 27 and 70. Ledbury Road is also located between the A40 (M) Westway to the north and the A40 Bayswater Road to the south, both of which are main roads linking the centre and west of London.

4. Environmental Quality

4.1 State of the Centre's Attractions and Environmental Quality / Attractions

The attitudinal assessment of the attractions and amenity of the centre is summarised in Tables 4 and 5 below. The centre's overall score for attractions is 30.8%, slightly lower than the Local Centre average of 315%, and ranks the centre =27th out of the 39 Local Centres in the City. Ledbury Road is rated as good in terms of the provision of specialist shops and for the general quality of the retail environment. The centre is rated as average for the provision of cultural/community events and sport/leisure facilities, owing to there being only a single provider (the church) but one which is home to a multitude of different uses and events such as a film club, an exhibition space, dance/fitness groups and children's parties/classes.

4.2 Daytime Amenity

Ledbury Road is rated very positively in terms of daytime amenity and is an attractive Local Centre, with a day time amenity rating of 91.3% compared with the average for all Local Centres of 68%, and is ranked =2nd out of the 39 Local Centres in the City. The centre is only rated poorly in one category (promotion/street events) but is rated very positively in almost everything else. The centre is rated well in the general cleanliness sub section, where seven of the eight categories are rated as good, with one average. The centre's overall 'feel good factor' rating is good.

Table 4: Attractions within the Local Centre 2013

ATTRACTIONS	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Retail Provision									
Prominence of multiple retailers			x			x			x
Prominence of independent shops			x			x			x
Availability of food shopping			x			x			x
Prominence of specialist shops	x			x			x		
Quality of market (frequency, variety etc.)	-	-	-	-	-	-	-	-	-
Quality of retail environment	x			x			x		
Art/Culture									
Quality of restaurants (availability, number etc.)			x			x			x
Quality of pubs/clubs/bars			x		x		x		
Range of cultural/community events (theatre, concerts)			x			x		x	
Availability of sports and leisure facilities			x			x		x	
Service Provision									
Local services (information, library etc.)			x			x			x
Employment/office space			x			x			x
Bank/building society provision			x			x			x
Total	4/26			5/26			8/26		
Percentage	15.38%			19.23%			30.77%		

Source: City of Westminster site survey December 2013

Table 5: Day Time Amenity within the Local Centre 2013

AMENITY – DAYTIME	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Overall environment of public areas in the centre									
General Cleanliness in Shopping Hours:									
Presence of litter	x				x		x		
Presence of refuse bags on the street	x				x		x		
Evidence of street fouling	x				x		x		
Presence of glass/glasses/other debris incl. food and food containers/wrapping	x			x			x		
Condition		x			x		x		
Quality of buildings	x			x			x		
Special features (pedestrianisation, street furniture, etc.)			x			x		x	
Impact of vacant sites			x		x		x		
Security									
Evidence of vandalism and graffiti (incl. on street furniture)	x			x			x		
Security during shopping hours (availability, access, security etc.)	x			x			x		
Ease of passage for pedestrians (incl. presence of obstacles e.g. illegally parked vehicles)	x			x			x		
Evidence of drunkenness, anti-social behaviour, rowdiness	x			x			x		
Presence of rough sleepers	x			x			x		
Presence of beggars	x			x			x		
Presence of street drinkers	x			x			x		
Evidence of touting (e.g. mini cabs, rickshaws, prostitution, drug dealing etc.)	x			x			x		
Presence of illegal street traders e.g. counterfeit goods, hot dogs, peanuts etc.	x			x			x		
Effectiveness of any deterrent measures (CCTV, police patrols, door security etc.)		x			x			x	
Quality of street lighting	x			X			x		
Safety perception in shopping hours	x			X			x		
Identity of town centre									
Features which identify the centre (e.g. flagship stores, buildings etc.)			x			x	x		
Promotion/ Street events			x			x			x
'Feel good' factor of town centre	x				x		x		
Total	36/46			33/46			42/46		
Percentage	78.3%			71.7%			91.3%		

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2013

Figure 4: Deviation of centre from the mean for Local Centres 2013

Ledbury Road is an average sized Local Centre with a slightly below average amount of retail floor space when compared to the overall average for the 39 local centres. The centre's A1 comparison focus is reflected in the floor space figure, which is considerably higher than the local centre average. Conversely, the centre does not contain any A1 convenience floor space, and the food and drink floor space is well below average. In terms of the rating of the physical environment, the centre has a higher than average daytime amenity rating.

5.2 Strengths, Weaknesses, Opportunities and Threats

SWOT analysis

6. Future capacity

6.1 Potential Capacity for Growth

Between 2007 and 2013, there was one instance of a change of use in the Local Centre. A planning application for A2 usage (an estate agent) at 168 Westbourne Grove was permitted in 2011, completing in 2013.

7. Health of the Centre

Table 6: Summary of Health Check Assessment 2013

Subject	Subject Matter	Data	Number	Sq M
RETAILING	Floor space	Total Floor space		2,363
		Total Convenience (A1)		0
		Total Comparison (A1)		1,595
		Total Service (A2)		100
		Total A3		0
		Total A4		129
		Total A5		0
		Total Sui Generis		482
		Total Vacant		57
	Retail Offer	Total Number of Shop Units	15	
		Total Number of A1 Units	11	
		a) Convenience shops	0	
		b) Department/principal stores	0	
		c) Prestige international shops	0	
		d) National comparison retailers	0	
		e) Specialist Independent shops	11	
		f) Independent shops	0	
		Total Comparison Multiples	11	
		Total Number of A2 Units	1	
		Total Number of A3 Units	0	
		Total Number of A4 Units	1	
		Total Number of A5 Units	0	
		Total Number of Sui Generis	1	
		Total Number of Vacant	1	
	Market	Days of operation	0	
		Number of stalls	0	
	Proposals	Changes of use A1 to A2	0	
		Changes of use A1 to A3	0	
		Changes of use A1 to A4	0	
		Changes of use A1 to A5	0	
ARTS/CULTURE		(cinemas, galleries, theatres etc.)	0	
HEALTH USES		(clinics, surgeries etc.)	0	
HOTELS			0	

In terms of its vitality and viability, and general economic health, this centre is considered to be ’healthy’.

Appendices

Appendix 1: Views of Local Centre

Appendix 2: Land Use Table (Westminster land use survey 2013)

Appendix 3: Land Use Map (GOAD 2012 retail data and Westminster land use survey 2013)

Appendix 4: Planning permissions Map (Westminster land use survey 2013)

Appendix 5: Location map of all local centres

Appendix 6: Glossary of Terms

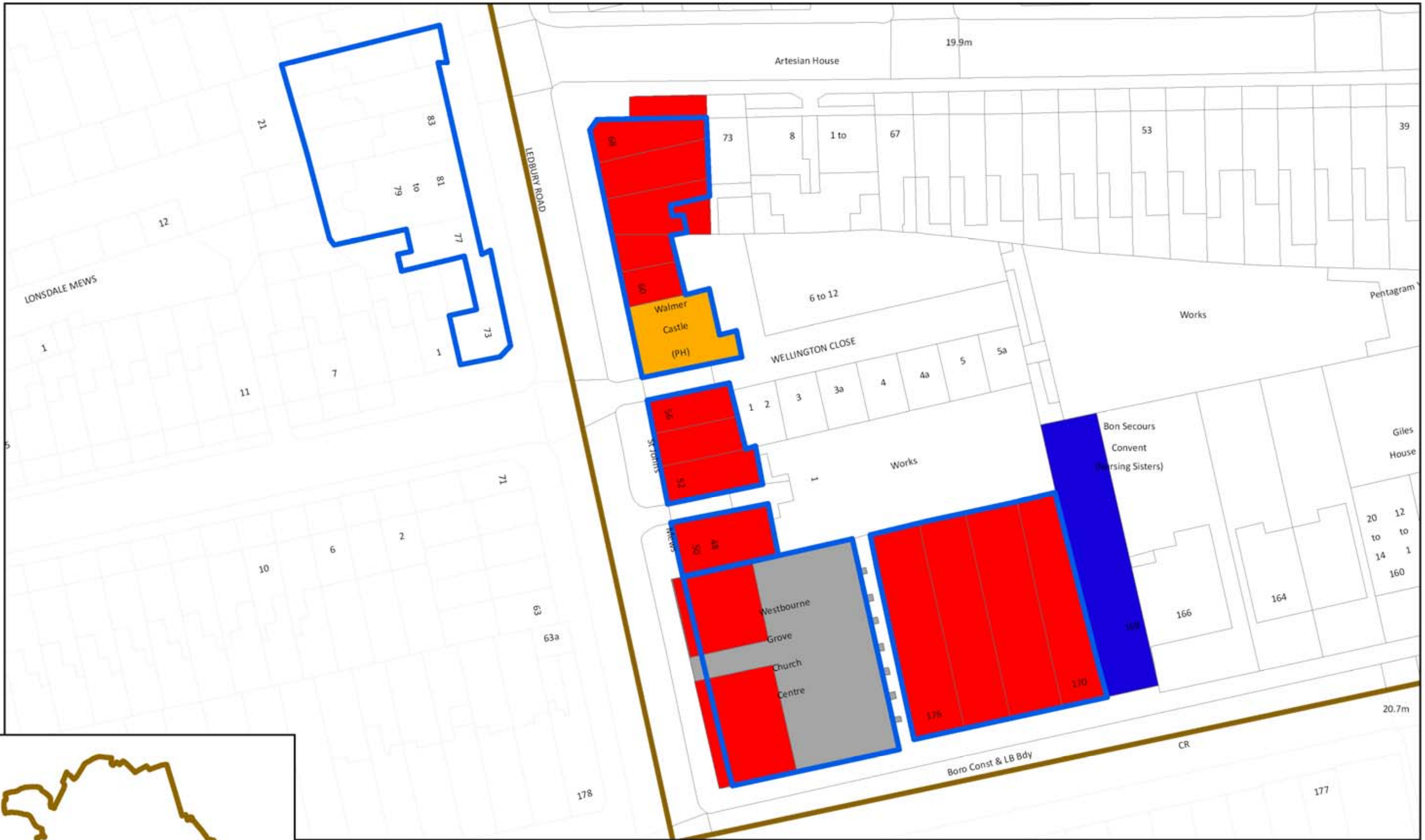
Views of Ledbury Road Local Centre

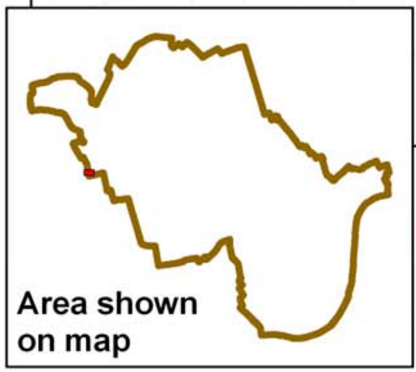
The refurbished, attractive Westbourne Grove Church, situated on the corner of the Local Centre.

The north end of the Local Centre, with well maintained, attractive shop fronts.

The north end/centre of the Local Centre, with clean, well maintained pavements and attractive shop fronts.

					A1	A1		A4	SG	Vacant	2007 Use
ADDRESS	**FASCIA**	**DESCRIPTION**	**USE**	**SQM**	**Spec.**	**Ind**	**A2**	**Pub/Bar**			
168 WESTBOURNE GROVE	SAVILLS	ESTATE AGENT	A2	100			1				
170 WESTBOURNE GROVE	MAISON SCOTCH	WOMEN'S CLOTHES	A1 Spec	176	1						A1 Spec
172 WESTBOURNE GROVE	TWENTY8TWELVE	WOMEN'S CLOTHES	A1 Spec	220	1						A1 Int
174 WESTBOURNE GROVE	HEIDI KLEIN	WOMEN'S CLOTHES	A1 Spec	197	1						A1 Spec
176 WESTBOURNE GROVE	FLAMANT	FURNITURE	A1 Spec	210	1						A1 Spec
WESTBOURNE GROVE	WESTBOURNE GROVE CHURCH	CHURCH	SG	482					1		A1 Spec
48A WESTBOURNE GROVE	CLAUDIE PIERLOT	WOMEN'S CLOTHES	A1 Spec	83	1						A1 Spec
48B WESTBOURNE GROVE	MELISSA ODABASH	WOMEN'S CLOTHES	A1 Spec	167	1						A1 Spec
48-50 LEDBURY ROAD	PENELOPE CHIVERS	WOMEN'S CLOTHES	A1 Spec	104	1						A1 Spec
52 LEDBURY ROAD	ILOVEGORGEOUS	GIRLS' CLOTHES	A1 Spec	73	1						Vacant
54LEDBURY ROAD	LE CREUSET	KITCHENWARE	A1 Spec	57	1						A1 Spec
56 LEDBURY ROAD		VACANT	Vacant	57						1	A1 Spec
60-64 LEDBURY ROAD	MATCHESFASHION.COM	CLOTHES	A1 Spec	151	1						A1 Spec
58 LEDBURY ROAD	WALMER CASTLE	PUBLIC HOUSE	A3 Pub/Bar	129				1			A3 Pub/Bar
66-68 LEDBURY ROAD	SCHUMACHER	WOMEN'S CLOTHES	A1 Spec	157	1						A1 Spec





Source: GOAD Retail Survey 2013

Local Centre: Ledbury Road

Local Shopping Centre Boundary

Westminster Boundary

A1: Retail

A2: Financial & Professional

A4: Pub/Bar

ASG: Sui Generis

0 12.5 25
Metres

N

Source: GOAD Retail Survey 2013
Local Centre: Ledbury Road
Completed 2007-2013
Under Construction
Vacant
Local Shopping Centre Boundary
Westminster Boundary
0
12.5
25
Metres
N
Area shown on map
LEDBURY ROAD
WELLINGTON CLOSE
LONSDALE MEWS
Artesian House
Walmer Castle (PH)
Works
Bon Secours Convent (Nursing Sisters)
Westbourne Grove Church Centre
Giles House
Boro Const & LB Bdy
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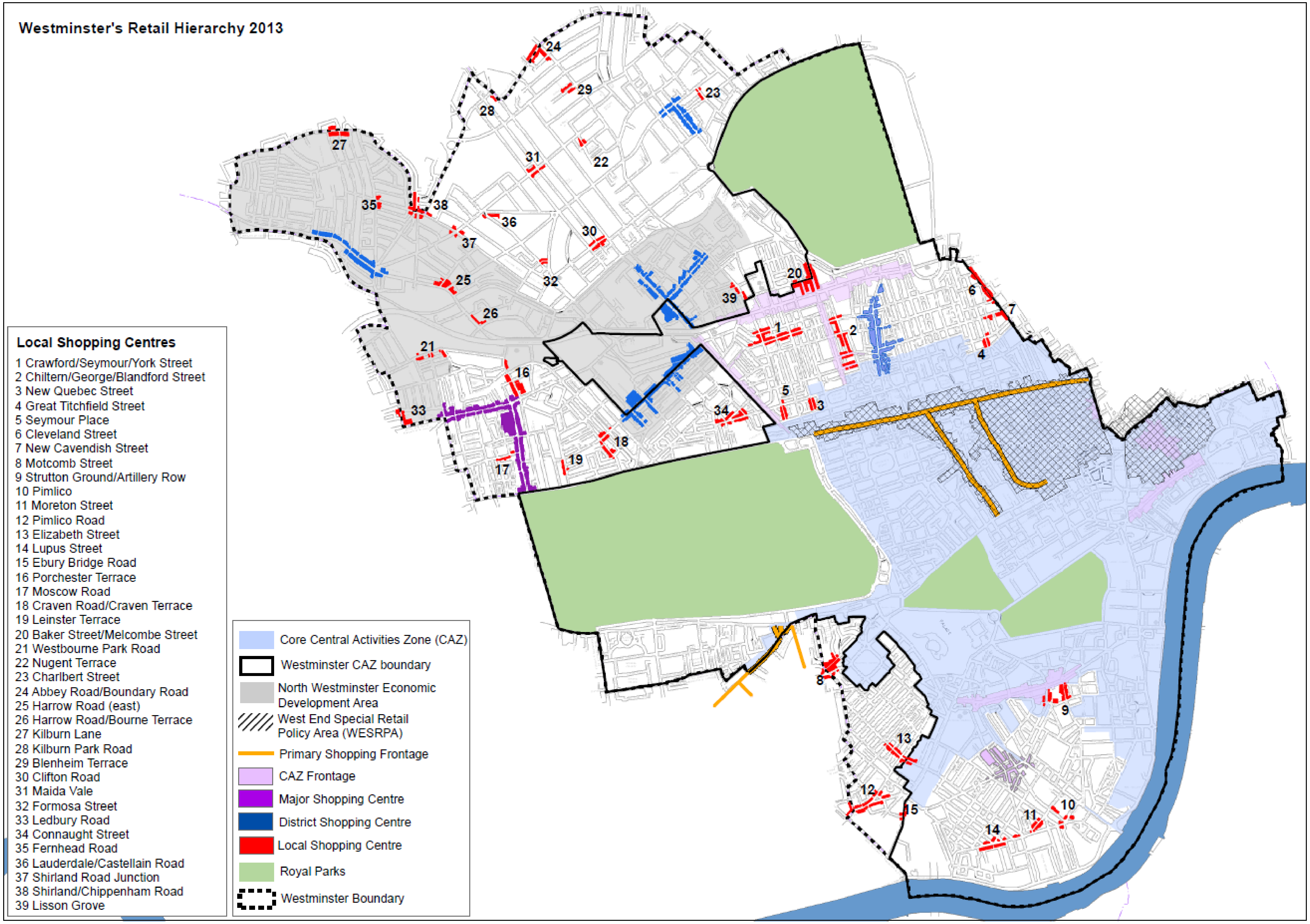
Figure 7 Westminster wide shopping centre boundaries plan



A1	**Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, dry cleaners, pet shops, sandwich bars, retail showrooms, and domestic hire shops.**
A1 café type uses	**Shops such as sandwich bars or coffee shops selling food and drinks to be consumed mainly off the premises, but not hot food takeaways. Examples include certain Pret a Manger shops, Costa Coffee and the Seattle Coffee Co. shops.**
A2	**Banks, building societies, bureau de change, estate and employment agencies, professional and financial services, telephone bureaux, betting offices and beauty salons (excluding hair).**
A3	**Food and drink uses such as restaurants, pubs, snack bars, cafés, wine bars and shops for the sale of hot food (hot food take-aways).**
A4	**Drinking Establishments: Premises where the primary purpose is the sale and consumption of alcoholic drinks on the premises.**
A5	**Hot Food Take-away: Premises where the primary purpose is the sale of hot food to take away.**
B1	**Business uses such as offices, research and development and industrial uses.**
CAZ	**Central Activities Zone (CAZ). The CAZ is an area of mixed uses, many of which contribute directly to the national, regional and local economy. It is this mix of activities and their supporting resources which underpins the success of London's economy.**
CAZ Frontages	**Mixed use areas usually with a predominant retail function. Appropriate areas for retail growth.**
Comparison	**A1 floor space selling predominantly durable items and not in convenience use.**
Convenience	**This is based on the classification provided by the unit for Retail Planning Information (URPI) set out in URPI brief 99/2. The classifications are: food, alcoholic drink, tobacco and other goods (newspapers and magazines, cleaning materials and matches). For the purposes of this assessment, convenience includes shops selling food or drink (excluding A1 café-type uses), newsagents, (including specialist tobacco stores), chemists (including Boots the Chemist stores) and post offices.**
Department/ principle store	**This includes the main department stores such as John Lewis, Liberty, and Selfridges, as well as variety stores such as Marks & Spencer and Virgin Mega-stores.**
District Centre	**Distributed more widely than Metropolitan and Major centres, they provide convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000-50,000 sqm of retail floor space. Some district centres have developed specialist shopping functions.**
Experian GOAD	**An independent retail data consultancy who provide maps of ground floor uses in shopping centres.**
F&B	**Food and beverage offer, covered by parts A3 (cafe's/restaurants), A4 (drinking establishments) and A5 (take aways) of the use classes order.**
Gross Floorspace	**Floorspace of buildings on all floors including external walls, half the thickness of parting walls and circulation areas.**
Independent store	**This includes non-convenience stores (see definition above) irrespective of size, that are not considered to be specialist retailers (see definition overleaf), that are operated by retailers that are not included within national retail chains or groups.**
Major Centre	**Typically found in inner and some parts of outer London with a borough-wide catchment. They generally contain over 50,000sqm of retail floor space and a relatively high proportion of comparison goods relative to convenience goods. They may also have significant employment, leisure, service and civic functions.**
NPPF	**National Planning Policy Framework. Central Government's key, revised guidance document driving planning policy in England, which compressed the**

	previous PPS documents and other guidance into a single document. It includes key guidance on town centres and health checks.
National retailers	**This includes all retailers (Class A1 only) that operate within the context of a national retail chain or group, such as Next. A schedule of all national retail multiples can be found in Retail Directory of the UK 2002 (Hemming Information). Specialist shops that are part of a retail chain or group, such as Whittards and Thorntons, are classified as national retailers. Although there are national chains of food and drink uses and betting shops, such as Ladbrokes, these are classified based on the use class (e.g. betting shops as A2 uses) and not as national retailers.**
Prestige international retailers	**This includes prestigious retailers that operate in more than one country, such as Gucci, Gianni Versace, and Giorgio Armani. It also includes flagship stores that are only found in select town centres in Britain. National airline shops, such as British Airways, have also been classified as international retailers.**
Primary Frontages	**Internationally recognised shopping destinations. The Primary Frontages defined in Westminster's City Plan - Strategic Policies document are Oxford Street, Regent Street, Bond Street and Knightsbridge/Brompton Road.**
Retail floorspace	**This is all A1, A2, A3, A4, A5 and sui generis floorspace, and vacant floorspace of any of the aforementioned categories.**
Shisha	**Flavoured tobacco smoked through a water pipe or hookah. Smoke free legislation means that it cannot be smoked indoors in public places, and is often smoked at tables and chairs on the footway and in garden areas. There has been a rapid rise in shisha uses over the past five years, and there is concern over issues of health, residential amenity and other issues.**
Specialist independent	**Similar to an independent store, but this category reflects the quality and specialisation of the retailer so that a shopper may make a specific shopping trip to that shop. For example, The Pen Shop on Regent Street or antique shops.**
Sui generis	**Sui Generis is a term that refers to a use on its own. Any planning use not falling within a specific class within the Use Class Order falls within this category. Examples of sui generis uses in shopping centres are launderettes, mini cab offices, amusement centres and car showrooms.**
UDP	**Unitary Development Plan produced by Westminster City Council, with saved policies forming part of the statutory development plan for Westminster.**
Vacancy	**This category includes vacant street level units, as well as units that are under alteration. However, if at any time the survey was completed it was evident who the unit would be occupied by, the unit was treated as being occupied.**
Zone A Rent	**The rental level per square metre achieved on the first six metres of a shop unit.**

Information Sources

Westminster's City Plan - Strategic Policies (adopted November 2013)
https://www.westminster.gov.uk/westminsters-city-plan-strategic-policies

Westminster's Unitary Development Plan (UDP, adopted January 2007)
https://www.westminster.gov.uk/unitary-development-plan-udp

The Mayor's London Plan (GLA, July 2011 as amended)
http://www.london.gov.uk/priorities/planning/london-plan

The National Planning Policy Framework (NPPF, DCLG 2012)
https://www.gov.uk/government/publications/national-planning-policy-framework--2

National Planning Practice Guidance (NPPG, March 2014)
http://planningguidance.planningportal.gov.uk/

Westminster High Street Health Checks 2013
https://www.westminster.gov.uk/high-street-health-checks

Westminster Health Check Archive
https://www.westminster.gov.uk/shopping-centre-health-checks

City of Westminster

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