City of Westminster

Shopping Centre Health Check Survey 2014

Local Centre 1: Baker Street & Melcombe 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 This requirement has been superseded by more recent national and regional policy frameworks and guidance.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 **1: Baker Street & Melcombe Street**

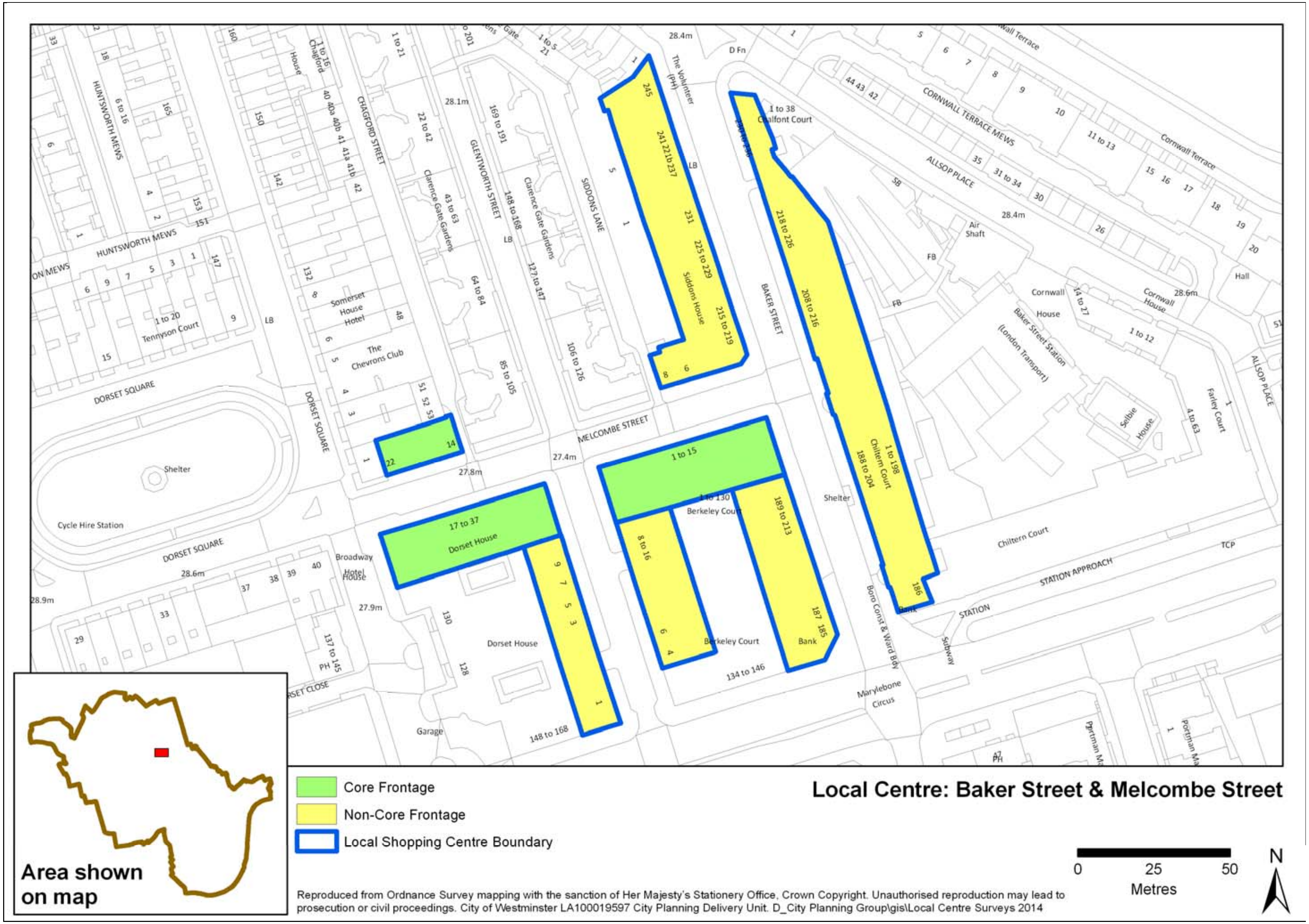
1. Introduction

1.1 Location

This large Local Centre is located in the north of Westminster's central area, close to Regent's Park, and adjacent to the main arterial road the A40 (M) Marylebone Road and Marylebone mainline railway station. The centre is spread over several streets but the core frontage is located on Melcombe Street, with secondary frontage primarily concentrated on Baker Street around the entrance to the London Underground Station, which is a main interchange served by five underground lines.

The centre is well served by transport links, consisting of the underground station, neighbouring mainline rail station, and numerous bus stops on Baker Street and Marylebone Road. The centre serves local residents, workers and commuters in the Marylebone area, in addition to many tourists passing through the transport interchange and visiting neighbouring attractions such as Madame Tussauds, the Planetarium, Lords Cricket Ground and Regents Park.

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		30	36	35	33
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*0*
	National retailers	*3*	*5*	*3*	*2*
	Specialist Independent	*3*	*5*	*4*	*5*
	Independent	*14*	*18*	*20*	*17*
	Convenience	*10*	*8*	*8*	*9*
Class A2	Financial & Professional	5	11	11	11
Food & Drink		10	11	14	13
Class A3	*Restaurant/Café*	*10*	*9*	*12*	*12*
Class A4	*Pubs/Bars*	*0*	*2*	*2*	*1*
Class A5	*Takeaway*	*0*	*0*	*0*	*0*
	Takeaway/Restaurant	*0*	*0*	*0*	*0*
Sui Generis		0	1	1	0
Vacant Units		8	3	2	6
Arts/Culture		0	0	1	1
Health uses		0	1	1	2
Hotels		0	0	0	0
TOTAL		**53**	**63**	**65**	**66**

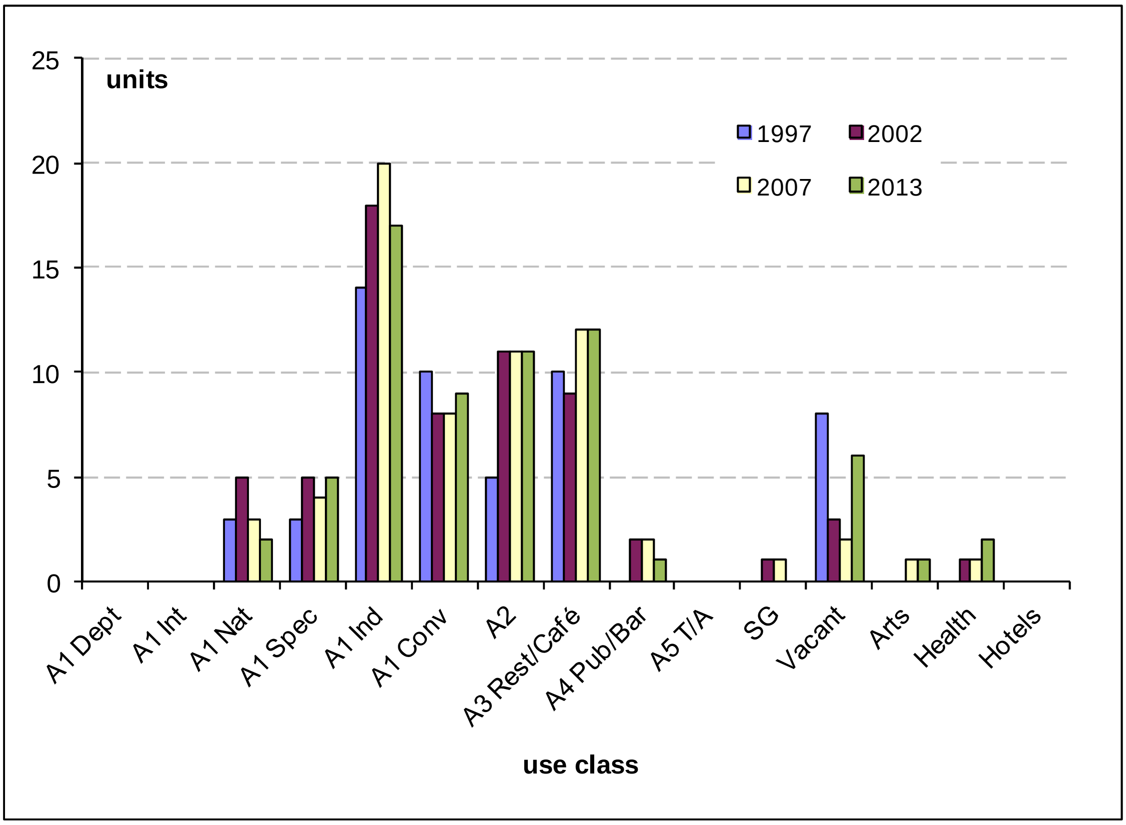
Source: WCC Land Use Survey December 2013

In total there are 66 units, an increase of one unit from the last survey, due to a new A3 unit opening in a new building at 215-229 Baker Street.

The number of A1 retail uses in Baker Street/Melcombe Street has decreased by two units since 2007, as units have become vacant. The number of Class A2, A3 and A5 uses has stayed the same and the number of Class A4 uses has decreased by one unit, with the Cipola di Hana bar on Glentworth Street becoming vacant. The centre contains no hotels, two health uses, and one cultural use (museum) tied in with the Sherlock Holmes character and his association with Baker Street. There are several offices in the centre, but no leisure facilities. The health uses are alternative medicine functions.

Overall the mix is therefore retail led but with a strong number of evening and night time food and drink uses, which are predominantly located on the Baker Street frontage around the underground entrance where there is a number of restaurants. The food and drink uses on Melcome Street are more cafe type uses aimed at daytime use. The centre has also seen the introduction of more chain coffee shops since 2007, with Pret a Manger and Costa now having fairly large corner sites that were previously occupied by other uses.

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



2.2 Range of A1 Uses

Baker Street/Melcombe Street has two national retailers, both selling phones. The centre has 33 Class A1 retail units including 9 convenience stores, 5 specialist retailers and 17 independent retailers. The convenience retailers include a Tesco Metro supermarket, other independent food shops and a Boots Chemist. The specialist retailers include memorabilia shops and a book shop. The independent stores include opticians, hairdressers and other retailers. The high proportion of comparison shops and one multiple retailers suggests that Baker Street/Melcombe Street serves both local residents and visitors with a mix of convenience and comparison shopping facilities.

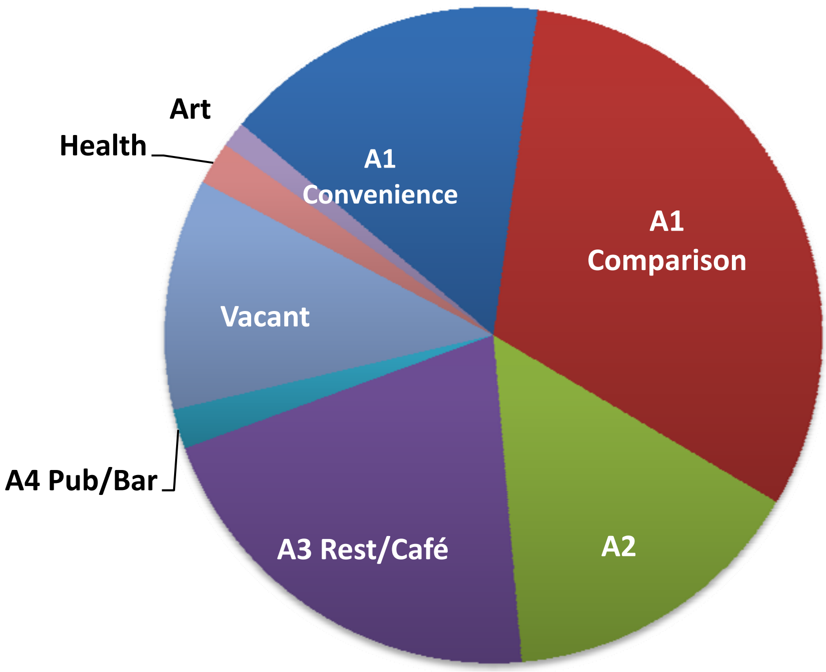
2.3 Total Retail Floor space

Total retail floor space in Baker Street/Melcombe Street is broken down in Table 2. In total, Baker Street/Melcombe Street has 7,886 sqm of retail floor space, which is above the average of 3,145 sqm for the 39 Local Centres in the City. Baker Street/Melcombe Street has double the proportion of A1 convenience to A2 and A3 retail floor space. There is also a high proportion of Class A1 independent retail floor space, which alone accounts for roughly a quarter of all the retail floor space. The centre has an average amount of A1 comparison floor space compared to the other local centres, and contains a large number of A3 restaurants and café's, higher than the Local Centre average. The remaining retail uses make negligible contributions to the overall retail floor space total as illustrated below.

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	1,264	16.0%	14.9%
A1 Comparison	2,473	31.4%	35.2%
A2	1,193	15.1%	11.2%
A3 Rest/Café/TA	1,637	20.8%	17.4%
A4 Pub/Bar	154	2.0%	5.1%
Sui Generis	0	0.0%	3.9%
Vacant	898	11.4%	8.6%
Health	167	2.1%	2.0%
Hotels	0	0.0%	0.5%
Art	100	1.3%	1.3%
Leisure	0	0.0%	0.1%
Total	**7,886**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



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

Baker Street/Melcombe Street is a Local Centre with a selection of local services and food shops. There are 2 banks, and most of the Class A2 uses are estate agents. As with other centres nail bars are becoming more prevalent with two opening since the last survey. The Local Centre provides a good range of shops and services compared to other centres.

2.4 Proportion of Vacant Street Level Property

The unit vacancy rate in Baker Street/Melcombe Street is the same as the average rate for Local Centres in Westminster although the amount of floorspace will be above the centre average, as shown in Table 3. The vacancy rate has increased since 2007 with six units now vacant. The vacant units are spread throughout the centre, but do not appear to be affecting the vibrancy of the centre. The national average vacancy rate for shopping centres is 14.1%.

Table 3: Level of Vacant Street Level Property 2013

% Vacant Units				% Local Centre Average
1997	2002	2007	2013	2013
15% (8) units	4.8% (3) units	3% (2) units	9% (6) units	8.3% (6) 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 when the Health Check Survey was carried out on a Friday afternoon in December 2013, especially with commuters travelling to Baker Street and Marylebone Station and tourists visiting the Sherlock Holmes Museum.

3.2 Accessibility on foot and by public transport

The local centre is one of the most accessible, with Baker Street London Underground Station contained in the centre (served by Jubilee, Bakerloo, Circle, Metropolitan, Hammersmith and City Lines). Marylebone mainline and London Underground station is also three minutes walk from the centre.

Table 4: Baker Street Underground annual entries & exits

Station	Entry & Exit Total 2011
Baker Street	27.02 million

Source: London Underground Limited, 2011

Many bus routes serve also serve the centre, feeding into many parts of the borough. Main bus routes include the 13 and 113 routes along Baker Street connecting the West End to St John's Wood and beyond. There are several other key bus routes which pass the centre, with stops on the Marylebone Road, many of which connect this centre to the larger mainline train stations such as Euston and Kings Cross St Pancras.

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 46.2%, meaning that this is an attractive centre compared to the other local centres. The rating is higher than the Local Centre average of 31%, and ranks Baker Street/Melcombe Street =5th out of the 39 Local Centres in the City. The centre has an average provision of multiple retailers, independent and specialist shops and pubs and office space. The centre's main strength is its good provision of banks, food shops and restaurants.

4.2 Daytime Amenity

Baker Street/Melcombe Street is a relatively attractive Local Centre. However the centre's day time amenity rating is 69.6% compared with the average for all Local Centres of 68.4%, and is ranked =20th out of the 39 Local Centres in the City. The centre's rating has gone up because of improvements in security. There is a lack of beggars and street drinkers and no graffiti. The centre has an average *'feel good factor'* as the buildings and shop fronts are generally tired and in need of upgrading and there are no distinguishing features to the centre (see table 6). The environment is also very traffic dominated, with the four-lane Baker Street making the street hard to cross. Most of the streets are also one way, with many buses, taxis and other traffic making it an unfriendly pedestrian environment. However there have been recent public realm improvements on Melcombe 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	**10/26**			**12/26**			**12/26**		
Percentage	**38.46%**			**46.15%**			**46.15%**		

Source: City of Westminster site survey December 2013

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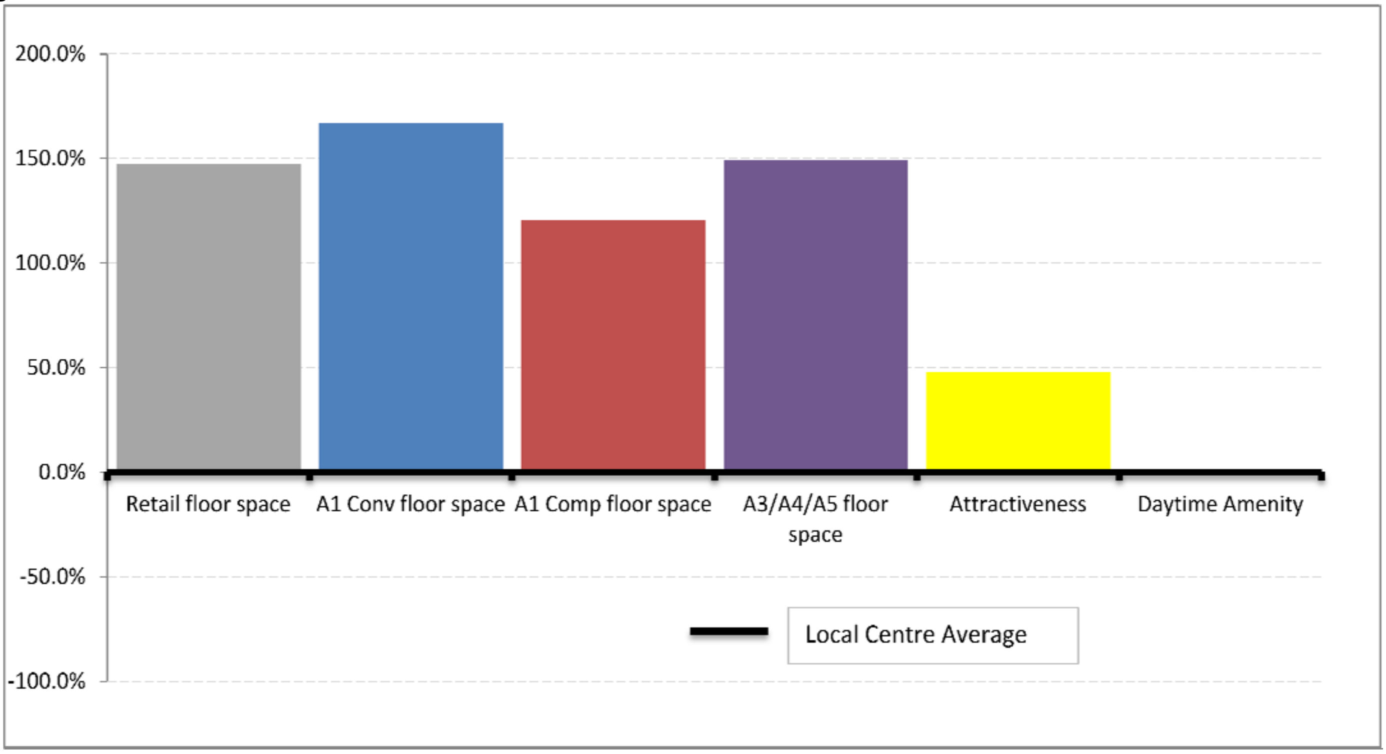
Table 6: Day Time Amenity within the Local Centre 2013

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	18/46			21/46			32/46		
Percentage	39.1%			45.7%			69.6%		

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



Baker Street/ Melcombe Street 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. 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 attractiveness rating. The daytime amenity score is marginally above the local centre average as discussed.

5.2 Strengths, Weaknesses, Opportunities and Threats

SWOT analysis

6. Future capacity

6.1 Potential Capacity for Growth

Between 2007 and 2013 one refused application for A2 nail bar used was allowed at appeal in Melcombe Street. This part of the centre still feels vibrant. Additional capacity could be accommodated in the six vacant shop units. Some of these units have been vacant for a while judging by the post piled up in door entrances but the centre is still vibrant despite the increase in vacant units.

7. Health of the Centre

Table 7: Summary of Health Check Assessment 2013

Subject	Subject Matter	Data	Number	Sqm
RETAILING	**Floor space**	**Total Floor space**		**7,886**
		Total Convenience (A1)		**1264**
		Total Comparison (A1)		**2,473**
		Total Service (A2)		**1193**
		Total A3		**1637**
		Total A4		**154**
		Total A5		**0**
		Total Sui Generis		**0**
		Total Vacant		**898**
	Retail Offer	**Total Number of Shop Units**	**66**	
		Total Number of A1 Units	**33**	
		a) Convenience shops	**9**	
		b) Department/principal stores	**0**	
		c) Prestige international shops	**0**	
		d) National comparison retailers	**2**	
		e) Specialist Independent shops	**5**	
		f) Independent shops	**17**	
		Total Comparison Multiples	**24**	
		Total Number of A2 Units	**11**	
		Total Number of A3 Units	**12**	
		Total Number of A4 Units	**1**	
		Total Number of A5 Units	**0**	
		Total Number of Sui Generis	**0**	
		Total Number of Vacant	**6**	
	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**	**100**
HEALTH USES		**(Clinics, surgeries etc.)**	**2**	**167**
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

Views of Baker Street/Melcombe Street local centre

Frontages on Baker Street (west side) showing the busy pedestrian scene.

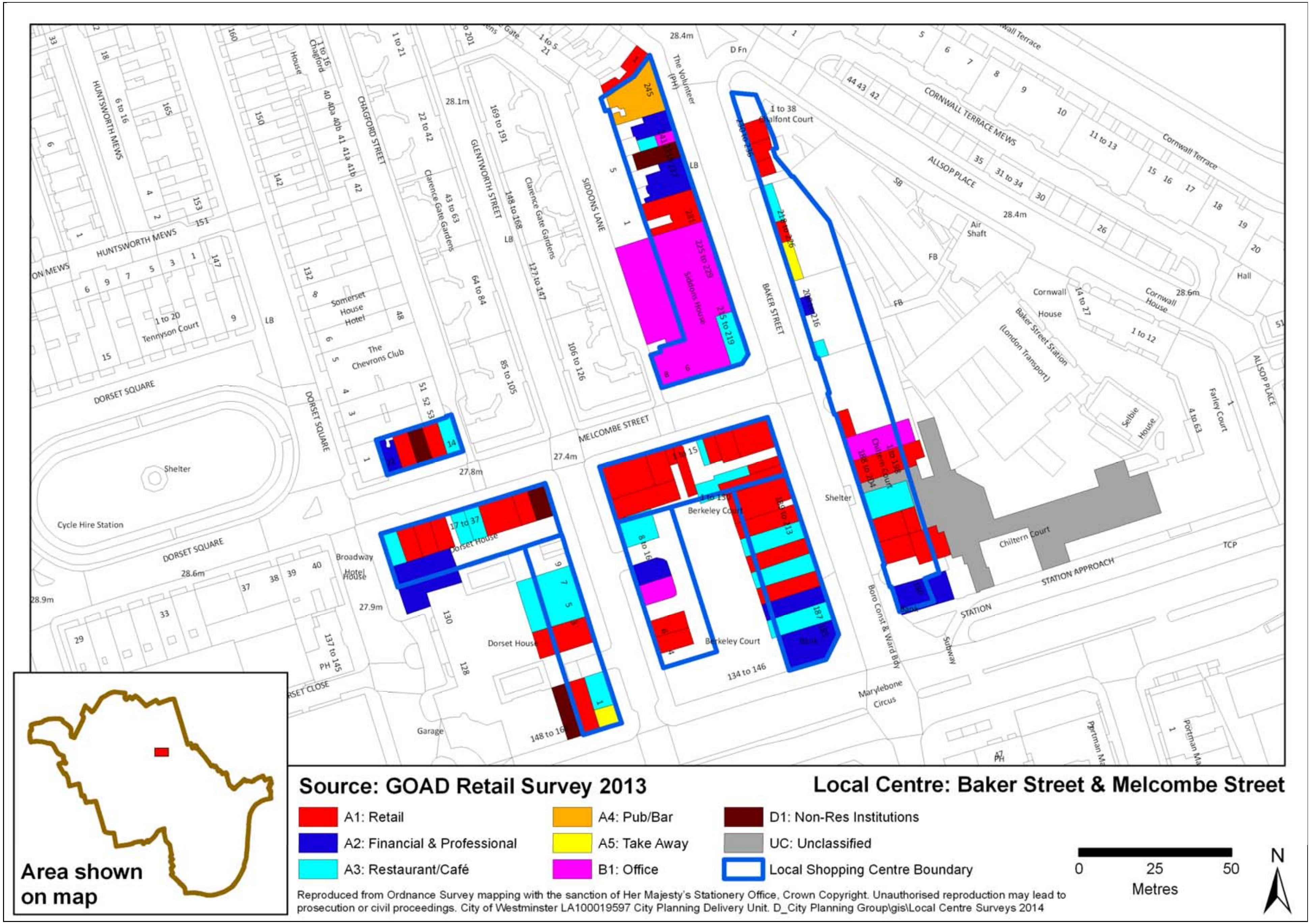
Well kept pavements on Melcombe Street.

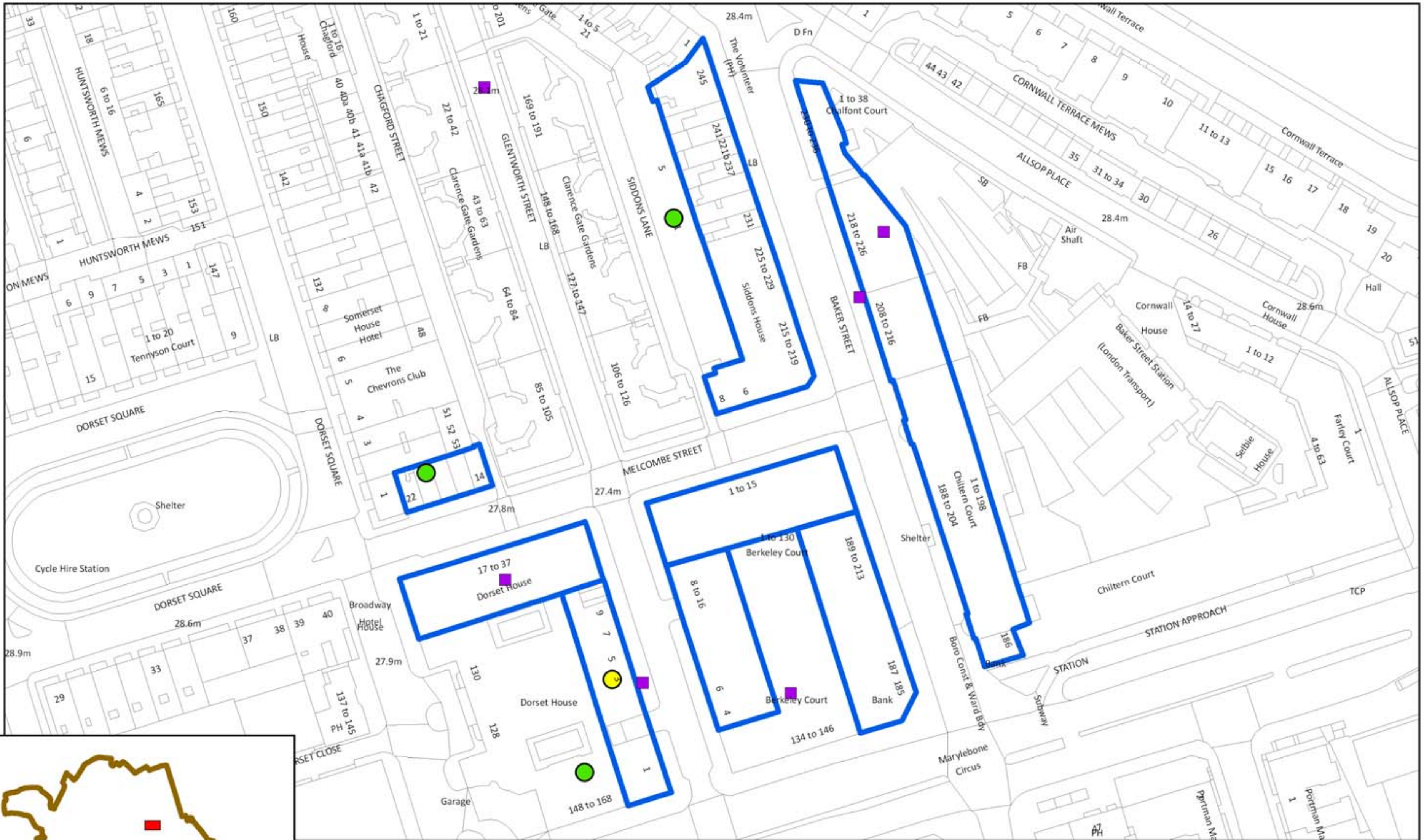
Busy pedestrian scene on Melcombe Street (looking back towards Baker Street).

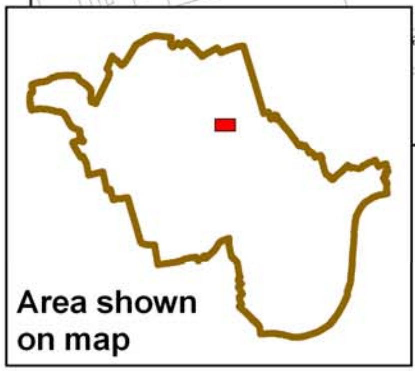
					A1	A1	A1	A1		A3	A4	A3						
ADDRESS	FASCIA	DESCRIPTION	USE	SQM	Conv.	Nat.	Spec.	Ind	A2	Res/Cafe	Pub/Bar	Rest/TA	B1	S G	Vacant	Health	Art	2007 Use
185BAKER STREET	Lloyds Bank	Bank	A2	68					1									A2
186BAKER STREET	HSBC	Bank	A2	92					1									A2
187BAKER STREET	Pizza Hut	Restaurant	A3 Rest/Café	63						1								A3 Rest/Café
188BAKER STREET		Offices - miscellaneous	B1	140									1					B1
189BAKER STREET	Fraser	Estate agents and valuers	A2	72					1									A2
190BAKER STREET	Vodaphone	Telephones	A1 Nat	150		1												A1 Nat
191BAKER STREET	Hidden Hearing	Opticians and Hearing	A1 Ind	71				1										A1 Ind
192BAKER STREET	London Premier Souvenirs	Souvenirs	A1	131				1										A3 Rest/Café
193BAKER STREET		Entrance to offices		92														
194BAKER STREET	L'Ultivo	Restaurant	A3 Rest/Café	216						1								A3 Rest/Café
195BAKER STREET	Soho Japan	Restaurant	A3 Rest/Café	76						1								A3 Rest/Café
197BAKER STREET	City Cuts	Hairdressing	A1 Ind	86				1										A1 Ind
198BAKER STREET	Boots	Chemist	A1 Conv	159	1													A1 Conv
199BAKER STREET	ASK	Restaurants	A3 Rest/Café	97						1								A3 Rest/Café
200BAKER STREET	London Regional Transport	Transport services	B1	128									1					B1
201BAKER STREET	American Dry Cleaning Company	Dry Cleaning	A1 Ind	89				1										A1 Ind
202BAKER STREET	Baker Street News	Stationers and newsagents	A1 Conv	137	1													A1 Conv
203-205BAKER STREET	Subway	Café	A1 Conv	78	1													A3 Rest/Café
204BAKER STREET		Offices - miscellaneous	B1	135									1					B1
206BAKER STREET		Miscellaneous non-retail		130														
207BAKER STREET	Danlor	Footwear	A1 Ind	94				1										A1 Ind
208BAKER STREET	Vacant	Vacant	Vacant	172											1			A1 Nat
209BAKER STREET	Chinese Medical Centre	Chinese Medical Centre	Health	106												1		Health
210-212BAKER STREET		Offices - miscellaneous	B1	187									1					B1
211-213BAKER STREET	Pret a Manger	Sandwich bar	A1 Conv	121	1													A2
214BAKER STREET	Vacant	Vacant	Vacant	108											1			A2
215-229BAKER STREET	Francesca	Cafe	A3	140						1								
218A-220BAKER STREET	Croque Monsieur	Restaurant	A3 Rest/Café	214						1								A3 Rest/Café
222BAKER STREET	London Quality Dry Cleaners	Dry cleaners and launderettes	A1 Ind	140				1										A1 Ind

224-226BAKER STREET	Bar Linda	Coffee bars and ice cream parlours	A3 Rest/Café	161						1								A3 Rest/Café
230BAKER STREET	It's Only Rock n Roll	Music Memorabilia	A1 Spec	54			1											Vacant
231BAKER STREET	London Beatles Store	Beatle Memorabilia	A1 Spec	98			1											A1 Spec
232BAKER STREET	Suit 2 Suit	Mens Clothes	A1 Ind	50				1										A1 Spec
233BAKER STREET	London Beatles Store	Beatle Memorabilia	A1 Spec	107			1											A1 Spec
234BAKER STREET	Vys Nails	Nail Bar	A2	59					1									A1 Ind
235-237BAKER STREET	Kinleigh, Folkard & Hayward	Estate agents and valuers	A2	206					1									A2
236BAKER STREET		Miscellaneous non-retail		60														
239BAKER STREET	Sherlock Holmes Museum	Museum	D1	100													1	D1
241BAKER STREET	Hudsons	Restaurant	A3 Rest/Café	101						1								A2
243BAKER STREET	Oakleys	Estate agents and valuers	A2	97					1									A2
245BAKER STREET	The Volunteer	Public houses and bars	A4 Pub/Bar	154							1							A3 Pub/Bar
1AGLENTWORTH STREET	Vacant	Vacant	Vacant	171											1			A3 Pub/Bar
3GLENTWORTH STREET	Vacant	Vacant	Vacant	186											1			SG
4GLENTWORTH STREET	China Holidays	Travel Agents	A1 Ind	154				1										A1 Ind
5GLENTWORTH STREET	Phoenix Palace	Restaurant	A3 Rest/Café	169						1								A3 Rest/Café
7GLENTWORTH STREET		Entrance		147														
6GLENTWORTH STREET	Golden Bridge	Travel Agents	A1 Ind	104				1										A1 Ind
8GLENTWORTH STREET	Carphone Warehouse	Phones	A1 Nat	104		1												A1 Nat
9GLENTWORTH STREET		Entrance		150														
10GLENTWORTH STREET	Glentworth Estates	Estate Agency	A2	130					1									A2
12-14GLENTWORTH STREET	Cinnamon Spice	Restaurant	A3 Rest/Café	250						1								A3 Rest/Café
16GLENTWORTH STREET	Vacant	Vacant	Vacant	161											1			A1 Ind
1MELCOMBE STREET	Robert Scott	Mens Clothes	A1 Ind	121				1										A1 Ind
3MELCOMBE STREET	Haru	Sushi Bar	A1 Ind	102				1										A1 Ind
3AMELCOMBE STREET	La Gauloise	Sandwich Bar	A1 Ind	119				1										A1 Ind
5-7MELCOMBE STREET	Berkeley Court Pharmacy	Chemist	A1 Conv	176	1													A1 Conv
7AMELCOMBE STREET	Dar Al-Taqwa	Booksellers	A1 Spec	121			1											A1 Spec
9MELCOMBE STREET	Zig Zag Hair & Body	Hairdressing	A1 Ind	117				1										A1 Ind
11-15MELCOMBE STREET	Tesco	Grocers	A1 Conv	339	1													A1 Conv

14MELCOMBE STREET	Café Saporito	Café	A3 Rest/Café	65						1								A3 Rest/Café
16MELCOMBE STREET	Le Beautique Spa	Beauticians	A2	64					1									A1 Ind
17MELCOMBE STREET	Ledow Health Centre	Chinese Medicine	A1 Spec	83			1											A1 Conv
18MELCOMBE STREET	NW Smiles	Dentist	A2	61												1		A2
19MELCOMBE STREET	In focus	Opticians	A1 Ind	75				1										A1 Ind
20MELCOMBE STREET	California Nail Bar	Nail Bar	A2	63					1									A1 Ind
21MELCOMBE STREET	The Fruit Garden	Greengrocers, fruiterers	A1 Conv	84	1													A1 Conv
22MELCOMBE STREET	Hugh G Shaw	Estate agents and valuers	A2	65					1									Vacant
23MELCOMBE STREET	The Fruit Garden	Greengrocers, fruiterers	A1 Conv	85	1													A1 Conv
25MELCOMBE STREET	Vacant	Vacant	Vacant	100											1			A1 Ind
27MELCOMBE STREET	Dorset Cafe	Café	A3 Rest/Café	85						1								A3 Rest/Café
29MELCOMBE STREET		Offices - miscellaneous	B1	98									1					B1
31MELCOMBE STREET	Tool Shop	D I Y	A1 Ind	106				1										A1 Ind
33MELCOMBE STREET	Chic	Dry cleaners and launderettes	A1 Ind	102				1										A1 Ind
35MELCOMBE STREET	Spirited Wines	Off Licence	A1 Ind	96				1										A1 Ind
37MELCOMBE STREET	Costa	Confectioners, tobacconists, newsagents	A1 Conv	85	1													A1 Conv
130 Gloucester Place	Ladbrokes	Betting Shop	A2	277					1									A2


Source: GOAD Retail Survey 2013
Local Centre: Baker Street & Melcombe Street
A1: Retail
A2: Financial & Professional
A3: Restaurant/Café
A4: Pub/Bar
A5: Take Away
B1: Office
D1: Non-Res Institutions
UC: Unclassified
Local Shopping Centre Boundary
0
25
50
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
BAKER STREET
MELCOMBE STREET
DORSET SQUARE
HUNTSWORTH MEWS
CHAGFORD STREET
GLENTWORTH STREET
SIDDONS LANE
CORNWALL TERRACE MEWS
ALLSOP PLACE
STATION APPROACH
Baker Street Station
(London Transport)
Chiltern Court
Berkeley Court
Dorset House
Siddons House
Marylebone Circus
Cycle Hire Station
The Chevrons Club
Somerset House Hotel
Tennyson Court
Cornwall House
Selbie House
Farley Court



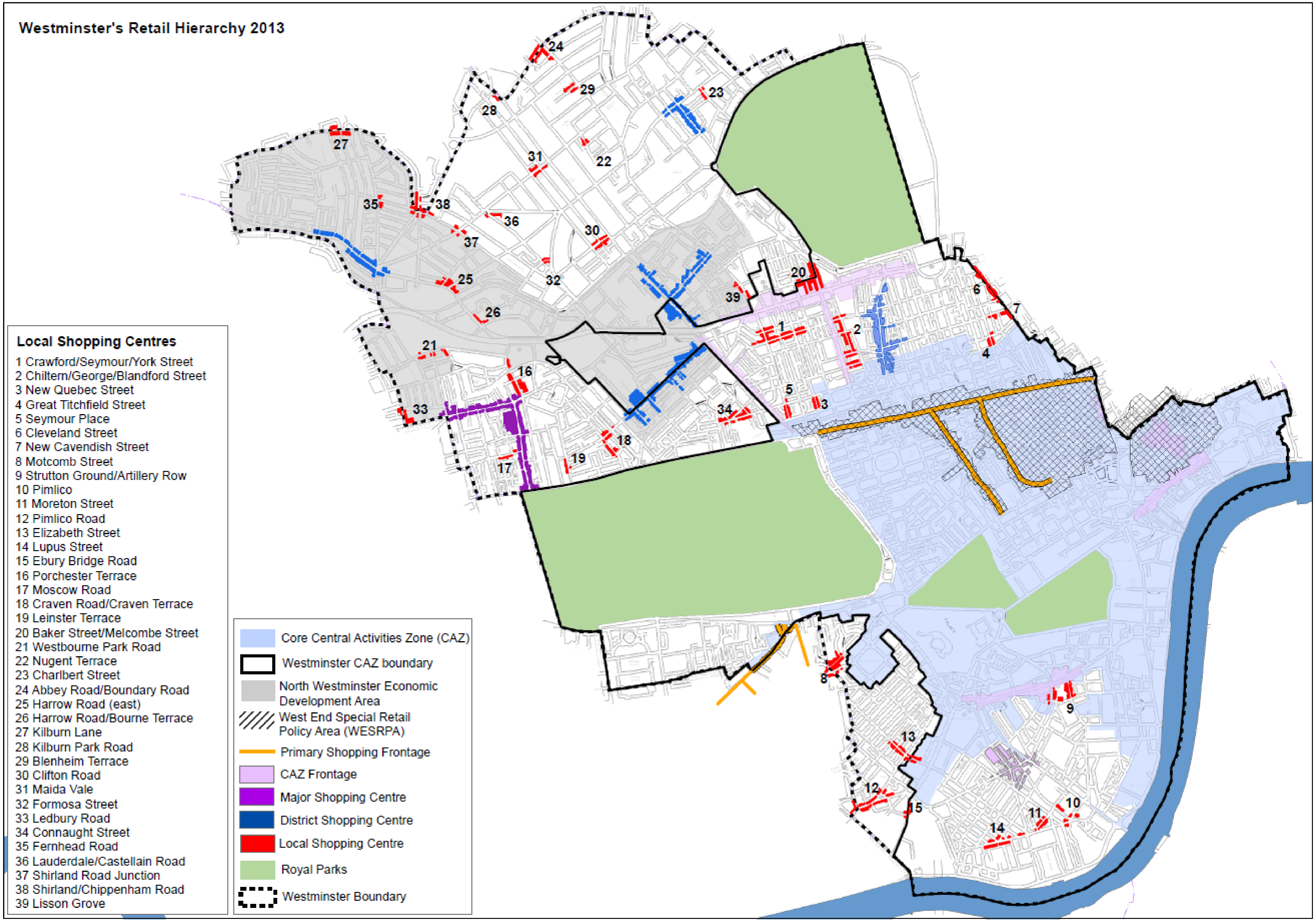


Source: GOAD Retail Survey 2013

Local Centre: Baker Street & Melcombe Street

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

0 25 50
Metres
N


Westminster's Retail Hierarchy 2013
Local Shopping Centres
1 Crawford/Seymour/York Street
2 Chiltern/George/Blandford Street
3 New Quebec Street
4 Great Titchfield Street
5 Seymour Place
6 Cleveland Street
7 New Cavendish Street
8 Motcomb Street
9 Strutton Ground/Artillery Row
10 Pimlico
11 Moreton Street
12 Pimlico Road
13 Elizabeth Street
14 Lupus Street
15 Ebury Bridge Road
16 Porchester Terrace
17 Moscow Road
18 Craven Road/Craven Terrace
19 Leinster Terrace
20 Baker Street/Melcombe Street
21 Westbourne Park Road
22 Nugent Terrace
23 Charlbert Street
24 Abbey Road/Boundary Road
25 Harrow Road (east)
26 Harrow Road/Bourne Terrace
27 Kilburn Lane
28 Kilburn Park Road
29 Blenheim Terrace
30 Clifton Road
31 Maida Vale
32 Formosa Street
33 Ledbury Road
34 Connaught Street
35 Fernhead Road
36 Lauderdale/Castellain Road
37 Shirland Road Junction
38 Shirland/Chippenham Road
39 Lisson Grove
Core Central Activities Zone (CAZ)
Westminster CAZ boundary
North Westminster Economic Development Area
West End Special Retail Policy Area (WESRPA)
Primary Shopping Frontage
CAZ Frontage
Major Shopping Centre
District Shopping Centre
Local Shopping Centre
Royal Parks
Westminster Boundary

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 2: Abbey Road & Boundary 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 **2: Abbey Road & Boundary Road**

1. Introduction

1.1 Location

This small Local Centre is located in the north of Westminster, on the border with the London Borough of Camden. The centre is close to both the A5 and A41, and includes units within the London Borough of Camden on the west side of Boundary Road. The catchment area of the centre is contained by the Kilburn train line to the north, and by Blenheim Terrace local centre and the larger St John's Wood district centre to the south east, in this very residential part of Westminster.

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		22	23	22	22
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*0*
	National retailers	*0*	*0*	*0*	*0*
	Specialist Independent	*6*	*7*	*3*	*3*
	Independent	*9*	*8*	*10*	*12*
	Convenience	*7*	*8*	*9*	*7*
Class A2	Financial & Professional	10	10	8	7
Food & Drink		0	10	10	12
Class A3	*Restaurant/Café*	*0*	*7*	*8*	*10*
Class A4	*Pubs/Bars*	*0*	*2*	*1*	*1*
Class A5	*Takeaway*	*0*	*1*	*1*	*1*
	Takeaway/Restaurant				*0*
Sui Generis		1	2	1	1
Vacant Units		3	4	6	3
Arts/Culture		0	0	2	2
Health uses		1	1	1	2
Hotels		0	0	0	0
TOTAL		**37**	**50**	**50**	**49**

Source: WCC Land Use Survey December 2013

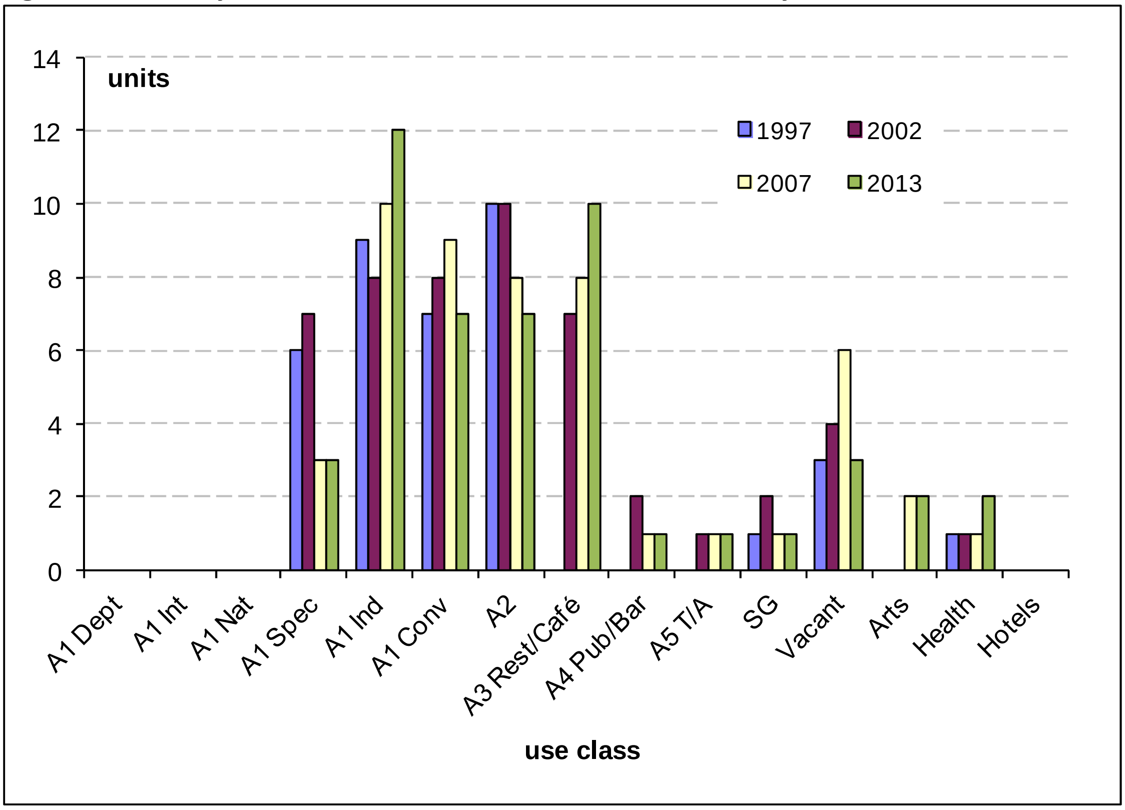
In total there are 49 units, which is one less than recorded during the previous survey in 2007 due to a retail unit converting to an office.

The number of A1 retail uses has remained the same since 2007, with two convenience use classes becoming independent retailers.

The vacant units have decreased by 3 from 2007. The centre contains two dental clinics and two art galleries but no sports/ leisure facilities.

The overall picture is therefore one of relative stability, with little change in composition of uses or occupiers in the centre. This is also a reflection of the area as a whole, which is very residential in nature, and does not experience large amounts of development or change.

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



2.2 Range of A1 Uses

Abbey Road/Boundary Road has no international or national retailers, or department stores. The centre has 22 Class A1 retail units including 12 independent retailers, 7 convenience stores and 3 specialist retailers. The specialist retailers include art shops and antique shops. The independent stores include six hairdressers. The high proportion of comparison shops and an absence of multiple retailers suggest that Abbey Road/Boundary Road serves local residents with a mix of convenience and comparison shopping facilities.

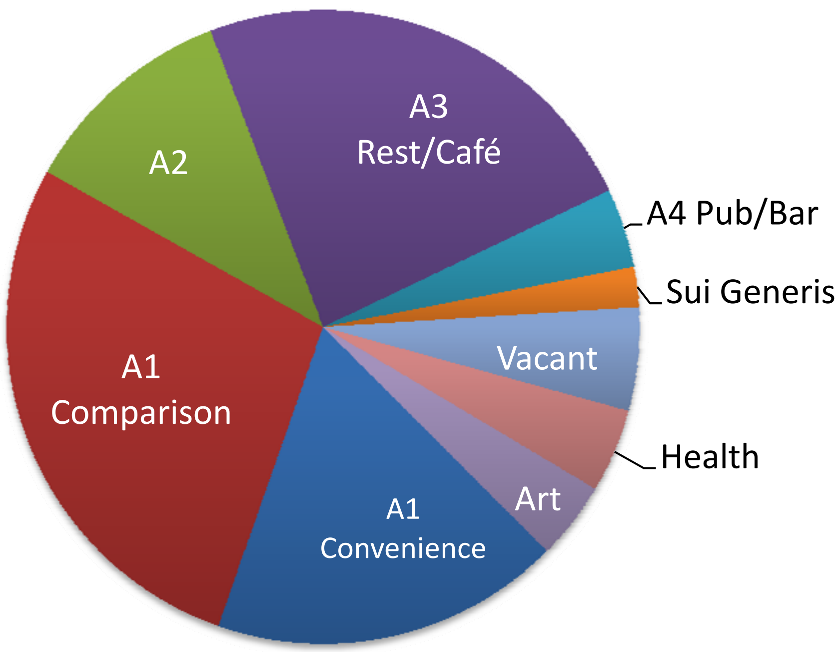
2.3 Total Retail Floor space

Total retail floor space is broken down in Table 2. In total, Abbey Road/Boundary Road has 3,911 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 comparable proportions of A1 convenience, A3 Restaurant/Café floor space, which together account for nearly 50% of the centre's total. The centre has one A4 pub and one A5 takeaways, lower than the Local Centre average. The centre also has a lower than average proportion of A1 comparison floor space, 27% 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	699	17.87%	14.85%
A1 Comparison	1086	27.77%	35.18%
A2	433	11.07%	11.16%
A3 Rest/Café/TA	927	23.70%	17.41%
A4 Pub/Bar	158	4.04%	5.13%
Sui Generis	80	2.05%	3.90%
Vacant	206	5.27%	8.55%
Health	167	4.27%	1.96%
Hotels	0	0.00%	0.45%
Art	155	3.96%	1.33%
Leisure	0	0.00%	0.06%
Total	**3,911**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



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

Abbey Road/Boundary Road 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 solicitors. The Local Centre does not provide the same range and selection found in large Local Centres or District Centres. It does contain some very popular food and drink uses including a public house and several neighbourhood type cafe's.

2.4 Proportion of Vacant Street Level Property

The unit vacancy rate in Abbey Road/Boundary Road is lower than the average rate for Local Centres in the City, as shown in Table 3. The vacancy rate has decreased by half since 2007 and now stands at a third of the local centre average of 8%. The three vacant units are spread throughout the centre, and are all located at ground floor level. 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	8.00% (4) units	12.00% (6) units	6.12% (3) units	8.3% (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 low in terms of pedestrian vibrancy when the Health Check Survey was carried out on a weekday morning in December 2013. This is unsurprising given the nature of the centre and its catchment and surrounding uses, which are predominantly residential.

3.2 Accessibility on foot and by public transport

The local centre is well served by transport links. There are three London underground stations within ten minutes walk of the centre: Kilburn Park (Bakerloo Line), Maida Vale (Bakerloo Line) and St John's Wood (Jubilee Line). There are also two mainline (London Overground) train stations in the vicinity, again roughly ten minutes walk from the centre: Kilburn High Road and South Hampstead. The centre is also served by several bus routes such as the 139 and 189 which pass through the local centre and serve the West End, as well as other local routes that pass close to the centre. The centre is also well served by main arterial roads such as the 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 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 Abbey Road/Boundary Road =28th out of the 39 Local Centres in the City. Abbey Road/Boundary Road has a poor provision of multiple retailers, cultural/community events, sport and leisure facilities and bank/building society provision. The centre's main strength are its provision of food shops and restaurants.

4.2 Daytime Amenity

Abbey Road/Boundary Road is a relatively attractive Local Centre, with a day time amenity rating of 72% compared with the average for all Local Centres of 8%, and is ranked =16th 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. The centre's rating is good in terms of the absence of refuse bags and litter as well as 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.

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			6/26		
Percentage	30.77%			30.77%			23.08%		

Source: City of Westminster site survey December 2013

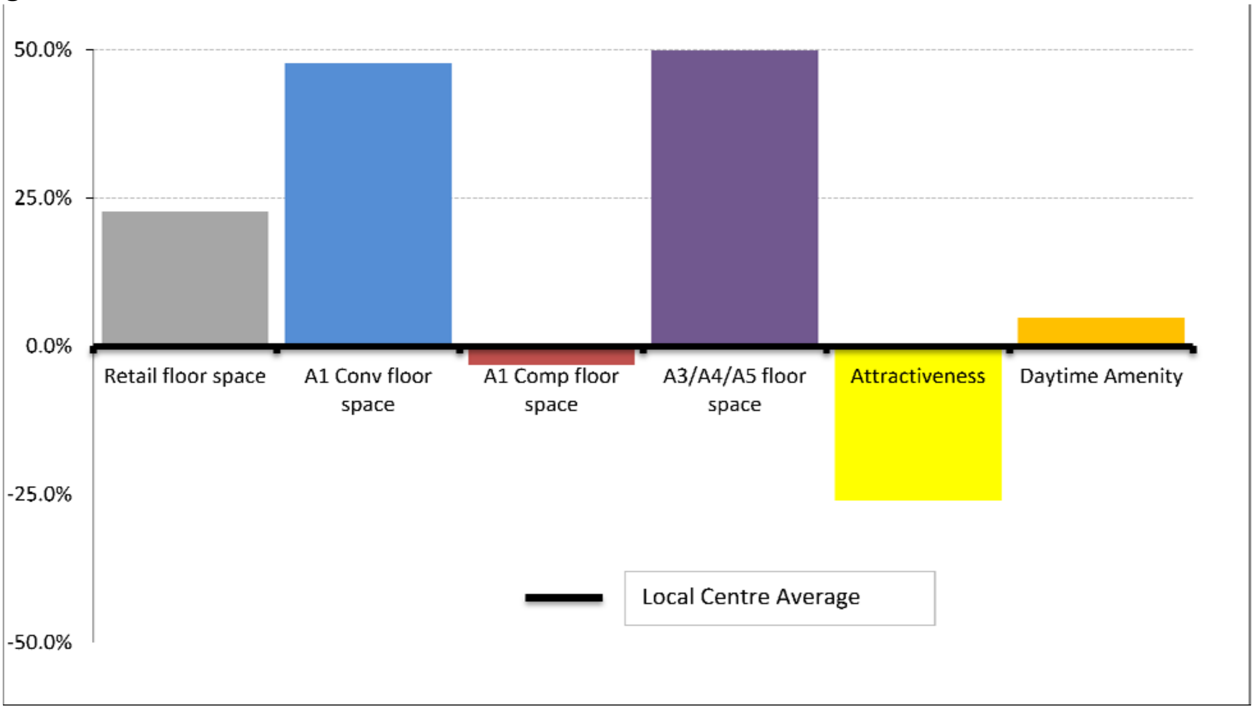
Table 5: Day Time Amenity within the Local Centre 2013

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 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	26/46			29/46			33/46		
Percentage	56.5%			63.0%			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



Abbey Road/Boundary Road is a small Local Centre with a total retail floor space that is above the overall average for the 39 local centres. This is also true for A1 convenience and for food and drink floor space figures (A3/A4/A5) floor space figures. In terms of the rating of the physical environment, the centre's attractiveness is far beneath the local centre average but the daytime amenity rating is marginally above 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 two planning applications, one for premises on Abbey Road one for Boundary Road. Neither application created new retail but one returned a vacant unit to use as a café and the other was for a rear residential extension.

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**		**3,911**
		Total Convenience (A1)		**699**
		Total Comparison (A1)		**1,086**
		Total Service (A2)		**433**
		Total A3		**833**
		Total A4		**158**
		Total A5		**94**
		Total Sui Generis		**80**
		Total Vacant		**206**
	Retail Offer	**Total Number of Shop Units**	**49**	
		Total Number of A1 Units	**22**	
		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	**12**	
		Total Comparison Multiples	**15**	
		Total Number of A2 Units	**7**	
		Total Number of A3 Units	**10**	
		Total Number of A4 Units	**1**	
		Total Number of A5 Units	**1**	
		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**	**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.)**	**2**	**155**
HEALTH USES		**(clinics, surgeries etc.)**	**2**	**167**
HOTELS			**0**	

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

Appendices

Views of Abbey Road/Boundary Road local centre

Abbey Road streetscape with mature trees and attractive frontages, but also showing refuse bags on the street and street clutter in the way of portable signs.

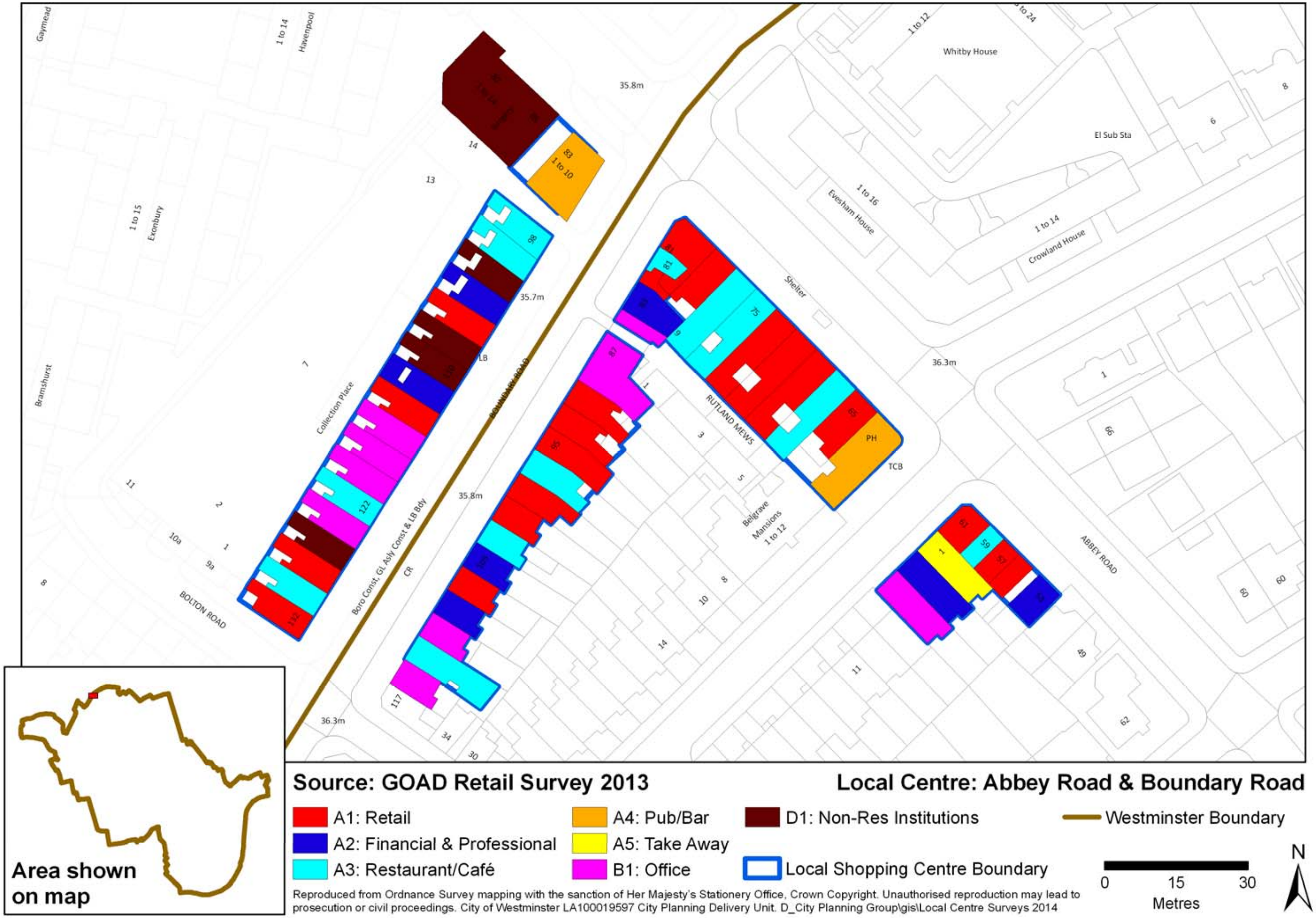
The attractive Salt House public house, with a well kept, attractive frontage.

The Westminster side of Boundary Road, with attractive shop frontages and a wide, well kept pavement.

ADDRESS	FASCIA	DESCRIPTION	USE	SQM	A1 Conv.	A1 Spec.	A1 Ind	A2	A3 Res/Caf	A4 Pub/Bar	A3 Takeaw.	B1	SG	Vacant	Health	Art	2007 Use
53ABBEY ROAD	THE ESTATE COMPANY	ESTATE AGENTS	A2	73				1									A2
55ABBEY ROAD	PERFECT	DRY CLEANERS	A1 Ind	37			1										A1 Conv
57-59ABBEY ROAD	ABBEY ROAD CAFÉ / FLORISTS	CAFE	A3 Rest/Café	81					1								A3 Rest/Café
61ABBEY ROAD	BRUNO'S DELI	ITALIAN FOOD SHOP	A1 Conv	54	1												A1 Conv
63ABBEY ROAD	THE SALT HOUSE	BAR	A3 Pub/Bar	158						1							A3 Pub/Bar
65ABBEY ROAD	AD FOOD & WINE	NEWSAGENTS	A1 Conv	145	1												A1 Conv
67ABBEY ROAD	ADAFINA	CAFE	A3 Rest/Café	123					1								A3 Rest/Café
69ABBEY ROAD	COASTLINE	FISHMONGER	A1 Conv	125	1												A1 Conv
71ABBEY ROAD	LONDOS	NEWS/OFF LICENSE	A1 Conv	128	1												A1 Conv
73ABBEY ROAD	BE YOUTHFULL	HAIR DRESSERS	A1 Ind	125			1										A1 Ind
75ABBEY ROAD	VACANT	VACANT	Vacant	123										1			Vacant
77ABBEY ROAD	SHARKEYS	HAIR DRESSERS	A1 Ind	124		1											A1 Conv
79ABBEY ROAD	HODGETTS CHEMIST	CHEMIST	A1 Conv	76	1												A1 Conv
81ABBEY ROAD	BROWNS OF LONDON	ANTIQUES	A1 Spec	69		1											A1 Spec
83ABBEY ROAD	RES & POEM RESTAURANT A3	RESIDENTIAL	C3	169													C3
1BELGRAVE GARDENS	PEKING INN	CHINESE TAKEAWAY	A3 T/A	94							1						A3 T/A
3BELGRAVE GARDENS	PROPERTY AUCTION OFFICE	OFFICE	B1	96								1					Vacant
5BELGRAVE GARDENS	TCFS SERVICES	OFFICE	B1	96								1					A2
81BOUNDARY ROAD	KAMILS LEBANESE	RESTAURANT	A3 Rest/Café	44					1								A3 Rest/Café
81ABOUNDARY ROAD	BROWNS OF LONDON	ANTIQUES	A1 Spec	31		1											A1 Spec
81ABOUNDARY ROAD	ABBEY BARBER	HAIRDRESSERS	A1 Ind	31			1										A1 Ind
83BOUNDARY ROAD	GREENSTONE ESTATE	ESTATE AGENTS	A2	0				1									A2
85BOUNDARY ROAD		VACANT	Vacant	0										1			Vacant
87BOUNDARY	INTER VIDEO	OFFICE VIDEO	A1 Ind	49			1										A1 Ind

ROAD																	
89BOUNDARY ROAD	INTER VIDEO	OFFICE VIDEO	A1 Ind	88			1										A2
91BOUNDARY ROAD	BROMPTONS	DRY CLEANERS	A1 Ind	88			1										A1 Ind
93BOUNDARY ROAD	CANDYS NAIL & BEAUTY	SALON	A1 Ind	85			1										A1 Ind
95BOUNDARY ROAD	BOUNDARY FOOD AND WINE	FOOD AND WINE STORE	A1 Conv	90	1												A1 Conv
97BOUNDARY ROAD	THE FITNESS CAFÉ	CAFE	A3 Rest/Café	88					1								Vacant
98BOUNDARY ROAD	CHOCOLA	CAFE	A3 Rest/Café	84					1								A1 Spec
99BOUNDARY ROAD	AVANTGARDE GALLERY	ART GALLERY	D1	74												1	D1
100BOUNDARY ROAD	HIRO	RESTAURANT	A3 Rest/Café	82					1								A3 Rest/Café
101BOUNDARY ROAD	THE LILAC GROUP	SALON	A1 Ind	57			1										A1 Ind
102BOUNDARY ROAD	SMILE CLINIC	DENTAL SURGERY	Health	83											1		Health
103BOUNDARY ROAD	BHAN THAI RESTAURANT	RESTAURANT	A3 Rest/Café	55					1								A3 Rest/Café
104BOUNDARY ROAD	FREEDMAN GREENE	SOLICITORS	A2	85				1									A2
105BOUNDARY ROAD	FREEDMAN GREENE	SOLICITORS	A2	56				1									A2
106BOUNDARY ROAD	KAMIL SAMMOUR	HAIRDRESSERS	A1 Ind	81			1										A1 Ind
107BOUNDARY ROAD	VALI BARBERS	HAIRDRESSERS	A1 Ind	56			1										A1 Ind
108BOUNDARY ROAD	BEN URI GALLERY - LONDON JEWISH MUSEUM OF ART	ART GALLERY	D1	81												1	D1
109BOUNDARY ROAD	FREEDMAN GREENE	SOLICITORS	A2	55				1									A2
110BOUNDARY ROAD	HAMILTON VETINARY CLINIC	VETINARY CLINIC	SG	80									1				SG
111BOUNDARY ROAD	TURNER AND GOLDRICH	OFFICE	B1	56								1					B1

112BOUNDARY ROAD	DIFFERENT CLINIC	DENTAL SURGERY	Health	84											1		B1
113BOUNDARY ROAD	MEGHNA GRILL	INDIAN CUISINE	A3 Rest/Café	113					1								A3 Rest/Café
114BOUNDARY ROAD	DERRIE FOX	HAIR DRESSERS	A1 Ind	82			1										A1 Ind
116BOUNDARY ROAD	COMPTON REEBACK	ESTATE AGENTS	A2	84				1									A2
118BOUNDARY ROAD	NASH HIRSH ESTATES	ESTATE AGENTS	A2	80				1									Vacant
120BOUNDARY ROAD		OFFICE	B1	83								1					B1
122BOUNDARY ROAD	TAMARADA	RESTAURANT	A3 Rest/Café	80					1								A3 Rest/Café
124BOUNDARY ROAD		VACANT	Vacant	83										1			Vacant
126BOUNDARY ROAD	ST JOHNS WOOD SCHOOL OF ENGLISH	EDUCATION		80													
128BOUNDARY ROAD	SHE LINE - SALON	SALON	A1 Ind	83			1										A1 Ind
130BOUNDARY ROAD	TORESAND	RESTAURANT	A3 Rest/Café	83					1								A3 Rest/Café
132BOUNDARY ROAD	SPAR	NEWSAGENTS	A1 Conv	81	1												A1 Conv
Out of Borough																	



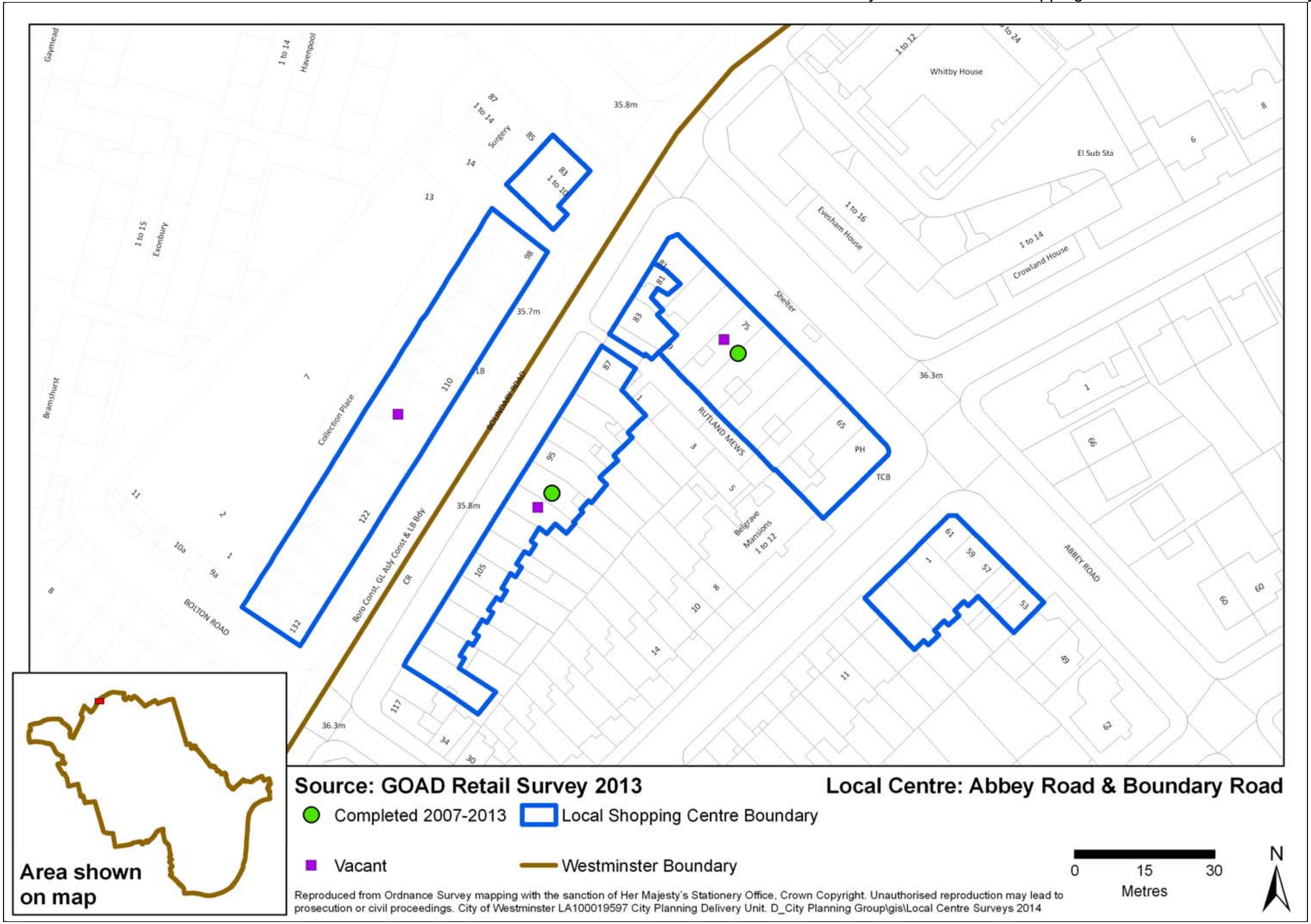
Source: GOAD Retail Survey 2013

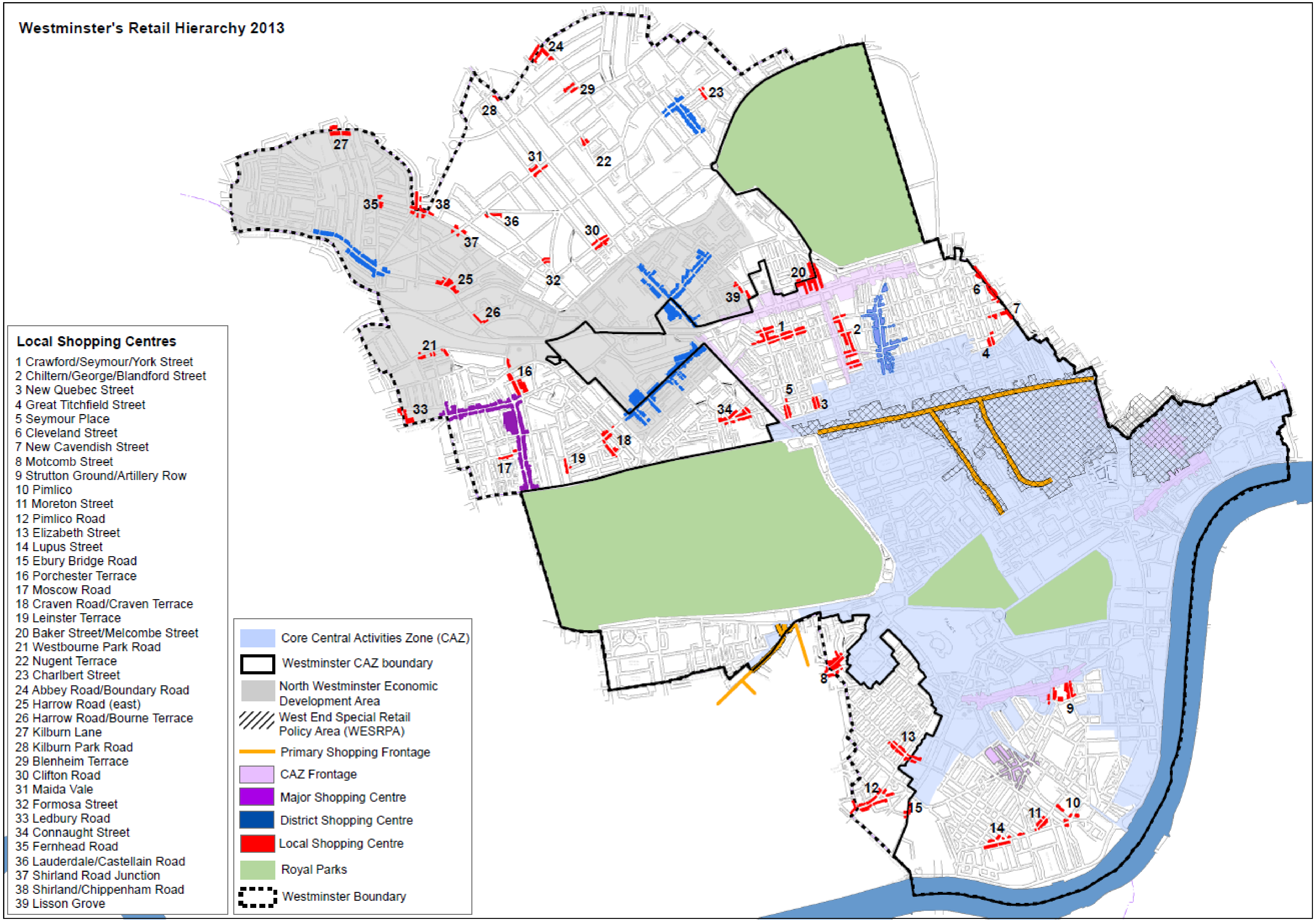
Local Centre: Abbey Road & Boundary Road

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

0 15 30
Metres

N


Source: GOAD Retail Survey 2013
Local Centre: Abbey Road & Boundary Road
Completed 2007-2013
Local Shopping Centre Boundary
Vacant
Westminster Boundary
0
15
30
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
BOUNDARY ROAD
ABBEY ROAD
RUTLAND MEWS
BOLTON ROAD
Collection Place
Boro Const, GL Assly Const & LB Bdy
Whitby House
Evesham House
Crowland House
Belgrave Mansions
El Sub Sta
Shelter
Surgery
PH
TCB
LB
CR
Gaymead
Havenpool
Exonbury
Bramshurst
35.8m
35.7m
36.3m



Westminster's Retail Hierarchy 2013
Local Shopping Centres
1 Crawford/Seymour/York Street
2 Chiltern/George/Blandford Street
3 New Quebec Street
4 Great Titchfield Street
5 Seymour Place
6 Cleveland Street
7 New Cavendish Street
8 Motcomb Street
9 Strutton Ground/Artillery Row
10 Pimlico
11 Moreton Street
12 Pimlico Road
13 Elizabeth Street
14 Lupus Street
15 Ebury Bridge Road
16 Porchester Terrace
17 Moscow Road
18 Craven Road/Craven Terrace
19 Leinster Terrace
20 Baker Street/Melcombe Street
21 Westbourne Park Road
22 Nugent Terrace
23 Charlbert Street
24 Abbey Road/Boundary Road
25 Harrow Road (east)
26 Harrow Road/Bourne Terrace
27 Kilburn Lane
28 Kilburn Park Road
29 Blenheim Terrace
30 Clifton Road
31 Maida Vale
32 Formosa Street
33 Ledbury Road
34 Connaught Street
35 Fernhead Road
36 Lauderdale/Castellain Road
37 Shirland Road Junction
38 Shirland/Chippenham Road
39 Lisson Grove
Core Central Activities Zone (CAZ)
Westminster CAZ boundary
North Westminster Economic Development Area
West End Special Retail Policy Area (WESRPA)
Primary Shopping Frontage
CAZ Frontage
Major Shopping Centre
District Shopping Centre
Local Shopping Centre
Royal Parks
Westminster Boundary

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 3: Blenheim 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.

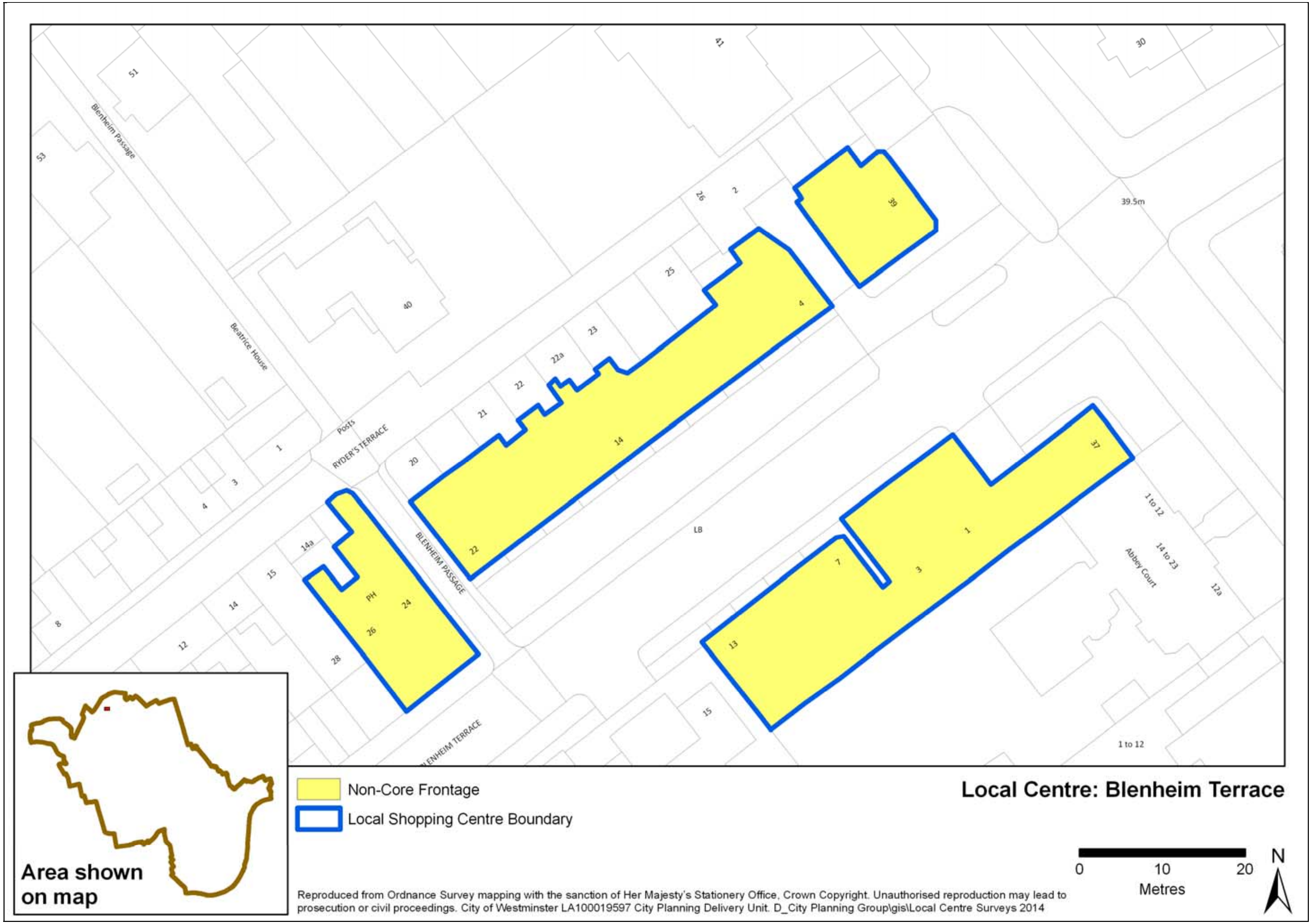
Local Centre **3: Blenheim Terrace**

1. Introduction

1.1 Location

This small Local Centre is a small centre located in the north west of Westminster, off the main arterial Abbey Road, and in the vicinity of the larger St John's Wood district centre. The local centre serves the adjacent residential areas around St Johns's Wood. The centre is close to transport links, and other district and local centres which limit its catchment area.

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	6	7	7
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*0*
	National retailers	*0*	*0*	*0*	*0*
	Specialist Independent	*1*	*1*	*0*	*1*
	Independent	*4*	*3*	*5*	*4*
	Convenience	*1*	*2*	*2*	*2*
Class A2	Financial & Professional	2	3	3	4
Food & Drink		4	5	6	6
Class A3	*Restaurant/Café*	*4*	*5*	*6*	*6*
Class A4	*Pubs/Bars*	*0*	*0*	*0*	*0*
Class A5	*Takeaway*	*0*	*0*	*0*	*0*
	Takeaway/Restaurant				*0*
Sui Generis		0	0	0	0
Vacant Units		1	2	1	1
Arts/Culture		0	0	1	0
Health uses		0	0	0	0
Hotels		0	0	0	0
TOTAL		**13**	**16**	**18**	**18**

Source: WCC Land Use Survey December 2013

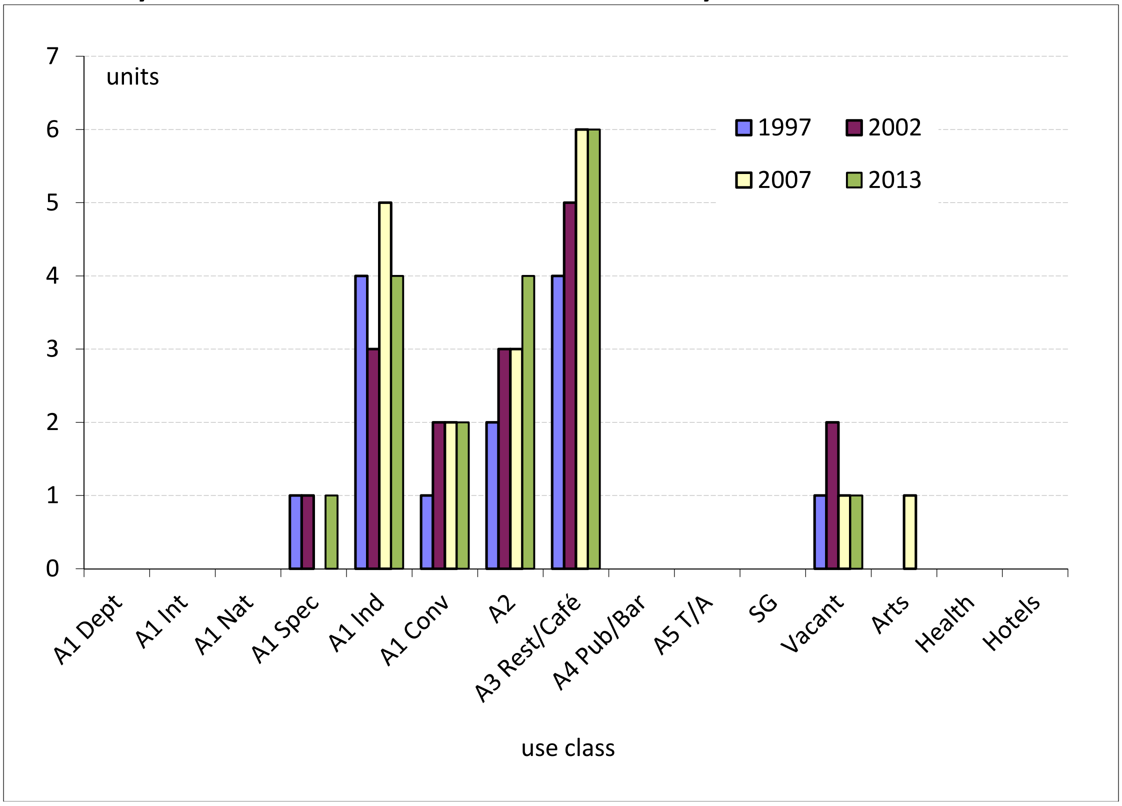
In total there are 18 units, which is constant from the previous survey in 2007.

The number of A1 retail uses has remained the same since 2007 however an independent unit changed to a specialist independent retailer.

The centre has no hotels, health or arts uses. The vacant units have remained constant as while a vacant unit has become occupied by a class A2 use an art gallery has become vacant.

The centre is small however there remains a good provision of food and drink uses including a Pizza Express and other popular local restaurants and cafe's. Many of the A1 uses are service type uses most likely serving local residents, such as hairdressers and dry cleaners, with little by the way of convenience retail present in the centre.

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



2.2 Range of A1 Uses

Blenheim Terrace has no international, national retailers or department stores. The centre has 7 Class A1 retail units including1 specialist independent retailer (Sixty Six clothing shop) 2 convenience stores and 4 independent retailers. The independent retailers include dry cleaners and hairdressers. The high proportion of comparison shops and absence of multiple retailers suggests that Blenheim Terrace serves local residents with a mix of convenience and comparison shopping facilities.

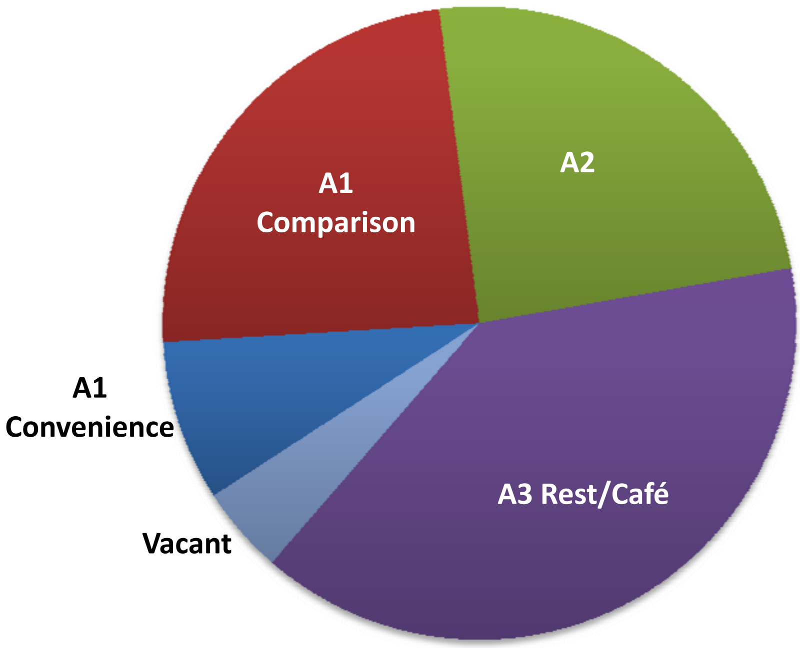
2.3 Total Retail Floor space

Total retail floor space is broken down in Table 2. In total, Blenheim Terrace has 1,340 sqm of retail floor space, which is below the average of 3,188 sqm for the 39 Local Centres in the City. Blenheim Terrace has a comparable proportion of A1 and A2 uses, with Class A3 retail floor space being the dominant use class, accounting for roughly a third of the total on its own. The centre has no A4 pubs or A5 takeaways, which is lower than the Local Centre average. The centre has a lower than average proportion of A1 comparison 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 % (2007)
A1 Convenience	110	8.21%	14.9%
A1 Comparison	321	23.92%	35.2%
A2	325	24.25%	11.2%
A3 Rest/Café	525	39.14%	17.4%
A4 Pub/Bar	0	0.00%	5.1%
Sui Generis	0	0.00%	3.9%
Vacant	60	4.48%	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	**1,340**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



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

Blenheim Terrace 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 all estate agents. The main use is A3 Restaurants/Café's, of which there are six in the centre. 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 lower than the average rate for Local Centres in the City, as shown in Table 3. The vacancy rate has remained constant since 2007. The one vacant unit is a ground floor unit. 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	12.50% (2) units	5.56% (1) units	5.56% (1) units	9% (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, as expected given the residential nature of the neighbouring areas.

3.2 Accessibility on foot and by public transport

The local centre is well served by transport links. There are three London underground stations and two mainline train stations within ten minutes walk: Kilburn Park (Bakerloo Line), Maida Vale (Bakerloo Line), St John's Wood (Jubilee Line) and Kilburn High Road, South Hampstead (Mainline). The centre is also served by several bus routes such as the 139 and 189 which pass through the local centre, as well as other local routes that pass close to the centre. The centre is also well served by main arterial roads such as the 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 23%, meaning that this centre has limited attractions. The rating is lower than the Local Centre average of 31%, and means the centre is ranked 30th out of the 39 Local Centres in the City. The centre has poor provision of multiple retailers, convenience retail, community events, sport and leisure facilities and bank/building society provision. Blenheim Terrace's main strength is its good provision of restaurants and café's.

4.2 Daytime Amenity

Blenheim Terrace is an attractive Local Centre, with a day time amenity rating of 72% compared with the average for all Local Centres of 68%, and is ranked joint 18th out of the 39 Local Centres in the City. The centre's rating is good in terms of the absence of graffiti, street fouling, beggars, rough sleepers, street drinkers, touting and illegal street traders. At the time of the survey there were refuse sacks out for collection and a small police presence adding to the security and safety. The centre has an average 'feel good factor'. The only poorly rated categories were the quality of buildings and the lack of promotion of street events.

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	6/26			7/26			6/26		
Percentage	23.08%			26.92%			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 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	32/46			31/46			33/46		
Percentage	70%			67%			72%		

5. Performance of the Centre

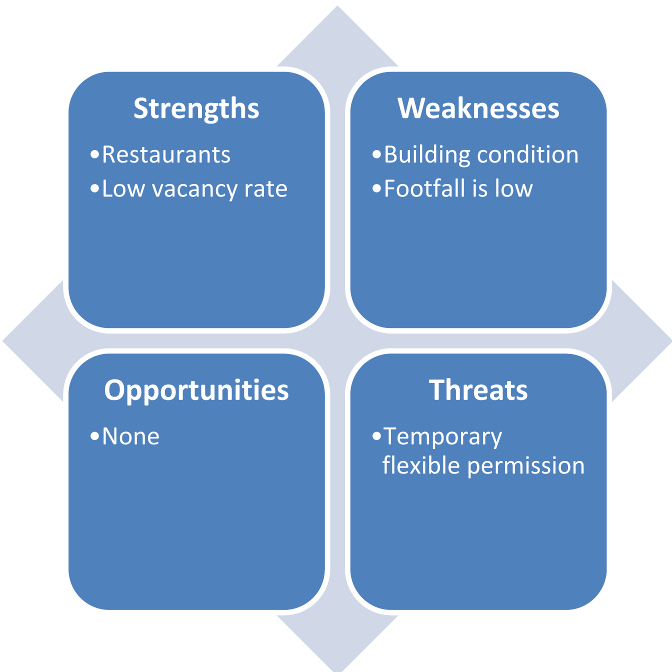
5.1 Relative Performance of the Local Centre 2013

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

Blenheim Terrace is a small Local Centre, and as a result 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, and for food and drink floor space figures (A3/A4/A5), with the largest variation from the overall average being with A1 comparison floor space. In terms of the rating of the physical environment, the centre has a lower than average attractiveness rating, but a higher than average score for daytime amenity as discussed.

5.2 Strengths, Weaknesses, Opportunities and Threats

SWOT analysis



6. Future capacity

6.1 Potential Capacity for Growth

Between 2007 and 2013, there were two permitted planning applications. One was a conversion of an a1 unit to a post office / collection point (A2) the other was a reduction of 23sqm of A1 floorspace to convert into residential use.

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**		**1,340**
		Total Convenience (A1)		**110**
		Total Comparison (A1)		**321**
		Total Service (A2)		**325**
		Total A3		**524.5**
		Total A4		**0**
		Total A5		**0**
		Total Sui Generis		**0**
		Total Vacant		**60**
	Retail Offer	**Total Number of Shop Units**	**18**	
		Total Number of A1 Units	**7**	
		a) Convenience shops	**2**	
		b) Department/principal stores	**0**	
		c) Prestige international shops	**0**	
		d) National comparison retailers	**0**	
		e) Specialist Independent shops	**1**	
		f) Independent shops	**4**	
		Total Comparison Multiples	**5**	
		Total Number of A2 Units	**4**	
		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	**1**	
	Market	**Days of operation**	**0**	
		Number of stalls	**0**	
	Proposals	**Changes of use A1 to A2**	**1**	**59**
		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', 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

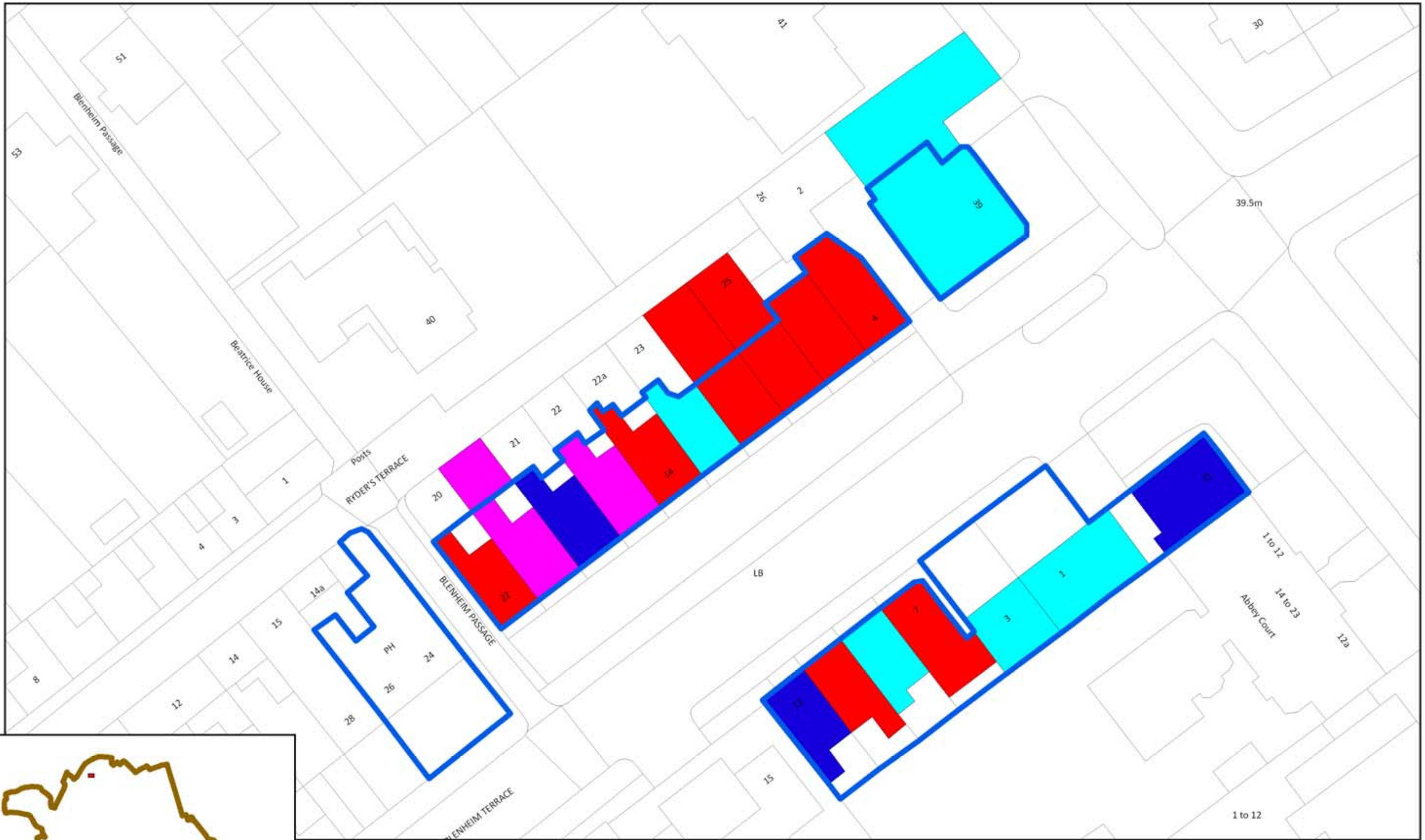
Views of Blenheim Terrace local centre

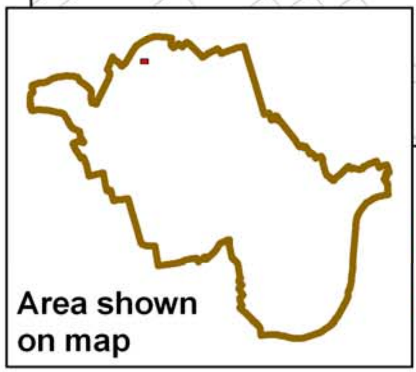
View of the south side frontage of Blenheim Terrace.

The north frontage of Blenheim Terrace, with many cars parked on the shop forecourts, breaking up the shopping frontage.

Refuse bags on the north side frontage of Blenheim terrace. This also shows how car parking and other street furniture breaks up the shopping frontage.

					A1	A1	A1		A3	B1	Vacant	2007 Use
ADDRESS	**FASCIA**	**DESCRIPTION**	**USE**	**SQM**	**Conv.**	**Spec.**	**Ind**	**A2**	**Res/Caf**			
37ABBEY ROAD	HAMILTON WOOD	ESTATE AGENTS	A2	139				1				A2
39ABBEY ROAD	PIZZA EXPRESS	RESTAURANT	A3 Rest/Café	163					1			A3 Rest/Café
1BLENHEIM TERRACE	1 BLENHEIM	RESTAURANT	A3 Rest/Café	127					1			A3 Rest/Café
3BLENHEIM TERRACE	L'AVENTURA	RESTAURANT	A3 Rest/Café	55					1			A3 Rest/Café
4BLENHEIM TERRACE	SIXTY SIX	LADIESWARE	A1 Spec.	69		1						Vacant
5BLENHEIM TERRACE	L'AVENTURA	RESTAURANT	A3 Rest/Café	54					1			A3 Rest/Café
6BLENHEIM TERRACE	SICILIANA	DRY CLEANER	A1 Ind	59			1					A1 Ind
7BLENHEIM TERRACE	ABBEY DRY CLEANING	DRY CLEANER	A1 Ind	77			1					A1 Ind
8BLENHEIM TERRACE	MANUEL	HAIRDRESSERS	A1 Ind	46			1					A1 Ind
9BLENHEIM TERRACE	Blenheim Coffee	Café	A3 Rest/Café	77					1			A3 Rest/Café
10BLENHEIM TERRACE	BASKERVILLE	GROCERIES	A1 Conv	47	1							A1 Conv
11BLENHEIM TERRACE	GIANNI CAPITANO	HAIRDRESSERS	A1 Ind	70			1					A1 Ind
12BLENHEIM TERRACE	MOMENT	RESTAURANT	A3 Rest/Café	49					1			A3 Rest/Café
13BLENHEIM TERRACE	ADLER GROUP/ EDCM	OFFICE	B1	72						1		B1
14BLENHEIM TERRACE	BLENHEIM TERRACE NEWS	NEWSAGENTS	A1 Conv	63	1							A1 Conv
16BLENHEIM TERRACE	ROYAL MAIL	POST OFFICE	A2	59				1				A1 Ind
18BLENHEIM TERRACE	JONATHAN ARRON	ESTATE AGENTS	A2	61				1				A2
20BLENHEIM TERRACE	ELYSIUM DIEM	ESTATE AGENTS	A2	66				1				A2
22BLENHEIM TERRACE	BLENHEIM GALLERY	VACANT	VACANT	60							1	D1
24BLENHEIM TERRACE		RESIDENTIAL		135								
26BLENHEIM TERRACE		RESIDENTIAL		94								



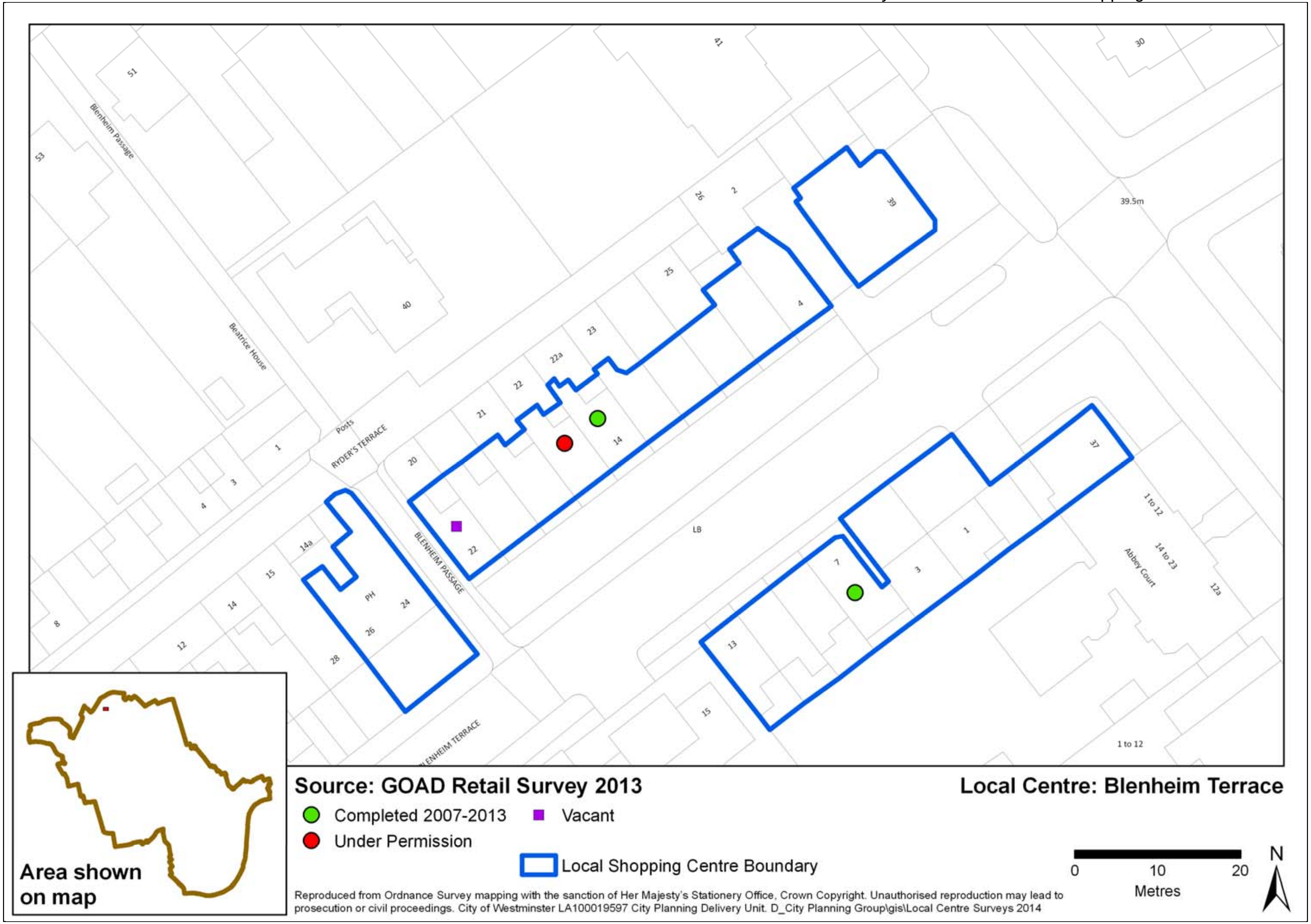


Source: GOAD Retail Survey 2013

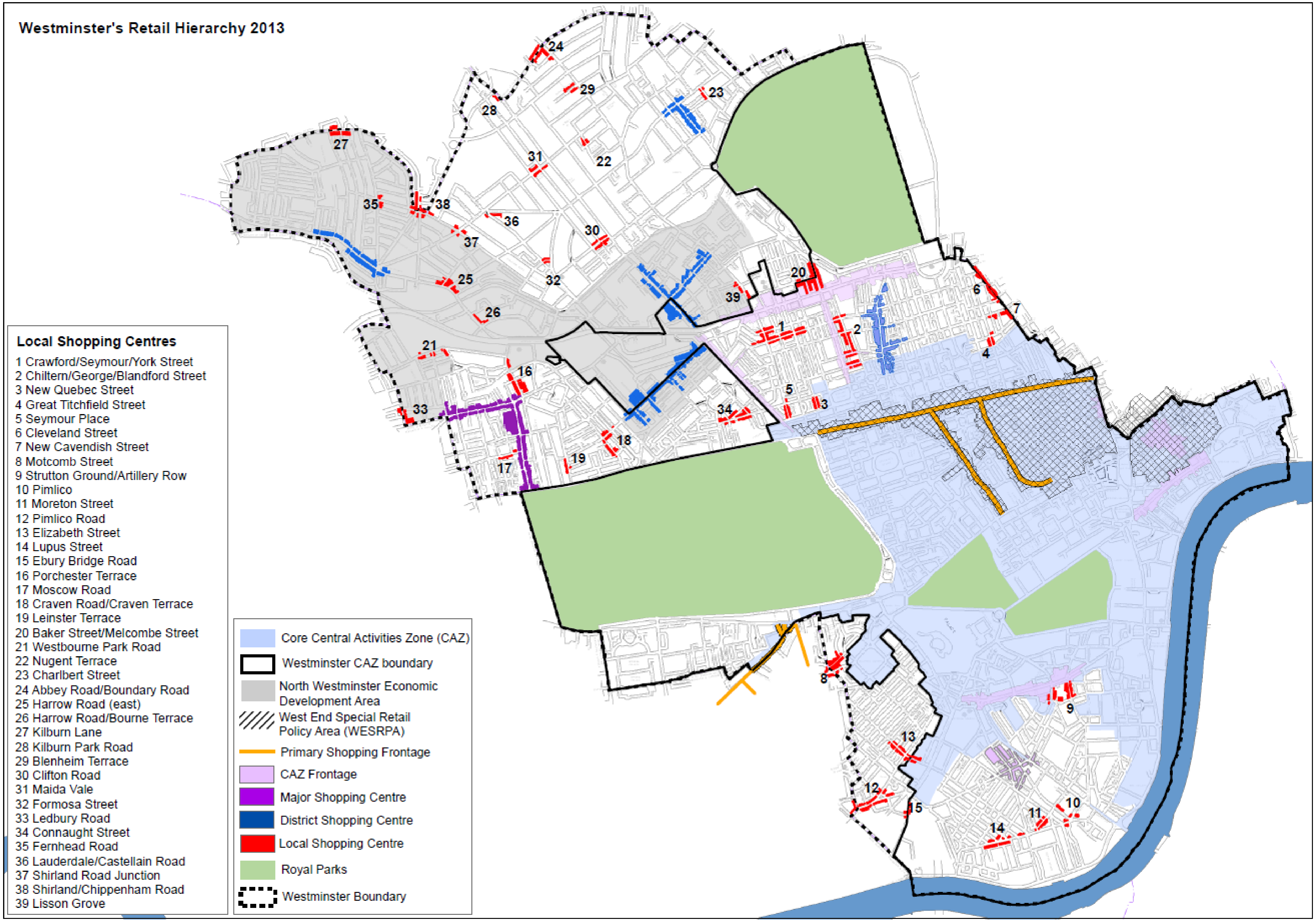
Local Centre: Blenheim Terrace

- A1: Retail
- A2: Financial & Professional
- A3: Restaurant/Café
- B1: Office
- Local Shopping Centre Boundary

0 10 20
Metres
N



Source: GOAD Retail Survey 2013
Local Centre: Blenheim Terrace
Completed 2007-2013
Vacant
Under Permission
Local Shopping Centre Boundary
0
10
20
Metres
N
Area shown on map
Blenheim Passage
Beatrice House
RYDER'S TERRACE
Posts
BLENHEIM PASSAGE
LB
Abbey Court
39.5m


Westminster's Retail Hierarchy 2013
Local Shopping Centres
1 Crawford/Seymour/York Street
2 Chiltern/George/Blandford Street
3 New Quebec Street
4 Great Titchfield Street
5 Seymour Place
6 Cleveland Street
7 New Cavendish Street
8 Motcomb Street
9 Strutton Ground/Artillery Row
10 Pimlico
11 Moreton Street
12 Pimlico Road
13 Elizabeth Street
14 Lupus Street
15 Ebury Bridge Road
16 Porchester Terrace
17 Moscow Road
18 Craven Road/Craven Terrace
19 Leinster Terrace
20 Baker Street/Melcombe Street
21 Westbourne Park Road
22 Nugent Terrace
23 Charlbert Street
24 Abbey Road/Boundary Road
25 Harrow Road (east)
26 Harrow Road/Bourne Terrace
27 Kilburn Lane
28 Kilburn Park Road
29 Blenheim Terrace
30 Clifton Road
31 Maida Vale
32 Formosa Street
33 Ledbury Road
34 Connaught Street
35 Fernhead Road
36 Lauderdale/Castellain Road
37 Shirland Road Junction
38 Shirland/Chippenham Road
39 Lisson Grove
Core Central Activities Zone (CAZ)
Westminster CAZ boundary
North Westminster Economic Development Area
West End Special Retail Policy Area (WESRPA)
Primary Shopping Frontage
CAZ Frontage
Major Shopping Centre
District Shopping Centre
Local Shopping Centre
Royal Parks
Westminster Boundary

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
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City of Westminster

Shopping Centre Health Check Survey 2014

Local Centre 4: Charlbert 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 **4: Charlbert Street**

1. Introduction

1.1 Location

Charlbert Street is a very small linear shopping area which runs parallel to the larger St John’s Wood district shopping centre in the north of the borough. The centre is close to Regent’s Park and several transport links in the Baker Street area. The centre serves local residents however its catchment area is restricted by its proximity to the large St Johns Wood district 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)

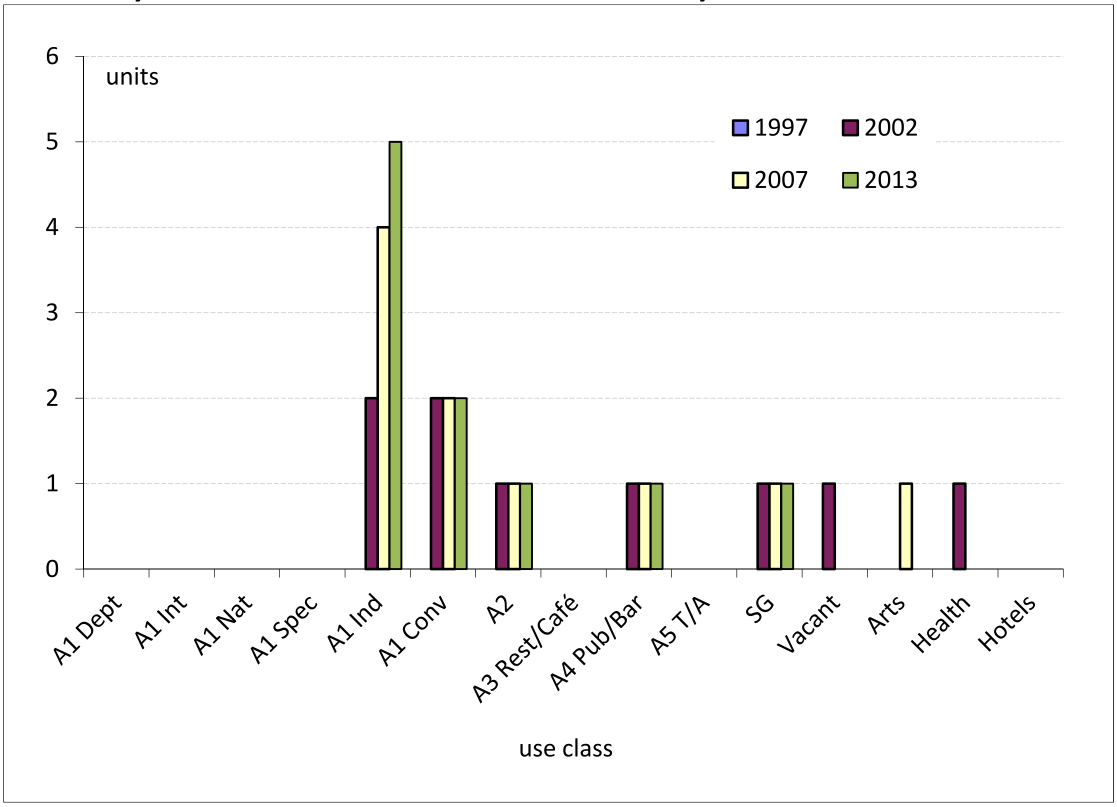
Use Class		No. of Units 1997	No. of Units 2002	No. of Units 2007	No. of Units 2013
Class A1 Retail		0	4	6	7
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*0*
	National retailers	*0*	*0*	*0*	*0*
	Specialist Independent	*0*	*0*	*0*	*0*
	Independent	*0*	*2*	*4*	*5*
	Convenience	*0*	*2*	*2*	*2*
Class A2	Financial & Professional	0	1	1	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*	*0*	*0*	*0*
Sui Generis		0	1	1	1
Vacant Units		0	1	0	0
Arts/Culture		0	0	1	0
Health uses		0	1	0	0
Hotels		0	0	0	0
TOTAL		**0**	**9**	**10**	**10**

Source: WCC Land Use Survey December 2013

The ten units in this centre are the same as 2007 but there have been changes between the uses of units.

The number of A1 retail uses in Charlbert Street has increased by one since 2007 as a gallery has changed from D1 Arts/Culture use to a dry cleaner. The number of Class A2 and A4 uses has stayed the same. The Lyndhurst Club remains the only SG use providing a karaoke club for Japanese ex pats.

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



2.2 Range of A1 Uses

The centre is home to seven A1 retail units including five independent retailers and two convenience stores. The independent retailers include a hairdressers, hardware store and dry cleaners. The mixture of independent and comparison shops and absence of multiple retailers suggests that Charlbert Street serves local residents with a mix of shopping facilities.

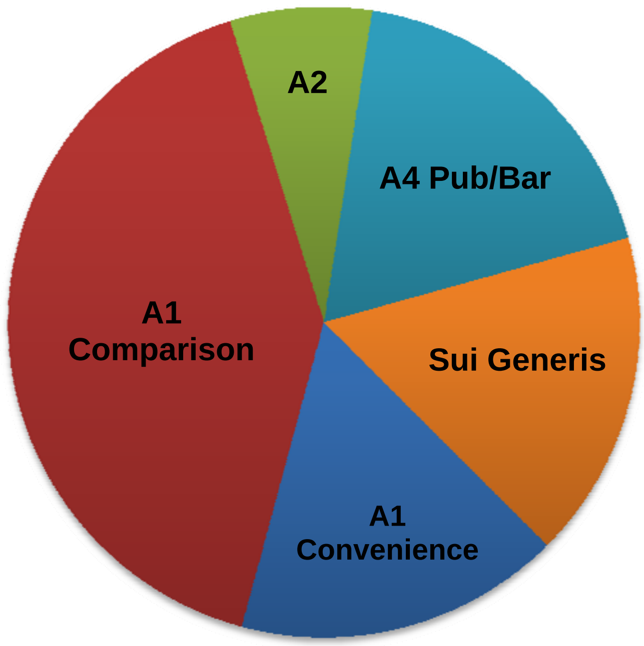
2.3 Total Retail Floor space

Total retail floor space in Charlbert Street is broken down in Table 2. In total, Charlbert Street has 773 sqm of retail floor space, which is below the average of 3,188 sqm for the 39 Local Centres in the City. Charlbert Street has a comparable proportion of A1 convenience and A1 independent retail floor space, which together account for over half of the total retail floor space, and also similar proportions of Class A3 floor space and SG floor space. The centre contains one A4 pub use, which is higher than the Local Centre average. Due to the small size of the centre, these figures are not overly comparable to other larger Shopping areas

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	129	16.69%	14.85%
A1 Comparison	317	41.01%	35.18%
A2	56	7.24%	11.16%
A3 Rest/Café	0	0.00%	17.41%
A4 Pub/Bar	141	18.24%	5.13%
Sui Generis	130	16.82%	3.90%
Vacant	0	0.00%	8.55%
Health	0	0.00%	1.96%
Hotels	0	0.00%	0.45%
Art	0	0.00%	1.33%
Leisure	0	0.00%	0.06%
Total	**773**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



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

Charlbert Street is a Local Centre with a small selection of independent shops and convenience stores. There are no banks or building societies, and the sole Class A2 use is an 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

There are no vacant units in this centre which gives the impression that the centre is viable. The unit vacancy rate in Charlbert Street is lower than the average rate for Local Centres in the City, as shown in Table 3.

Table 3: Level of Vacant Street Level Property 2013

% Vacant Units				% Local Centre Average
1997	2002	2007	2013	2013
0% (0) units	11% (1) units	0% (0) units	0% (0) units	9% (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 average 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

The local centre is reasonably well connected in terms of transport links. St Johns Wood London Underground station is located roughly 5 minutes walk from the centre. There are also bus routes which run close to the centre, with many main routes such as the 13, 113 and the 187 running along the nearby Finchley/ Wellington Road, which is the main arterial road in the area (A41). These bus stops are roughly 5-10 minutes walk from the centre. There are also bus stops to the south of the centre adjacent to Regents Park.

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 19.2%, meaning that the centre offers little in the way of attractions. This is considerably lower than the Local Centre average of 31%, and ranks Charlbert Street =33rd out of the 39 Local Centres in the City, which represents little improvement on 2007. Charlbert Street has a poor provision of multiple retailers, cultural/community events, sport and leisure facilities and bank/building society provision. The centre's main strength is its provision of local retailers who serve the housing estate directly opposite and surrounding residential streets.

4.2 Daytime Amenity

Charlbert Street is a relatively attractive Local Centre. However the centre's day time amenity rating is 63.0% compared with the average for all Local Centres of 68%, and is ranked 25th out of the 39 Local Centres in the City. The centre's rating is good in terms of the absence of vacant sites, beggars, rough sleepers, street drinkers, touting and illegal street traders. The centre has an average *'feel good factor'*. The absence of special features, street events and identifying landmarks reduce the centre's overall rating. The condition, quality of buildings, security measures, street lighting, safety perceptions and ease of passage for pedestrians are 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)			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		2/26			3/26			5/26	
Percentage		7.7%			11.5%			19.23	

Source: City of Westminster site survey December 2013

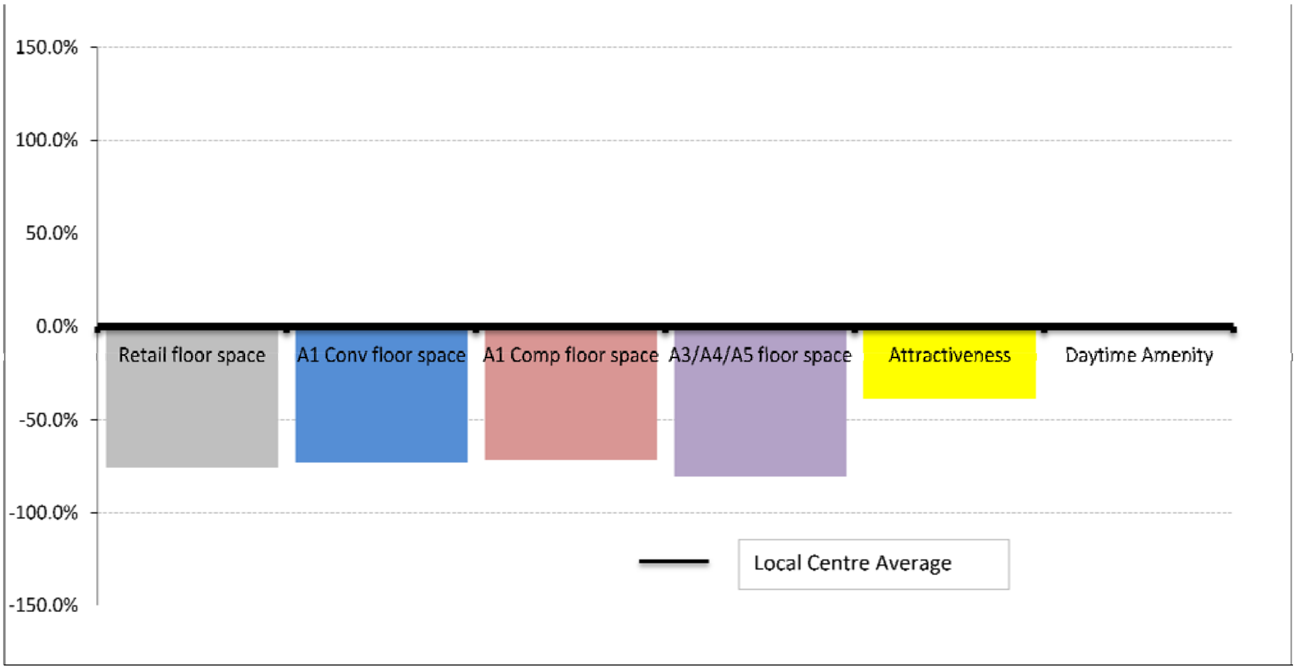
Table 5: Day Time Amenity within the Local Centre 2013

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			28/46			31/46		
Percentage	46%			61%			67%		

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



Charlbert Street is a very small Local Centre and as a result has a much 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, and for food and drink floor space figures (A3/A4/A5). In terms of the rating of the physical environment, the centre has a much lower than average attractiveness rating, but a daytime amenity score much closer 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 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	Sq M
RETAILING	**Floor space**	**Total Floor space**		**773**
		Total Convenience (A1)		**129**
		Total Comparison (A1)		**317**
		Total Service (A2)		**56**
		Total A3		**0**
		Total A4		**141**
		Total A5		**0**
		Total Sui Generis		**130**
		Total Vacant		**0**
	Retail Offer	**Total Number of Shop Units**	**10**	
		Total Number of A1 Units	**7**	
		a) Convenience shops	**2**	
		b) Department/principal stores	**0**	
		c) Prestige international shops	**0**	
		d) National comparison retailers	**0**	
		e) Specialist Independent shops	**0**	
		f) Independent shops	**5**	
		Total Comparison Multiples	**5**	
		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	**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

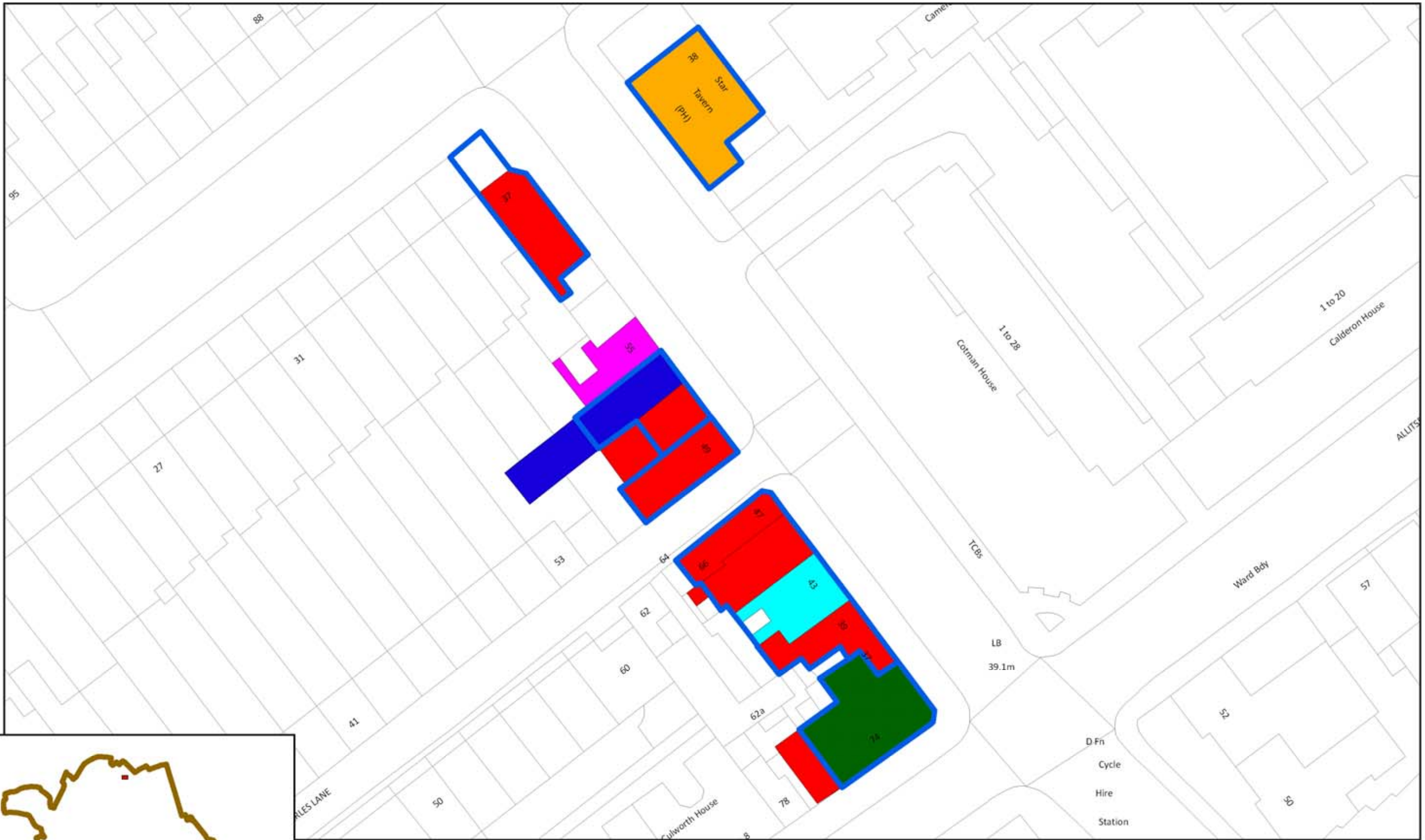
Views of Charlbert Street local centre

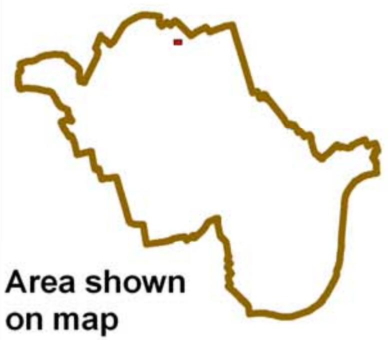
The south end of Charlbert Street local centre, showing most of the core frontage.

The north end of Charlbert Street local centre.

Attractive shop frontage on Charlbert Street.

					A1	A1		A4	S G	2007 Use
ADDRESS	**FASCIA**	**DESCRIPTION**	**USE**	**SQM**	**Conv.**	**Ind**	**A2**	**Pub/Bar**		
74ALLITSEN ROAD	The Lyndhurst Club	Social Club	SG	130					1	SG
37-39CHARLBERT STREET	Brown of St Johns Wood	Fishmongers	A1 Conv	61	1					A1 Conv
41CHARLBERT STREET	St Johns Wood Food Ltd	Grocers	A1 Conv	68	1					A1 Conv
43 CHARLBERT STREET	SW Snack Bar	Café/Shop	A1 Ind	66		1				A1 Ind
47CHARLBERT STREET	St Johns Wood Dry Cleaners	Dry Cleaners	A1 Ind	48		1				D1
49CHARLBERT STREET	Majestic Hardware	Hardware	A1 Ind	65		1				A1 Ind
51CHARLBERT STREET	Elixir Holidays	Travel Agents	A1 Ind	35		1				A1 Ind
53CHARLBERT STREET	Cluttons	Estate Agents	A2	56			1			A2
37ST JOHNS WOOD TERRACE	EQUIPE HAIRDRESSER	Hairdresser	A1 Ind	103		1				A1 Ind
38ST JOHNS WOOD TERRACE	The Star	Public House	A4 Pub/Bar	141				1		A3 Pub/Bar




Area shown on map

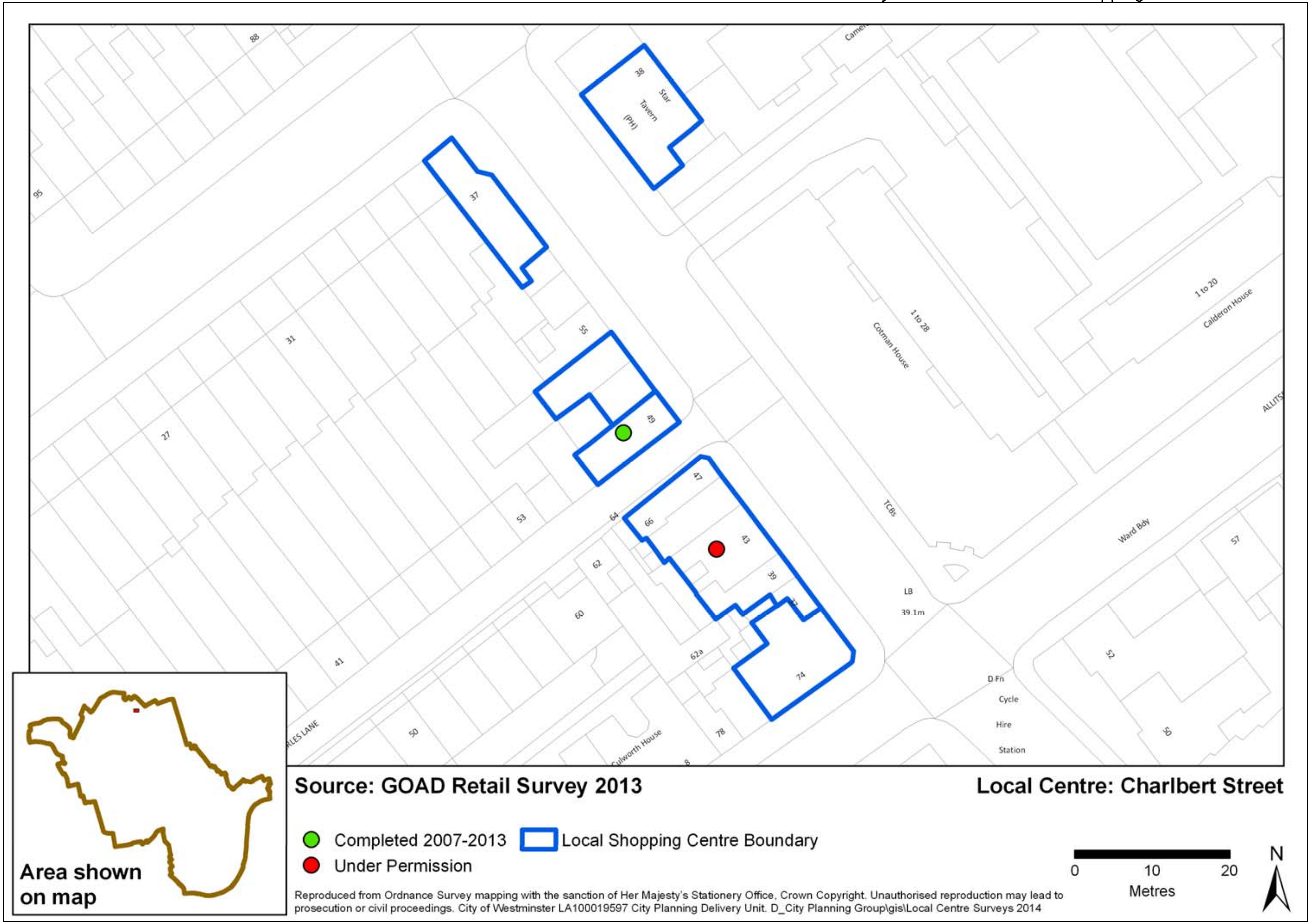
Source: GOAD Retail Survey 2013

Local Centre: Charlbert Street

A1: Retail
A2: Financial & Professional
A3: Restaurant/Café
A4: Pub/Bar
B1: Office
D2: Assembly & Leisure
Local Shopping Centre Boundary

0 10 20
Metres

N


Source: GOAD Retail Survey 2013
Local Centre: Charlbert Street
Completed 2007-2013
Under Permission
Local Shopping Centre Boundary
0
10
20
Metres
N
Area shown on map
38 Star Tavern (PH)
37
55
49
47
66
64
43
39
74
78
62
62a
60
53
41
31
27
50
95
88
1 to 28 Cotman House
1 to 20 Calderon House
TCBs
LB
39.1m
D Fn
Cycle
Hire
Station
Ward Bdy
57
52
50
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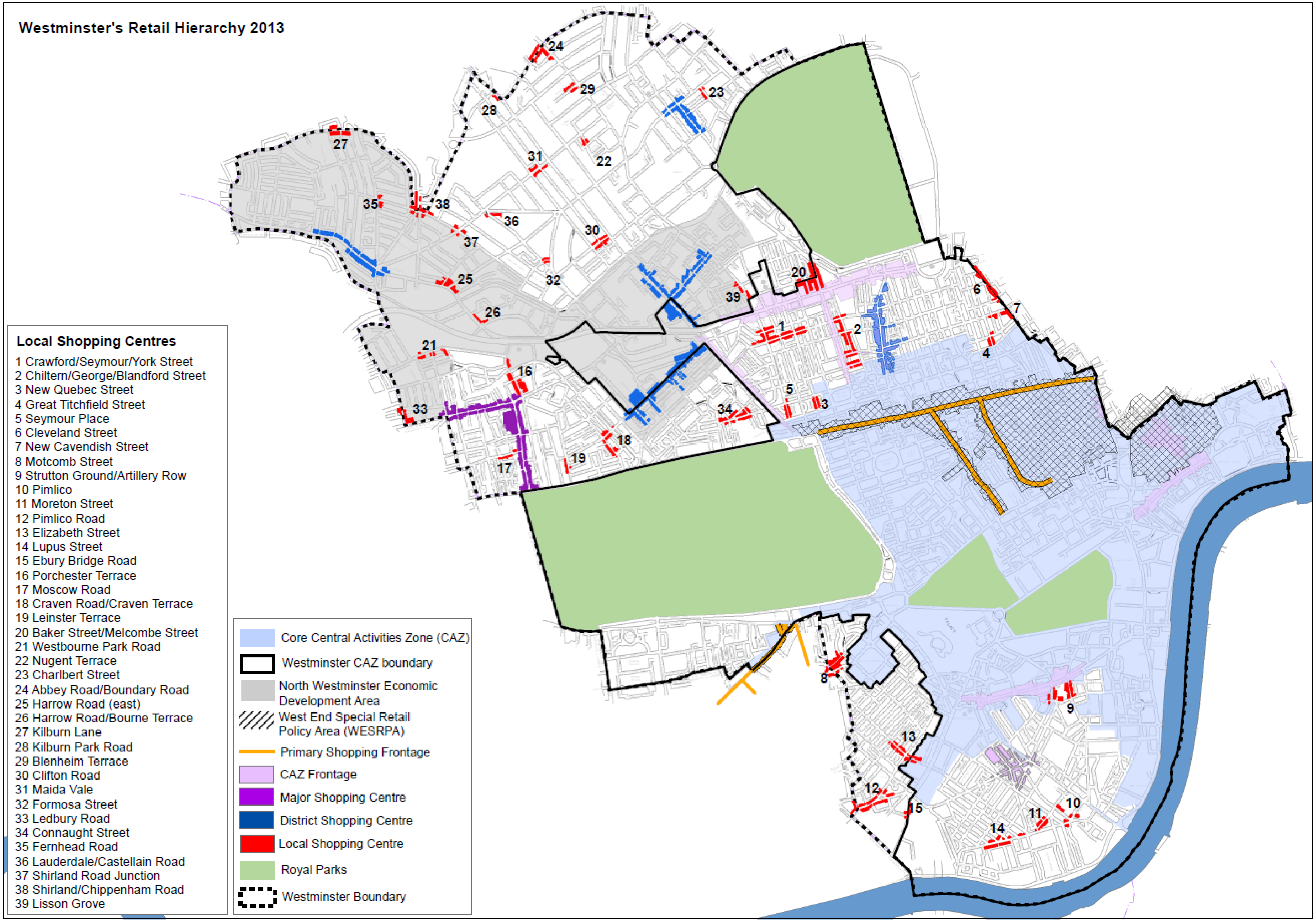

Westminster's Retail Hierarchy 2013
Local Shopping Centres
1 Crawford/Seymour/York Street
2 Chiltern/George/Blandford Street
3 New Quebec Street
4 Great Titchfield Street
5 Seymour Place
6 Cleveland Street
7 New Cavendish Street
8 Motcomb Street
9 Strutton Ground/Artillery Row
10 Pimlico
11 Moreton Street
12 Pimlico Road
13 Elizabeth Street
14 Lupus Street
15 Ebury Bridge Road
16 Porchester Terrace
17 Moscow Road
18 Craven Road/Craven Terrace
19 Leinster Terrace
20 Baker Street/Melcombe Street
21 Westbourne Park Road
22 Nugent Terrace
23 Charlbert Street
24 Abbey Road/Boundary Road
25 Harrow Road (east)
26 Harrow Road/Bourne Terrace
27 Kilburn Lane
28 Kilburn Park Road
29 Blenheim Terrace
30 Clifton Road
31 Maida Vale
32 Formosa Street
33 Ledbury Road
34 Connaught Street
35 Fernhead Road
36 Lauderdale/Castellain Road
37 Shirland Road Junction
38 Shirland/Chippenham Road
39 Lisson Grove
Core Central Activities Zone (CAZ)
Westminster CAZ boundary
North Westminster Economic Development Area
West End Special Retail Policy Area (WESRPA)
Primary Shopping Frontage
CAZ Frontage
Major Shopping Centre
District Shopping Centre
Local Shopping Centre
Royal Parks
Westminster Boundary

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

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 5: Kilburn 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.

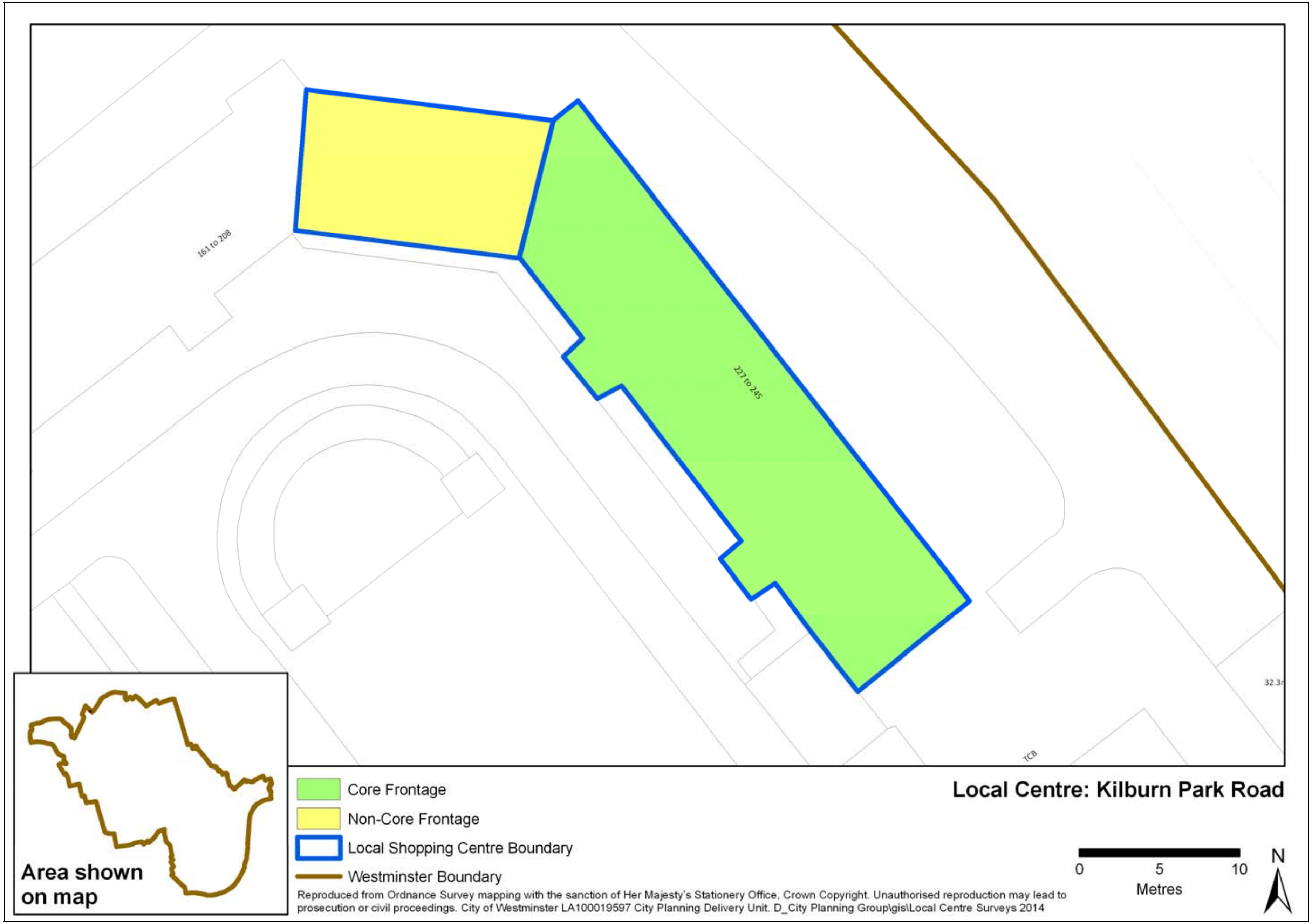
Local Centre **5: Kilburn Park Road**

1. Introduction

1.1 Location

This small Local Centre is located along the main arterial road Maida Vale (A5) in the north west of Westminster, next to the boundary between Westminster and the London Boroughs of Brent and Camden. The residential catchment of the local centre is limited by its proximity to the larger local centres of Maida Vale and Abbey Road/Boundary Road.

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		0	6	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*	*1*	*2*
	Independent	*0*	*2*	*2*	*0*
	Convenience	*0*	*3*	*3*	*3*
Class A2	Financial & Professional	0	1	1	0
Food & Drink		0	1	1	1
Class A3	*Restaurant/Café*	*0*	*1*	*1*	*1*
Class A4	*Pubs/Bars*	*0*	*0*	*0*	*0*
Class A5	*Takeaway*	*0*	*0*	*0*	*0*
	Takeaway/Restaurant	*0*	*0*	*0*	*0*
Sui Generis		0	0	0	0
Vacant Units		0	0	0	2
Arts/Culture		0	0	0	0
Health uses		0	1	1	1
Hotels		0	0	0	0
TOTAL		**0**	**9**	**9**	**9**

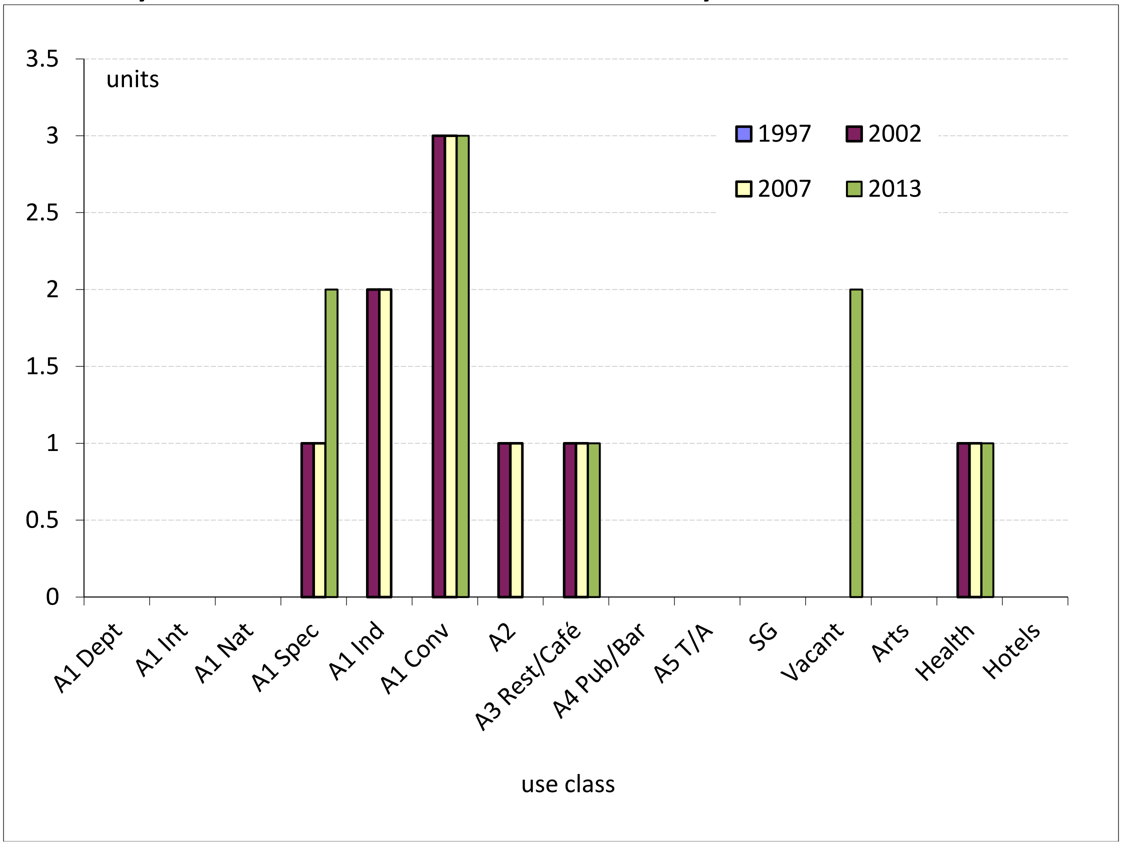
Source: WCC Land Use Survey December 2013

In total there are 9 units, which has remained constant from the previous survey in 2007.

The composition of units has altered slightly with one A2 (estate agents) closing and both the independent retailers closing. One specialist shop has opened (a coffee machine supplier).

The centre has no hotels or Arts space but does have a dentist. The vacant units have increased to two.

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



2.2 Range of A1 Uses

There are no national retailers within the Kilburn Park Road Local Centre. In total there are only five A1 retail units. Three of these are convenience stores, a newsagent and two grocers. There are also two specialist shops, a carpet / flooring store and a coffee machine supplier.

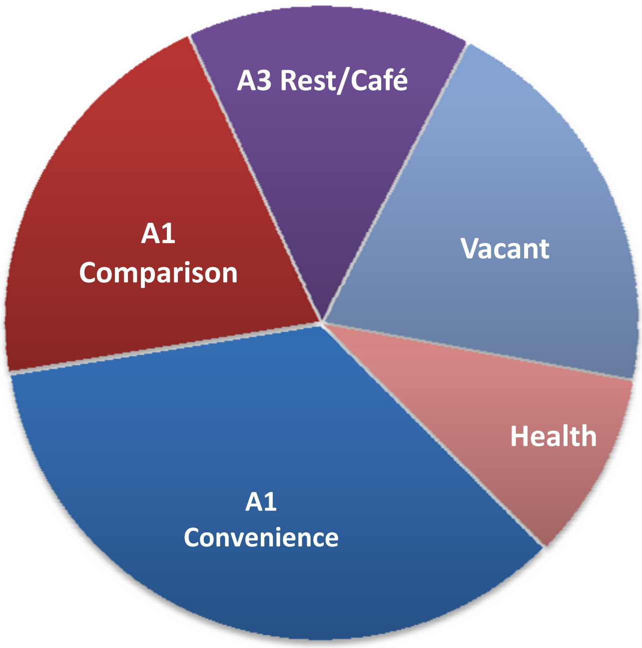
2.3 Total Retail Floor space

Total retail floor space is broken down in Table 2. In total, Kilburn Park Road has 469 sqm of retail floor space, which is below the average of 3,188 sqm for the 39 Local Centres in the City, due to the very small size of the centre. A1 uses account for roughly two thirds of the total floor in the centre, with convenience stores being the largest single use class in terms of floor space. The rest of the space is made up of a combination of the single A2, A3 and Health units that make up the rest of this small local centre. The size of the centre makes it difficult to make meaningful comparisons to the larger local 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	164	34.97%	14.9%
A1 Comparison	97	20.68%	35.2%
A2	0	0.00%	11.2%
A3 Rest/Café	68	14.50%	17.4%
A4 Pub/Bar	0	0.00%	5.1%
Sui Generis	0	0.00%	3.9%
Vacant	95	20.26%	8.6%
Health	45	9.59%	2.0%
Hotels	0	0.00%	0.5%
Art	0	0.00%	1.3%
Leisure	0	0.00%	0.1%
Total	**469**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



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

Kilburn Park Road is a Local Centre with a small selection of local services and food shops as noted. There are no banks, building societies or A2 uses. 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 in Kilburn Park Road is higher than the average rate for Local Centres in the City, as shown in Table 3. The vacancy rate has increased significantly since 2007 and now stands at more than twice the local centre average of 9%, however given the small size of the centre this figure is distorted. The two vacant units are spread throughout the centre, and are all located at ground floor level. The national average vacancy rate for shopping centres is over 14%.

Table 3: Level of Vacant Street Level Property 2013

% Vacant Units				% Local Centre Average
1997	2002	2007	2013	2012
0.00% (0) units	0.00% (0) units	0.00% (0) units	22.22% (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 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 local centre is situated very close to Kilburn Park London Underground station (Bakerloo line) which is situated in the neighbouring London Borough of Brent, and is roughly 5-10 minute walk from Maida Vale London Underground station (Bakerloo line). The local centre is also situated very close to Kilburn High Road mainline train station, and there are several bus routes which serve the centre on Maida Vale (A5), including the number 16 and 98 which serve the centre 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 4 below. The centre’s overall score for attractions is 7.7%, meaning that the centre is not very attractive. This rating is lower than the Local Centre average of 31%, and ranks Kilburn Park Road =38th out of the 39 Local Centres in the City. Kilburn Park Road scored no ‘good’ ratings and only two ‘average’ ratings, illustrating the limited range of services and attractions that the centre has to offer.

4.2 Daytime Amenity

Kilburn Park Road is a relatively unattractive Local Centre, with a day time amenity rating of 41.3% compared with the average for all Local Centres of 68%, and is ranked =38th out of the 39 Local Centres in the City. The centre’s rating is good in terms of the absence of vacant sites, rough sleepers, street drinking, beggars, touting and illegal street traders. The centre has a poor ‘feel good factor’. Presence of litter and food containers, street fouling, the condition of the area, the presence of graffiti, and absence of features that identify the centre and lack of promotion/street events reduces the centre’s overall rating. The presence of security and street lighting are 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)			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	2/26			2/26			2/26		
Percentage	7.69%			7.69%			7.69%		

Source: City of Westminster site survey December 2013

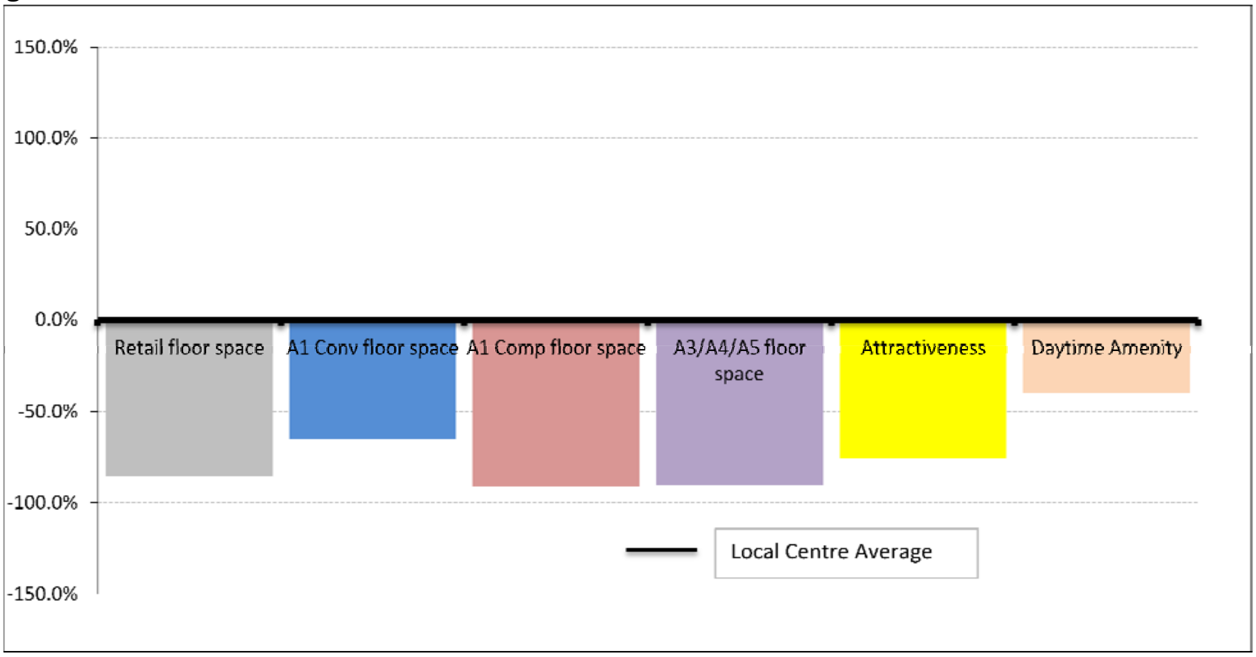
Table 5: Day Time Amenity within the Local Centre 2013

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 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	25/46			21/46			19/46		
Percentage	54%			46%			41%		

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 Park Road is a 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, and for food and drink floor space figures (A3/A4/A5). In terms of the rating of the physical environment, the centre has a much lower than average attractiveness rating, and a below average score for 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 were no planning applications submitted.

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**		**469**
		Total Convenience (A1)		**164**
		Total Comparison (A1)		**97**
		Total Service (A2)		**0**
		Total A3		**68**
		Total A4		**0**
		Total A5		**0**
		Total Sui Generis		**0**
		Total Vacant		**95**
	Retail Offer	**Total Number of Shop Units**	**9**	
		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	**2**	
		f) Independent shops	**0**	
		Total Comparison Multiples	**2**	
		Total Number of A2 Units	**0**	
		Total Number of A3 Units	**1**	
		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.)**	**1**	
HOTELS			**0**	

In terms of its vitality and viability, and general economic health this centre is considered to be 'in decline', a worsening of the situation in 2007 when the centre was 'neutral'. This is mainly due to the high vacancy rate, which is a significant increase on the results from the previous survey 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

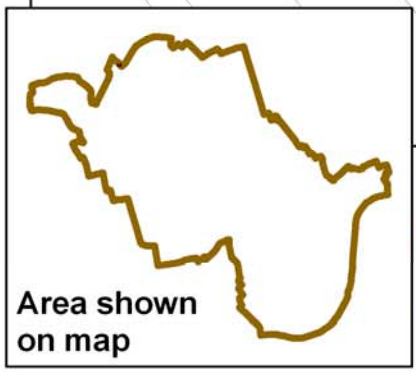
Views of Kilburn Park Road local centre

The core shopping frontage of Kilburn Park Road local centre.

The secondary shopping frontage of Kilburn Park Road local shopping centre.

Refuse on the street next to the secondary shopping frontage in the centre.

					A1	A1	A3	Vacant	Health	2007 Use
ADDRESS	FASCIA	DESCRIPTION	USE	SQM	Conv.	Spec.	Res/Caf			
227KILBURN PARK ROAD	Expresso Centre	Coffee Machine Supplier	A1 Spec	54		1				A1 Ind
229KILBURN PARK ROAD	Ryan Hair	HAIRDRESSER	Vacant	54				1		A1 Ind
231KILBURN PARK ROAD	Anju News	NEWSAGENT	A1 Conv	57	1					A1 Conv
233KILBURN PARK ROAD	Queens FOOD AND WINE	GROCERS	A1 Conv	53	1					A1 Conv
235KILBURN PARK ROAD	Queens Cottage	CAFÉ	A3 Rest/Café	68			1			A3 Rest/Café
237-239KILBURN PARK ROAD	Milad SUPERMARKET	GROCERS	A1 Conv	54	1					A1 Conv
241KILBURN PARK ROAD	MAIDA VALE ESTATES	Vacant	Vacant	41				1		A2
243KILBURN PARK ROAD	DENTAL SURGERY	DENTIST	Health	45					1	Health
245KILBURN PARK ROAD	RAINBOW CARPETS AND CURTAINS	CARPETS AND FLOORING	A1 Spec	43		1				A1 Spec



Source: GOAD Retail Survey 2013

Local Centre: Kilburn Park Road

Local Shopping Centre Boundary

A1: Retail

D1: Non-Res Institutions

A3: Restaurant/Café

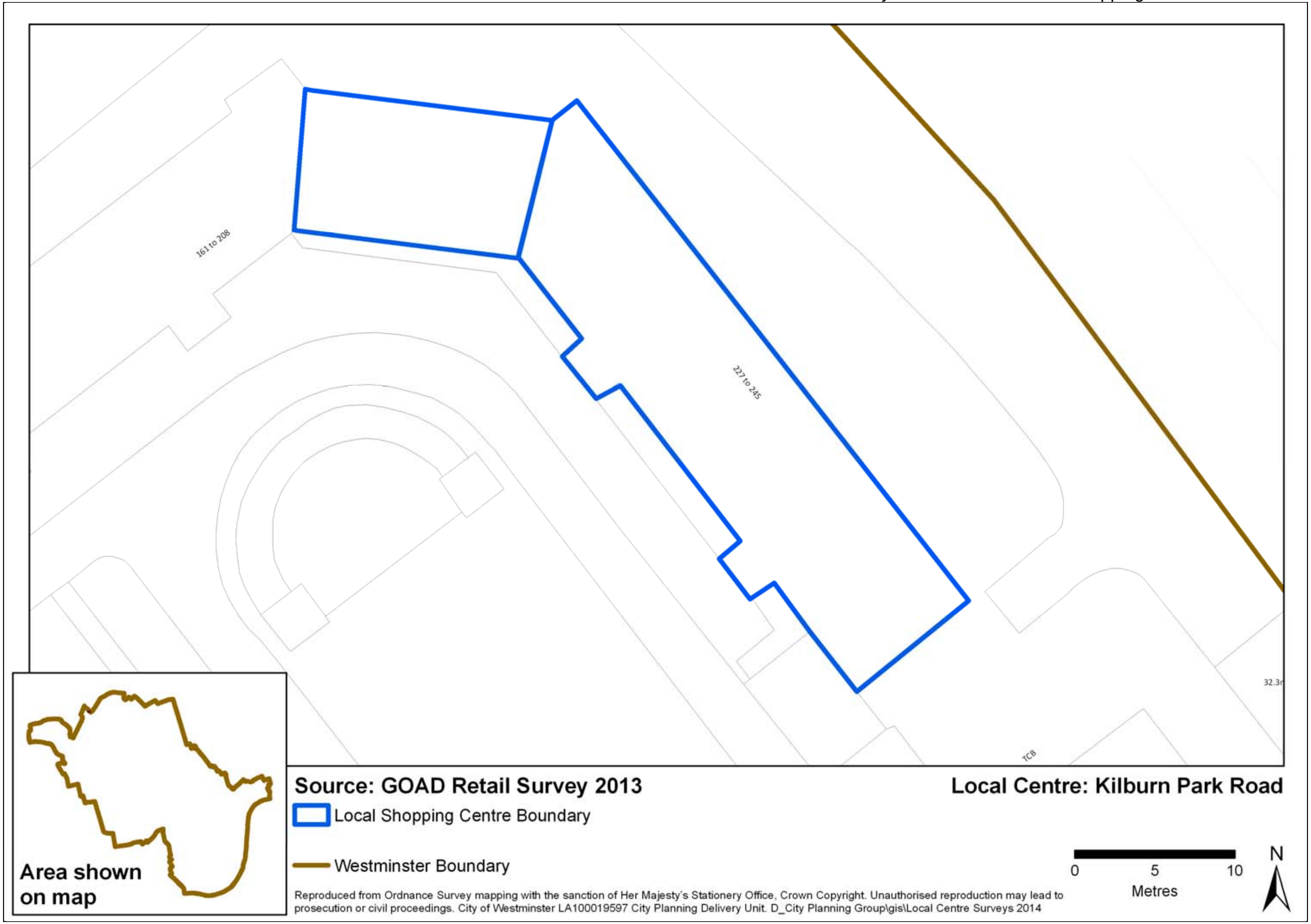
UC: Unclassified

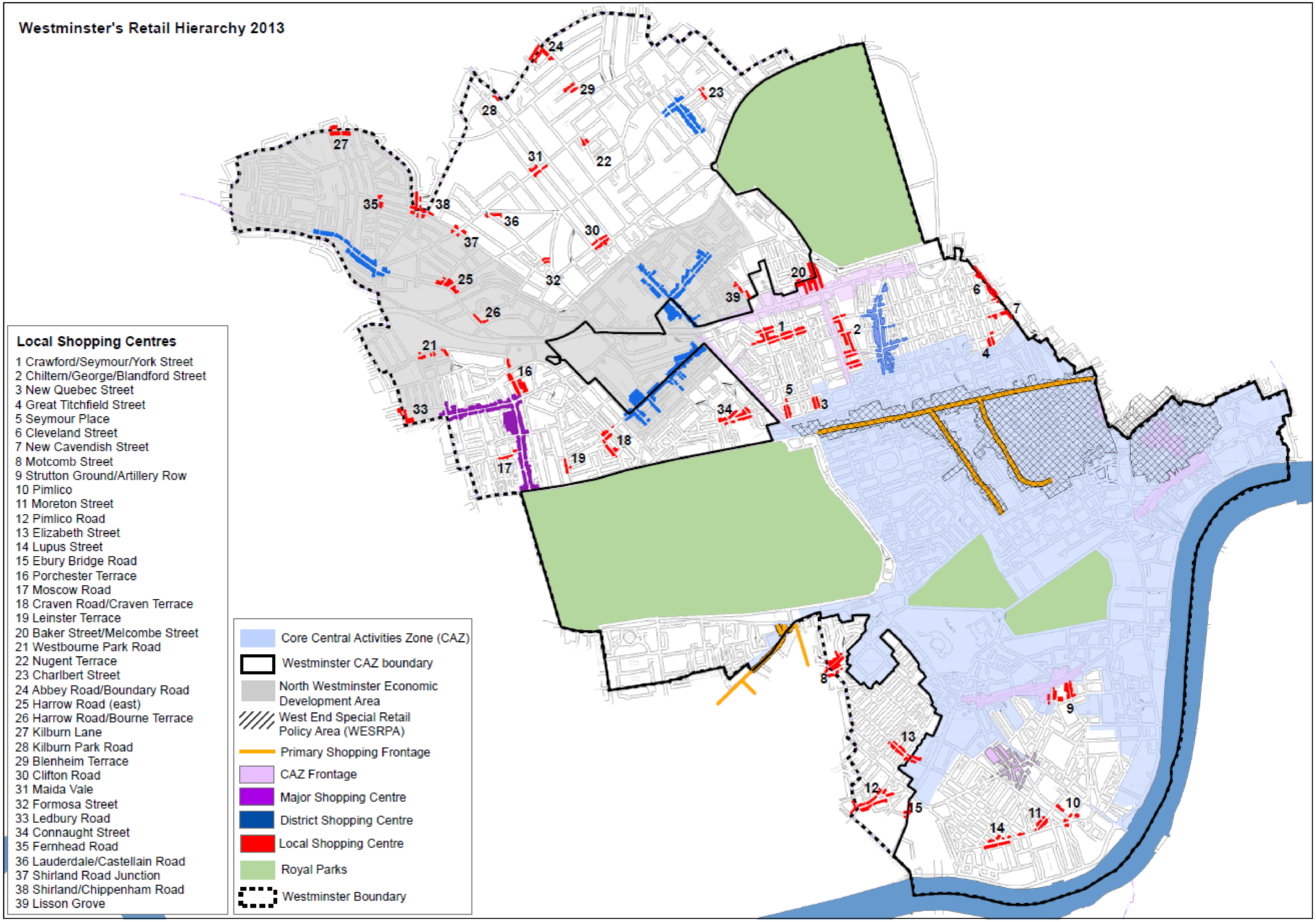
Westminster Boundary

0 5 10

Metres

N


161 to 208
227 to 245
TCB
Area shown on map
Source: GOAD Retail Survey 2013
Local Centre: Kilburn Park Road
Local Shopping Centre Boundary
Westminster Boundary
0
5
10
Metres
N



Westminster's Retail Hierarchy 2013
Local Shopping Centres
1 Crawford/Seymour/York Street
2 Chiltern/George/Blandford Street
3 New Quebec Street
4 Great Titchfield Street
5 Seymour Place
6 Cleveland Street
7 New Cavendish Street
8 Motcomb Street
9 Strutton Ground/Artillery Row
10 Pimlico
11 Moreton Street
12 Pimlico Road
13 Elizabeth Street
14 Lupus Street
15 Ebury Bridge Road
16 Porchester Terrace
17 Moscow Road
18 Craven Road/Craven Terrace
19 Leinster Terrace
20 Baker Street/Melcombe Street
21 Westbourne Park Road
22 Nugent Terrace
23 Charlbert Street
24 Abbey Road/Boundary Road
25 Harrow Road (east)
26 Harrow Road/Bourne Terrace
27 Kilburn Lane
28 Kilburn Park Road
29 Blenheim Terrace
30 Clifton Road
31 Maida Vale
32 Formosa Street
33 Ledbury Road
34 Connaught Street
35 Fernhead Road
36 Lauderdale/Castellain Road
37 Shirland Road Junction
38 Shirland/Chippenham Road
39 Lisson Grove
Core Central Activities Zone (CAZ)
Westminster CAZ boundary
North Westminster Economic Development Area
West End Special Retail Policy Area (WESRPA)
Primary Shopping Frontage
CAZ Frontage
Major Shopping Centre
District Shopping Centre
Local Shopping Centre
Royal Parks
Westminster Boundary

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 6: Lisson Grove

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 **6: Lisson Grove**

1. Introduction

1.1 Location

Lisson Grove is a small linear Local Centre located to the north of Marylebone Road. Smaller units are concentrated on the western side of Lisson Grove, while a relatively large Tesco Express store, which opened in 2008/09, fronts the eastern side of Lisson Grove. The catchment area for the centre is limited by the proximity of the large Edgware Road/Church Street District Centre to the west.

Figure 1: Local Centre Boundary 2013

2 Land Use

2.1 Range of Uses

Table 1 shows that Lisson Grove 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 1997	No. of Units 2002	No. of Units 2007	No. of Units 2013
Class A1 Retail		8	5	6	5
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*0*
	National retailers	*0*	*0*	*0*	*1*
	Specialist Independent	*3*	*1*	*1*	*0*
	Independent	*2*	*1*	*2*	*3*
	Convenience	*3*	*3*	*3*	*1*
Class A2	Financial & Professional	1	4	2	3
Food & Drink		0	6	5	7
Class A3	*Restaurant/Café*	*0*	*3*	*3*	*5*
Class A4	*Pubs/Bars*	*0*	*1*	*1*	*1*
Class A5	*Takeaway*	*0*	*2*	*1*	*0*
	Takeaway/Restaurant	*0*	*0*	*0*	*1*
Sui Generis		1	0	0	0
Vacant Units		6	2	4	1
Arts/Culture		0	0	0	0
Health uses		0	0	0	0
Hotels		0	0	0	0
TOTAL		**16**	**17**	**17**	**16**

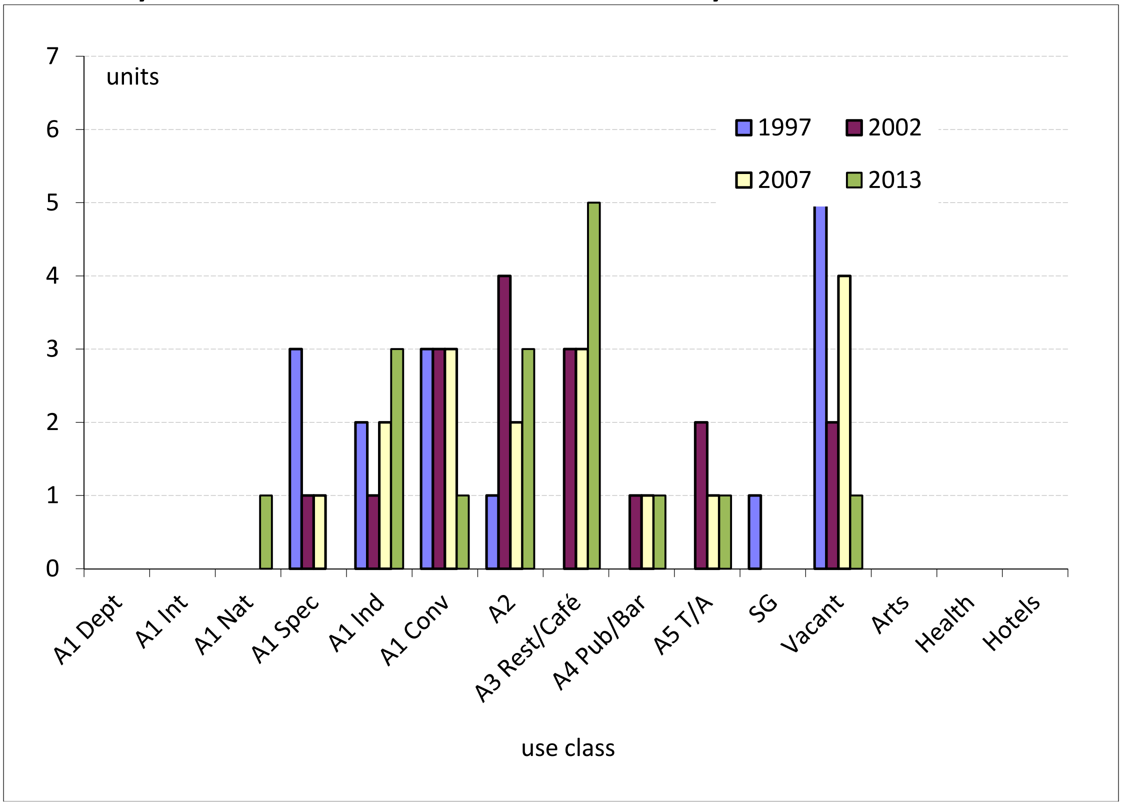
Source: WCC Land Use Survey December 2013

Lisson Grove Local Centre contains 16 units in total, compared to 17 in 2007 as a result of the amalgamation of two vacant units into one restaurant, the change of use of a further vacant unit to residential use, and the addition of a new retail unit as part of the Local Centre.

The Local Centre has expanded following the change of use of former office premises into a Tesco Express convenience shop, amounting to 493 sq m, which is significantly larger than the two former food shops. Over half of the units are in class A3-A5 use, comprising five restaurants/cafes, one Public House and a very popular takeaway. Three class A2 units are present. The Local Centre contains only one vacant unit, but does not contain any arts, health or hotel uses.

The mix is reflective of the catchment the centre, with the large convenience retail store, and then a mix of food and drink uses serving the large nearby resident population, but also local workers in the many offices around Marylebone Station (and therefore also some commuters), which is one minute from the centre.

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



2.2 Range of A1 Uses

There are five class A1 retail units, including one new national retailer, three independent stores and one convenience store. A Tesco Express store opened in 2008/09, which resulted in the expansion of the Local Centre. Since the 2007 survey, the Best One food shop is now in use as a cafe. The independent retailers comprise a locksmith, a nail salon and a dry cleaners. Notably, the dry cleaners has replaced a former Post Office, which might be considered a significant loss for local residents. The remaining convenience store is a pharmacy, which was previously in use as a newsagent.

The A2 uses include a solicitor's office, a large Job Centre and a small recruitment centre, which has replaced a former specialist furniture shop. As a consequence, there are no specialist independent shops within the Local Centre. This Local Centre does not provide the same range and selection of shops and services found in large Local Centres or District Centres.

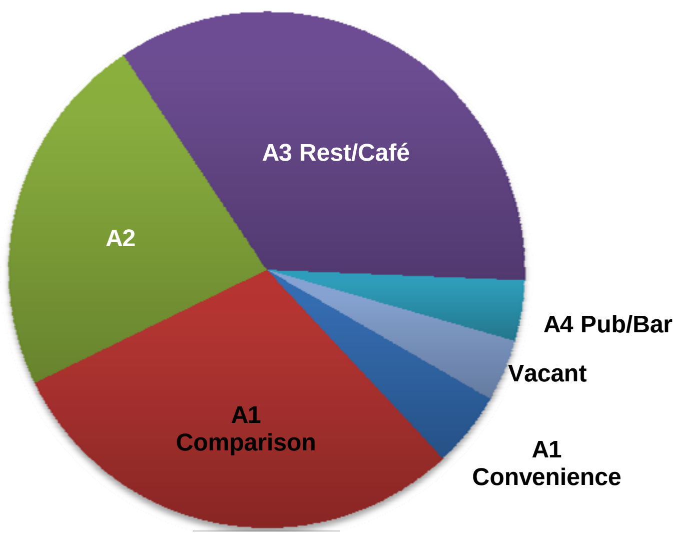
2.3 Total Retail Floor Space

Total retail floor space in Lisson Grove is broken down in Table 2. In total, the centre has 1,965 sqm of retail floor space, which is below the average of 3,188 sqm for the 39 Local Centres in the City.

Table 2: Total Retail Floor space 2013

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2014)
A1 Convenience	98	4.71%	14.9%
A1 Comparison	619	29.73%	35.2%
A2	476	22.86%	11.2%
A3 Rest/Café	729	35.01%	17.4%
A4 Pub/Bar	79	3.79%	5.1%
Sui Generis	0	0.00%	3.9%
Vacant	81	3.89%	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	**2,082**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



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

Table 2 shows that A1 uses constitute 31% of the total floorspace, while A2 and A3-A4 uses represent 24% and 41% of the total floorspace respectively. There are three relatively large units accommodating the Tesco Express (493 sqm), the Job Centre (363 sqm) and the Sea Shell of Lisson Grove restaurant (317 sqm). The single vacant unit comprises 81 sqm of floorspace.

2.4 Proportion of Vacant Street Level Property

The unit vacancy rate in Lisson Grove is lower than the average rate for Local Centres in the City, as shown in Table 3. Note that the number of vacant units has fluctuated significantly since 1997; surveys of 2007 and 2013 show a decrease from four to just one vacant unit, which was also vacant in 2007. Occupiers have changed frequently in the centre as well, particularly the independent food and drink offer.

Table 3: Level of Vacant Street Level Property 2013

% Vacant Units				% Local Centre Average
1997	2002	2007	2013	2013
30.0% (6) units	11.8% (2) units	23.5% (4) units	6.3% (1) units	8.3% (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 active in terms of pedestrian vibrancy when the Health Check Survey was carried out on a pleasant, weekday morning in February 2014.

3.2 Accessibility on foot and by public transport

Lisson Grove is located within a three minute walk of Marylebone mainline rail station and underground station. Although no bus routes pass directly along the Local Centre, bus services can be accessed within a three minute walk; two routes serve Lisson Grove to north and several routes pass along Marylebone Road to the south. One issue is the dominance of traffic in the centre as Lisson Grove is a very busy road connecting to Marylebone Road to the south, with side roads also being busy. This makes the pedestrian environment hostile, and the road is hard to cross, particularly in the main shopping part 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 Table 4 below. The centre's overall score for attractions is 30.8%, meaning that the environmental quality and range of attractions is poor. The rating is just lower than the Local Centre average of 31.1%, and ranks Lisson Grove =22nd out of the 39 Local Centres in the City. The availability of food shopping has been maintained as good, however this is considered to have significantly improved with the introduction of a Tesco Express store and the loss of the relatively small Best One store. The prominence of specialist shops has also been downgraded, given that there are no specialist independent shops within the Lisson Grove Local Centre. 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 rated as poor for all of the other categories, aside from availability of local services (which was rated as average due to the presence of the Job Centre) and the quality of the retail environment. However, the quality of restaurants has been upgraded to good to reflect the increasing number and range of restaurants/cafes on offer.

4.2 Daytime Amenity

Lisson Grove is a pleasant Local Centre with a daytime amenity rating of 54.3%, compared with the average for all Local Centres of 68%, and is ranked =33rd out of the 39 Local Centres in the City. The daytime amenity rating has marginally improved since 2007, due to the number of vacant units falling from four to one; however, the majority of the factors were rated as average. Hoardings at ground floor level around the building works at Nos. 53-55 Lisson Grove caused a minor obstruction at the time of the survey, however this would be temporary and therefore the rating for 'ease of passage for pedestrians' has not been affected. Several factors relating to security were rated as good, while factors relating to the identity of the town centre were rated as poor. The overall 'feel good' factor was also considered to be poor.

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**			**8/26**		
Percentage	**26.9%**			**30.8%**			**30.8%**		

Source: City of Westminster site survey December 2013

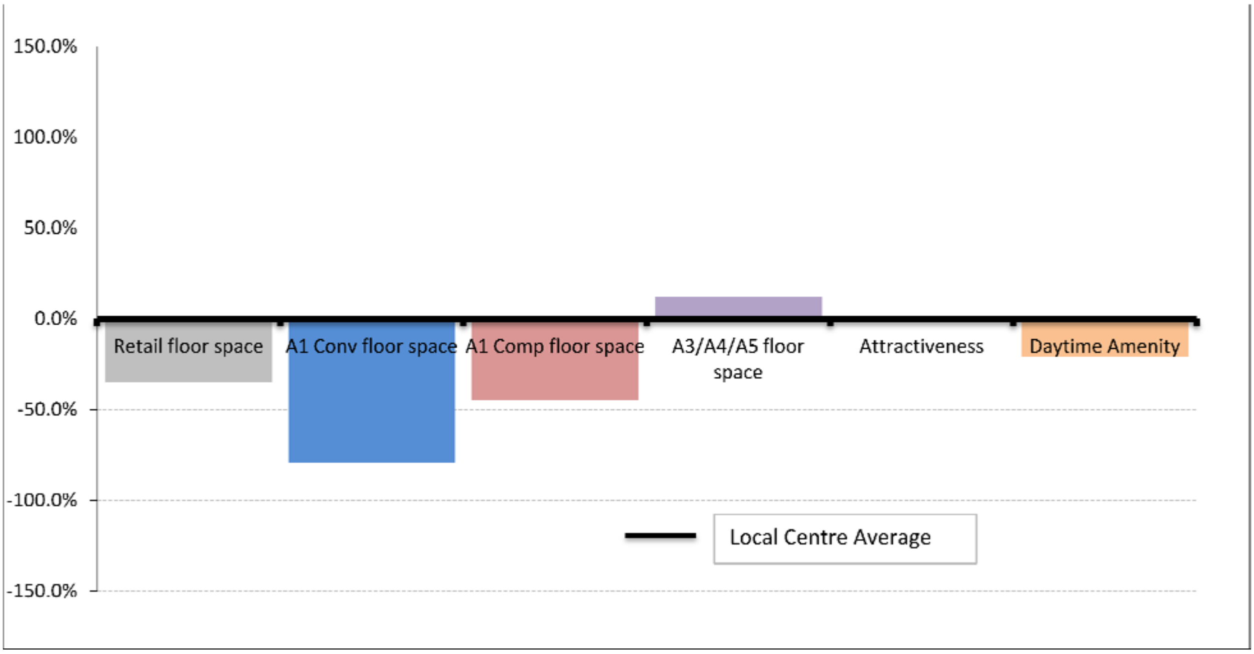
Table 5: Day Time Amenity within the Local Centre 2013

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	**13/46**			**24/46**			**25/46**		
Percentage	**28.3%**			**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



Lisson Grove is a reasonably small Local Centre that is only two thirds the size 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 below the Local Centre average due to the size of this centre. In terms of the rating of the physical environment, both the attractiveness rating and the daytime amenity rating are below the Local Centre average, illustrating the poor quality of the retail environment.

5.2 Strengths, Weaknesses, Opportunities and Threats

SWOT analysis

6. Future capacity

6.1 Potential Capacity for Growth

The redevelopment of a former light industrial building at 53-55 Lisson Grove into five residential flats is likely to increase the immediate customer base. Note that the occupation of the vacant unit 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**		**2,082**
		Total Convenience (A1)		**98**
		Total Comparison (A1)		**619**
		Total Service (A2)		**476**
		Total A3		**677**
		Total A4		**79**
		Total A5		**52**
		Total Sui Generis		**0**
		Total Vacant		**81**
	Retail Offer	**Total Number of Shop Units**	**16**	
		Total Number of A1 Units	**5**	
		a) Convenience shops	**1**	
		b) Department/principal stores	**0**	
		c) Prestige international shops	**0**	
		d) National comparison retailers	**1**	
		e) Specialist Independent shops	**0**	
		f) Independent shops	**3**	
		Total Comparison Multiples	**4**	
		Total Number of A2 Units	**3**	
		Total Number of A3 Units	**5**	
		Total Number of A4 Units	**1**	
		Total Number of A5 Units	**1**	
		Total Number of Sui Generis	**0**	
		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, overall this centre is considered to have somewhat improved following significant change since 2007, when it was rated as ‘in decline’. Despite the loss of the only specialist unit and Post Office, it has seen the introduction of the Tesco Express store and a pharmacy, an increase in the quantity and quality of the restaurant/cafe offer, and a reduction in the number of vacant units.

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

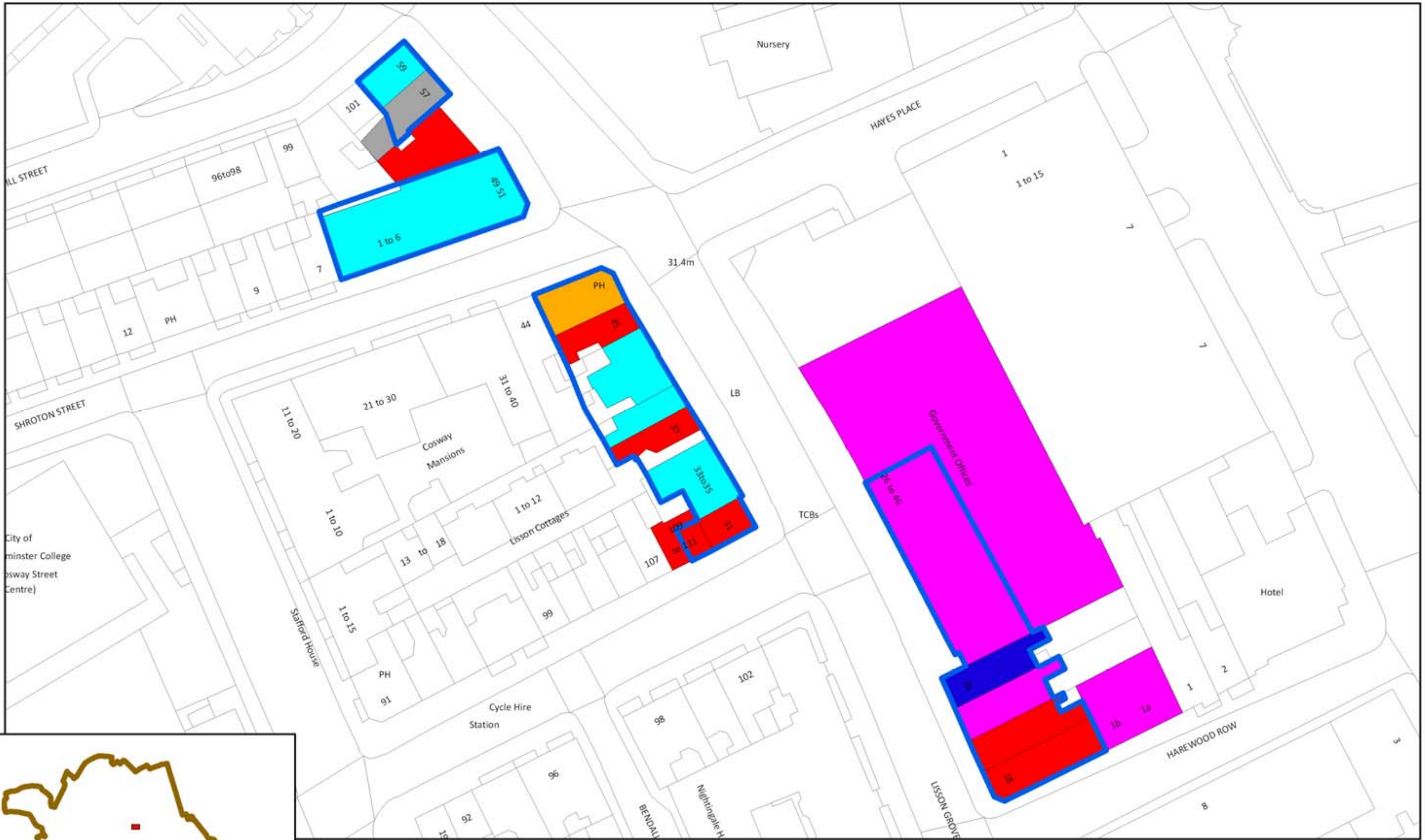
Views of Lisson Grove Local Centre

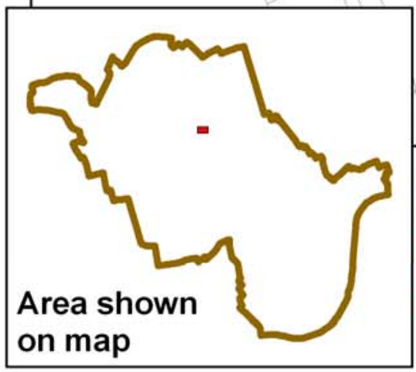
A Tesco Express store opened in 2008/09.

Lisson Grove is a pleasant Local Centre.

Over half of the units are in class A3-A5 use, comprising five restaurants/cafes, one Public House and a takeaway.

LISSON GROVE													
					A1	A1	A1		A3	A4	A3	Vacant	2007 Use
ADDRESS	FASCIA	DESCRIPTION	USE	SQM	Conv.	Nat.	Ind	A2	Res/Caf	Pub/Bar	Rest/TA		
109-111BELL STREET	EUROMASTER LOCKSMITHS	LOCKSMITHS	A1 Ind	19			1						A1 Ind
18LISSON GROVE	MARYLEBONE PHARMACY	PHARMACY	A1 Conv	98	1								A1 Conv
20LISSON GROVE	PIE AND MASH SEAFOOD BAR	RESTAURANT	A3 Rest/Café	85					1				A3 Rest/Café
22LISSON GROVE	VACANT	VACANT SHOP	Vacant	81								1	Vacant
24LISSON GROVE	ANTHONY LOUCA	SOLICITOR	A2	77				1					A2
26-34LISSON GROVE	JOB CENTRE	JOB CENTRE	A2	363				1					A2
31LISSON GROVE	PLAN CARE	RECRUITMENT AGENCY	A2	36				1					A1 Spec
33-35LISSON GROVE	CAFE MARAIS	CAFE	A3 Rest/Café	93					1				A1 Conv
37LISSON GROVE	MARYLEBONE DRYCLEAN	DRY CLEANERS	A1 Ind	49			1						A1 Conv
39LISSON GROVE	NOSH CAFE	RESTAURANT AND TAKEAWAY	A3 Rest/TA	52							1		A3 Rest/TA
41LISSON GROVE *	OZZ	RESTAURANT	A3 Rest/Café	132					1				Vacant
43LISSON GROVE **	OZZ	RESTAURANT	A3 Rest/Café	0									Vacant
45LISSON GROVE	GAMOUR	NAIL SPA	A1 Ind	58			1						A1 Ind
47LISSON GROVE	THE GLOBE	PUBLIC HOUSE	A3 Pub/Bar	79						1			A3 Pub/Bar
49-51LISSON GROVE	SEA SHELL OF LISSON GROVE	RESTAURANT	A3 Rest/Café	317					1				A3 Rest/Café
57LISSON GROVE *	RESIDENTIAL	RESIDENTIAL	RESIDENTIAL	51									Vacant
59LISSON GROVE	SUNSNACKS CAFE	CAFE	A3 Rest/Café	50					1				A3 Rest/Café
26-46LISSON GROVE ***	TESCO EXPRESS	SMALL SUPERMARKET	A1 Nat	493		1							B1





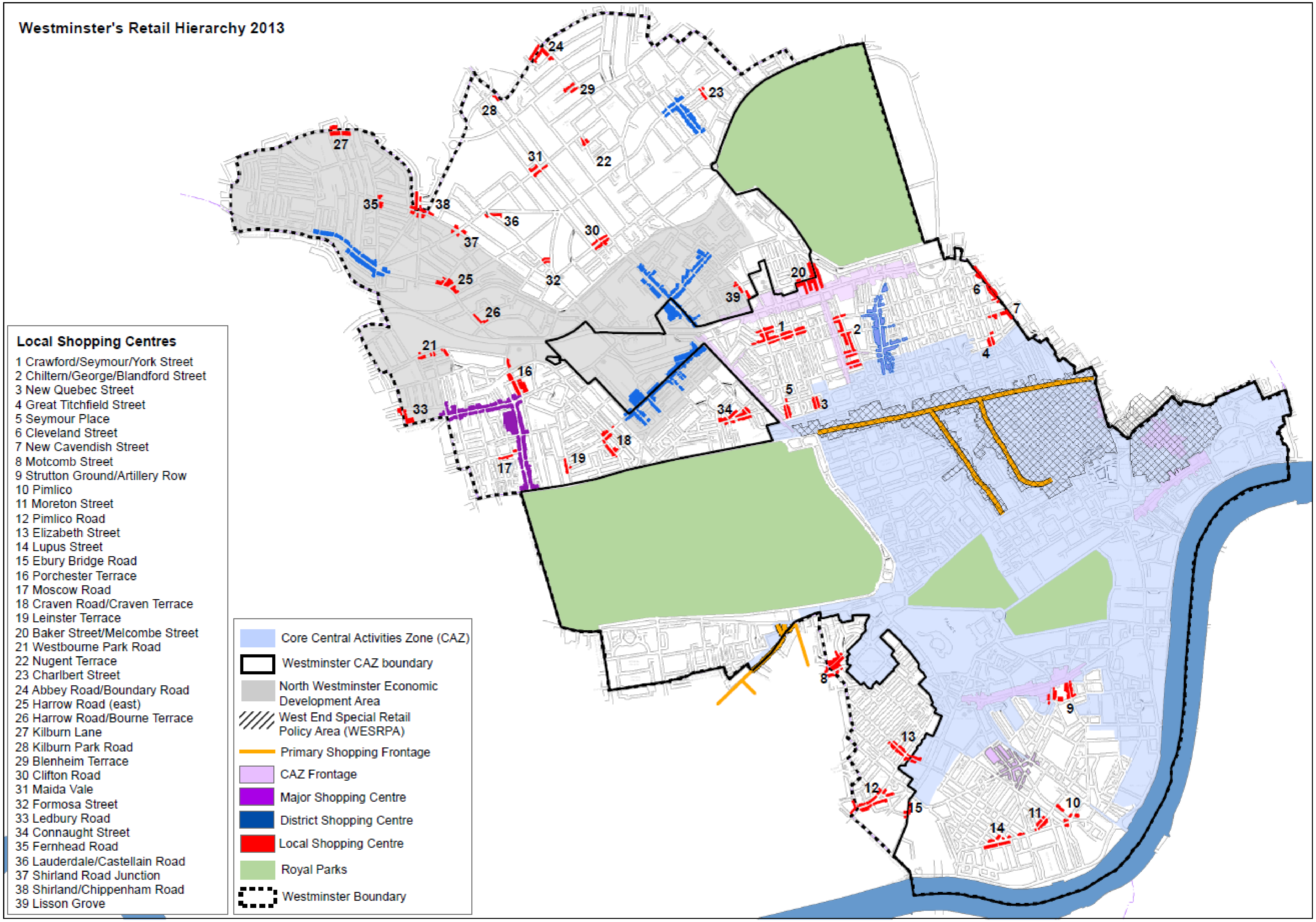
Source: GOAD Retail Survey 2013

Local Centre: Lisson Grove

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

0 12.5 25
Metres
N


Nursery
HAYES PLACE
ILL STREET
SHROTON STREET
Cosway Mansions
Lisson Cottages
Government Offices
Hotel
Cycle Hire Station
Stafford House
HAREWOOD ROW
LISSON GROVE
Nightingale H
BENDALL
City of
minster College
osway Street
Centre)
31.4m
LB
TCBs
PH
Area shown on map
Source: GOAD Retail Survey 2013
Local Centre: Lisson Grove
Completed 2007-2013
Local Shopping Centre Boundary
Vacant
0
12.5
25
Metres
N


Westminster's Retail Hierarchy 2013
Local Shopping Centres
1 Crawford/Seymour/York Street
2 Chiltern/George/Blandford Street
3 New Quebec Street
4 Great Titchfield Street
5 Seymour Place
6 Cleveland Street
7 New Cavendish Street
8 Motcomb Street
9 Strutton Ground/Artillery Row
10 Pimlico
11 Moreton Street
12 Pimlico Road
13 Elizabeth Street
14 Lupus Street
15 Ebury Bridge Road
16 Porchester Terrace
17 Moscow Road
18 Craven Road/Craven Terrace
19 Leinster Terrace
20 Baker Street/Melcombe Street
21 Westbourne Park Road
22 Nugent Terrace
23 Charlbert Street
24 Abbey Road/Boundary Road
25 Harrow Road (east)
26 Harrow Road/Bourne Terrace
27 Kilburn Lane
28 Kilburn Park Road
29 Blenheim Terrace
30 Clifton Road
31 Maida Vale
32 Formosa Street
33 Ledbury Road
34 Connaught Street
35 Fernhead Road
36 Lauderdale/Castellain Road
37 Shirland Road Junction
38 Shirland/Chippenham Road
39 Lisson Grove
Core Central Activities Zone (CAZ)
Westminster CAZ boundary
North Westminster Economic Development Area
West End Special Retail Policy Area (WESRPA)
Primary Shopping Frontage
CAZ Frontage
Major Shopping Centre
District Shopping Centre
Local Shopping Centre
Royal Parks
Westminster Boundary

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 7: Ebury Bridge Road

Contents

Tables

Figures

(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.

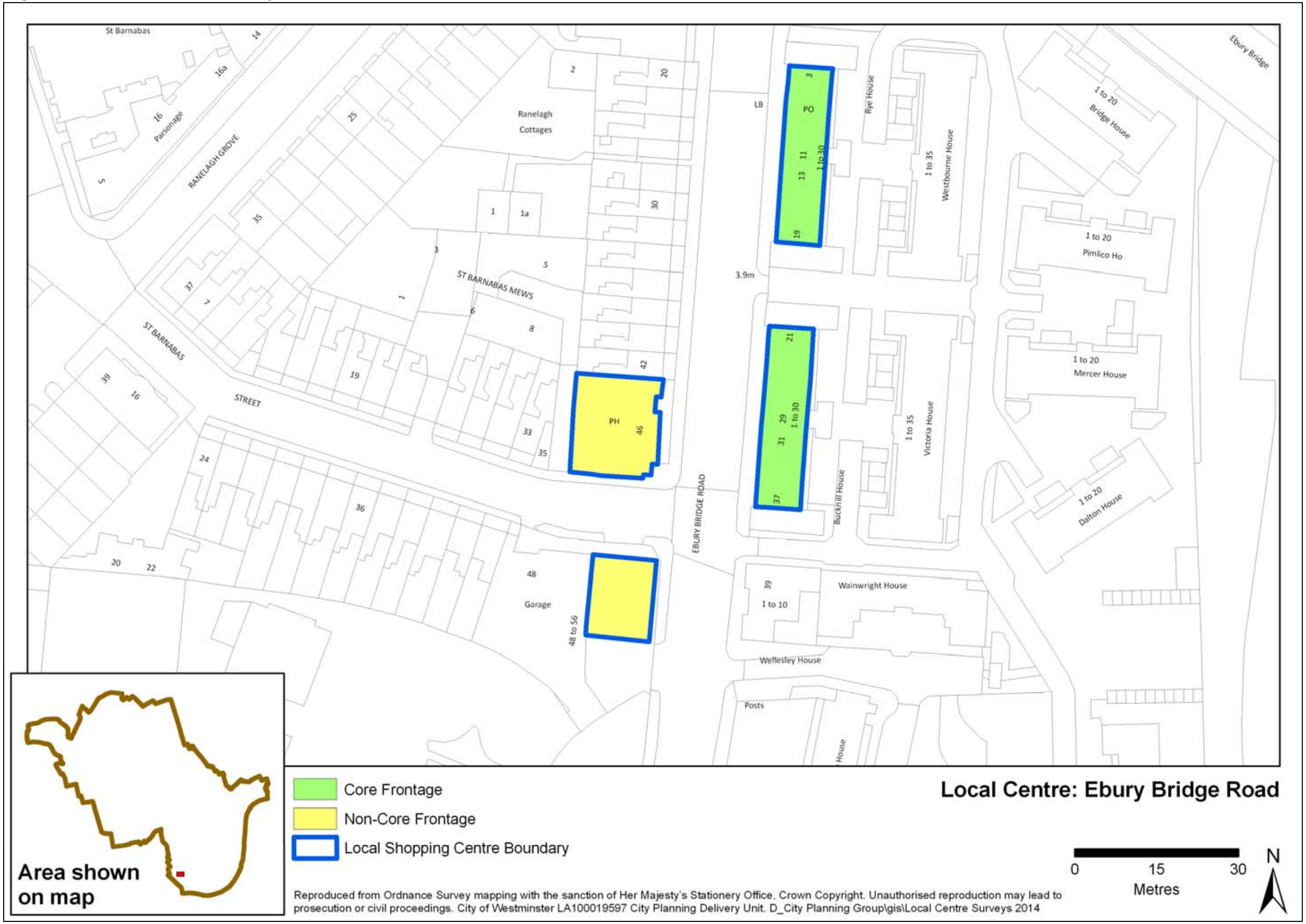
Local Centre 7: Ebury Bridge Road

1. Introduction

1.1 Location

Ebury Bridge Road is a small linear local centre located in the Pimlico area of south Westminster, close to Chelsea Barracks and Buckingham Palace Road which leads up to Victoria. Most of the shop units in this centre are situated on the east side of Ebury Bridge Road (**Error! Reference source not found.**), adjacent to the Ebury Bridge Estate. The catchment of the centre is restricted by the railway tracks to the east and its proximity to the much larger Pimlico Road local centre to the west, however a reasonable resident population remains in the vicinity.

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		0	9	10	11
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*0*
	National retailers	*0*	*0*	*0*	*0*
	Specialist Independent	*0*	*2*	*1*	*2*
	Independent	*0*	*3*	*6*	*6*
	Convenience	*0*	*4*	*3*	*3*
Class A2	Financial & Professional	0	0	2	1
Food & Drink		0	2	2	2
Class A3	*Restaurant/Café*	*0*	*1*	*1*	*1*
Class A4	*Pubs/Bars*	*0*	*1*	*1*	*1*
Class A5	*Takeaway*	*0*	*0*	*0*	*0*
	Takeaway/Restaurant	*0*	*0*	*0*	*0*
Sui Generis		1	1	1	0
Vacant Units		4	1	0	0
Arts/Culture		0	0	0	0
Health uses		0	0	0	0
Hotels		0	0	0	0
TOTAL		**5**	**13**	**15**	**14**

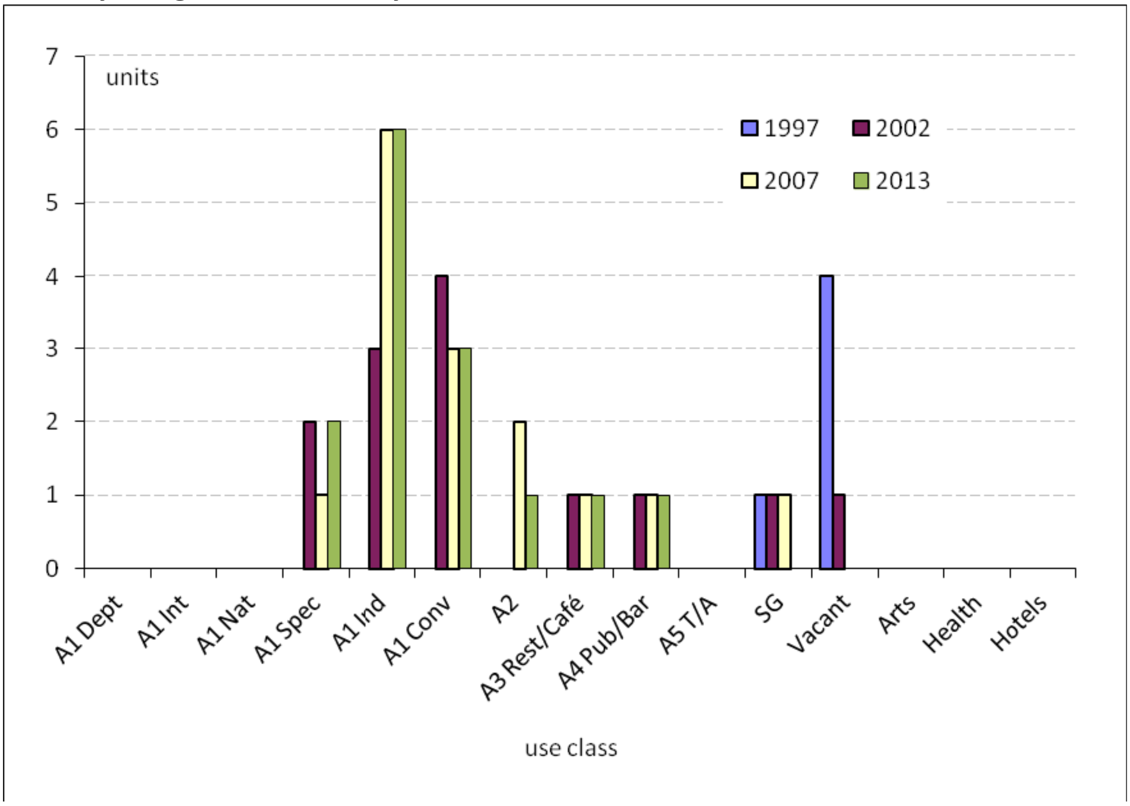
Source: WCC Land Use Survey July 2013

In total there are 14 units, which is one fewer than was recorded when the centre was last surveyed in 2007.

The number of A1 retail uses in Ebury Bridge Road Local Shopping Centre has increased by one unit since 2007. The types of A1 retailer have basically remained the same outside of the gain of one specialist independent retailer. Independent retail remains the dominant type of occupier in the centre. The number of Class A2 uses has decreased by one unit and the number of Class A3 uses has remained the same. In general there has been little movement with a Sui Generis unit converting to a specialist retailer.

The centre is dominated by A1 uses and contains no arts, health or hotel uses. A description of these Use Classes is included in the Glossary of Terms attached to this report.

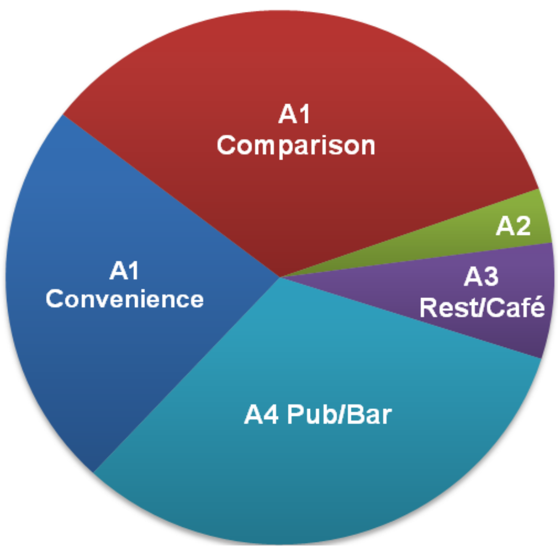
Figure 1 Ebury Bridge Road: Units by use class



2.2 Range of A1 Uses

Ebury Bridge Road has no department stores or international or national retailers, reflective of the small-scale of units in this centre, which average approximately 35sqm each. The centre has 11 Class A1 retail units including 6 independent retailers, 3 convenience stores and 2 specialist retailers. The specialist retailers include a jewellers and a lighting shop. The independent retailers include a travel agency and a Drycleaners. The high proportion of convenience and comparison shops (57%) and no multiple retailers suggests that Ebury Bridge Road serves local residents with a mix of convenience and comparison shopping facilities.

Figure 2 Retail Units 2013



2.3 Total Retail Floorspace

Total retail floor space in Ebury Bridge Road is broken down in Table 2 below. In total, Ebury Bridge Road has 711 sqm of retail floor space, which is below the average of 3,188 sqm for the 39 Local Centres in the City. Ebury Bridge Road has comparable proportions of convenience and comparison retail floor space, which together account for 57% of the total floor space in this centre. There is a high proportion of class A4 pub/bar floorspace, however this is all contained in one larger unit on the western side of Ebury Bridge Road. The centre has a lower than average proportion of A1 comparison floor space than other local centres in Westminster.

Ebury Bridge Road is a quiet Local Centre with a small selection of local services and retailers. 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 elsewhere in Westminster. It is important to maintain the existing local range of convenience shops in the Ebury Bridge Road Local Centre as they encourage walking, and make city life more practical and attractive.

Table 2 Total Retail Floor space 2013

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2014)
A1 Convenience	167	23.49%	14.9%
A1 Comparison	243	34.17%	35.2%
A2	24	3.31%	11.2%
A3 Rest/Café	50	7.01%	17.4%
A4 Pub/Bar	228	32.02%	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	**711**	**100%**	**100%**

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

2.4 Proportion of Vacant Street Level Property

The unit vacancy rate in Ebury Bridge Road is lower than the average rate for Local Centres in Westminster, as shown in **Table 3** below. The vacancy rate has decreased to zero percent since 2007 and is now below the Local Centre average of 8%. There are no vacant units at ground floor level at the moment and it could mean that the retail market is performing well here.

The *general* layout of the centre suggests potential (subject to other policy considerations) for the residential units immediately adjacent to the shops on the eastern side of this centre to be converted to retail use, to cover any other market demands as a consequence of the new development proposal for the Ebury Bridge Estate and wider area. There is potential to better use space of the ground floor units, located next to the core frontage of the local shopping centre, for retail activities. This will give the opportunity to improve the quality of the units and reduce the existing conditions of damp for the residential units, which should be relocated above the retail units in order to discourage any potential crime/vandalism after working hours. Nevertheless, the Council will not accept any overall loss of residential, and the architectural design of the existing street blocks, with the corner residential units being slightly set-forward from the shopping parades, does not naturally lend itself to retail conversion. These residential book-ends act as natural gateways into the housing estate and do not significantly distract from or break up the existing retail frontage. Their future will be the subject of further review through the Ebury Bridge Estate Master plan process (see Section 6 below).

Table 3 Level of Vacant Street Level Property 2013

	% Vacant Units 1997	% Vacant Units 2002	% Vacant Units 2007	% Vacant Units 2013	% Local Centre Average 2013
Ebury Bridge Road	N/A	25% (4 units)	6.3% (1 unit)	0% (0 units)	8% (1 unit)

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

3. Accessibility

3.1 Pedestrian Flows (footfall)

The centre was found to be quiet when the Health Check Survey was carried out on a weekday afternoon in July 2013.

3.2 Accessibility on foot and by public transport

Ebury Bridge Road local centre is accessed mainly on foot or by bus. The nearest London Underground stations are Sloane Square (District and Circle Lines) which is roughly ten minutes walk away, and Victoria mainline and London Underground Station which is 10-15 minutes' walk away. There are many bus routes which run close to the local centre, including the number 44 which runs down Ebury Bridge Road, and then seven other routes which run along the neighbouring roads of Chelsea Bridge Road, Pimlico Road and Sutherland Street/Ebury Bridge. Victoria Coach Station is also a short 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 38.46%, meaning that the centre offers average attractions. This score has more than doubled in comparison with the 2007 report. This is above the Local Centre average of 31%, and ranks Ebury Bridge Road 14 out of the 39 Local Centres in Westminster.

Ebury Bridge Road has a poor provision of multiple retailers, cultural/community events, sport and leisure facilities and bank/building society provision, however, the centre's main strength is its good provision of independent, specialist independent and convenience shops.

4.3 Daytime Amenity

Ebury Bridge Road is a relatively attractive Local Centre. The centre's day time amenity rating is 65% compared with the average for all Local Centres of 68%, and is ranked =15th out of the 39 Local Centres in Westminster . The centre's rating is good in terms of the absence of litter, refuse bags, street fouling, beggars, rough sleepers, street drinkers, touting and illegal street traders and ease of passage for pedestrians. However, the centre does have a poor *'feel good factor'*, and the lack of features that identify the centre and lack of promotion/street events reduces the centre's overall rating. The condition, quality of buildings, security measures, street lighting, safety perceptions and evidence of vandalism are 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	3/26			4/26			10/26		
Percentage	11.54%			15.38%			38.46%		

Source: City of Westminster site survey July 2013
Note: Each issue is ranked in a scale 0 to 2, with 2 being the highest positive score achievable. Scores are provided from the adopted 2002 and 2007 Health Checks Surveys and a 2013 update to allow comparison to be made between the others results.

Table 5 Day Time Amenity within the Local Centre 2013

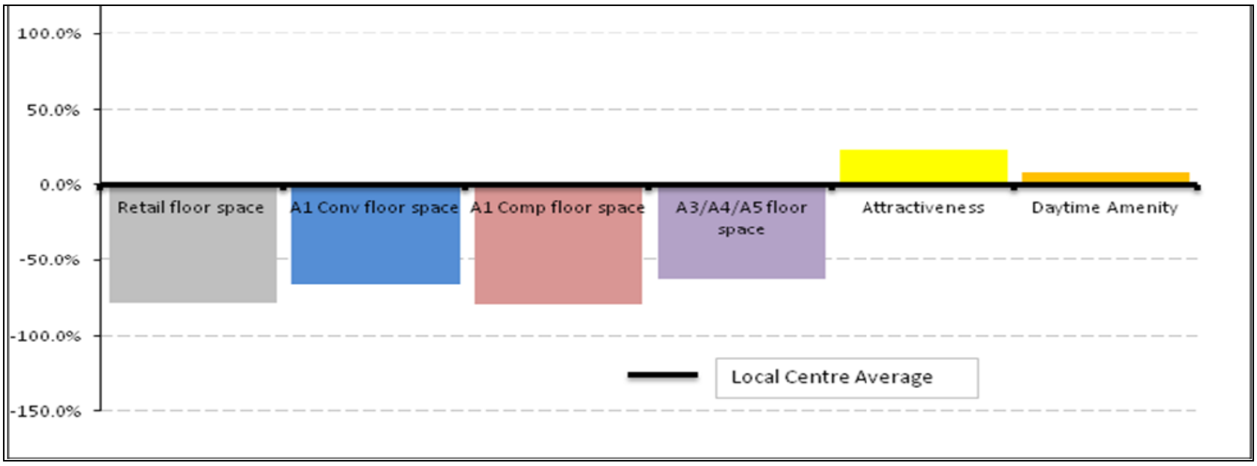
AMENITY - DAYTIME	1997			2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Overall environment of public areas in the centre												
General Cleanliness in Shopping Hours												
Presence of litter		N/A			X		X			X		
Presence of refuse bag		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)		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 eg illegally parked vehicles)		N/A			X			X		X		
Evidence of drunkenness, antisocial behaviour rowdiness		N/A		X			X			X		
Presence of rough sleepers / Presence of beggars		N/A		X			X			X		
Presence of street drinkers Evidence of touting (eg minicabs, ricksaws, prostitution, drug dealing, etc)		N/A		X			X			X		
Presence of illegal street traders e.g. counferteit 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 (eg flagship stores, buildings, etc)		N/A				X			X			X
Promotion / Streets events		N/A				X			X			X
Feel good' factor of town centre		N/A				X			X		X	
Total	N/A			**25/46**			**29/46**				**30/46**	
Percentage	N/A			54.3%			63.0%				65.2%	

Source: City of Westminster site survey July 2013 / No**te:** Each issue is ranked in a scale 0 to 2, with 2 being the highest positive score achievable.

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 2007



Ebury Bridge Road is a small Local Centre, with a total retail floor space of only a third of the local centre average. The centre 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, and for food and drink floor space figures (A3/A4/A5). In terms of the rating of the physical environment, the centre has an attractiveness and amenity rating above the overall 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 or refused planning applications involving A-class uses within this centre.

6.2 Development Proposals

Recently, residents of the Ebury Bridge Estate (which the eastern side of Ebury Bridge Road Local Shopping Centre forms part of) have voted in favour of regeneration proposals for housing renewal and associated works. These proposals include the refurbishment of the two front blocks (above the retail units) and further residential redevelopment on the rest of the Estate. This development will bring the opportunity to review the retail frontage on the eastern side of the street and to improve the quality of the existing housing in the area. There will be an increment of housing offer, with 35% proposed to be affordable housing.

There is also a new development proposed on the site of the former Chelsea Barracks, immediately to the south west of the Ebury Bridge Estate. Although subject to change and a considerable amount of uncertainty, outline planning permission for this site includes provision of a supermarket on Ebury Bridge Road and other retail uses on the opposite side of the site.

Figure illustrates the boundaries of these proposal sites.

6.3 Recommendations:

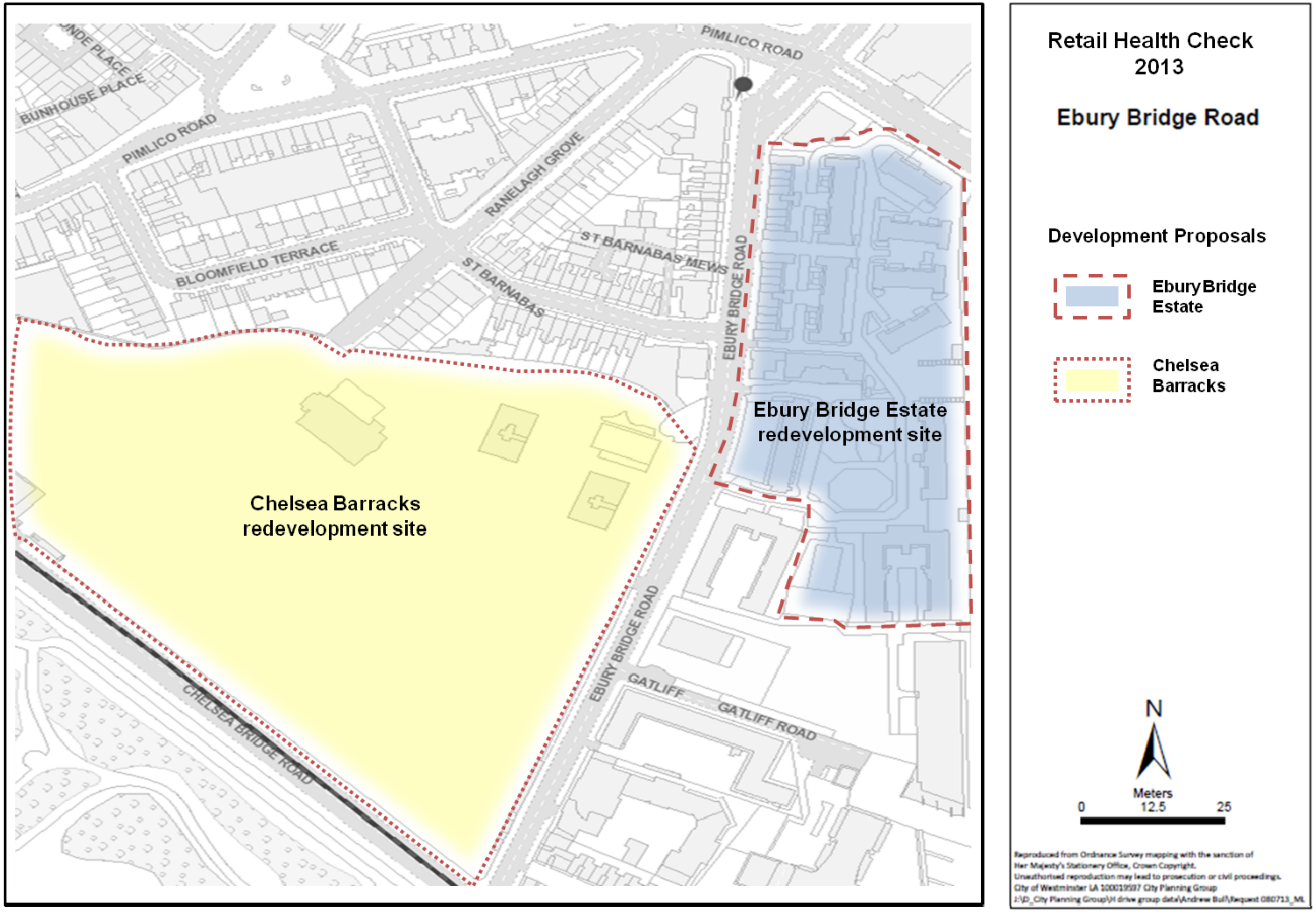
- Maintain existing retail units as they are, including the retail mix;
- Consider improving the existing retail units at ground level by being stepped back to increase the floorspace and, therefore, providing improved residential space above at the rear.
- Improve existing shop fronts and / or make each consistent with one another;
- Improve the general retail environment, paving, lighting and security etc.;

Table 6 Potential floor space available

	Potential floorspace for retail use
Floorspace Sq M	227.84
Percentage	19%

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

Figure 6 Development Proposals for Ebury Bridge Road



7. Health of the Centre Summary

Table 7 Summary of Health Check Assessment 2013

Subject	Subject Matter	Data	Number	Sq M
RETAILING	**Floor space**	**Total Floor space**		**711**
		Total Convenience (A1)		**167**
		Total Comparison (A1)		**243**
		Total Service (A2)		**24**
		Total A3		**50**
		Total A4		**228**
		Total A5		**0**
		Total Sui Generis		**0**
		Total Vacant		**0**
	Retail Offer	**Total Number of Shop Units**	**14**	
		Total Number of A1 Units	**11**	
		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	**6**	
		Total Comparison Multiples	**8**	
		Total Number of A2 Units	**1**	
		Total Number of A3 Units	**1**	
		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 ’neutral’, as it was in 2007.

Little has changed on site since the last survey was carried out in this centre. The centre boundary remains valid although this remains open to review (see sections 2.4 and 6 above). Further extension to this shopping centre could be considered alongside the major redevelopment schemes in the area, and should take into account the future redevelopment of Chelsea Barracks, the Ebury Bridge housing estate and the potential increased customer base and retail offer that these could provide.

However, certain types of extensions and changes of use do not require full planning permission as they are classed as ‘permitted development’and recent changes to permitted development rights now allow town centre uses (A1, A2, A3, A4, A5, B1, D1 and D2) below a certain size to change temporarily to A1, A2, A3 or B1 for a period of two years. This could impact on the land use mix here and will be kept under review. The Government are considering further changes to permitted development rights to allow shop units to change permanently to residential, banks and building societies. These changes will all be kept under review.

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

Table 8 Views of Ebury Bridge Road local centre

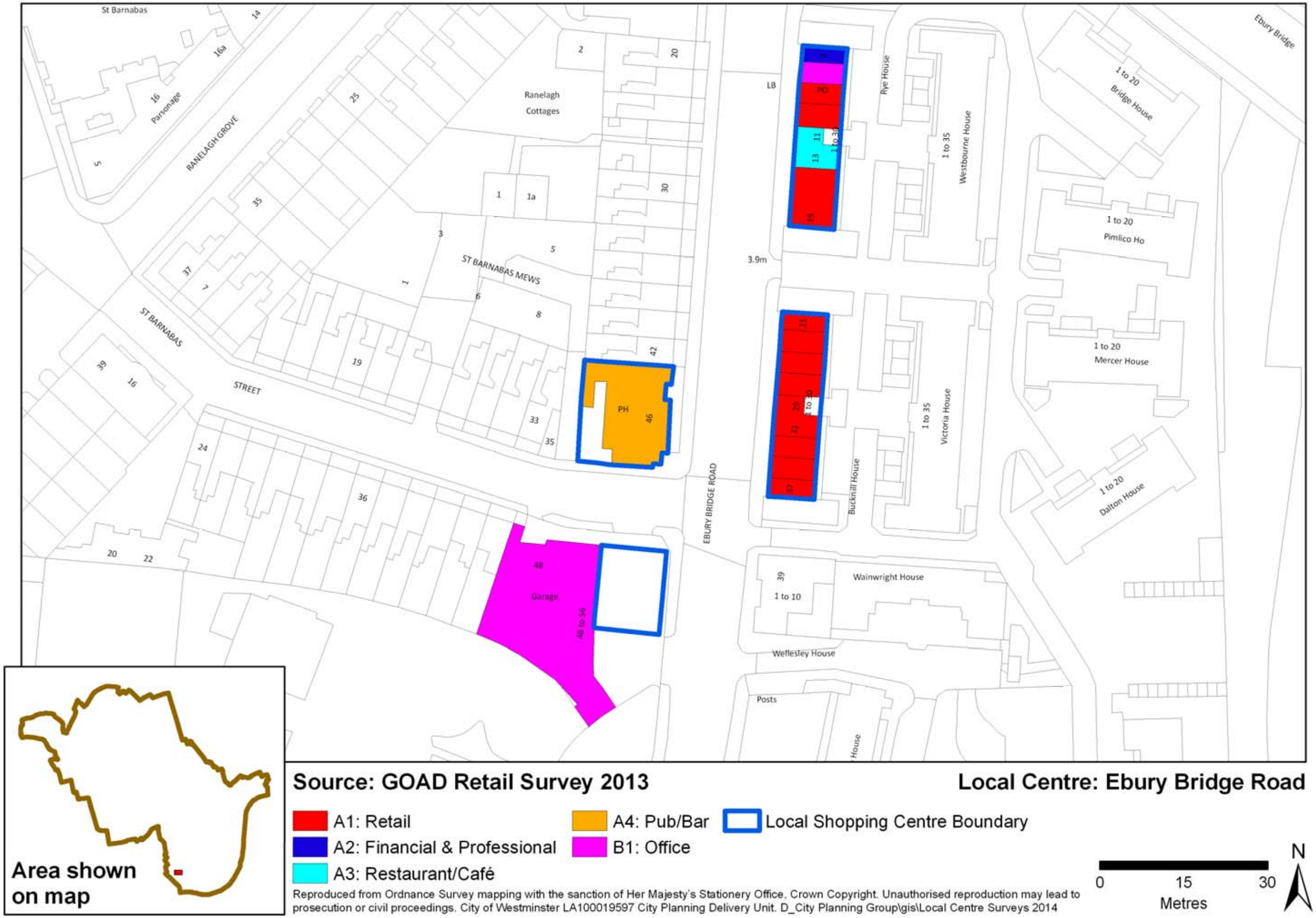
The north end of the core frontage in this quiet local centre.

The southern end of the core frontage, showing closed and vacant shop units in the local centre.

The secondary frontage on the west side of the local centre, comprising a public house and garage.

Table 9 Goad Retail Data 2013

					A1	A1	A1		A3	A4	B1
ADDRESS	FASCIA	DESCRIPTION	USE	SQM	Conv.	Spec.	Ind	A2	Res/Caf	Pub/Bar	
46 EBURY BRIDGE ROAD	THE RISING SUN	PUBLIC HOUSE	A4	228						1	
ST BARNABAS STREET	EBURY GARAGE	CAR REPAIRS	B1	471							1
EBURY BRIDGE ROAD		DWELLING	Residential	59							
EBURY BRIDGE ROAD		DWELLING	Residential	58							
33 EBURY BRIDGE ROAD	MAURO SERGIO	HAIRDRESSING	A1	31			1				
27 EBURY BRIDGE ROAD	CAPRICORN TRAVEL	TRAVEL AGENT	A1	33			1				
3 EBURY BRIDGE ROAD	VIVAL PROPERTY	ESTATE AGENT	A2	24				1			
25 EBURY BRIDGE ROAD	DASILVA	INTERIOR DECORATIONS	A1	32			1				
37 EBURY BRIDGE ROAD	PETS PERFECTION	PET SHOP	A1	27			1				
9 EBURY BRIDGE ROAD	ROBERT MCMILLAN CLOCKMAKER	JEWELLER	A1	34		1					
23 EBURY BRIDGE ROAD	EBURY NEWS	NEWSAGENT	A1	32	1						
11 - 13 EBURY BRIDGE ROAD	IDEAL CAFE	CAFE	A3	50					1		
7 EBURY BRIDGE ROAD	EBURY TRADING	LIGHTING	A1	29		1					
29 - 31 EBURY BRIDGE ROAD	GREENS PHARMACY	CHEMIST	A1	50	1						
35 EBURY BRIDGE ROAD	MILLINER WAREHOUSE	HABERDASHERY	A1	32			1				
21 EBURY BRIDGE ROAD	CHOICE DRY CLEANERS	DRY CLEANING	A1	26			1				
5 EBURY BRIDGE ROAD	POST BOX DIRECT	BUSINESS SERVICES	B1	29							1
15 - 19 EBURY BRIDGE ROAD	EBURY FOOD & WINES	CONVENIENCE STORE	A1	85	1						



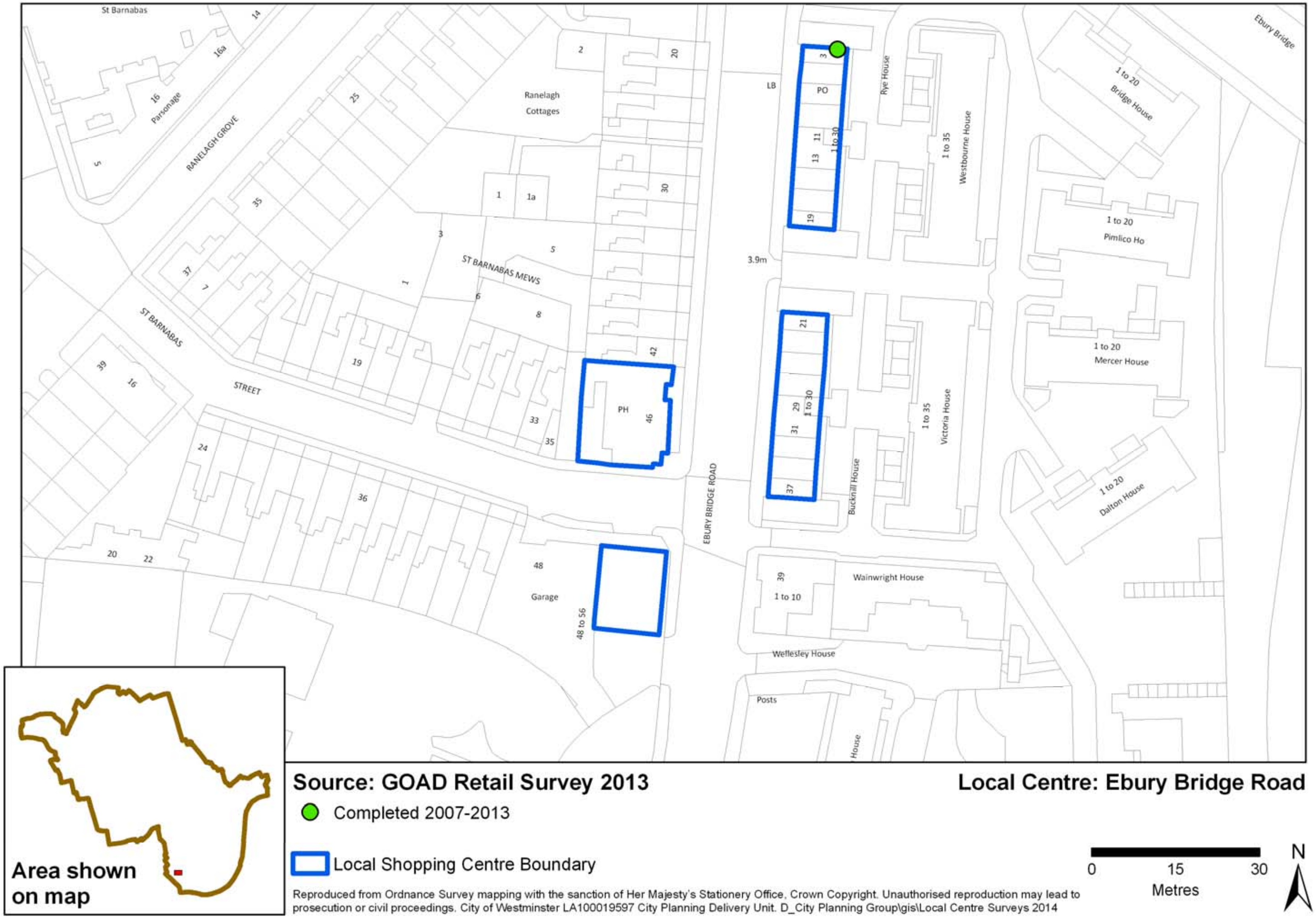
Source: GOAD Retail Survey 2013

Local Centre: Ebury Bridge Road

- A1: Retail
- A2: Financial & Professional
- A3: Restaurant/Café
- A4: Pub/Bar
- B1: Office
- Local Shopping Centre Boundary

N

0 15 30
Metres



Source: GOAD Retail Survey 2013

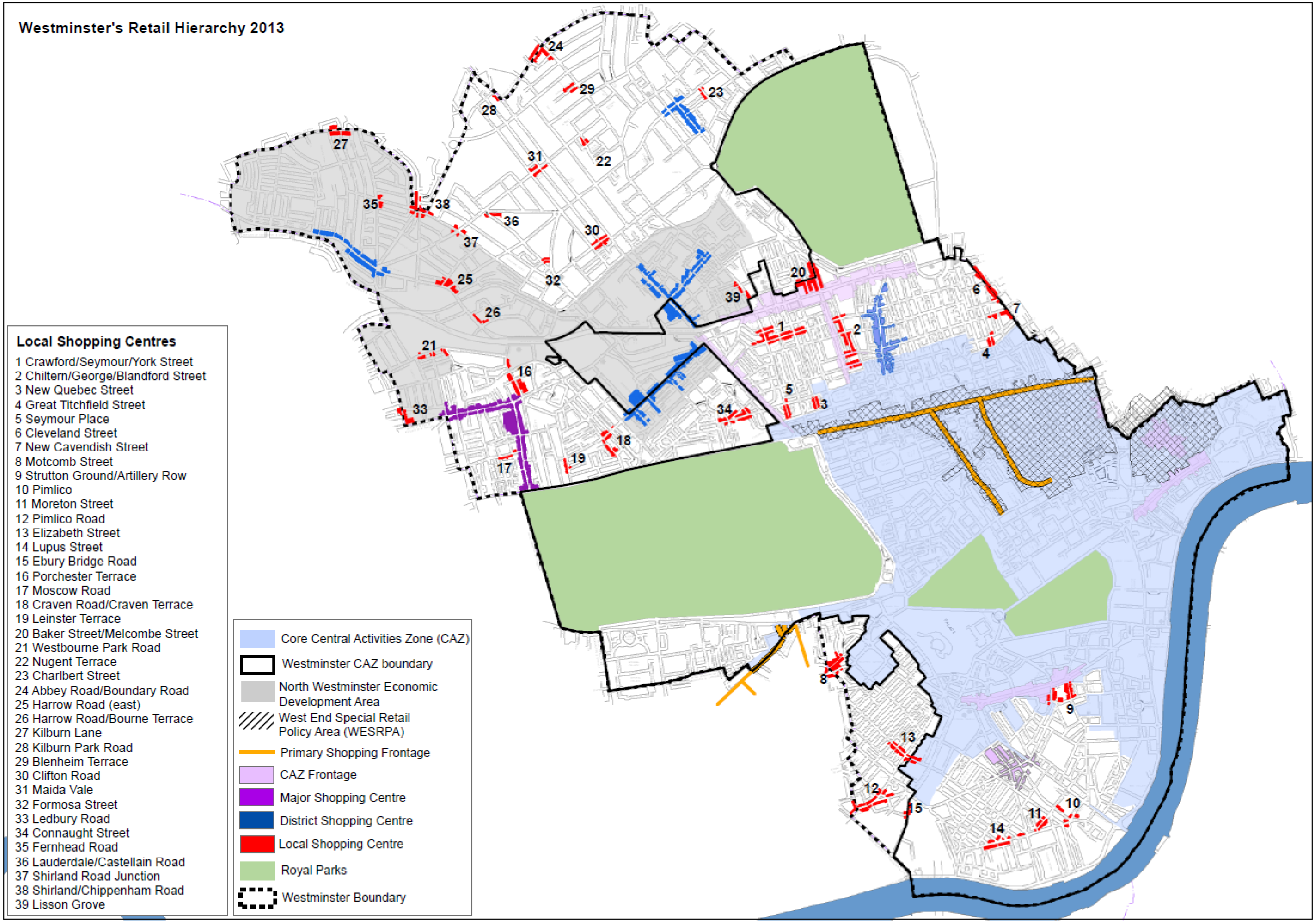
Local Centre: Ebury Bridge Road

Completed 2007-2013

Local Shopping Centre Boundary

0 15 30
Metres
N

Figure 9 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 8: Elizabeth Street

Contents

Tables

Figures

(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 8: Elizabeth Street

1. Introduction

1.1 Location

Elizabeth Street is a medium sized linear local centre located in the south west of Westminster close to Victoria Station, serving the residents of Belgravia (**Error! Reference source not found.**). The centre is adjacent to Buckingham Palace Road (A3214) at its eastern end, a main arterial road. The centre's catchment area is restricted by the proximity to Victoria Street and other local centres such as the Pimlico Road and Ebury Bridge Road centres to the south (see Westminster wide shopping centre boundaries plan – Figure 2). The centre is also adjacent to the Victoria Coach Station, which is a busy and major part of the wider Victoria Transport Interchange.

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		25	32	28	23
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*0*
	National retailers	*1*	*0*	*0*	*0*
	Specialist Independent	*12*	*14*	*15*	*12*
	Independent	*4*	*7*	*6*	*4*
	Convenience	*8*	*11*	*7*	*7*
Class A2	Financial & Professional	3	9	9	4
Food & Drink		4	10	11	14
Class A3	*Restaurant/Café*	*4*	*10*	*6*	*8*
Class A4	*Pubs/Bars*	*0*	*0*	*4*	*3*
Class A5	*Takeaway*	*0*	*0*	*1*	*1*
	Takeaway/Restaurant	*0*	*0*	*0*	*2*
Sui Generis		0	1	1	1
Vacant Units		1	2	4	5
Arts/Culture		0	0	0	0
Health uses		0	0	0	2
Hotels		0	0	0	3
TOTAL		**33**	**54**	**53**	**52**

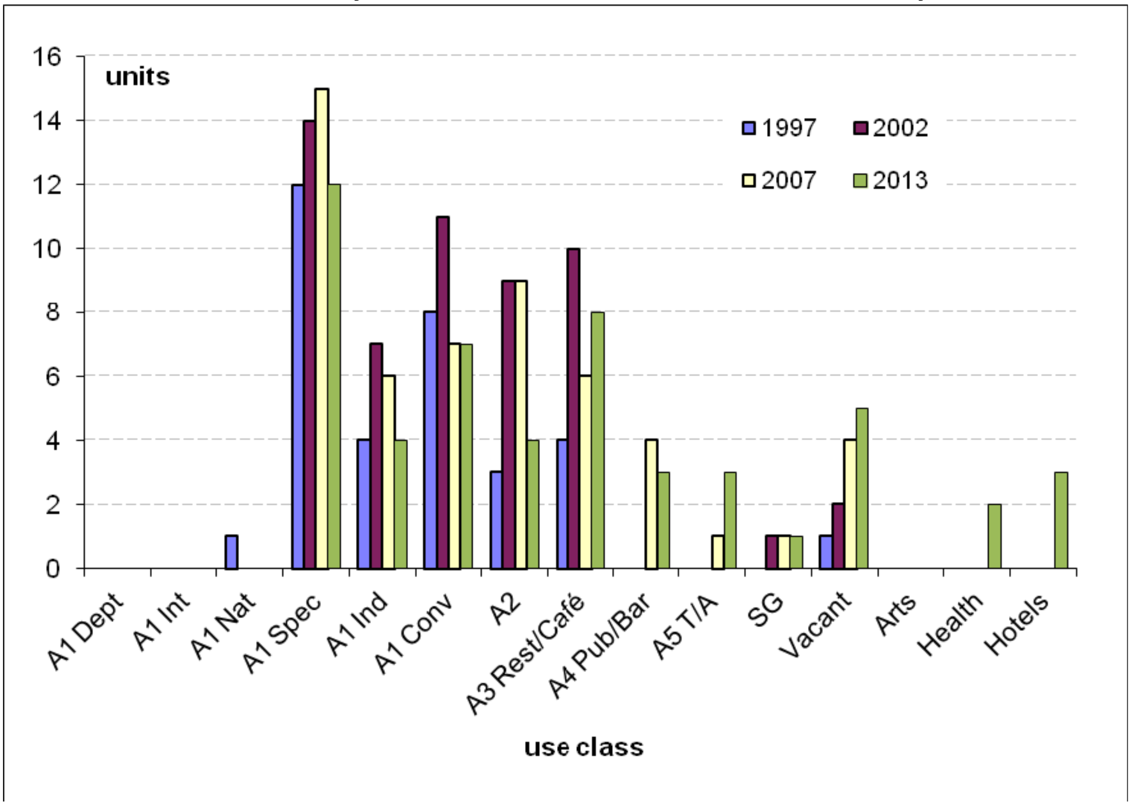
Source: WCC Land Use Survey August 2013

Within the Elizabeth Street Local Centre Boundary there are 52 units in total, which is one less than recorded when the centre was last surveyed in 2007.

The number of A1 retail uses in Elizabeth Street has decreased by 5 units since 2007, while the main increase has been in food and drink and health uses. The number of Class A2 uses has also decreased by 5 units while the number of Class A3/A4 and A5 uses has increased by 3 units. With A1 uses, there was a loss of 3 specialist independent units and a loss of 2 independent units while the number of convenience shops remains the same. However specialist retail remains a key feature of the centre including many boutique type retailers. The number and configuration of restaurant/cafes/bars has increased by 3 units, and the centre contains several popular, well maintained pubs. The number of sui generis units has remained the same since 2007.

Outside of A-class retail uses within the local centre boundary, the centre now contains 3 hotels and 2 health uses but no arts uses as shown in Table 1. A description of these Use Classes is included in the Glossary of Terms attached to this report.

Figure 1 Elizabeth Street: Units by use class within the local centre boundary



2.2 Range of A1 Uses

Elizabeth Street has no department stores or international or national retailers. The centre has 23 Class A1 retail units including 7 convenience stores, 12 specialist retailers and 4 independent retailers. The specialist retailers include a bridal wear and several boutique shops, a dog and cat outfitters shop, a cake making supplies store, a picture frames shop and a tobacconist store. The independent stores include several jewellers, a stationery store and a book store. The high proportion of comparison and convenience shops (**Error! Reference source not found.**) and absence of multiple retailers suggests that Elizabeth Street serves local residents with a mix of convenience and comparison shopping facilities.

2.3 Total Retail Floor space

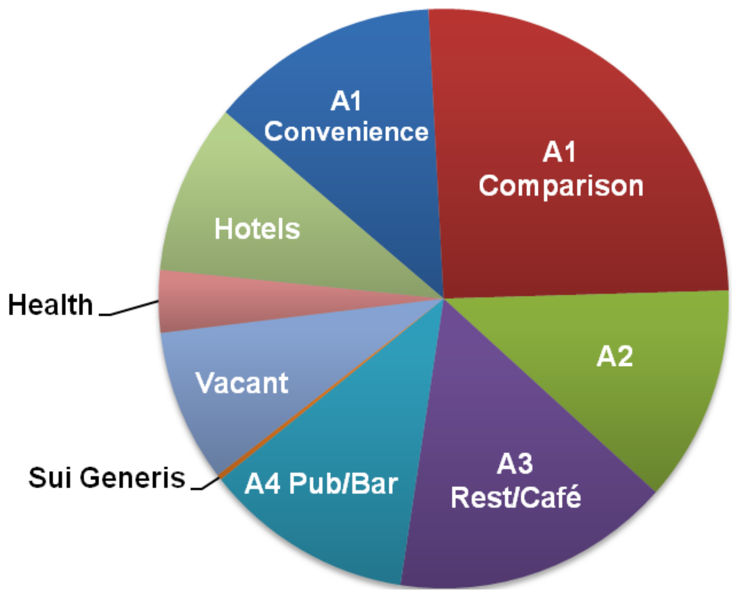
Total retail floor space in Elizabeth Street is broken down in Table 2. In total, Elizabeth Street has 4,176 sqm of retail floor space, which is above the average of 3,188 sqm for the 39 Local Centres in the City. A1 convenience and comparison floor space is dominant in the centre (38%), accounting for almost two fifths of the total. Elizabeth Street has a comparable proportion of vacant space which represents almost 9% of the total retail floorspace in the local centre. The centre has eight A3 Restaurants/Cafes, three A4 Pubs/Bars and three A5 Take-Away uses, with floor spaces higher than the Local Centre average for 2007.

Table 2 Total Retail Floor space 2013 within the local centre boundary

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2014)
A1 Convenience	544	13.04%	14.9%
A1 Comparison	1061	25.40%	35.2%
A2	504	12.07%	11.2%
A3 Rest/Café	660	15.82%	17.4%
A4 Pub/Bar	495	11.86%	5.1%
Sui Generis	12	0.29%	3.9%
Vacant	356	8.52%	8.6%
Health	145	3.48%	2.0%
Hotels	397	9.52%	0.5%
Art	0	0.00%	1.3%
Leisure	0	0.00%	0.1%
Total	**4,176**	**100%**	**100%**

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

Figure 3 Street Retail Floor Space 2013



Elizabeth Street is a Local Centre with a selection of local services and food shops. There is one bank, and the remainder of the Class A2 uses are estate agents. Overall, the Local Centre does provide a good range and selection of shops and services. It is important to maintain the existing local range of convenience shops in the Elizabeth Street Local Centre as they encourage walking, and make city life more practical and attractive.

2.4 Proportion of Vacant Street Level Property

The unit vacancy rate in Elizabeth Street is higher than the average rate for Local Centres in Westminster as shown in **Table 3**. The vacancy rate has increased its value and the quantity of vacant units since 2007. The five vacant units are mainly concentrated at the east of the local centre (non-core frontage). The concentration of vacant units highlights the location of proposed improvement works.

Table 3 Level of Vacant Street Level Property 2013

	% Vacant Units 1997	% Vacant Units 2002	% Vacant Units 2007	% Vacant Units 2013	% Local Centre Average 2012
Elizabeth Street	3% (1 unit)	3.8% (2 units)	7.5% (4 units)	9.6% (5 units)	8.3% (4 units)

Source: City of Westminster GIS System and site survey August 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 August 2013.

3.2 Accessibility on foot and by public transport

Elizabeth Street is located 5-10 minutes walk from Victoria station, one of the main London Underground and mainline train stations in London. The local centre is also 5-10 minutes walk from Sloane Square London Underground station. Victoria Coach Station is located on Elizabeth Street, which serves national and international destinations. There are also several bus routes which run close to the local centre, including the C1 which runs through the centre, and several routes which run along Buckingham Palace Road including route numbers 11, 44, 211, 239.

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 50%, meaning that the centre offers a good range of attractions. This is higher than the Local Centre average of 31%. Elizabeth Street has a poor provision of multiple retailers, cultural/community events, sport and leisure facilities but it has a new bank/building society provision since 2007. The centre's main strength is its good provision of a range of shops and a reasonable level of restaurants, cafes and bars.

4.2 Daytime Amenity

Elizabeth Street is a relatively attractive Local Centre. The centre's day time amenity rating is 69.5% which is slightly above than the average for all Local Centres of 68% (as surveyed in 2007 Local Health Check Reports), and was ranked =22nd out of the 39 Local Centres in Westminster in 2007. The centre's rating is good in terms of the absence of debris, beggars, rough sleepers, street drinkers, touting and illegal street traders. The centre has an average *'feel good factor'*. A lot of the security categories are also rated as good, such as the lighting, the deterrent measures and feeling of safety. There are no features that identify the centre and no promotion of street events, which together reduce the centre's overall rating.

In 2013, the attractions and amenity surveys recorded some improvements on the west side of Elizabeth Street that recovered the quality of the west side of Elizabeth Street Local Shopping Centre. Conversely, the east side of this local centre remains the same due to the presence of the Victoria Coach Station area and the uncertainty of the redevelopment plan for Eccleston Place.

The quality of buildings on the west side was improved with new shop fronts and trees on the north side pathway. Also, features such as parking bays and pedestrian paths were upgraded with a good level of design and pavement improvements, and new street lighting design. Furthermore, nowadays safety perceptions had a little enhancement with no evidence of vandalism but there are some obstacles over the passage for pedestrians.

Victoria Coach Station is just interrupting the continuity of these improvements around the local centre. However there are some opportunities with the recent granted permission of the planning application reference number 12/08252/FULL which consists in an amalgamation of six ground floor retail units (north side pathway) to create two larger retail units (Class A1) but it is not yet implemented. Once the planning application has been implemented, it could represent an enhancement of the entire Local Shopping 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	11/26			11/26			13/26		
Percentage	42.31%			42.31%			50.00%		

Source: City of Westminster site survey August 2013

Note: Each issue is ranked in a scale 0 to 2, with 2 being the highest positive score achievable. Scores are provided from the adopted 2002 and 2007 Health Checks Surveys and a 2013 update to allow comparison to be made between the others results.

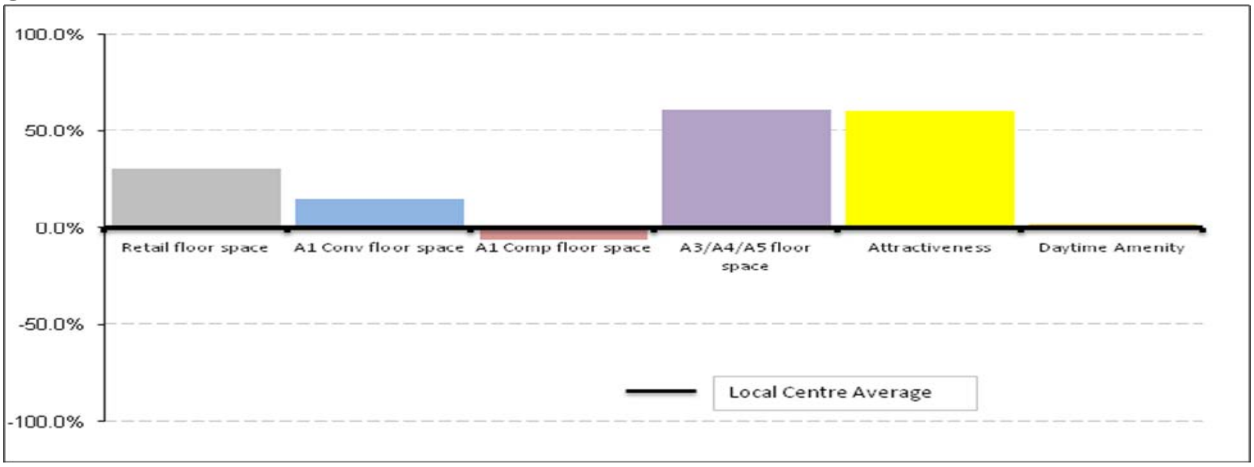
Table 5 Day Time Amenity within the Local Centre 2013

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		X										
Presence of litter		N/A			X			X			X	
Presence of refuse bag		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		X			X			X		X		
Quality of Buildings		X			X			X				X
Special features (pedestrianisation, street furniture)		X			X			X			X	
Impact of vacant sites	X			X				X			X	
Security		X										
Evidence of Vandalism and Graffiti (incl. on street furniture)		N/A			X			X		X		
Security during shopping hours (availability, access, security, etc)		X		X			X			X		
Ease of passage for pedestrians (incl. presence of obstacles eg illegally parked vehicles)		N/A		X			X			X		
Evidence of drunkenness, antisocial behaviour rowdiness		N/A		X			X			X		
Presence of rough sleepers / Presence of beggars		N/A		X / X			X / X			X / X		
Presence of street drinkers Evidence of touting (eg minicabs, ricksaws, prostitution, drug dealing, etc)		N/A		X X			X X			X X		
Presence of illegal street traders e.g. counferteit goods, hot dogs, peanuts, etc		N/A		X			X			X		
Effectiveness of any deterrent measures (CCTV, police patrols, door security, etc)		X			X			X			X	
Quality of street lighting		X			X			X			X	
Safety perception in shopping hours		X			X			X			X	
Identity of town centre												
Features which identify the centre (eg flagship stores, buildings, etc)			X			X			X			X
Promotion / Streets events			X			X			X			X
'Feel good' factor of town centre		X		X							X	
Total		**12/26**			**33/46**			**29/46**			**32/46**	
Percentage		46.0%			71.7%			63.0%			69.5%	

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2013

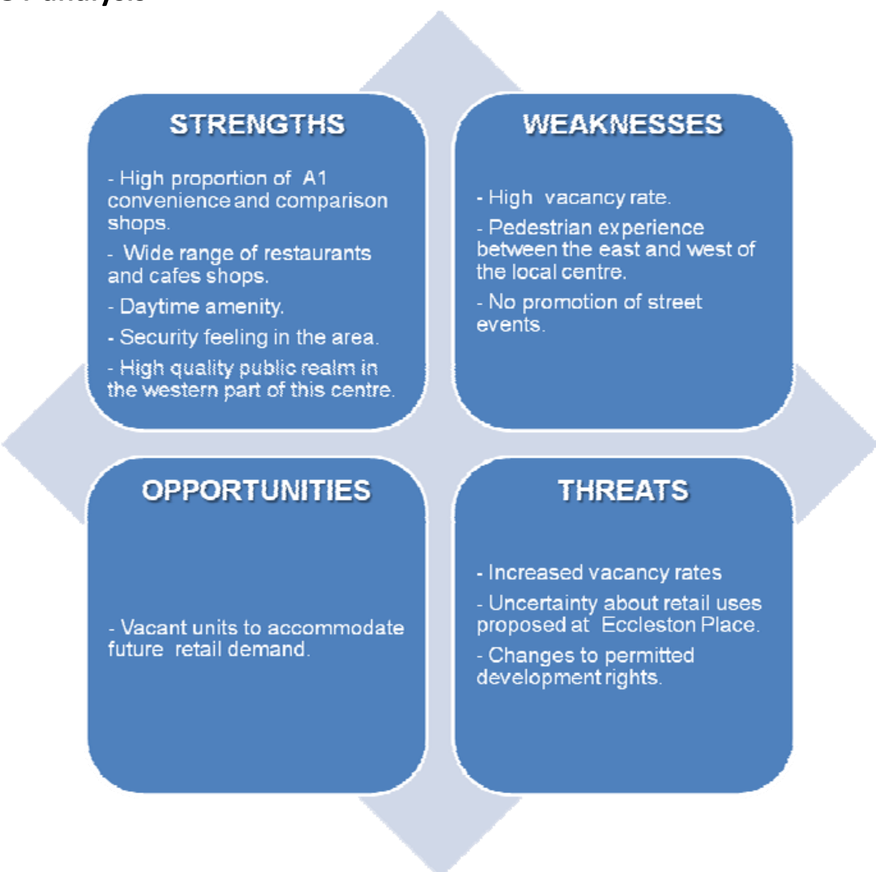
Figure 4 Deviation of centre from the mean for Local Centres 2013



Elizabeth Street 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. This is also true for A1 convenience and comparison floor space figures. In terms of the rating of the physical environment, the centre has a far higher than average attractiveness rating, and a daytime amenity rating very slightly below the 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 a few permitted planning applications related to new and some alterations to shop fronts, improvements in pavement level and installation of some benches outside a retail store. Also, there was a permitted planning application (reference number 12/08252/FULL) for the amalgamation of six ground floor retail units (north side pathway) to create two larger retail units (Class A1) but it is not yet implemented. This planning application is linked to the Eccleston Place redevelopment plan which is still ongoing and there is uncertainty regarding the proposed retail units.

6.2 Development Proposal

The Eccleston Place site consists in the redevelopment of almost 10 acres in area near Elizabeth Street Local Centre which involves a wide range of uses, including offices, residential, retail and the Victoria Coach Station (VCS). The north part of the site contains the VCS Arrivals Hall, and the south part contains the Departures Hall. Recently there were a few workshops as a part of the public consultation of the project in order to explore how the site could be developed in the future. There is uncertainty about the whole project and how it will impact the Elizabeth Street Local Shopping Centre (see www.makingecclestonplace.com).

6.3 Recommendations

6.3.1 General

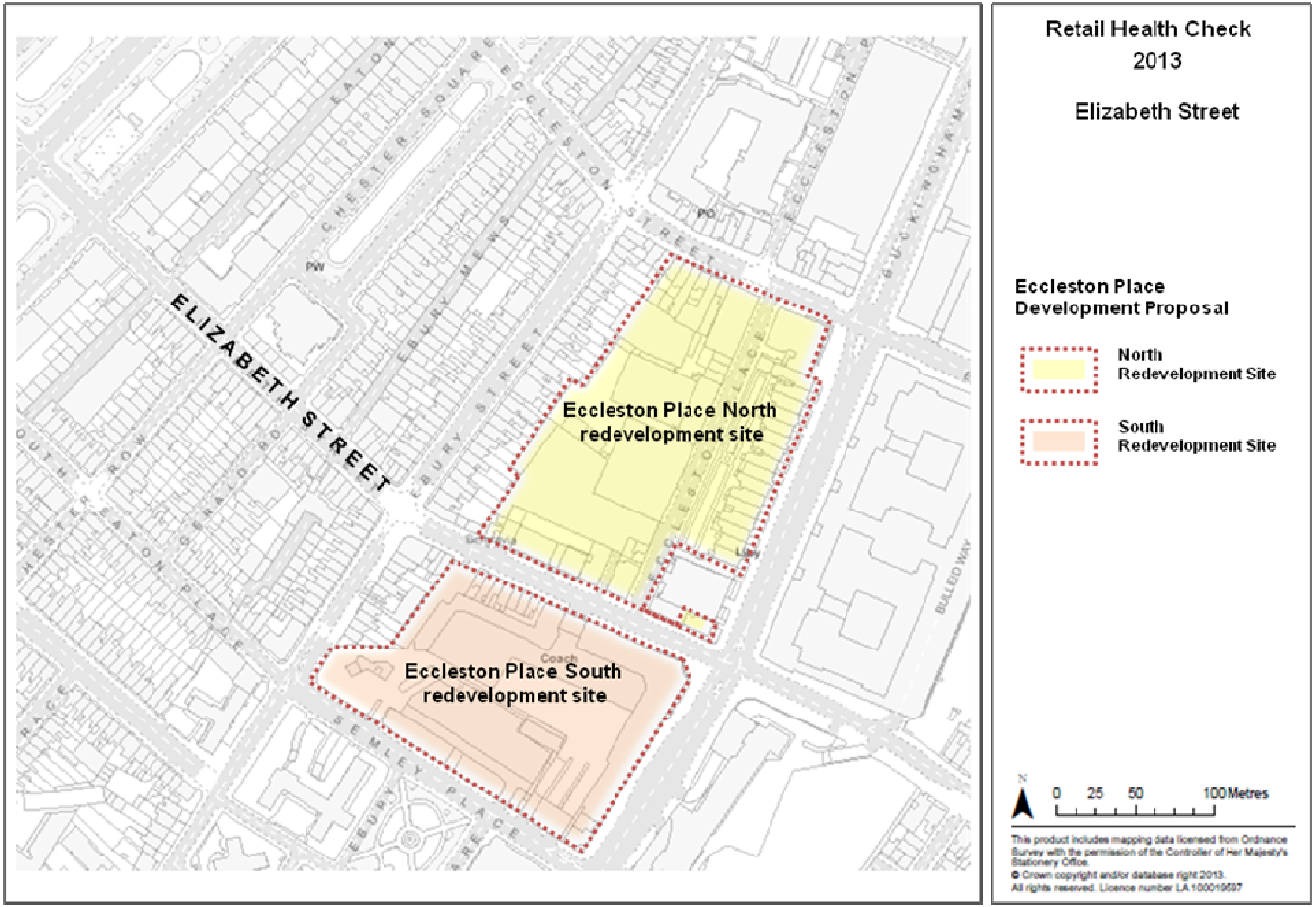
- To consider the extension of the Elizabeth Street Local Centre boundary in order to include the three hotels and health use services offered in the area.

6.3.2 Specific

- To provide support along the redevelopment plan of Eccleston Place.
- To evaluate the impact of Eccleston Place redevelopment plan in the Elizabeth Street Local Shopping Centre.

Figure illustrates the boundaries of the Eccleston Place proposal site.

Figure 6 Eccleston Place redevelopment site



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**		**4,176**
		Total Convenience (A1)		**544**
		Total Comparison (A1)		**1,061**
		Total Service (A2)		**504**
		Total A3		**464.6932**
		Total A4		**495**
		Total A5		**195.6888**
		Total Sui Generis		**12**
		Total Vacant		**356**
	Retail Offer	**Total Number of Shop Units**	**52**	
		Total Number of A1 Units	**23**	
		a) Convenience shops	**7**	
		b) Department/principal stores	**0**	
		c) Prestige international shops	**0**	
		d) National comparison retailers	**0**	
		e) Specialist Independent shops	**12**	
		f) Independent shops	**4**	
		Total Comparison Multiples	**16**	
		Total Number of A2 Units	**4**	
		Total Number of A3 Units	**8**	
		Total Number of A4 Units	**3**	
		Total Number of A5 Units	**3**	
		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**	**0**
HEALTH USES		**(clinics, surgeries etc.)**	**2**	**145**
HOTELS			**3**	**397**

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

The centre boundary remains valid although this remains open to review (see sections 6, 6.3.1 and 6.3.2 above). Further extension to this shopping centre could be considered at the edge of the current boundary on Ebury Street because of the local services they provide to the area (see Table 7 below for health and hotel uses).

Table 7 Local services available outside the currently designated centre boundary

Use Class	Number of Units 1997	Number of Units 2002	Number of Units 2007	Number of Units 2013
Arts/Culture	0	0	0	0
Health uses	0	0	0	1
Hotels	0	0	0	3

Certain types of extensions and changes of use do not require full planning permission as they are classed as “permitted development” and recent changes to permitted development rights now allow town centre uses (A1, A2, A3, A4, A5, B1, D1 and D2) below a certain size to change temporarily to A1, A2, A3 or B1 for a period of two years. This could impact on the land use mix here and will be kept under review.

The Government are considering further changes to permitted development rights to allow shop units to change permanently to residential, banks and building societies. These changes will all be kept under review.

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 Local Centre 8: Elizabeth Street

Table 8 Views of the Elizabeth Street Local Shopping Centre

Attractive core shopping frontages on the south west side of the local centre.

An attractive public house in the core shopping frontage of the local centre. Features such as pedestrian path and pavement level were upgraded with a good level of design.

The streetscape and secondary shopping frontages in the local centre, including valuable local services such as a bank.

Attractive corner of the non-core shopping frontages on the north east side of the local centre.

Vacant boutique unit to let in the core frontage of the local shopping centre.

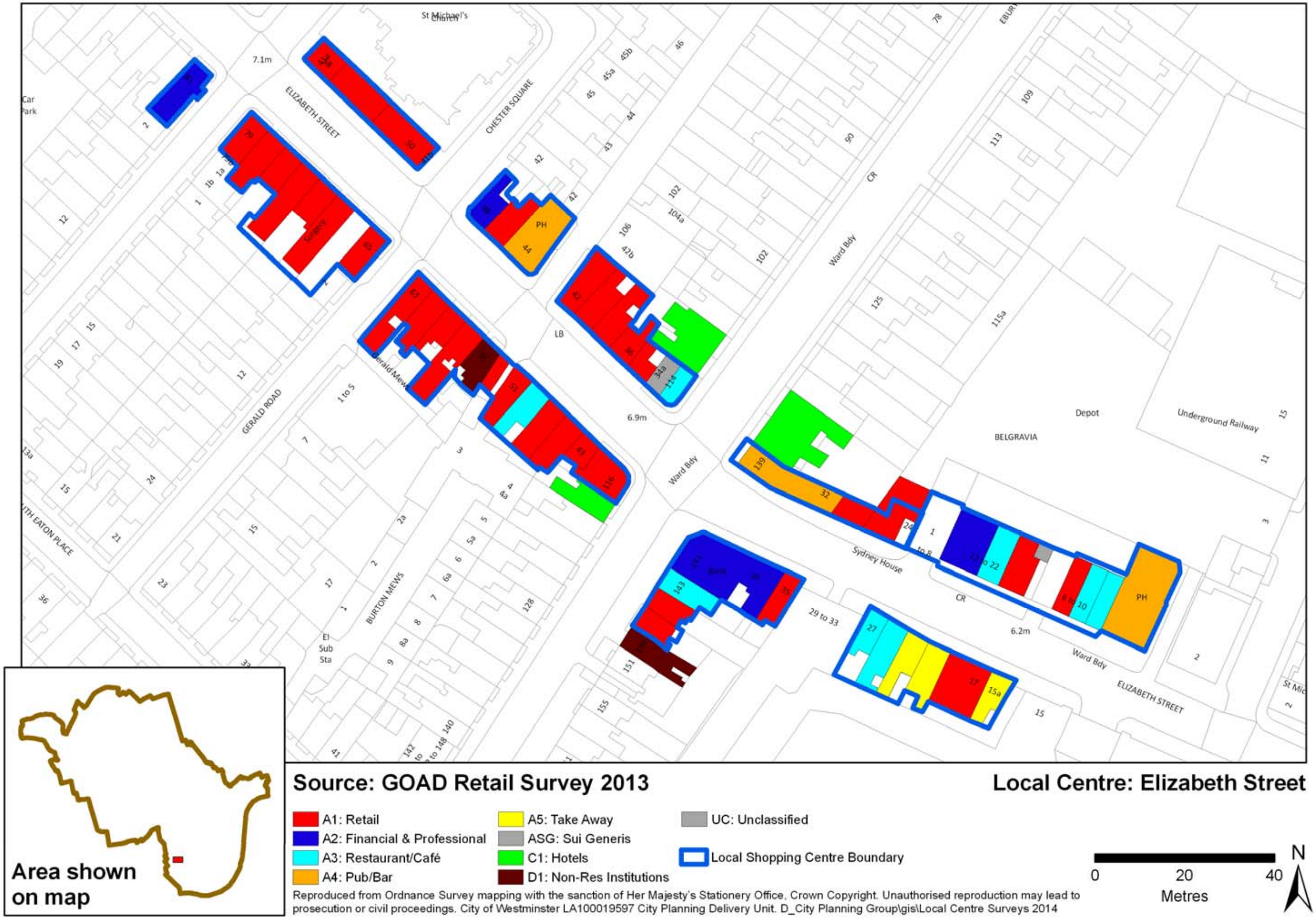
Another view of the secondary frontage on the north side of the local centre. 5 out of the 8 vacant units are located in this area and are subject to redevelopment plans. (Planning application granted / reference number 12/08252/FULL)

Table 9 Goad Data 2013

					A1	A1	A1		A3	A4	A3	A3	S G	Vacant	Health	Hotels
ADDRESS	**FASCIA**	**DESCRIPTION**	**USE**	**SQM**	**Conv.**	**Spec.**	**Ind**	**A2**	**Res/Caf**	**Pub/Bar**	**Takeaw.**	**Rest/TA**				
45 ELIZABETH STREET	Vacant	VACANT	Vacant	70										1		
67 ELIZABETH STREET		DWELLING	Residential	101												
61 ELIZABETH STREET	Vacant	VACANT	Vacant	70										1		
49 ELIZABETH STREET	OLIVETO	ITALIAN RESTAURANT	A3	64					1							
143 EBURY STREET	IL CONVIVIO	ITALIAN RESTAURANT	A3	66					1							
43 ELIZABETH STREET	PAPOUELLI	CHILDRENS WEAR	A1	37												
53 ELIZABETH STREET	KIM POOR	JEWELLER	A1	25												
114 EBURY STREET	TOM TOM COFFEE HOUSE	CAFE	A3	36					1							
63 ELIZABETH STREET	TOMTOM	TOBACCONIST	A1	95												
59 ELIZABETH STREET	DE VROOMEN	JEWELLER	A1	50												
47 ELIZABETH STREET	THE GROSVENOR STATIONERY	STATIONER	A1	72												
34A ELIZABETH STREET		DWELLINGS	Residential	35												
55 ELIZABETH STREET	ELIZABETH STREET VETS	VETERINARY SURGERY	D1	60											1	
147 EBURY STREET	Vacant	VACANT	Vacant	45										1		
57 ELIZABETH STREET	ANDREW KORNAT DESIGNS	LIGHTING	A1	102												
149 EBURY STREET	Doctors	DOCTORS SURGERY	D1	85											1	
118 EBURY STREET	THE BELGRAVIA HOTEL	GUEST HOUSE	C1	64												1
110 - 112 EBURY STREET	THE ASTORS HOTEL	GUEST HOUSE	C1	137												1
40 ELIZABETH STREET	DONNA IDA	LADIES WEAR	A1	70		1										
42 ELIZABETH STREET	ALLEGRA HICKS	LADIES & MENS WEAR	A1	86		1										
141 EBURY STREET	NATWEST	BANK	A2	243				1								
38 ELIZABETH STREET	ERICKSON BEAMON	JEWELLER	A1	75		1										
51 ELIZABETH STREET	HAWICK	LADIES & MENS WEAR	A1	63		1										
145 EBURY STREET	ALLISON RODGER	LADIES WEAR	A1	50		1										
36 ELIZABETH STREET	MARKET QUARTER	DELICATESSEN	A1	52	1											
34 ELIZABETH STREET	JENNY PACKHAM	JEWELLER	A1	34		1										
116 EBURY STREET	PEGGY PORSCHEN	CAKE MAKING SUPPLIES	A1	81		1										
ELIZABETH STREET	CHEQUERS	TAXI HIRE	SG	12									1			
8 ELIZABETH STREET	LA SOSTA	CAFE	A3	51					1							

6 ELIZABETH STREET	IL CORRIERE	CAFE	A3	50					1							
25 ELIZABETH STREET	CAFFE FRARELLI	CAFE	A3	80					1							
26 - 28 ELIZABETH STREET	Vacant	VACANT	Vacant	114										1		
14 ELIZABETH STREET	POLONIA TRANSPORT	TRAVEL AGENT	A1	73			1									
10 ELIZABETH STREET	EURO FRESH FOOD	GROCER	A1	53	1											
24 ELIZABETH STREET		ENTRANCE		19												
16 ELIZABETH STREET	DNISTER CAFE	CAFE	A3	67					1							
12 ELIZABETH STREET		ENTRANCE		16												
30 ELIZABETH STREET	PEGGY PORSCHEN ACADEMY	CAKE MAKING SUPPLIES	A1	42		1										
21 ELIZABETH STREET	FRIARS INN	FISH & CHIPS	A5	74							1					
27 ELIZABETH STREET	MELISSA	CAFE	A3	51					1							
139 EBURY STREET	EBURY WINE BAR	BAR	A4	132						1						
20 - 18 ELIZABETH STREET	WILLIAM HILL	BETTING OFFICE	A2	115				1								
15C ELIZABETH STREET	A R M CHICKEN	TAKE AWAY	A5	55								1				
35 ELIZABETH STREET	Vacant	VACANT	Vacant	56										1		
23 ELIZABETH STREET	FRIARS INN TAKEAWAY	TAKE AWAY	A5	67								1				
65 ELIZABETH STREET	WALDEN CHEMISTS	CHEMIST	A1	63	1											
79 ELIZABETH STREET	MUNGO & MAUD	PET SHOP	A1	61			1									
54 - 56 ELIZABETH STREET	BAKER & SPICE	BAKER	A1	87	1											
69 ELIZABETH STREET	PHILIP TREACY	MILLINERY	A1	98		1										
44 ELIZABETH STREET	THE THOMAS CUBITT	PUBLIC HOUSE	A4	136						1						
73 ELIZABETH STREET	VERONICA MONCHO LOBO	LADIES & MENS WEAR	A1	100		1										
58 ELIZABETH STREET	HENRY STOKES	BOOKS	A1	49			1									
77 ELIZABETH STREET	SEBASTIAN D`ORSAI	POSTERS & PICTURE FRAMING	A1	74		1										
81 ELIZABETH STREET	BEST GAPP	ESTATE AGENT	A2	87				1								
50 - 52 ELIZABETH STREET	JEROBOAMS	OFF LICENCE	A1	98	1											
46 ELIZABETH STREET	POILANE	BAKER	A1	65	1											
75 ELIZABETH STREET	JENNY PACKHAM	BRIDAL WEAR	A1	50		1										
71 ELIZABETH STREET	LES SENTEURS	HEALTH & BEAUTY	A1	54			1									
48 ELIZABETH STREET	JOHN D WOOD & CO	ESTATE AGENT	A2	59				1								

135 - 137 EBURY STREET	THE LIME TREE	GUEST HOUSE	C1	197												1
17 - 19 ELIZABETH STREET	VICTORIA GROCERS	CONVENIENCE STORE	A1	125	1											
83 ELIZABETH STREET		DWELLING	Residential	73												
4 ELIZABETH STREET	TRAVELLERS TAVERN	PUBLIC HOUSE	A4	228						1						
					7	12	4	4	8	3	1	2	1	5	2	3
					544.44	*823.72*	*236.8403*	*504.07*	*464.6932*	*495.3265*	*74.0575*	*121.6313*	*12.3*	*355.844*	*145.26*	*397.48*



Source: GOAD Retail Survey 2013

Local Centre: Elizabeth Street

- A1: Retail
- A2: Financial & Professional
- A3: Restaurant/Café
- A4: Pub/Bar
- A5: Take Away
- ASG: Sui Generis
- C1: Hotels
- D1: Non-Res Institutions
- UC: Unclassified
- Local Shopping Centre Boundary

0 20 40 Metres N

Area shown on map

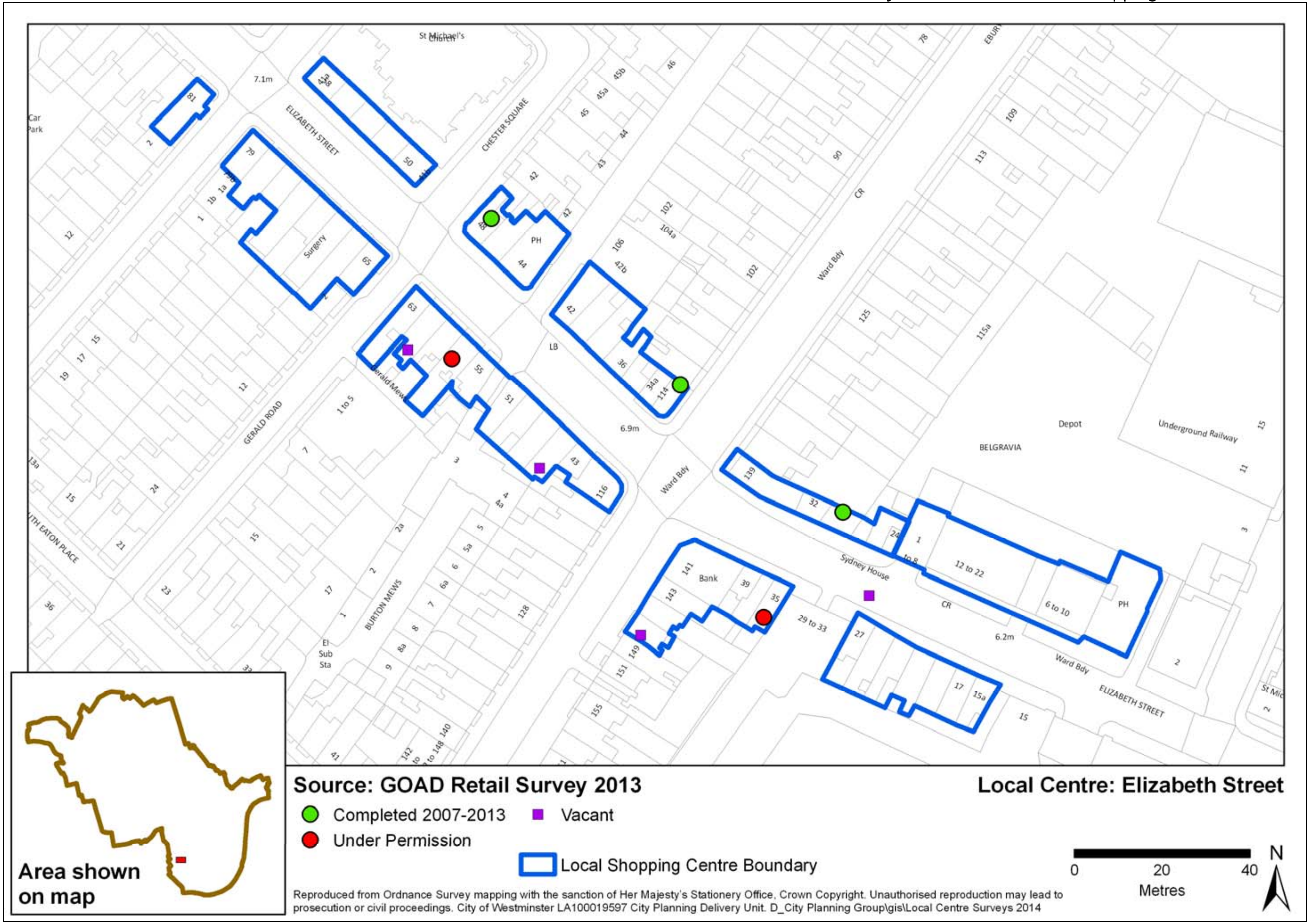
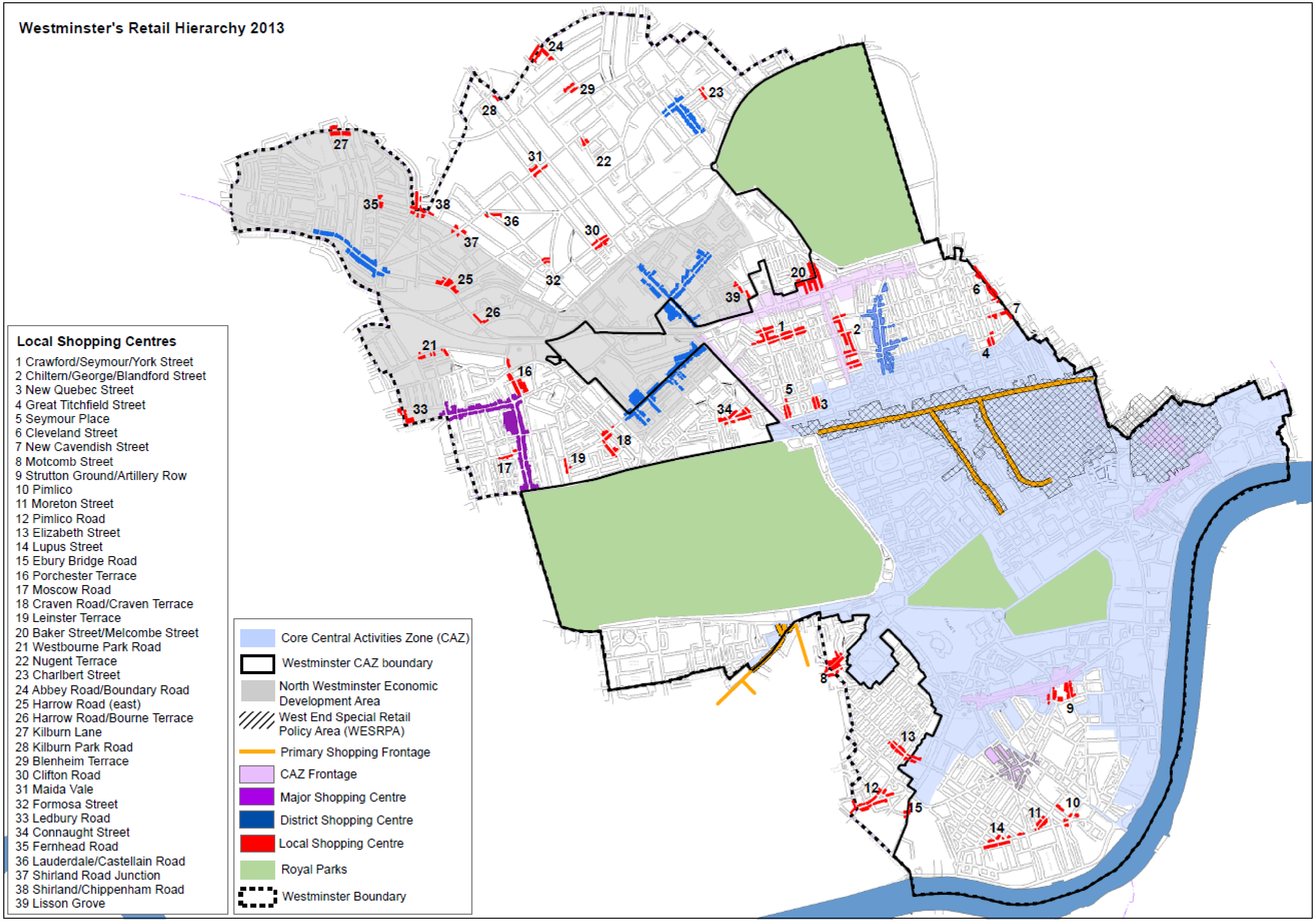

Source: GOAD Retail Survey 2013
Local Centre: Elizabeth Street
Completed 2007-2013
Vacant
Under Permission
Local Shopping Centre Boundary
0
20
40
Metres
N
Area shown on map
ELIZABETH STREET
CHESTER SQUARE
GERALD ROAD
BURTON MEWS
BELGRAVIA
Depot
Underground Railway
Sydney House
Bank
Surgery
PH
LB
Ward Bdy
CR

Figure 2 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 9: Lupus Street

Contents

Tables

Figures

(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.

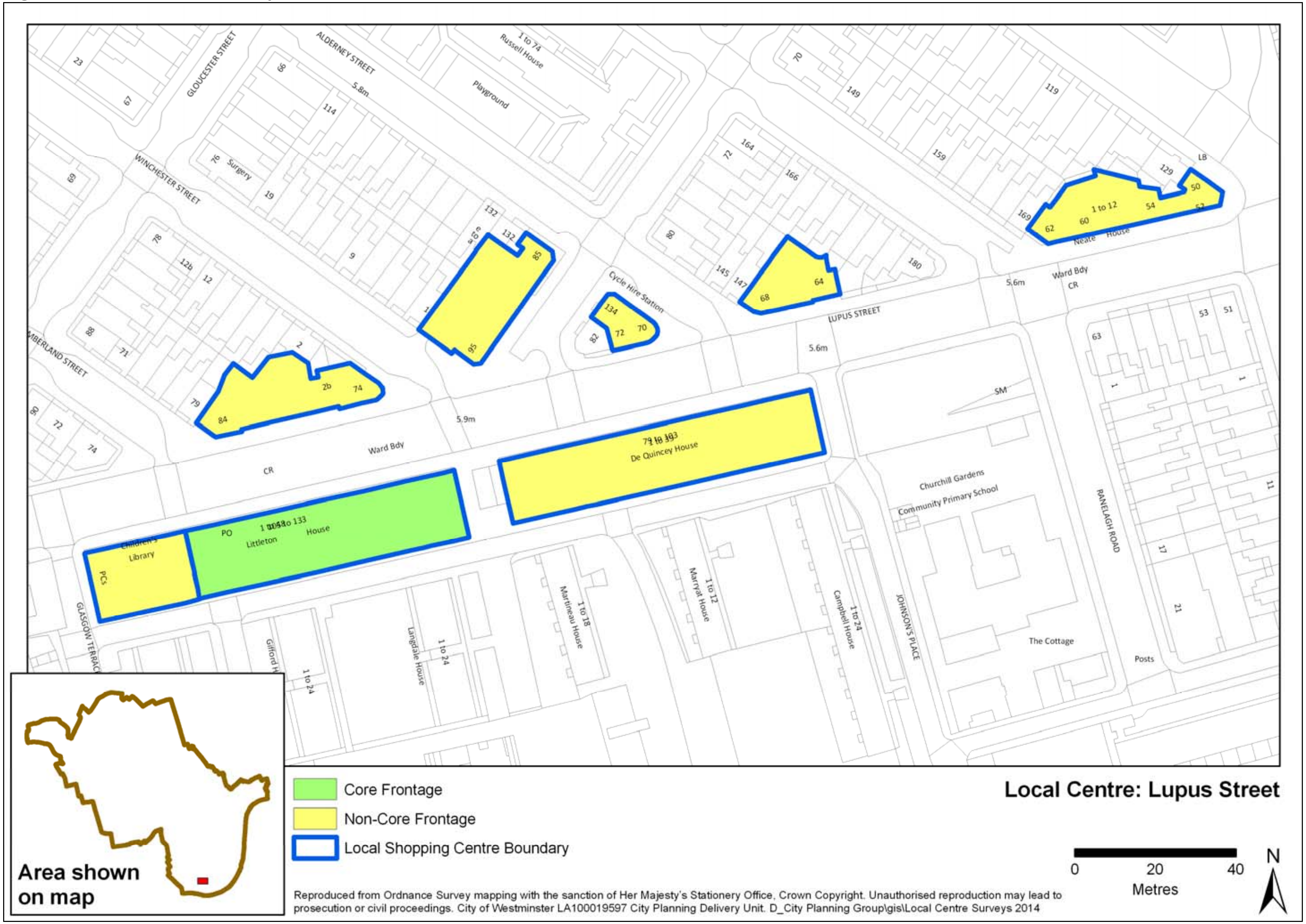
Local Centre **9: Lupus Street**

1. Introduction

1.1 Location

This large linear local centre is located in the south of Westminster in Pimlico (**Error! Reference source not found.**). The retail units on the southern side of Lupus Street are purpose built units (1960’s) with residential development above. The closest London Underground station is Pimlico, further down Lupus Street to the east. The catchment of the local centre is limited by the proximity to Moreton Street and Pimlico local centres, and to the larger Warwick Way/Tachbrook Street District Centre (see Westminster wide shopping centre boundaries plan – Figure 2).

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		23	29	28	26
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*0*
	National retailers	*1*	*0*	*0*	*0*
	Specialist Independent	*1*	*5*	*4*	*3*
	Independent	*5*	*7*	*6*	*11*
	Convenience	*16*	*17*	*18*	*12*
Class A2	Financial & Professional	4	5	5	4
Food & Drink		0	5	5	5
Class A3	*Restaurant/Café*	*0*	*2*	*2*	*2*
Class A4	*Pubs/Bars*	*0*	*0*	*0*	*0*
Class A5	*Takeaway*	*0*	*3*	*3*	*3*
	Takeaway/Restaurant	*0*	*0*	*0*	*0*
Sui Generis		2	2	1	2
Vacant Units		7	2	5	4
Arts/Culture		0	0	0	0
Health uses		0	0	0	0
Hotels		1	0	0	0
TOTAL		**37**	**43**	**44**	**41**

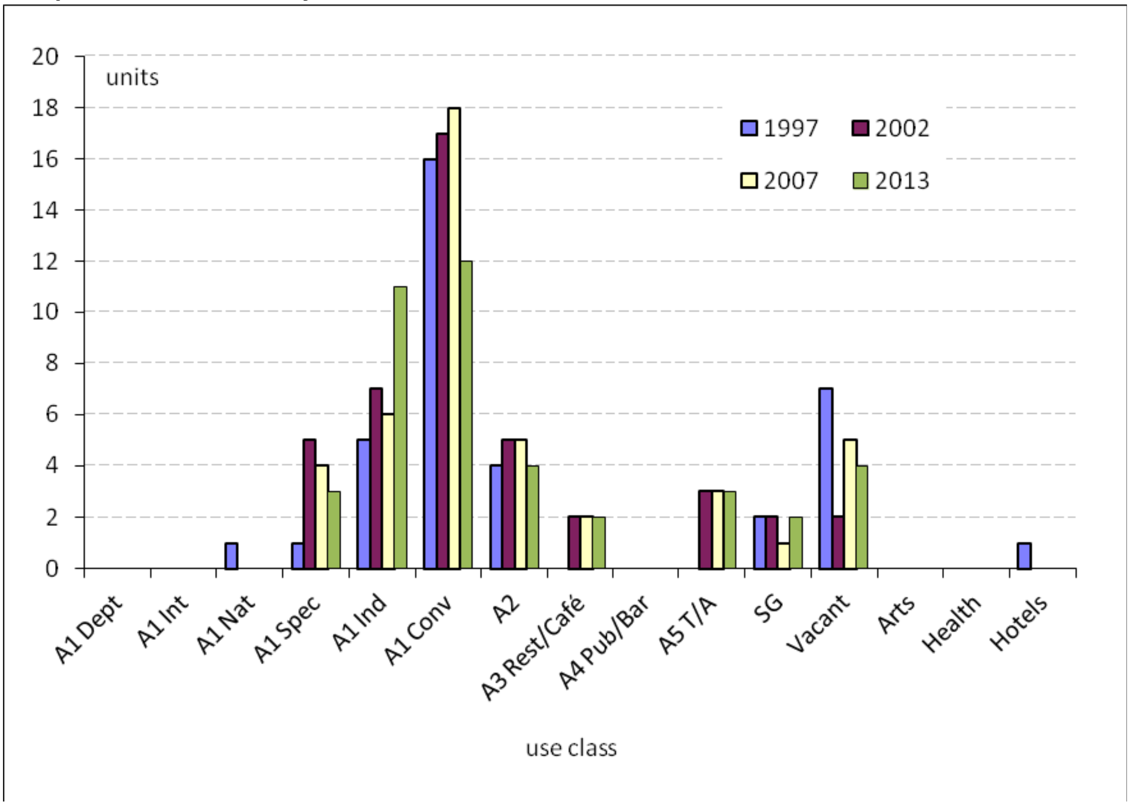
Source: WCC Land Use Survey July 2013

In total there are 41 units, which is below the number recorded when the centre was last surveyed in 2007.

The number of A1 retail uses in Lupus Street has decreased by two units since 2007. The number of Class A2 uses has decreased by 1 units and the number of Class A3/A4 and A5 uses has remained the same. With A1 uses, there was a loss of a specialist unit and six convenience shops, but a gain of five independent units. The number and configuration of restaurant/café's/bars has remained constant, and the number of sui generis units has increased by 1 from 2007.

Outside of A-class retail uses, the centre does not contain any hotels, health uses or arts uses but B1-class use has been introduced into the area since 2007 as shown on Figure 1. A description of these Use Classes is included in the Glossary of Terms attached to this report.

Figure 1 Lupus Street: Units by use class



2.2 Range of A1 Uses

Lupus Street has no department stores or international or national retailers. The centre has 26 Class A1 retail units including 12 convenience stores, 3 specialist retailers and 11 independent retailers. The specialist retailers include carpet and glazing shops. The independent stores include plumbing services and property care shops. The high proportion of comparison shops (**Error! Reference source not found.**) and absence of multiple retailers suggests that Lupus Street serves local residents with a mix of convenience and comparison shopping facilities.

2.3 Total Retail Floor space

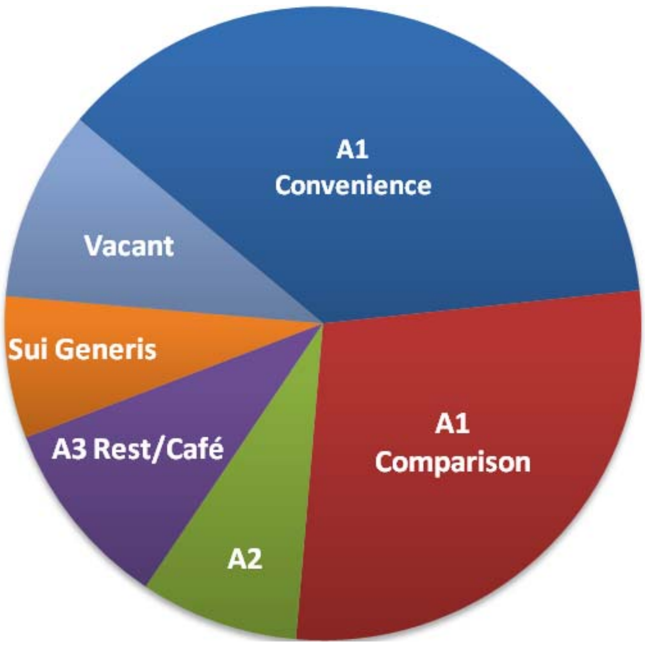
Total retail floor space in Lupus Street is broken down in Table 2. In total, Lupus Street has 3,233 sqm of retail floor space, which is above the average of 3,188 sqm for the 39 Local Centres in the City. A1 convenience floor space is dominant in the centre (almost 37%) due to the size of certain individual units, but Lupus Street has comparable proportions of A1 independent, A1 specialist and A2 floor space, which together account for over a third of the total retail floor space (36%). The centre has two A3 Restaurants/Café and three A5 Take-Away uses, but does not contain any A4 pubs or bars.

Table 2 Total Retail Floor space 2013

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2014)
A1 Convenience	1203	37.22%	14.85%
A1 Comparison	906	28.03%	35.18%
A2	260	8.06%	11.16%
A3 Rest/Café	315	9.74%	17.41%
A4 Pub/Bar	0	0.00%	5.13%
Sui Generis	233	7.22%	3.90%
Vacant	315	9.74%	8.55%
Health	0	0.00%	1.96%
Hotels	0	0.00%	0.45%
Art	0	0.00%	1.33%
Leisure	0	0.00%	0.06%
Total	**3,233**	**100%**	**100%**

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

Figure 3 Street Retail Floor Space 2013



Lupus Street is a Local Centre with a selection of local services and many convenience and food shops. There are no banks or building societies, and only a few restaurants, cafés or bars. The Local Centre does not provide the same range and selection found in large Local Centres or District Centres elsewhere in Westminster. It is important to maintain the existing local range of convenience shops in the Lupus Street Local Centre as they encourage walking, and make city life more practical and attractive.

2.4 Proportion of Vacant Street Level Property

The unit vacancy rate in Lupus Street is 2.3% which is lower than the average rate for Local Centres in Westminster as shown in **Table 3**. The vacancy rate has decreased by one unit since 2007 when there were five vacant units in the local centre.

Table 3 Level of Vacant Street Level Property 2013

	% Vacant Units 1997	% Vacant Units 2002	% Vacant Units 2007	% Vacant Units 2013	% Local Centre Average 2013
Lupus Street	17.1% (7 units)	4.7% (2 units)	11.4% (5 units)	9.76% (4 unit)	8% (4 units)

Source: City of Westminster GIS System and site survey July 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 July 2013.

3.2 Accessibility on foot and by public transport

The local centre is reasonably well served by transport links. The nearest London Underground Station is Pimlico (Victoria Line) which is found 5-10 minutes walk from the local centre, at the east end of Lupus Street. Victoria Station is roughly 15 minutes walk north of the local centre. The centre is also reasonably well served by bus as the routes C10, 360 and 24 all serve the local 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 **Table 4** below. The centre's overall score for attractions is 34.62%, meaning that the centre is quite average in terms of the attractions it offers. This is slightly higher than the Local Centre average of 31%. Lupus Street has a poor provision of multiple retailers, restaurants, cultural/community events, sport and leisure facilities and bank/building society provision. The centre's main strength is its good provision of food shops and local services.

4.2 Daytime Amenity

Lupus Street is an attractive Local Centre. The centre's day time amenity rating is 67% which is slightly lower than the average for all Local Centres of 68%, and was ranked =12th out of the 39 Local Centres in Westminster. The centre's rating is good in terms of the absence of litter, street fouling, glass and debris, vandalism, beggars, rough sleepers, street drinkers, touting and illegal street traders. A lot of the security categories are also rated as good, such as the lighting, the deterrent measures and feeling of safety. The centre has a poor *'feel good factor'* as there are no features that identify the centre and no promotion of street events, which together reduce the centre's overall rating.

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			9/26		
Percentage	26.92%			30.77%			34.62%		

Source: City of Westminster site survey July 2013

Note: Each issue is ranked in a scale 0 to 2, with 2 being the highest positive score achievable. Scores are provided from the adopted 2002 and 2007 Health Checks Surveys and a 2013 update to allow comparison to be made between the others results.

Table 5 Day Time Amenity within the Local Centre 2013

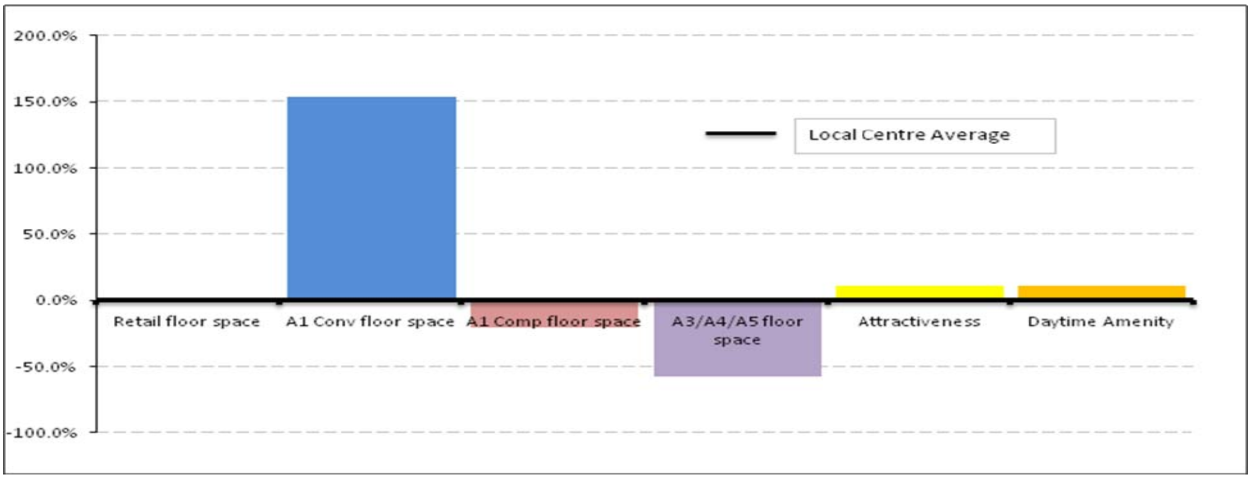
AMENITY - DAYTIME	1997			2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Overall environment of public areas in the centre												
General Cleanliness in Shopping Hours												
Presence of litter		N/A			X		X			X		
Presence of refuse bag		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		X			X			X			X	
Quality of Buildings		X			X			X			X	
Special features (pedestrianisation, street furniture)		X			X			X			X	
Impact of vacant sites			X	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)		X			X			X		X		
Ease of passage for pedestrians (incl. presence of obstacles eg illegally parked vehicles)		N/A			X			X		X		
Evidence of drunkenness, antisocial behaviour rowdiness		N/A		X			X			X		
Presence of rough sleepers / Presence of beggars		N/A		X			X			X		
Presence of street drinkers Evidence of touting (eg minicabs, ricksaws, prostitution, drug dealing, etc)		N/A		X			X			X		
Presence of illegal street traders e.g. counferteit goods, hot dogs, peanuts, etc		N/A		X			X			X		
Effectiveness of any deterrent measures (CCTV, police patrols, door security, etc)		X		X			X				X	
Quality of street lighting		X			X		X			X		
Safety perception in shopping hours		X			X		X			X		
Identity of town centre												
Features which identify the centre (eg flagship stores, buildings, etc)			X			X			X			X
Promotion / Streets events			X			X			X			X
'Feel good' factor of town centre			X			X			X			X
Total		**8/28**		**29/46**			**33/46**				**31/46**	
Percentage		31.0%		63.0%			71.7%				67.4%	

Source: City of Westminster site survey July 2013 / Note**:** Each issue is ranked in a scale 0 to 2, with 2 being the highest positive score achievable.

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2007

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



Lupus Street is a relatively large Local Centre that has an average amount of retail floor space when compared to the overall average for the 39 local centres. The A1 convenience floorspace is far above the overall local centre average. However, both A1 comparison floor space figures, and food and drink floor space figures (A3/A4/A5) are below the average level as illustrated, showing its predominant function as a convenience shopping location for local residents. In terms of the rating of the physical environment, the centre has an attractiveness rating and a daytime amenity rating both slightly above 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 was only one permitted planning application involving an A-class use for a new shop-front installation. There was also one refused application for retention of fruit and vegetable racks to front of shop to an existing convenience shop. Additional capacity could be accommodated in the currently vacant shop 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**		**3,233**
		Total Convenience (A1)		**1203**
		Total Comparison (A1)		**906**
		Total Service (A2)		**260**
		Total A3		**115**
		Total A4		**0**
		Total A5		**200**
		Total Sui Generis		**233**
		Total Vacant		**315**
	Retail Offer	**Total Number of Shop Units**	**41**	
		Total Number of A1 Units	**26**	
		a) Convenience shops	**12**	
		b) Department/principal stores	**0**	
		c) Prestige international shops	**0**	
		d) National comparison retailers	**0**	
		e) Specialist Independent shops	**3**	
		f) Independent shops	**11**	
		Total Comparison Multiples	**14**	
		Total Number of A2 Units	**4**	
		Total Number of A3 Units	**2**	
		Total Number of A4 Units	**0**	
		Total Number of A5 Units	**3**	
		Total Number of Sui Generis	**2**	
		Total Number of Vacant	**4**	
	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**	**0**
HEALTH USES		**(clinics, surgeries etc.)**	**0**	**0**
HOTELS			**0**	**0**

Little has changed on site since the last survey was carried out in this centre. In terms of its vitality and viability, and general economic health this centre is considered to be ‘neutral’, as it was when last surveyed in 2007.

Certain types of extensions and changes of use do not require full planning permission as they are classed as ‘permitted development’and recent changes to permitted development rights now allow town centre uses (A1, A2, A3, A4, A5, B1, D1 and D2) below a certain size to change temporarily to A1, A2, A3 or B1 for a period of two years. This could impact on the land use mix here and will be kept under review.

The Government are considering further changes to permitted development rights to allow shop units to change permanently to residential, banks and building societies. These changes will all be kept under review.

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 Local Centre 9: Lupus Street

Table 7 Lupus Street Local Centre Views

The core frontage on the south west side of the local centre.

The secondary frontage on the south side of the local centre, illustrating the groceries display on the pavement.

Another view of the secondary frontage on the south side of the local centre.
A1 convenience (dry cleaner) and A2 use (betting office)

The Post Office located at the core frontage of the local centre.

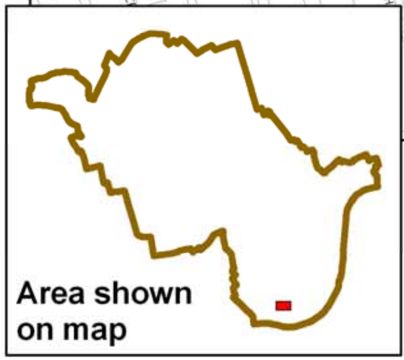
A more attractive shop front and streetscape in the secondary frontage on the north side of the local centre

Another view of the secondary frontage on the north side of the local centre where a planning permission is being implemented for a new shop front installation for either A1 or D1 use. Reference: 13/01597/ADFULL

Table 8 Land Use Table (Westminster land use survey 2013)

ADDRESS	FASCIA	DESCRIPTION	USE	SQ M	A1 Conv.	A1 Spec.	A1 Ind	A2	A3 Res/Caf	A3 Takeaw.	B1	S G	Vacant
85 CHARLWOOD STREET		VACANT	Vacant	90									1
84 LUPUS STREET	HAIR TRENDY	HAIRDRESSING	A1	80			1						
82 LUPUS STREET	FRIENDS SUPERMARKET	CONVENIENCE STORE	A1	56	1								
111 LUPUS STREET	GREGGS	BAKER	A1	59	1								
107 LUPUS STREET	GREEN HILLS	GREENGROCER	A1	67	1								
101 LUPUS STREET	BELGRAVE SERVICES LTD	ESTATE AGENT	A2	59				1					
78 LUPUS STREET	PIMLICO FINANCE	BANK	A2	60				1					
76 LUPUS STREET	PIMLICO HARDWARE	DIY	A1	60			1						
109 LUPUS STREET	PIMLICO EYE CARE	OPTICIAN	A1	57			1						
105 LUPUS STREET	SIMMONDS PHARMACY	CHEMIST	A1	88	1								
91 CHARLWOOD STREET	PAXALL CHEMISTS	CHEMIST	A1	58	1								
127 LUPUS STREET	F.P.J. SHOE REPAIR & KEYCUTTING	SHOE REPAIRS	A1	38			1						
117 LUPUS STREET	FREEMANS BUTCHERS	BUTCHER	A1	63	1								
87 CHARLWOOD STREET	Office	OFFICE	B1	56							1		
LUPUS STREET	F P J NAILS	BEAUTY SALON	A2	29				1					
129 LUPUS STREET	BOSS HEATING ELECTRICAL PLUMBING SUPPLIES	HARDWARE	A1	57			1						
133 LUPUS STREET	THE PIMLICO TOY LIBRARY	CHARITY SHOP	A1	95			1						
99 LUPUS STREET	SAND CAFE	CAFE	A3	57					1				
93 CHARLWOOD STREET	MY CAFE	CAFE	A3	58					1				
95 CHARLWOOD STREET	MAKING WAVES	HAIRDRESSING	A1	101			1						
131 LUPUS STREET	CONNEXIONS	ADVICE CENTRE	ASG	159								1	
74 LUPUS STREET		VACANT	Vacant	97									1
115 LUPUS STREET	NORRIS NEWSAGENT	NEWSAGENT	A1	75	1								
119 LUPUS STREET	PANTALOONS	CLOTHING HIRE	A1	56		1							
80 LUPUS STREET	LUPUS DRY CLEANERS	DRY CLEANING	A1	61			1						
121 - 125 LUPUS STREET	POST OFFICE	POST OFFICE	A1	242	1								

103 LUPUS STREET	PIMLICO TRADITIONAL FISH & CHIPS	FISH & CHIPS	A5	60						1			
89 CHARLWOOD STREET	DOMINO`S PIZZA	PIZZA TAKE AWAY	A5	55						1			
113 LUPUS STREET	PIZZA HUT DELIVERY	PIZZA TAKE AWAY	A5	85						1			
97 LUPUS STREET	KF STORES	NEWSAGENT	A1	56	1								
134 ALDERNEY STREET		VACANT	Vacant	55									1
82 CHARLWOOD STREET	Residential	DWELLING	Residential	56									
72 LUPUS STREET	THE SALON	HAIRDRESSING	A1	37			1						
81 - 83 LUPUS STREET	CORAL	BETTING OFFICE	A2	113				1					
50 - 52 LUPUS STREET	STANDARD FOODS	CONVENIENCE STORE	A1	84	1								
79 LUPUS STREET	EXPERT	DRY CLEANING	A1	65			1						
68 LUPUS STREET		VACANT	Vacant	73									1
66 LUPUS STREET	Office	OFFICE	B1	64							1		
70 LUPUS STREET	DELI DELIZIE D`ITALIA	DELICATESSEN	A1	39			1						
85 - 87 LUPUS STREET	ALHAYAT	CONVENIENCE STORE	A1	118	1								
60 LUPUS STREET	CARPET EXPRESS	CARPETS & FLOORING	A1	96		1							
54 - 58 LUPUS STREET	GLASS EXPRESS	GLASS MERCHANT	B1	79							1		
62 LUPUS STREET	CARPET EXPRESS	CARPETS & FLOORING	A1	65		1							
93 - 95 LUPUS STREET	TESCO EXPRESS	CONVENIENCE STORE	A1	237	1								
64 LUPUS STREET	RED & WHITE LAUNDRIES	LAUNDERETTE	ASG	74								1	
109 - 129 ST GEORGES DRIVE	Residential	DWELLINGS	Residential	887									



Source: GOAD Retail Survey 2013

Local Centre: Lupus Street

- A1: Retail
- A2: Financial & Professional
- A3: Restaurant/Café
- A5: Take Away
- ASG: Sui Generis
- B1: Office
- Local Shopping Centre Boundary

0 20 40
Metres

N

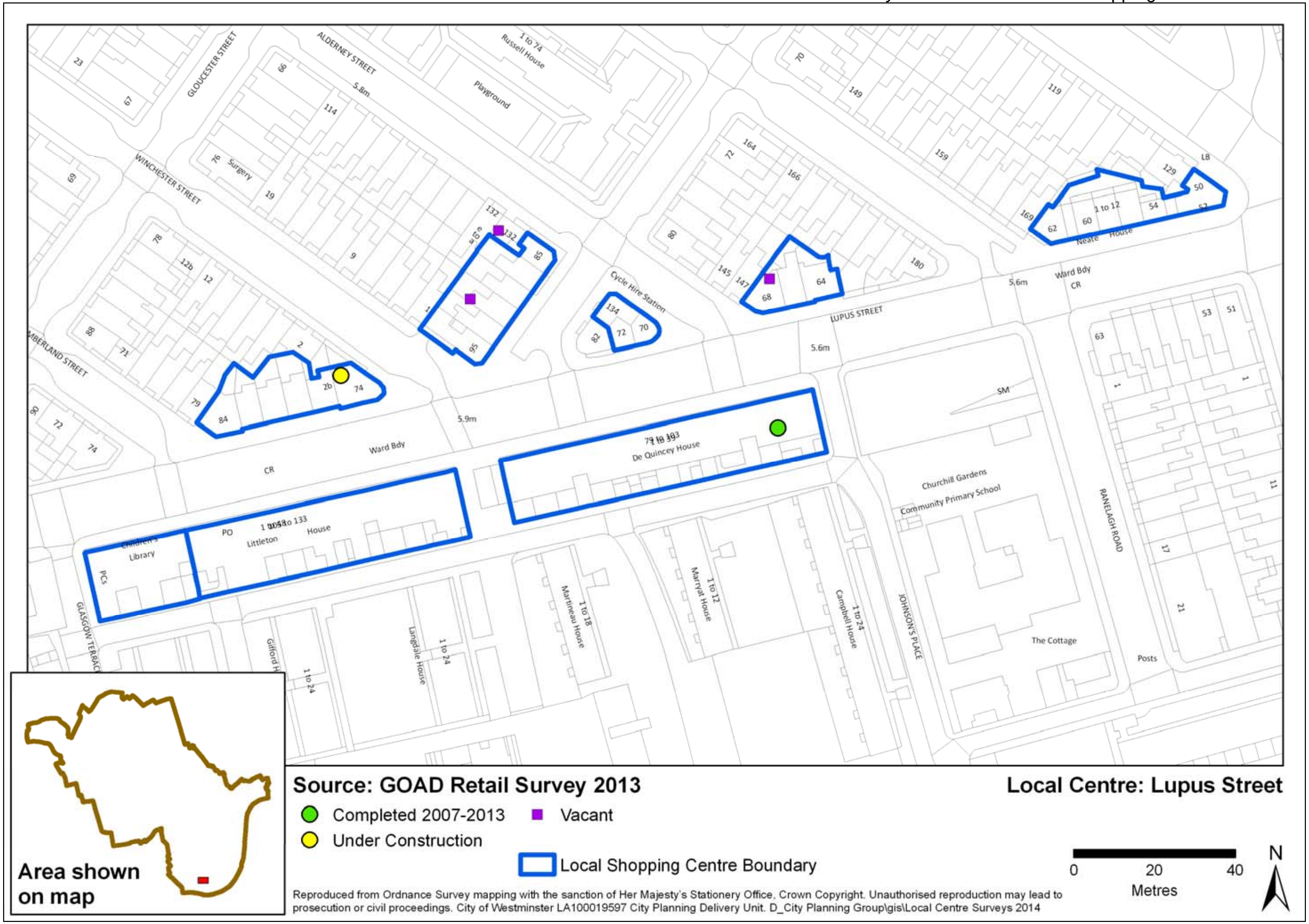
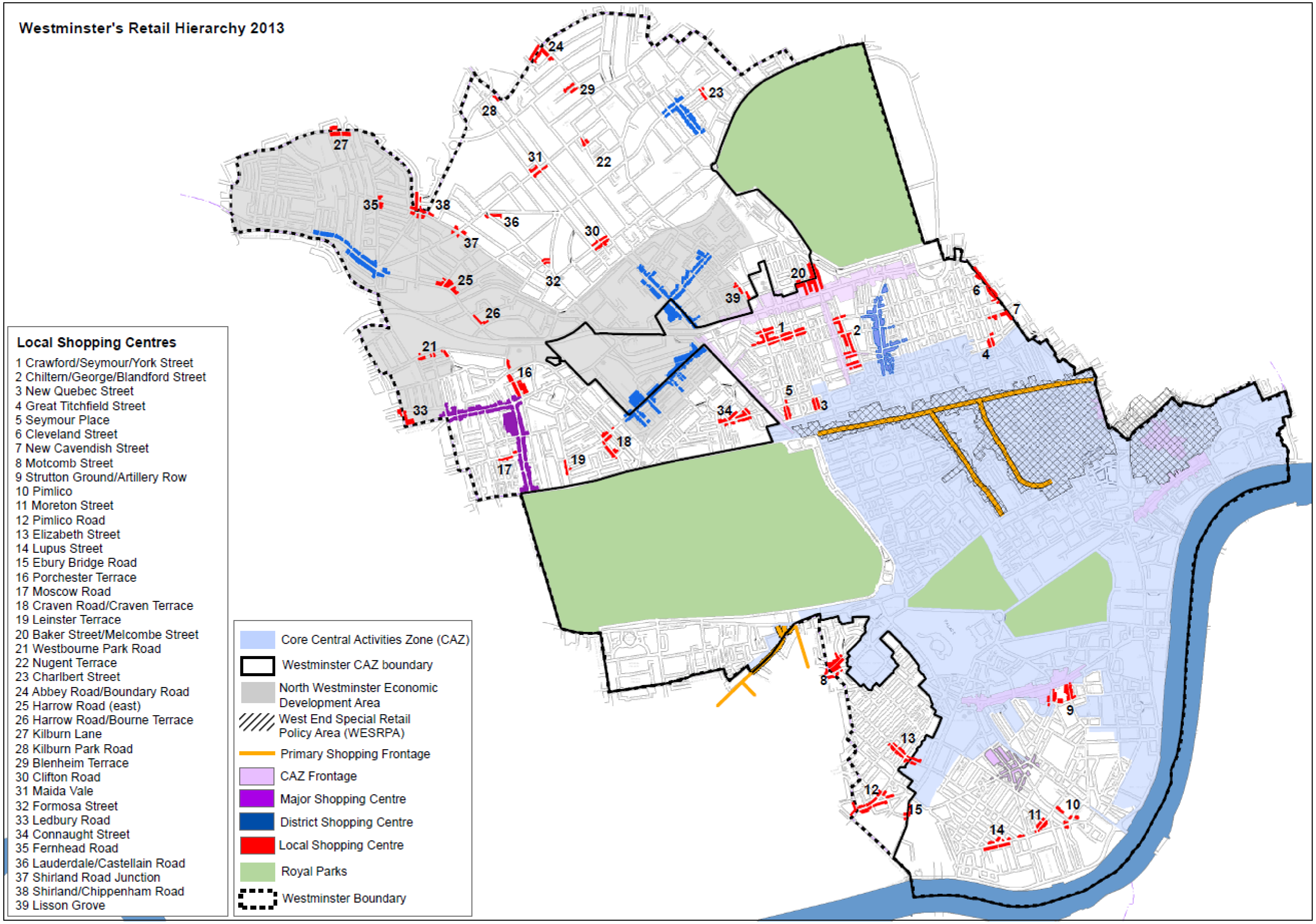

Source: GOAD Retail Survey 2013
Local Centre: Lupus Street
Completed 2007-2013
Vacant
Under Construction
Local Shopping Centre Boundary
0
20
40
Metres
N
Area shown on map
Reproduced from Ordnance Survey mapping with the sanction of Her Majesty's Stationery Office, Crown Copyright. Unauthorised reproduction may lead to prosecution or civil proceedings. City of Westminster LA100019597 City Planning Delivery Unit. D_City Planning Group\gis\Local Centre Surveys 2014
GLOUCESTER STREET
ALDERNEY STREET
WINCHESTER STREET
LUPUS STREET
RANELAGH ROAD
JOHNSON'S PLACE
Cycle Hire Station
Playground
Surgery
Russell House
De Quincey House
Littleton House
Children's Library
Churchill Gardens Community Primary School
The Cottage
Martineau House
Marryat House
Campbell House
Langdale House
Neate House
Ward Bdy
Posts

Figure 2 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

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Shopping Centre Health Check Survey 2014

Local Centre 10: Moreton Street

Contents

Tables

Figures

(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.

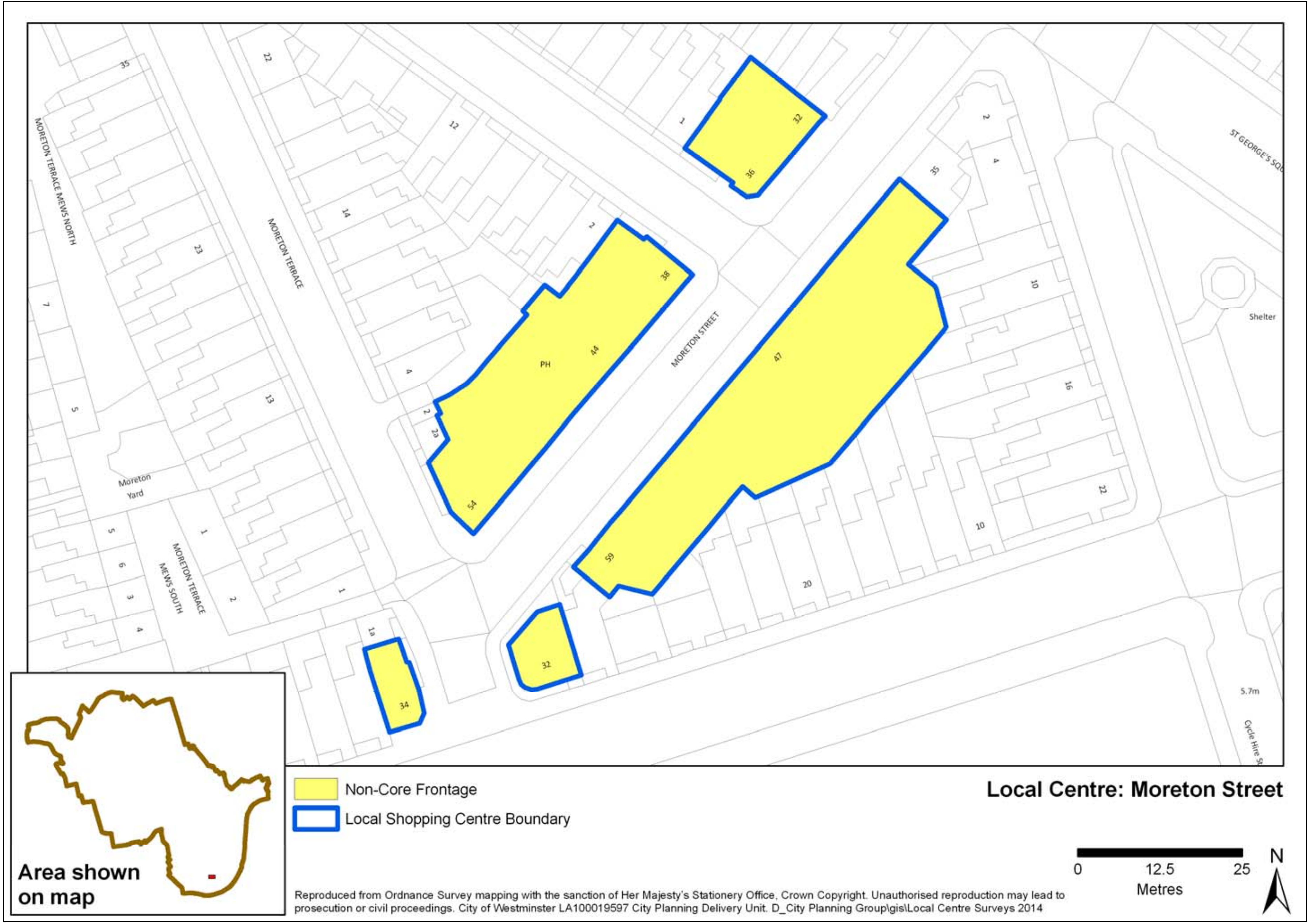
Local Centre **10: Moreton Street**

1. Introduction

1.1 Location

Moreton Street is a small linear local shopping centre, located in Pimlico in the south of Westminster, between the two larger local centres of Lupus Street and Pimlico (see **Error! Reference source not found.** below), and very close to the larger Warwick Way/Tachbrook Street district centre. The centre is an amalgamation of offices and specialist shops, adjacent to streets that are very residential in nature, and for this reason does not really compete with the neighbouring centres.

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 2002	No. of Units 2007	No. of Units 2013
Class A1 Retail		12	12	16
	Department/principle stores	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*
	National retailers	*0*	*0*	*0*
	Specialist Independent	*8*	*7*	*6*
	Independent	*4*	*5*	*9*
	Convenience	*0*	*0*	*1*
Class A2	Financial & Professional	0	0	3
Food & Drink		3	4	3
Class A3	*Restaurant/Café*	*3*	*4*	*3*
Class A4	*Pubs/Bars*	*0*	*0*	*0*
Class A5	*Takeaway*	*0*	*0*	*0*
	Takeaway/Restaurant	*0*	*0*	*0*
Sui Generis		0	0	0
Vacant Units		2	0	1
Arts/Culture		0	0	0
Health uses		0	1	0
Hotels		0	0	0
TOTAL		**17**	**17**	**23**

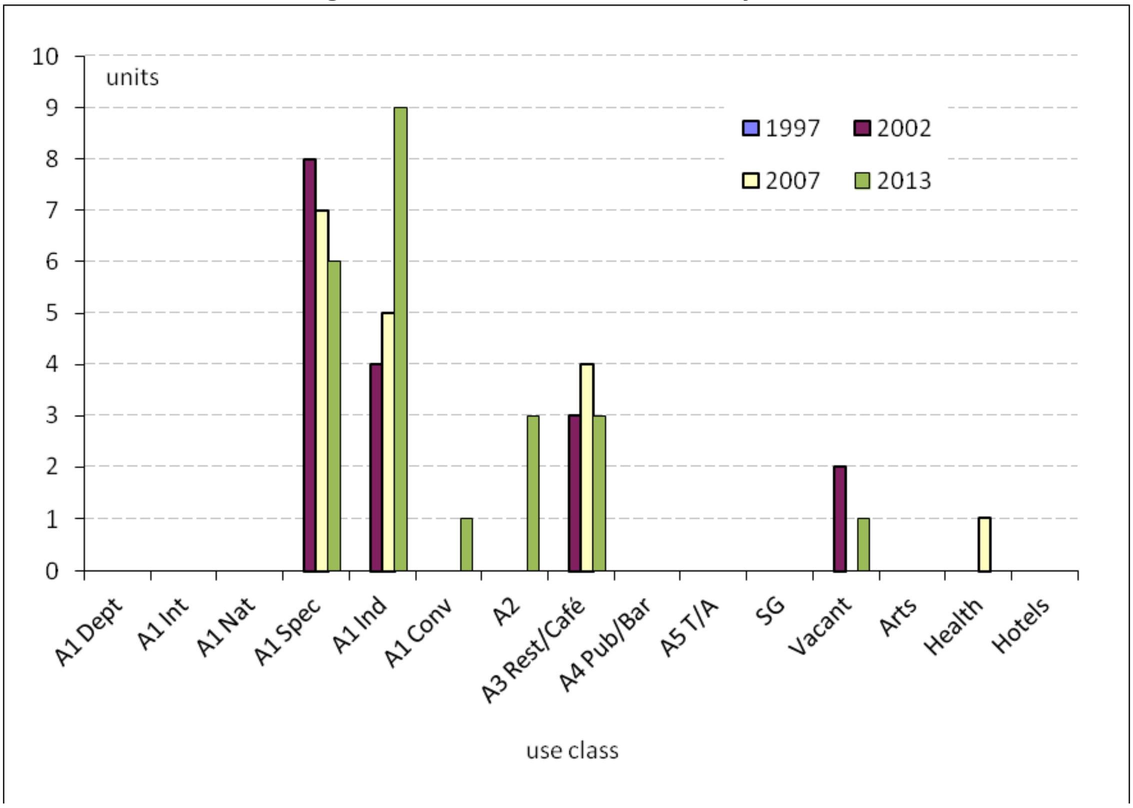
Source: WCC Land Use Survey July 2013

In total there are 23 units, an increase of 6 units (as recorded in the 2007 land survey), one of which is a vacant unit. Three of the newly recorded units were previously excluded from the 2007 health check survey and other units might have split since 2007.

The number of A1 retail uses in Moreton Street has increased by 4 units, with a gain of 4 independent retailers, one convenience shop and a decrease of one specialist retailer. The number of Class A2 units has increased by 3 and the number of Class A3/A4 and A5 units has decreased by one unit.

Outside of A-class retail uses, the centre does not contain any hotels, health uses or arts uses but two D1 (Non-residential institutions) are offered in the centre as a nursery school and a training centre. A description of these Use Classes is included in the Glossary of Terms attached to this report.

Figure 1 Moreton Street: Units by Class



2.2 Range of A1 Uses

Moreton Street has no department stores or international/national retailers. The centre has 16 Class A1 retail units including 6 specialist retailers, 9 independent retailers and 1 convenience retailer shop. The specialist retailers retail are art galleries and antique shops. The independent stores include clothes and accessories shops, a hair products shop, a beauty skincare shop, a limestone shop and a laptop service shop. The high proportion of comparison shops and no multiple retailers suggests that Moreton Street serves local residents and specialist shoppers with a high proportion of comparison and specialist shopping facilities.

2.3 Total Retail Floor space

Total retail floor space in Moreton Street is broken down in Table 2 below. In total, Moreton Street has 1,528 sqm of retail floor space, which is below the average of 3,188 sqm for the 39 Local Centres. Moreton Street has comparable proportions of A1 independent, A1 specialist and A3 Restaurant/Café floor spaces, which together account for 78% of the total retail floor space in this centre (see Figure 3 below). There is an absence of the A4 and A5 use class. The Vacant floor space available reaches 4% of the total of floor space in this centre. The local centre has an above average proportion of comparison floor space, due to the low proportion (4%) of A1 convenience floor space.

Figure 3 Moreton Street Retail Floor Space 2013

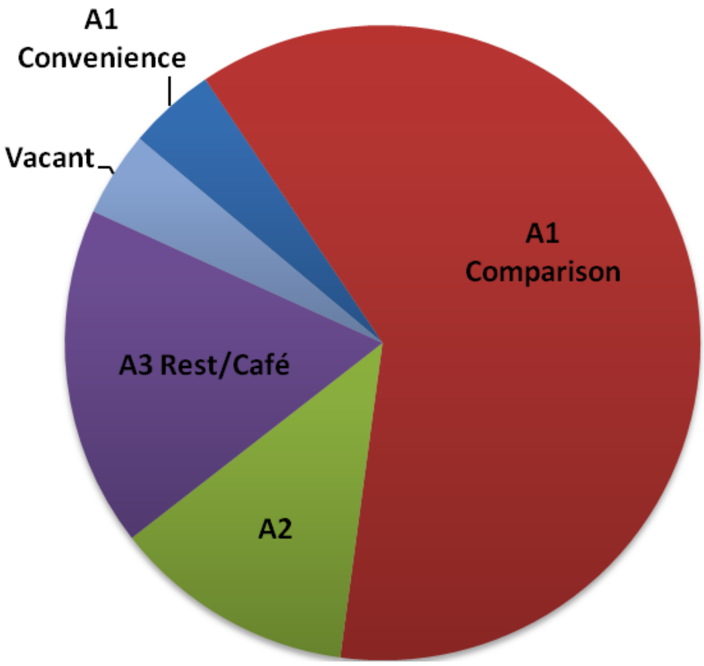


Table 2 Total Retail Floor space 2013

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2014)
A1 Convenience	68	4.46%	14.85%
A1 Comparison	941	61.56%	35.18%
A2	189	12.35%	11.16%
A3 Rest/Café	264	17.29%	17.41%
A4 Pub/Bar	0	0.00%	5.13%
Sui Generis	0	0.00%	3.90%
Vacant	66	4.33%	8.55%
Health	0	0.00%	1.96%
Hotels	0	0.00%	0.45%
Art	0	0.00%	1.33%
Leisure	0	0.00%	0.06%
Total	**1,528**	**100%**	**100%**

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

Moreton Street is a Local Centre which is dominated by two retail use classes as illustrated above (A1 and A3). 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 in Moreton Street is below the average vacancy rate for Local Centres in Westminster (2007), as shown in **Table 3** below. The vacancy rate has increased by 1 units since 2007 when the centre was in full occupancy, and is below the Local Centre average of 8%.

Table 3 Level of Vacant Street Level Property 2013

	% Vacant Units 1997	% Vacant Units 2002	% Vacant Units 2007	% Vacant Units 2013	% Local Centre Average 2013
Moreton St	N/A	11.8% (2 units)	0% (0 units)	4.4% (1 units)	8% (2 units)

Source: City of Westminster GIS System and site survey July 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 weekday afternoon in July 2013.

3.2 Accessibility on foot and by public transport

Moreton Street is located under 5 minutes walk from Pimlico London Underground Station (Victoria Line), and around 10 minutes walk from Victoria mainline and London Underground Station. Several buses also serve the area around the local centre including the route numbers 24, C10 and 360.

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 38.5%, meaning that the centre is reasonably attractive, but it remains with only minimal improvements since the last assessment was undertaken. This is slightly higher than the Local Centre average of 31%. Moreton Street has a poor provision of multiple retailers, cultural/community events, sport and leisure facilities and bank/building society provision. The centre’s main strength is its good provision of independent and specialist retailers.

4.2 Daytime Amenity

Moreton Street is a very attractive Local Centre. The centre’s day time amenity rating is 85% which is higher than the average for all Local Centres of 68%, and was ranked 5th out of the 39 Local Centres in Westminster. The centre’s rating is only rated as ‘poor’ in terms of promotion and street events, and average in terms of refuse bags on the street, special features, security, the quality of street lighting and the absence of features which identify the centre. The centre is rated as ‘good’ for a vast majority of the categories in terms of the appearance, security and all other 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	8/26			9/26			10/26		
Percentage	30.77%			34.62%			38.46%		

Source: City of Westminster site survey July 2013

Note: Each issue is ranked in a scale 0 to 2, with 2 being the highest positive score achievable. Scores are provided from the adopted 2002 and 2007 Health Checks Surveys and a 2013 update to allow comparison to be made between the others results.

Table 5 Day Time Amenity within the Local Centre 2013

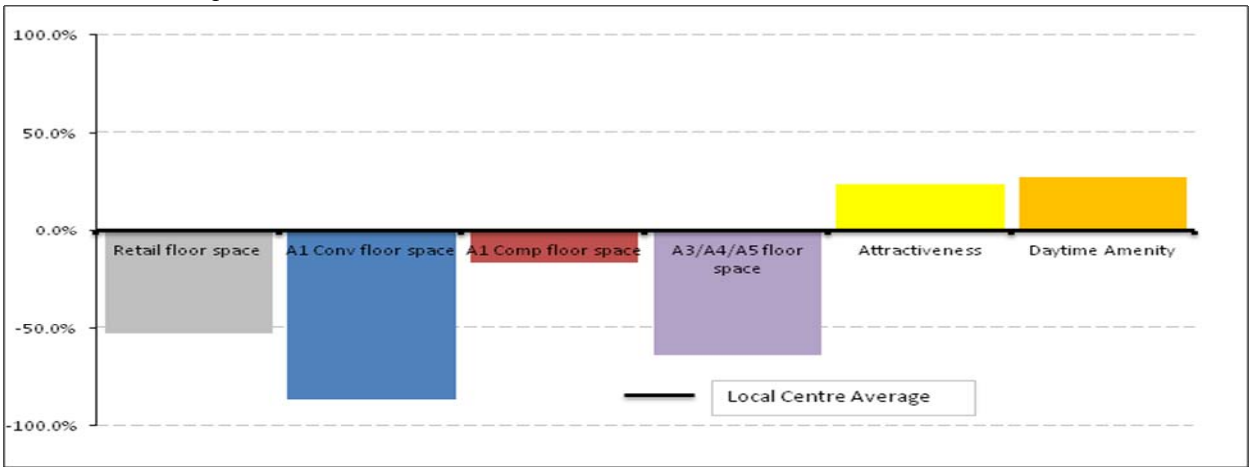
AMENITY - DAYTIME	1997			2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Overall environment of public areas in the centre												
General Cleanliness in Shopping Hours												
Presence of litter		N/A		X			X			X		
Presence of refuse bag		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)		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 eg illegally parked vehicles)		N/A			X		X			X		
Evidence of drunkenness, antisocial behaviour rowdiness		N/A		X			X			X		
Presence of rough sleepers / Presence of beggars		N/A		X / X			X / X			X / X		
Presence of street drinkers Evidence of touting (eg minicabs, ricksaws, prostitution, drug dealing, etc)		N/A		X X			X X			X X		
Presence of illegal street traders e.g. counferteit 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 (eg flagship stores, buildings, etc)		N/A			X			X			X	
Promotion / Streets events		N/A				X			X			X
Feel good' factor of town centre		N/A		X			X			X		
Total		**N/A**			**39/46**			**40/46**			**39/46**	
Percentage		N/A			84.8%			87.0%			84.8%	

Source: City of Westminster site survey July 2013 / No**te:** Each issue is ranked in a scale 0 to 2, with 2 being the highest positive score achievable.

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2007

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



Moreton Street is a reasonably 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 floor space which is well below the average, and also for comparison floor space figures, and food and drink floor space figures (A3/A4/A5) as illustrated. In terms of the rating of the physical environment, the centre has a higher than average attractiveness rating, and a daytime amenity rating well above the overall average, reflecting the environmental quality of 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 two permitted planning applications involving A-class uses within Pimlico Local Centre, which implicated a new shop front improvement, and A1 Use Class to be used as A1 or A2 (beauty skincare products). Additional capacity could be accommodated in currently vacant shop 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**		**1,528**
		Total Convenience (A1)		**68**
		Total Comparison (A1)		**941**
		Total Service (A2)		**189**
		Total A3		**264**
		Total A4		**0**
		Total A5		**0**
		Total Sui Generis		**0**
		Total Vacant		**66**
	Retail Offer	**Total Number of Shop Units**	**23**	
		Total Number of A1 Units	**16**	
		a) Convenience shops	**1**	
		b) Department/principal stores	**0**	
		c) Prestige international shops	**0**	
		d) National comparison retailers	**0**	
		e) Specialist Independent shops	**6**	
		f) Independent shops	**9**	
		Total Comparison Multiples	**15**	
		Total Number of A2 Units	**3**	
		Total Number of A3 Units	**3**	
		Total Number of A4 Units	**0**	
		Total Number of A5 Units	**0**	
		Total Number of Sui Generis	**0**	
		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**	**0**
HEALTH USES		**(clinics, surgeries etc.)**	**0**	**0**
HOTELS			**0**	**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.

Certain types of extensions and changes of use do not require full planning permission as they are classed as 'permitted development' and recent changes to permitted development rights now allow town centre uses (A1, A2, A3, A4, A5, B1, D1 and D2) below a certain size to change temporarily to A1, A2, A3 or B1 for a period of two years. This could impact on the land use mix here and will be kept under review.

The Government are considering further changes to permitted development rights to allow shop units to change permanently to residential, banks and building societies. These changes will all be kept under review.

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

Table 7 Views of Moreton Street local centre

Attractive, well kept shop frontages on the south side of the local centre, also illustrating the high standard of the street environment.
Antique store.

Attractive frontages in the middle of the local centre, with clear and ease pavement which improve the general streetscape.

The attractive but quiet local centre, due in part to the type of predominantly specialist retail contained in the centre.

Another quiet streetscape view with well kept shop frontages illustrating the high standard of the street environment.

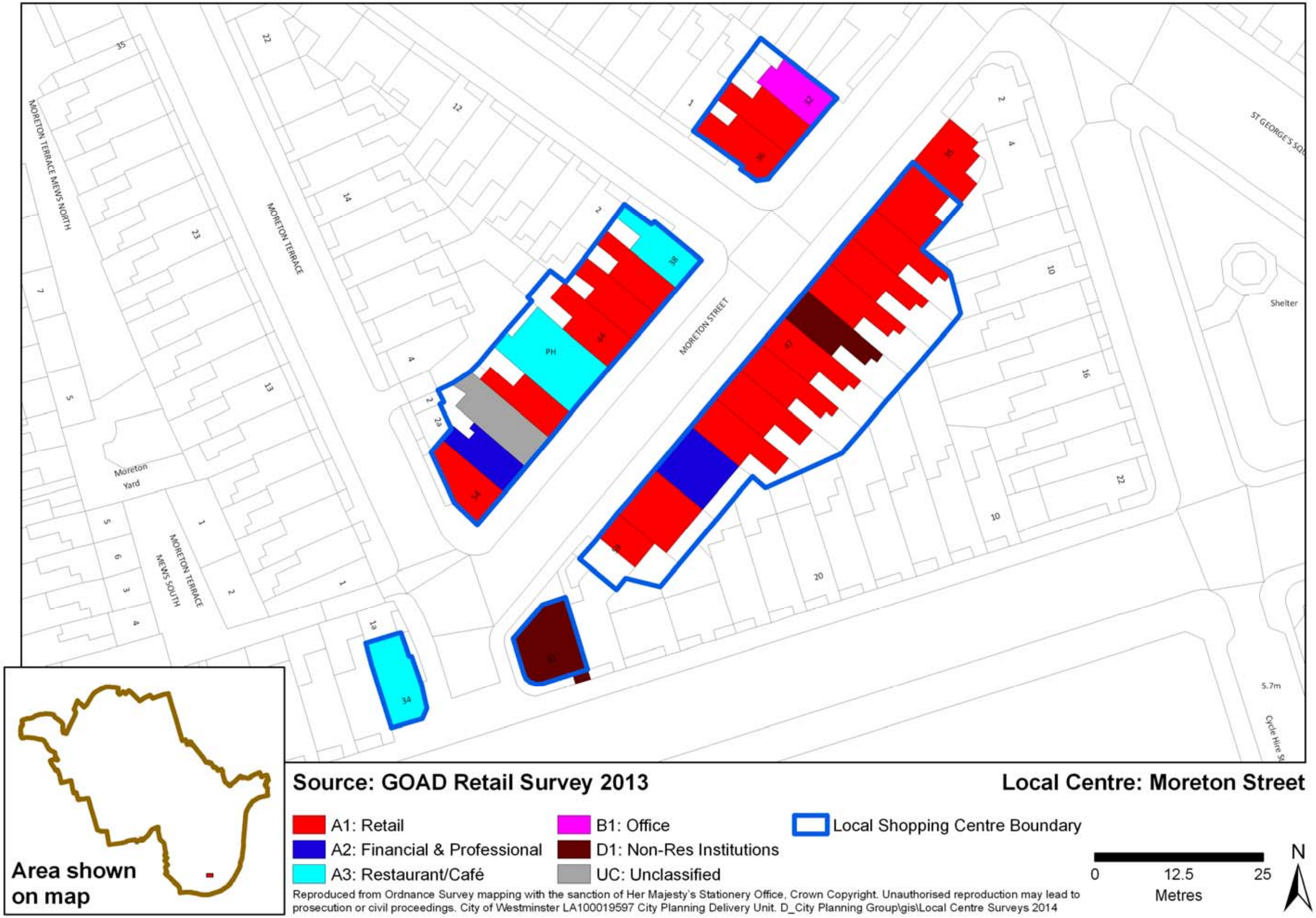
An attractive vacant unit available in this quiet centre located next to a restaurant.
48 Moreton Street

Another vacant unit available in the local centre.
55 Moreton Street

Table 8 Goad data 2013

					A1	A1	A1		A3	B1	Vacant
ADDRESS	**FASCIA**	**DESCRIPTION**	**USE**	**SQM**	**Conv.**	**Spec.**	**Ind**	**A2**	**Res/Caf**		
59 MORETON STREET	SW1SH	HAIRDRESSING	A1	32			1				
2 - 2A MORETON TERRACE	Residential	DWELLING	C3	30							
50 MORETON STREET	Residential	DWELLINGS	C3	83							
53 MORETON STREET	LITTLE BEVAN	CHILDRENS WEAR	A1	67			1				
55 MORETON STREET	LONDON ACADEMY OF MODELLING	EMPLOYMENT AGENCY	A2	79				1			
42 MORETON STREET	PETA SMYTH ANTIQUE TEXTILES	ANTIQUES	A1	59		1					
43 MORETON STREET	APPURU	HEALTH & BEAUTY	A1	63			1				
35 MORETON STREET	SW1	BATHROOM FURNITURE	A1	68		1					
48A MORETON STREET	PIMLICO PRESENTS	GIFTS	A1	55			1				
52 MORETON STREET	FRY & COMPANY	ESTATE AGENT	A2	54				1			
36 MORETON STREET	KHALLOUK & TAYLOR DELI	DELICATESSEN	A1	68	1						
46 MORETON STREET	PIZZAEXPRESS	PIZZA RESTAURANT	A3	125					1		
39 MORETON STREET	PIMLICO GALLERY	ART GALLERY (RETAIL)	A1	64		1					
47 MORETON STREET	ULRICH ENGLER	LADIES & MENS WEAR	A1	64			1				
40 MORETON STREET	INCREDIBLE YOU	BEAUTY SALON	A2	56				1			
34 MORETON STREET	QUINLANS	OPTICIAN	A1	66			1				
1A MORETON TERRACE	Residential	DWELLING	C3	26							
45 MORETON STREET	CENTRE FOR ALEXANDER TECHNIQUE	HEALTH CENTRE	D1	63							
54 MORETON STREET	HONEYLIGHT COMPUTERS	COMPUTER EQUIPMENT	A1	61			1				
41 MORETON STREET	GALLERY FORTY ONE	ANTIQUES	A1	62		1					
32 MORETON STREET	Office	OFFICE	B1	57						1	
44 MORETON STREET	TIMOTHY LANGSTON	ANTIQUES	A1	64		1					
37 MORETON STREET	LIMESTONE GALLERY	CARPETS & FLOORING	A1	76			1				
57 MORETON STREET	ROYAL DRY CLEANERS	DRY CLEANING	A1	79			1				
34 LUPUS STREET	GOYA PIMLICO	SPANISH RESTAURANT	A3	77					1		
MORETON STREET	Residential	DWELLING	C3	31							
32 LUPUS STREET		KINDERGARTEN	D1	96							
51 MORETON STREET		VACANT	Vacant	66							1
38 MORETON STREET	PIMLICO TANDOORI RESTAURANT	INDIAN RESTAURANT	A3	62					1		
36 - 42 LUPUS STREET	Residential	DWELLINGS	C3	305							

49 MORETON STREET	KATHERINE FRANKLIN ADAMS	MILLINERY	A1	62		1					
2 - 20 ST GEORGES SQUARE	Residential	DWELLINGS	C3	811							

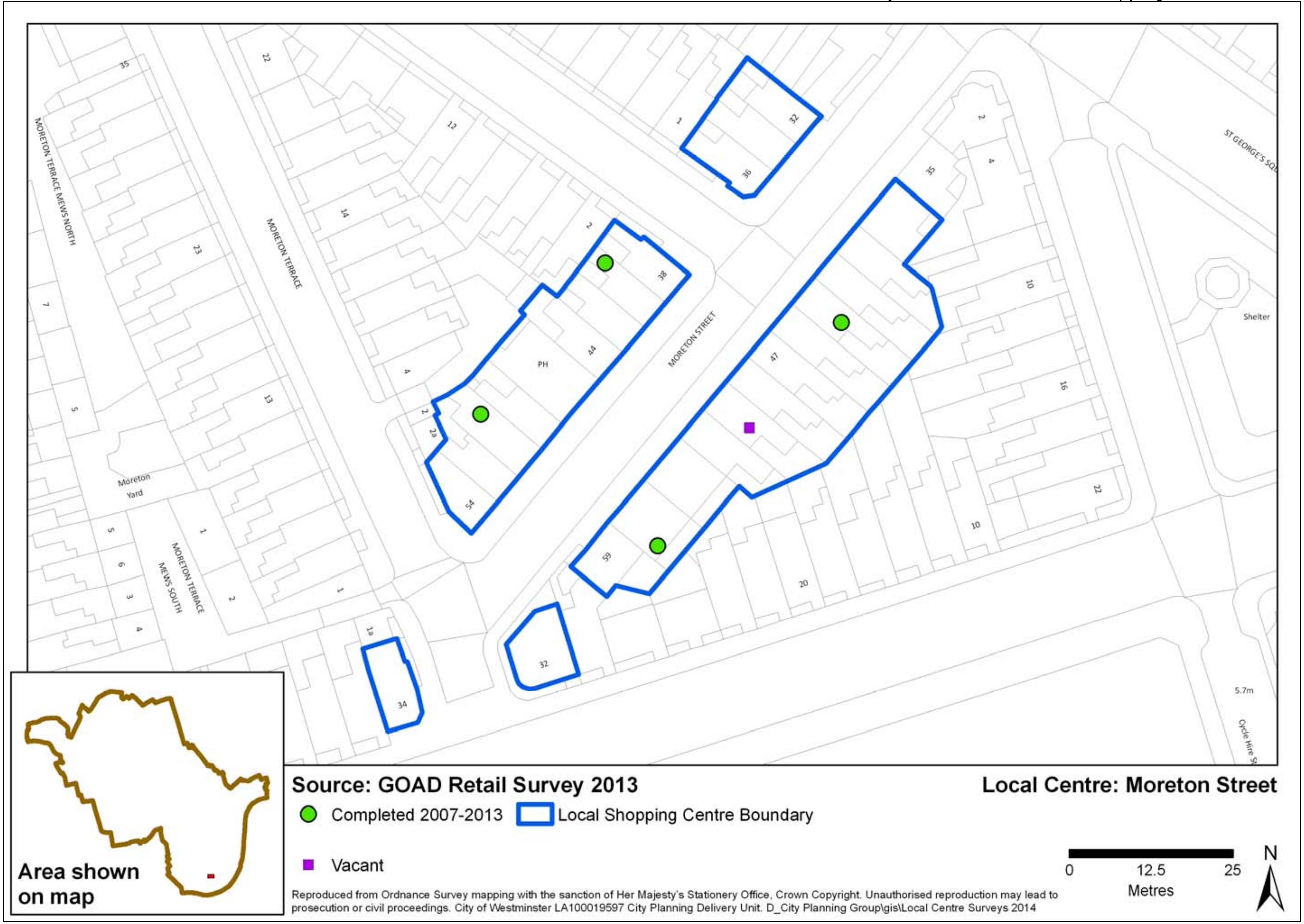


Source: GOAD Retail Survey 2013

Local Centre: Moreton Street

- A1: Retail
- A2: Financial & Professional
- A3: Restaurant/Café
- B1: Office
- D1: Non-Res Institutions
- UC: Unclassified
- Local Shopping Centre Boundary

0 12.5 25
Metres
N



Source: GOAD Retail Survey 2013

Local Centre: Moreton Street

Completed 2007-2013

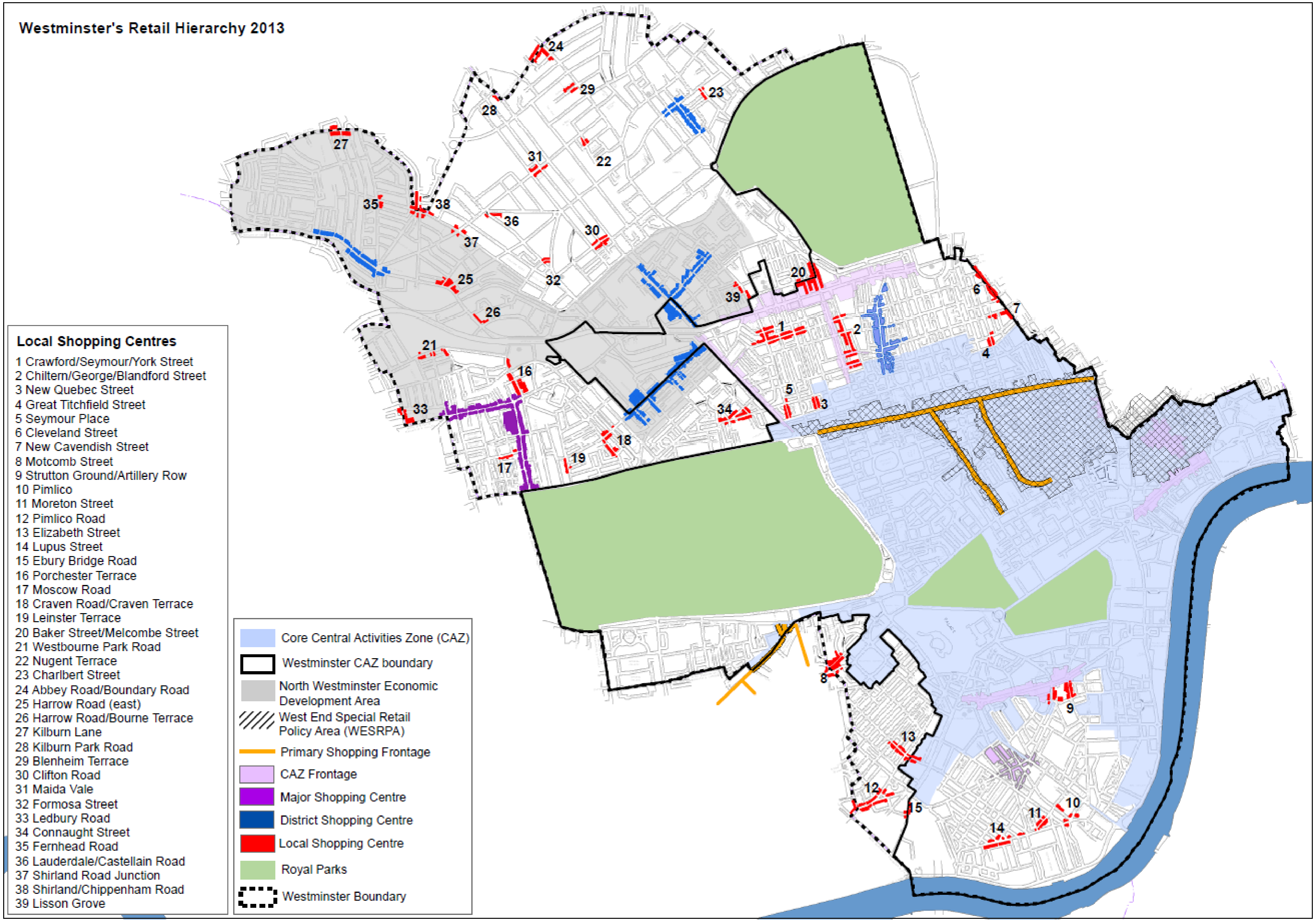
Local Shopping Centre Boundary

Vacant

0 12.5 25 Metres

N

Figure 2 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 11: Motcomb 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 **11: Motcomb Street**

1. Introduction

1.1 Location

Motcomb Street is a medium sized Local Centre located in the south of Westminster, on the border with the Royal Borough of Kensington and Chelse. The centre serves residents in the north Belgravia area, and was previously called Belgravia due to its proximity to Belgrave Square. The centre is close to the larger Knightsbridge area and attracts shoppers from a wide catchment area given the nature of the retailers and other town centre uses and services located in the centre. The centre is also close to the main road the A4.

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		50	41	43	50
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*3*
	National retailers	*0*	*0*	*12*	*0*
	Specialist Independent	*31*	*28*	*22*	*24*
	Independent	*15*	*9*	*7*	*9*
	Convenience	*4*	*4*	*2*	*14*
Class A2	Financial & Professional	8	9	9	9
Food & Drink		8	3	9	12
Class A3	*Restaurant/Café*	*N/A*	*2*	*8*	*11*
Class A4	*Pubs/Bars*	*N/A*	*1*	*1*	*1*
Class A5	*Takeaway*	*N/A*	*0*	*0*	*0*
	Takeaway/Restaurant	*N/A*	*0*	*0*	*0*
Sui Generis		0	0	0	0
Vacant Units		4	16	9	0
Arts/Culture		0	0	0	1
Health uses		0	0	0	0
Hotels		0	0	0	0
TOTAL		**70**	**69**	**70**	**72**

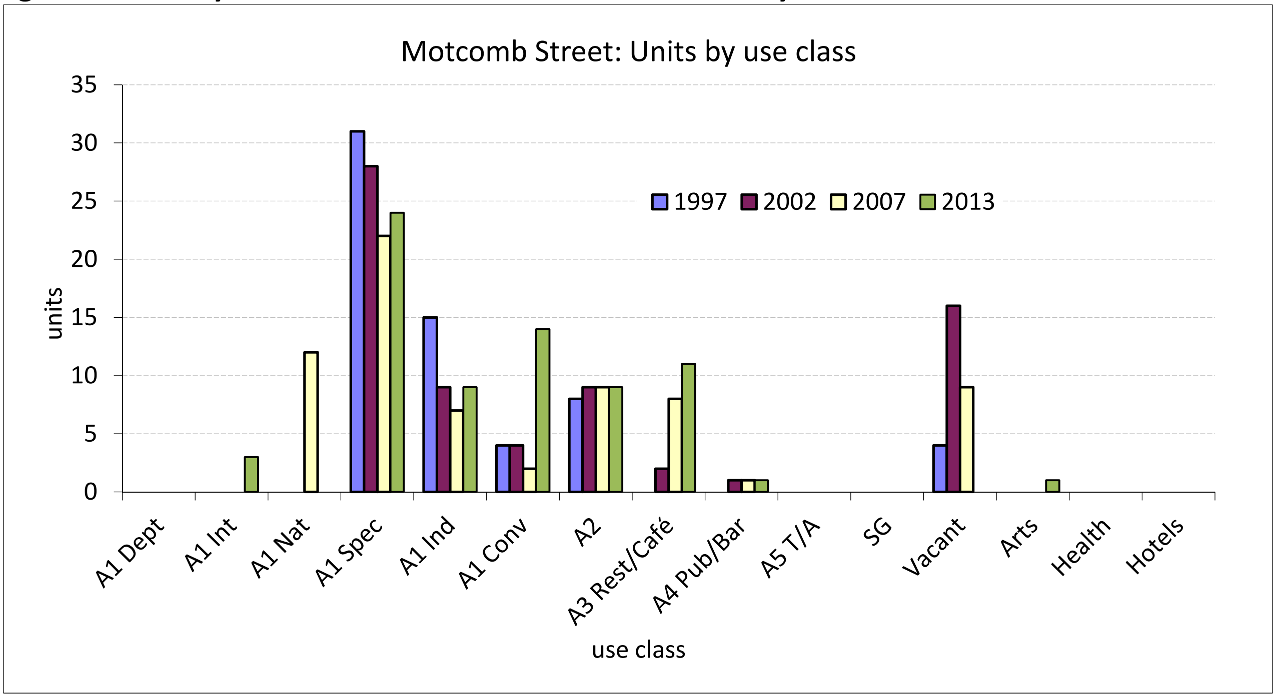
Source: WCC Land Use Survey December 2013

In total there are 72 units, which is an increase of two units from the previous survey in 2007.

The number of A1 retail uses in Motcomb Street has increased by seven units since 2007. The number of Class A2 uses has stayed the same and the number of Class A3 uses has increased by three units. The A1 uses structure has changed significantly as all nine previously vacant units have been occupied, while three international retailers have moved into the centre.

The centre has no hotels or health uses but an arts space has opened for fashion films. The vacant units have all become occupied in a very short space in time, illustrating the rapid improvement in the centre, which now has a strong identity and is a destination in its own right, given the large supermarket, international boutique retailers and high quality restaurants.

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



2.2 Range of A1 Uses

Motcomb Street has no department stores but is now home to three international retailers. The centre contains one large national supermarket, and a national coffee chain. The centre has 50 Class A1 retail units, including Waitrose convenience stores, 24 specialist retailers and 9 independent retailers. The specialist retailers include a gunsmith, clothes shops and an upmarket florist. The independent stores include several hairdressers and dry cleaners. The mix of shops and the presence of several national retailers, including a large supermarket, suggests that Motcomb Street serves people beyond the local area residents. This is reinforced by the high number of specialist retailers and the small number of convenience shops and local services.

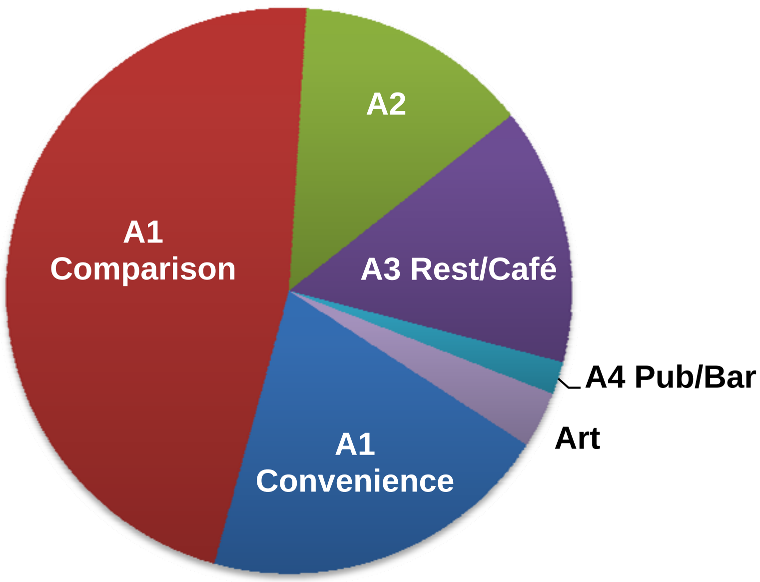
2.3 Total Retail Floor space

Total retail floor space in Motcomb Street is broken down in Table 2. In total, Motcomb Street has 6,075 sqm of retail floor space, which is above the average of 3,188 sqm for the 39 Local Centres in the City. Motcomb Street has a high proportion of A1 specialist and A1 independent floor space, which together account for over half of the total floor space in the centre. The centre also has a reasonable proportion of A3 floor space spread over 12 units, including several high quality restaurants. However, the centre has only one pub and no take aways, lower than the Local Centre average. The centre has a higher than average proportion of A1 comparison floor space, accounting for 65% of the total 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	1221	20.10%	14.9%
A1 Comparison	2837	46.70%	35.2%
A2	813	13.38%	11.2%
A3 Rest/Café/TA	894	14.72%	17.4%
A4 Pub/Bar	114	1.88%	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	196	3.23%	1.3%
Leisure	0	0.00%	0.1%
Total	**6,075**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



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

Motcomb Street is a Local Centre with a wide selection of shops and a good selection of restaurants. There is a bank, and most of the remaining Class A2 uses are estate agents or consultants. The Local Centre provides a wide range and selection of shops when compared to other local centres; however the range of local services is more limited.

2.4 Proportion of Vacant Street Level Property

The unit vacancy rate in Motcomb Street is lower than the average rate for Local Centres in the City, as shown in Table 3. There are currently no vacant units in Motcomb Street 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
5.70% (4 units)	23.20% (16 units)	12.90% (9 units)	0.00% (0 units)	8% (6 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

Motcomb Street local centre is located roughly five minutes walk from Hyde Park Corner London (Piccadilly line) and Knightsbridge (Piccadilly line) Underground Stations, and is also a 10 minute walk from Victoria mainline and London Underground Station. The centre is close to the main road the A4 and although no bus routes pass through the local centre itself, over 20 routes service the neighbouring main roads Sloane Street, Knightsbridge and Grosvenor Place which are all roughly 5 minutes walk from 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 Table 4 below. The centre's overall score for attractions is 50%, meaning that this is one of the most attractive centres. The rating is much higher than the Local Centre average of 31%, and means the centre is ranked =2nd out of the 39 Local Centres in the City. Motcomb Street has an average provision of multiple retailers but poor cultural/community events, sport and leisure facilities and bank/building society provision. The centre's main strength is its good provision of food shops, and independent and specialist shops.

4.2 Daytime Amenity

Motcomb Street 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 4th out of the 39 Local Centres in the City. The centre is not rated as being poor in any of the categories under study, and is rated as good in 17 of the 23 categories, with a particular strength in the cleanliness section where 7 of the 8 categories studied were rated as good. The centre is less strong in the Security categories where a quarter of the categories are rated as being 'average', but still scores well overall in this sub-section, and consistently well through all sections assessed

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	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	9/26			12/26			13/26		
Percentage	34.60%			46.10%			50.00%		

Source: City of Westminster site survey December 2013

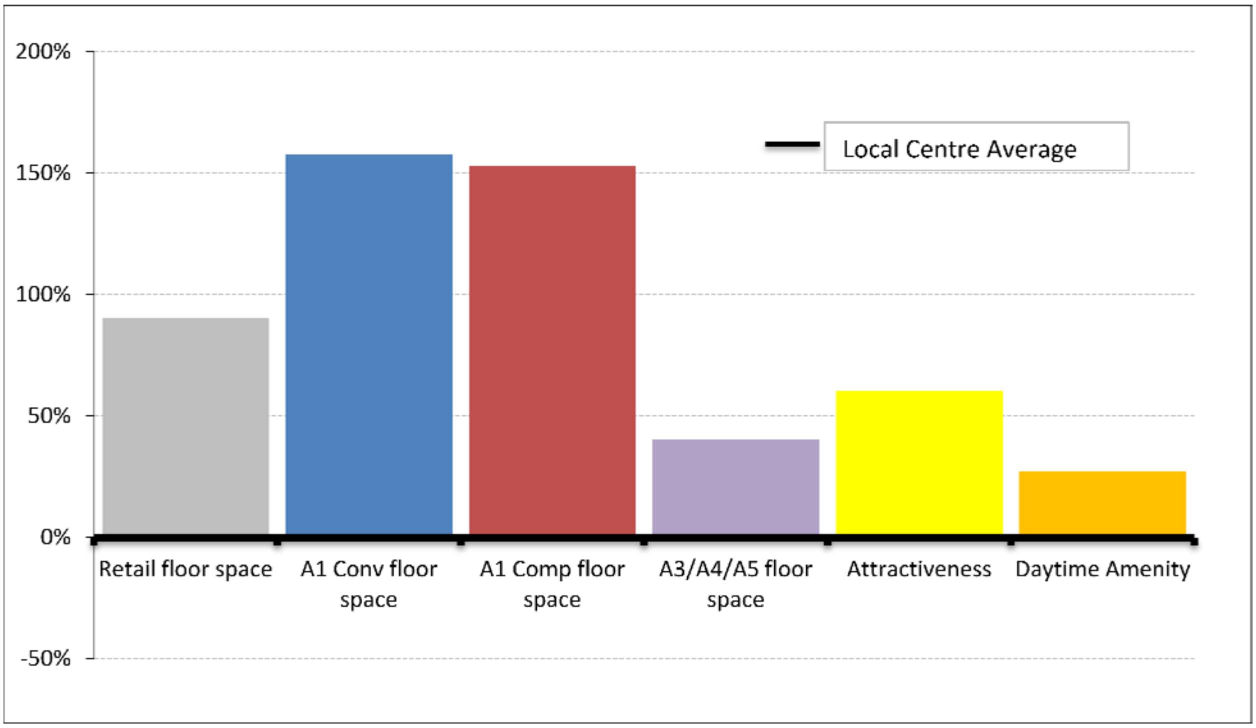
Table 5: Day Time Amenity within the Local Centre 2013

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	36/46			38/46			40/46		
Percentage	78.3%			82.6%			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



Motcomb Street 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 a below average amount of A1 convenience floor space, but a well above average amount of A1 comparison floor space, and a slightly above average amount of food and drink floor space (A3/A4/A5). In terms of the rating of the physical environment, the centre has a significantly higher than average attractiveness rating, and an above average daytime amenity rating, illustrating the overall high quality of the 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 were two permitted planning applications in Motcomb Street, involving A-class uses changing from a shops (A1) into a restaurants (A3).

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**		**6,075**
		Total Convenience (A1)		**1221**
		Total Comparison (A1)		**2,837**
		Total Service (A2)		**813**
		Total A3		**894**
		Total A4		**114**
		Total A5		**0**
		Total Arts		**196**
		Total Vacant		**0**
	Retail Offer	**Total Number of Shop Units**	**72**	
		Total Number of A1 Units	**50**	
		a) Convenience shops	**14**	
		b) Department/principal stores	**0**	
		c) Prestige international shops	**0**	
		d) National comparison retailers	**0**	
		e) Specialist Independent shops	**26**	
		f) Independent shops	**10**	
		Total Comparison Multiples	**48**	
		Total Number of A2 Units	**9**	
		Total Number of A3 Units	**11**	
		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	**2**	**236**
		Changes of use A1 to A4	**0**	
		Changes of use A1 to A5	**0**	
ARTS/CULTURE		**(cinemas, galleries, theatres etc.)**	**1**	**196**
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', 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 Motcomb Street local centre

Attractive shop fronts and a well maintained streetscape in the core frontage of the local centre.

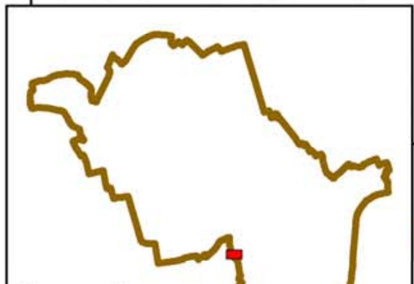
Secondary frontages at the east end of the local centre, including a public house/restaurant.

The Halkin Arcade secondary shopping frontage in the local centre.

					A1	A1	A1	A1	A1	A1	
ADDRESS	FASCIA	DESCRIPTION	USE	SQM	Conv.	Dept.	Int.	Nat.	Spec.	Ind	A2
2HALKIN ARCADE	WAITROSE	SUPERMARKET	A1 Conv	11	1						
4HALKIN ARCADE	WAITROSE	SUPERMARKET	A1 Conv	17	1						
6HALKIN ARCADE	WAITROSE	SUPERMARKET	A1 Conv	24	1						
7HALKIN ARCADE	WAITROSE	SUPERMARKET	A1 Conv	26	1						
8HALKIN ARCADE	WAITROSE	SUPERMARKET	A1 Conv	17	1						
9HALKIN ARCADE	WAITROSE	SUPERMARKET	A1 Conv	23	1						
10HALKIN ARCADE	WAITROSE	SUPERMARKET	A1 Conv	32	1						
11-12HALKIN ARCADE	WAITROSE	SUPERMARKET	A1 Conv	30	1						
14HALKIN ARCADE	AMAYA	RESTAURANT	A3 Rest/Café	47							
15HALKIN ARCADE	AMAYA	RESTAURANT	A3 Rest/Café	46							
15AHALKIN ARCADE	AMAYA	RESTAURANT	A3 Rest/Café	43							
16HALKIN ARCADE	ZAFFERANO DELICATESSEN	DELICATESSEN	A1 Spec	58					1		
17HALKIN ARCADE	ZAFFERANO	RESTAURANT	A3 Rest/Café	55							
18HALKIN ARCADE	ERROL DOUGLAS	HAIRDRESSERS	A1 Ind	53						1	
1KINNERTON STREET	PETRUS	RESTAURANT	A3 Rest/Café	119							
3KINNERTON STREET	PETRUS	RESTAURANT	A3 Rest/Café	87							
5KINNERTON STREET	BLAKES	WHITE GOODS	A1 Spec	56					1		
7KINNERTON STREET	BLAKES	WHITE GOODS	A1 Spec	46					1		
9KINNERTON STREET	COBBLERS	SHOE REPAIR	A1 Ind	69						1	
12LOWNDES STREET	HERME PARIS	LADIESWEAR	A1 Int	87			1				
14LOWNDES STREET	AOUAGE	LADIESWEAR	A1 Spec	71					1		
15-16LOWNDES STREET	ZAFFERANO	RESTAURANT	A3 Rest/Café	144							
17LOWNDES STREET	ZAFFERANO	RESTAURANT	A3 Rest/Café	63							
18LOWNDES STREET	HIELD	MENSWEAR	A1 Spec	67					1		
12CADOGAN PLACE	RAY WARD	GUNSMITH	A1 Spec	101					1		
25ALOWNDES STREET	BEAUTY AT 25A	BEAUTY SALON	A2	59							1
25BLOWNDES STREET	HAYWARDS	DRY CLEANERS	A1 Ind	37						1	
25CLOWNDES STREET	LOWNDES	CLOTHING	A1 Spec	49					1		
25ELOWNDES STREET	BELGRAVIA HEALTH FOODS	CHEMIST	A1 Conv	38	1						
25FLOWNDES STREET	CHATOO & CO LTD	OPTICIANS	A1 Ind	39						1	
25GLOWNDES STREET	RICCI BURNS	LADIESWEAR	A1 Spec	67					1		
26LOWNDES STREET		ENTRANCE TO FLATS									

27LOWNDES STREET	STEIGER	SHOE SHOP	A1 Spec	69					1		
28LOWNDES STREET	FARAONE	JEWELLER	A1 Spec	124					1		
29LOWNDES STREET	HERVE LEGER	CLOTHING	A1 Spec	123					1		
30LOWNDES STREET	SHI CASHMERE	CLOTHING	A1 Spec	122					1		
31LOWNDES STREET	CHESTERTON	ESTATE AGENTS	A2	118							1
32LOWNDES STREET	C HOARE & CO	BANK	A2	62							1
33LOWNDES STREET		ENTRANCE TO OFFICES									
1MOTCOMB STREET	HENRY & JAMES	ESTATE AGENTS	A2	88							1
2MOTCOMB STREET	JONATHAN WYLDER	ART SHOP & GALLERY	A1 Spec	78					1		
3MOTCOMB STREET	CONCORDE OF KNIGHTSBRIDGE	DRY CLEANERS	A1 Ind	81						1	
4MOTCOMB STREET	CAROLINA BUCCI	JEWELLER	A1 Spec	74					1		
5MOTCOMB STREET	ROCOCO CHOCLATES	SWEET SHOP	A1 Spec	78					1		
6-7MOTCOMB STREET	L&B	INTERIOR GOODS	A1 Spec	144					1		
8MOTCOMB STREET	GLOWSPA & BEAUTY	BEAUTY SALON	A2	87							1
9MOTCOMB STREET	BPP	CONSTRUCTION CONSULTANTS	A2	59							1
10MOTCOMB STREET	PANTHEON ROOMS	PUBLIC HOUSE	A3 Pub/Bar	114							
11-12MOTCOMB STREET	ON	HAIRDRESSERS	A1 Ind	97						1	
13MOTCOMB STREET	OTTOLENCHI	CAKE SHOP	A1 Spec	59					1		
14MOTCOMB STREET	STEWART PARVIN	CLOTHING	A1 Spec	59					1		
15MOTCOMB STREET	MAYHEWS	NEWSAGENTS	A1 Conv	57	1						
16MOTCOMB STREET	NO NAME	CLOTHING	A1 Spec	55					1		
17MOTCOMB STREET	PATESSERIE VALERIE	CAFÉ	A3 Rest/Café	60							
18MOTCOMB STREET	ERROL DOUGLAS	HAIRDRESSERS	A1 Ind	102						1	
19MOTCOMB STREET	SHOW STUDIO	GALLERY SPACE	Arts	196							
19AMOTCOMB STREET	STARBUCKS	COFFEE SHOP	A1 Nat	49	1						
19BMOTCOMB STREET	COSMETICS A LA CARTE	BEAUTY SALON	A2	35							1
20MOTCOMB STREET	ANICK GOUTAIL	COSMETICS	A1 Int	67			1				
21MOTCOMB STREET	GIO GENCO	MENSWEAR	A1 Spec	79					1		
22MOTCOMB STREET	G & C	HAIR & BEAUTY	A1 Ind	80						1	
23MOTCOMB STREET	CHRISTIAN LOUBOUTIN	SHOES	A1 Int	64			1				
24MOTCOMB STREET	CORTHAY	SHOES	A1 Spec	75					1		
25-26MOTCOMB STREET	MOTCOMBS RESTAURANT & BAR	RESTAURANT & BAR	A3 Rest/Café	141							
27MOTCOMB STREET	WAITROSE	SUPERMARKET	A1 Conv	603	1						
27AMOTCOMB STREET	WAITROSE	SUPERMARKET	A1 Conv		1						
28MOTCOMB STREET	WAITROSE	SUPERMARKET	A1 Conv	294	1						

4WEST HALKIN STREET		HAIRDRESSERS	A1 Ind	93						1	
8WEST HALKIN STREET	BARCLAYS BANK	BANK	A2	239							1
9-10WEST HALKIN STREET	LOUISE KENNEDY	LADIESWEAR	A1 Spec	87					1		
10WEST HALKIN STREET	L'ETO	CAFÉ	A3 Rest/Café	89							
11WEST HALKIN STREET	NEIL STRAIN	FLORAL COUTURE	A1 Spec	95					1		
5WEST HALKIN STREET		OFFICE	A2	66							1
6WEST HALKIN STREET		JEWELLER	A1 Spec	132					1		
UNITS IN K&C					14	0	3	0	24	9	9



Source: GOAD Retail Survey 2013

Local Centre: Motcombe Street

Local Shopping Centre Boundary

Westminster Boundary

A1: Retail

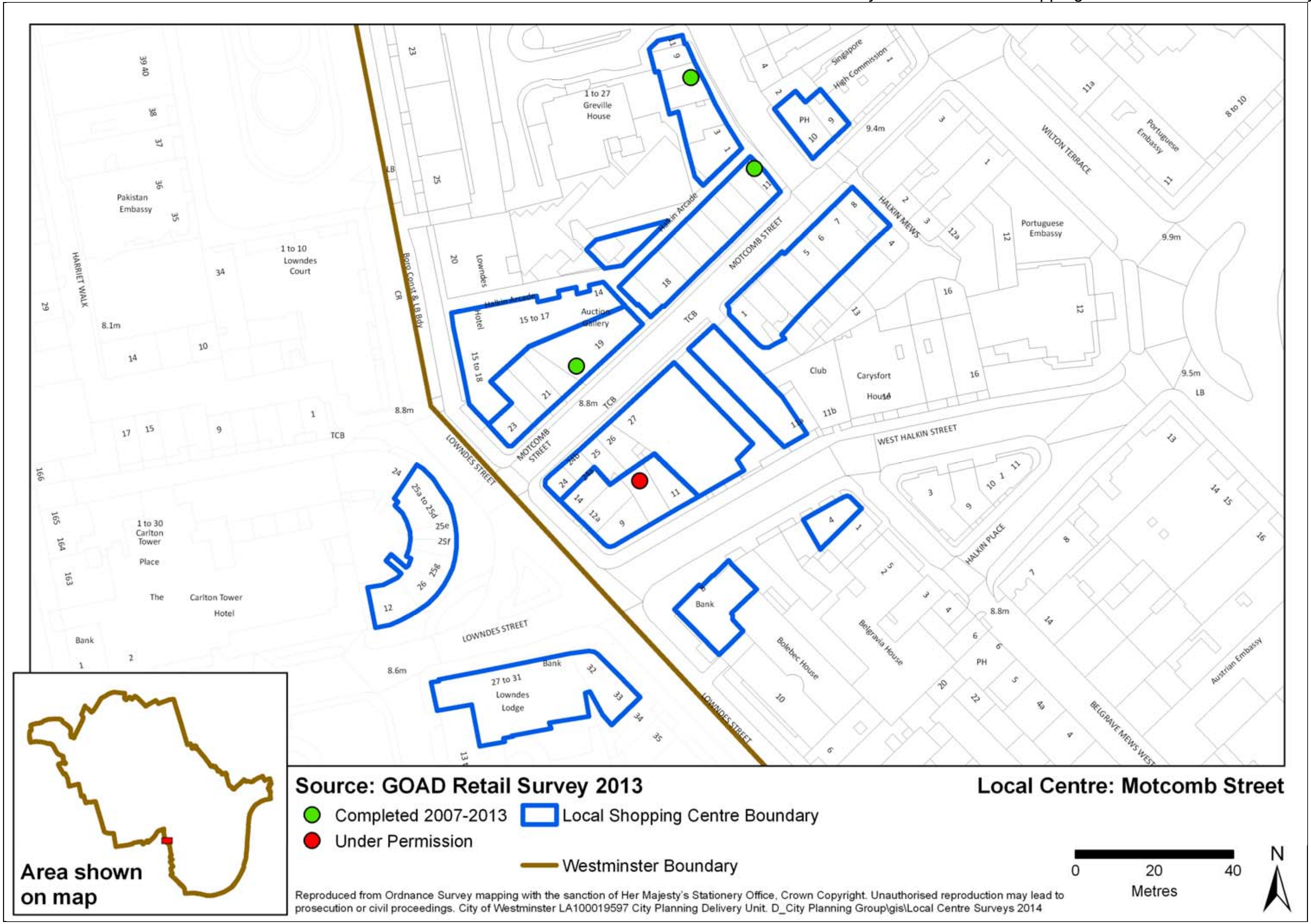
A2: Financial & Professional

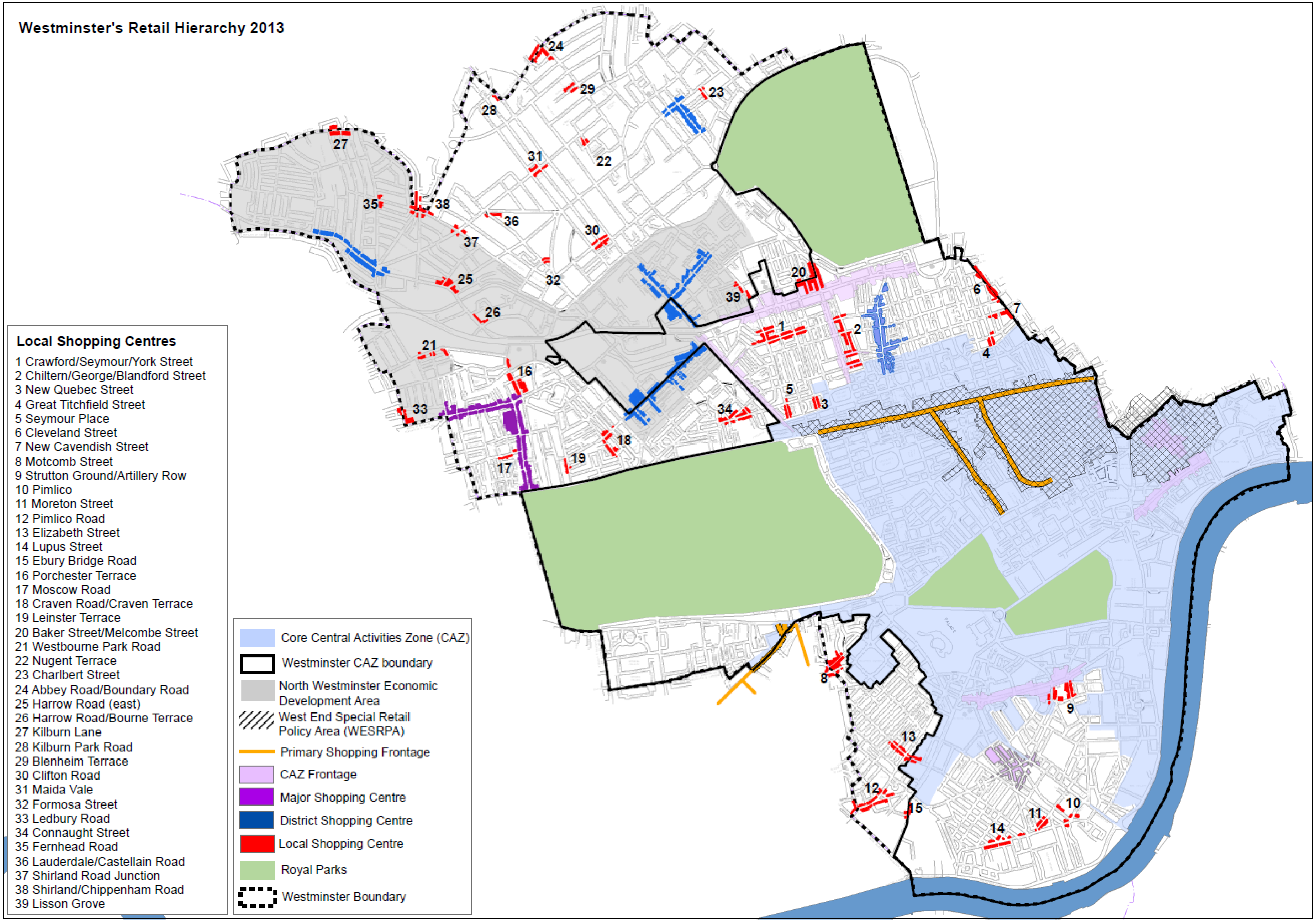
A3: Restaurant/Café

A4: Pub/Bar

0 20 40 Metres

N


Area shown on map
Motcomb Street
Halkin Arcade
West Halkin Street
Lowndes Street
Wilton Terrace
Halkin Mews
Halkin Place
Belgrave Mews West
Harriet Walk
Portuguese Embassy
Pakistan Embassy
Austrian Embassy
Singapore High Commission
Carlton Tower Hotel
Lowndes Lodge
Greville House
Carysfort House
Source: GOAD Retail Survey 2013
Local Centre: Motcomb Street
Completed 2007-2013
Under Permission
Local Shopping Centre Boundary
Westminster Boundary
0
20
40
Metres
N


Westminster's Retail Hierarchy 2013
Local Shopping Centres
1 Crawford/Seymour/York Street
2 Chiltern/George/Blandford Street
3 New Quebec Street
4 Great Titchfield Street
5 Seymour Place
6 Cleveland Street
7 New Cavendish Street
8 Motcomb Street
9 Strutton Ground/Artillery Row
10 Pimlico
11 Moreton Street
12 Pimlico Road
13 Elizabeth Street
14 Lupus Street
15 Ebury Bridge Road
16 Porchester Terrace
17 Moscow Road
18 Craven Road/Craven Terrace
19 Leinster Terrace
20 Baker Street/Melcombe Street
21 Westbourne Park Road
22 Nugent Terrace
23 Charlbert Street
24 Abbey Road/Boundary Road
25 Harrow Road (east)
26 Harrow Road/Bourne Terrace
27 Kilburn Lane
28 Kilburn Park Road
29 Blenheim Terrace
30 Clifton Road
31 Maida Vale
32 Formosa Street
33 Ledbury Road
34 Connaught Street
35 Fernhead Road
36 Lauderdale/Castellain Road
37 Shirland Road Junction
38 Shirland/Chippenham Road
39 Lisson Grove
Core Central Activities Zone (CAZ)
Westminster CAZ boundary
North Westminster Economic Development Area
West End Special Retail Policy Area (WESRPA)
Primary Shopping Frontage
CAZ Frontage
Major Shopping Centre
District Shopping Centre
Local Shopping Centre
Royal Parks
Westminster Boundary

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 12: Pimlico

Contents

Tables

Figures

(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.

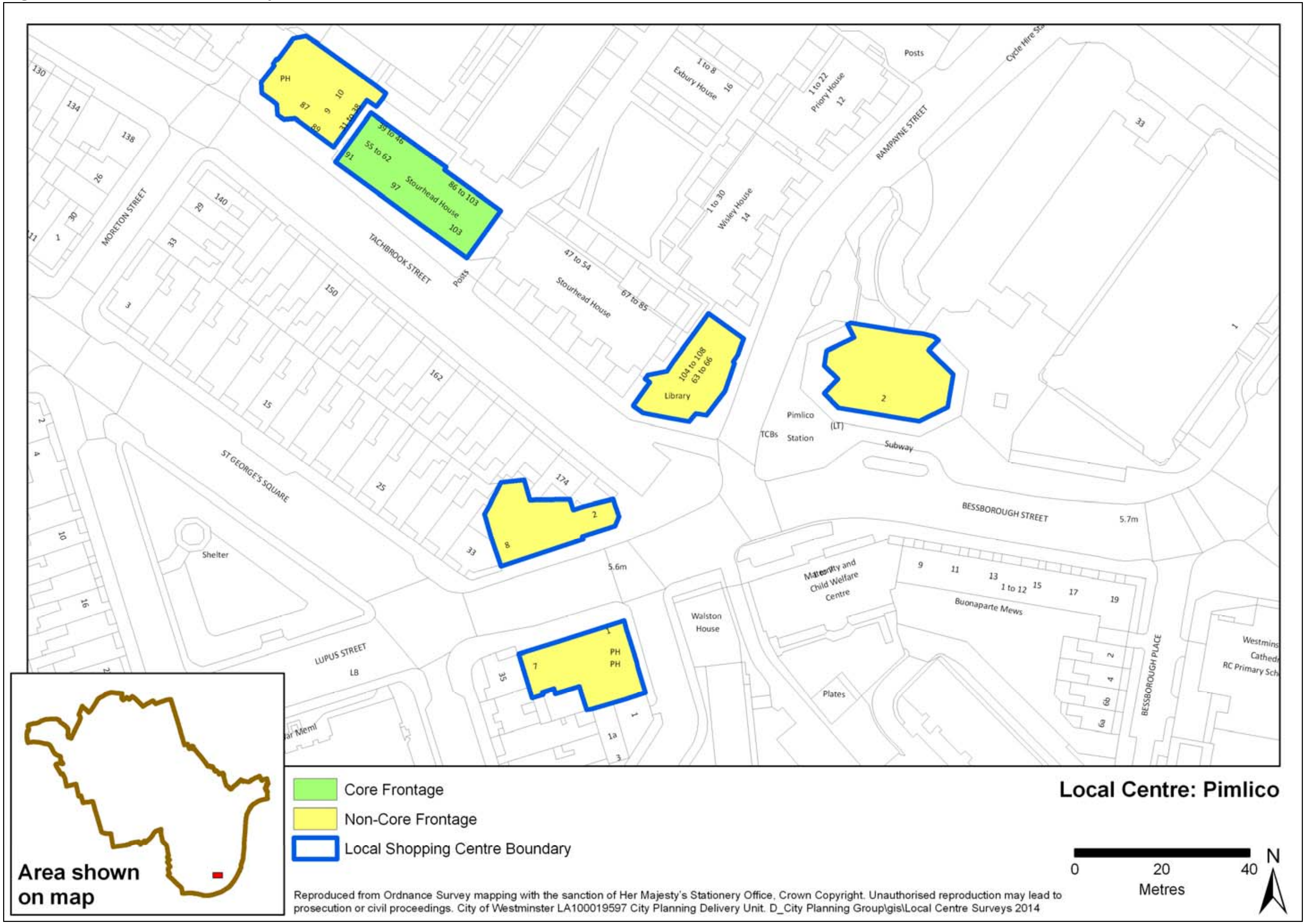
Local Centre **12: Pimlico**

1. Introduction

1.1 Location

Pimlico is a small local centre located in the south of Westminster covering the junction between Tachbrook Street, Lupus Street, Rampayne Street and Bessborough Street (see **Error! Reference source not found.**), in a predominantly residential part of Westminster. The local centre is located close to the River Thames and the Tate Britain. The centre is also close to Victoria and the larger Warwick Way/Tachbrook Street district centre to the North West. Pimlico London Underground station is located in the 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		0	10	11	10
	Department/principal stores	*N/A*	*0*	*0*	*0*
	International retailers	*N/A*	*0*	*0*	*0*
	National retailers	*N/A*	*0*	*0*	*0*
	Specialist Independent	*N/A*	*0*	*0*	*0*
	Independent	*N/A*	*2*	*3*	*4*
	Convenience	*N/A*	*8*	*8*	*6*
Class A2	Financial & Professional	N/A	1	1	1
Food & Drink		0	4	5	5
Class A3	*Restaurant/Café*	*N/A*	*1*	*1*	*3*
Class A4	*Pubs/Bars*	*N/A*	*2*	*2*	*2*
Class A5	*Takeaway*	*N/A*	*1*	*2*	*0*
	Takeaway/Restaurant	*0*	*0*	*0*	*0*
Sui Generis		N/A	1	1	1
Vacant Units		N/A	1	0	2
Arts/Culture		N/A	1	1	0
Health uses		N/A	0	0	0
Hotels		N/A	0	0	0
TOTAL		**N/A**	**18**	**19**	**19**

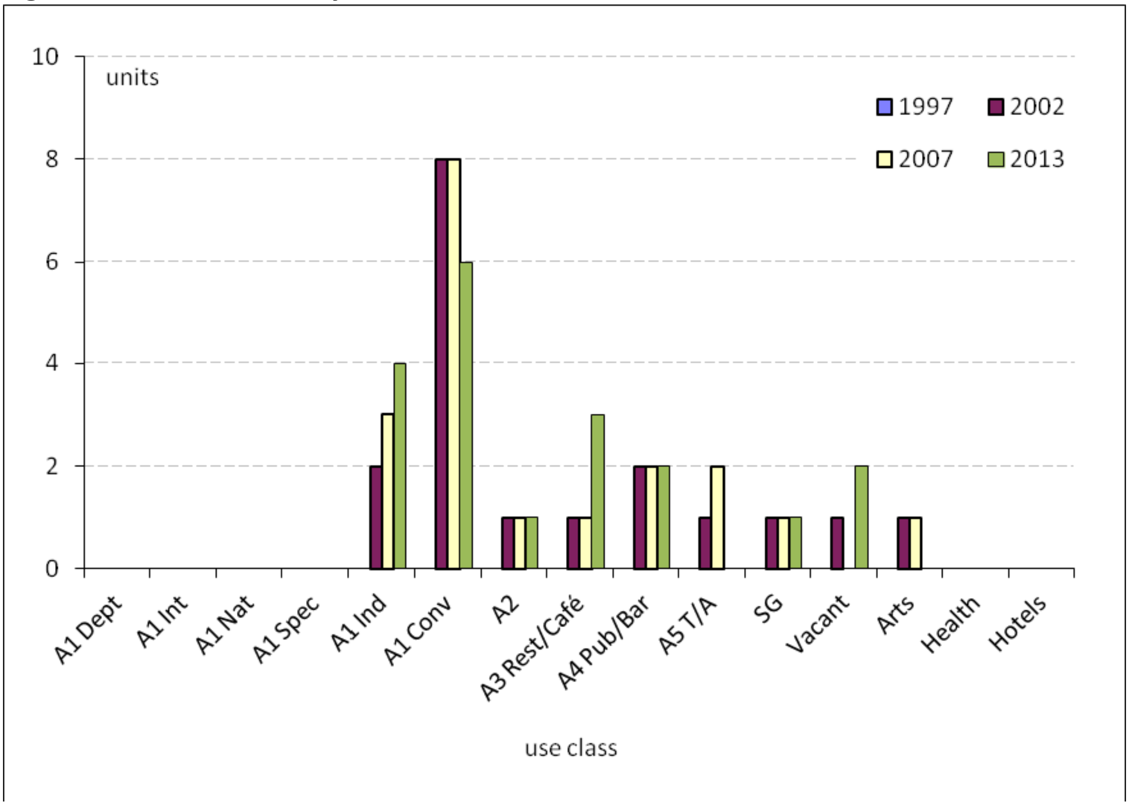
Source: WCC Land Use Survey July 2013

In total there are 19 units, which is the same number as recorded when the local centre was last surveyed in 2007.

The number of A1 retail uses in Pimlico Local Shopping Centre has reduced by one since 2007. The number of Class A2 and A4 uses has stayed the same while the A5 units registered in the land survey 2007 have now changed to A3 use restaurants/cafes. Within class A1 uses Pimlico is dominated by A1 convenience shops (see Figure 1 below).

There has been a change regarding the non retail uses; the library (the single art and culture use of this local centre), was relocated to the redeveloped Pimlico Academy and Adult Education Centre on Lupus Street, a few minutes walk from this centre. The former corner library site is now is a vacant space under a D1 Use Class. The centre is dominated by A1 uses and no longer contains any arts, health or hotel uses. A description of these Use Classes is included in the Glossary of Terms attached to this report.

Figure 1 Pimlico: Units by use class



2.2 Range of A1 Uses

Pimlico has no department stores, international or national retailers. The centre has 10 Class A1 retail units, 6 of which are convenience stores. The independent retailer store registered in the 2013 land survey is one florist shop. The high proportion of A1 shops and no multiple retailers suggests that Pimlico serves local residents with a high proportion of convenience shopping facilities.

2.3 Total Retail Floor space

In total, Pimlico has 1,921 sqm of retail floor space (broken down in Table 2, which is below the average of 3,188 sqm for the 39 Local Centres in Westminster. Pimlico has a comparable proportion of class A1 convenience and comparison retail floor space, which together account for 46% of the total retail floor space in this centre (see Figure 3 below). There is a high proportion of class A4 pub/bar floorspace and relatively small proportions outside of the use classes already mentioned. Conversely the centre has a lower than average proportion of A1 comparison floor space (16%) than other local centres in Westminster.

Figure 3 Pimlico Retail Floor Space 2013

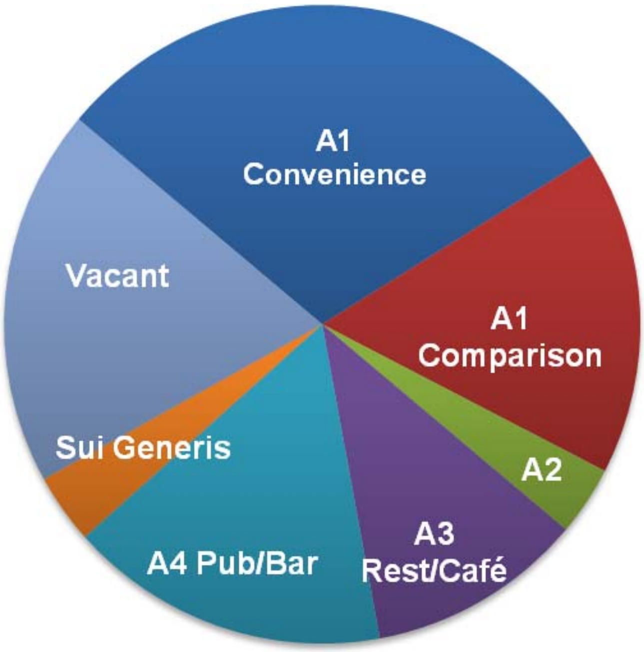


Table 2 Total Retail Floor space 2013

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All Local Centres Average Floor Space % (2014)
A1 Convenience	576	30.00%	14.85%
A1 Comparison	317	16.49%	35.18%
A2	67	3.51%	11.16%
A3 Rest/Café	211	11.00%	17.41%
A4 Pub/Bar	313	16.30%	5.13%
Sui Generis	68	3.54%	3.90%
Vacant	368	19.17%	8.55%
Health	0	0.00%	1.96%
Hotels	0	0.00%	0.45%
Art	0	0.00%	1.33%
Leisure	0	0.00%	0.06%
Total	**1,921**	**100%**	**100%**

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

Pimlico is a Local Centre of services and food shops. There are no banks or building societies and the single Class A2 use is a betting office. It 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 in Pimlico is higher than the average rate for Local Centres in Westminster, as shown in **Table 3** below. The vacancy rate has increased by two units since 2007 and is w the Local Centre average of 8%.

The vacant space corresponds to the former Pimlico Library building on Rampayne Street. This building is Grade II listed and, along with other properties in this local centre, lies within the Lillington Gardens Conservation Area. This building was found to be vacant at the time of survey, as Pimlico Library itself recently moved to a new and larger site in Pimlico Academy, Lupus Street, adjacent to the Lupus Street Local Centre. This vacated unit has more recently been used for art installations and is believed to be a D1 Use Class.

Table 3 Level of Retail Vacant Street Level Property 2013

	% Vacant 1997	% Vacant 2002	% Vacant 2007	% Vacant 2013	% Local Centre 2013
Pimlico	N/A	5.6% (1 unit)	0% (0 units)	19.1% (2 units)	8% (2 units)

Source: City of Westminster GIS System and site survey July 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 July 2013.

3.2 Accessibility on foot and by public transport

The local centre is exceptionally well served by public transport, with Pimlico London Underground Station (Victoria Line) located within the local centre. Victoria mainline and London Underground station is also located ten minutes walk from the local centre. There are also several bus routes that serve the centre including the numbers 24, C10 and 360. Several other bus routes also pass very close to the centre along Vauxhall Bridge Road, which is a main arterial road which passes next to 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 **Table 4** below. The centre's overall score for attractions is 30.7%, meaning that the centre is quite limited in the attractions it offers. This score is slightly higher than the score registered in the 2007 report, is on par with the Local Centre average of 31%, and ranks Pimlico 21st of the 39 Local Centres in Westminster.

Pimlico has a poor provision of multiple retailers and specialist shops, cultural/community events, sport and leisure facilities and bank/building society provision, however this reflects the size, location and function of the centre. The centre's main strength is its good provision of convenience shops and its accessibility by public transport.

4.2 Daytime Amenity

Pimlico is an attractive Local Centre, with a day time amenity rating of 73.9% compared with the average for all Local Centres of 68%, and was ranked 9th out of the 39 Local Centres in Westminster. The centre's rating remains the same as 2007 for the categories surveyed, with particular strength in the security categories such as no presence of graffiti, street drinkers, rough sleepers and street drinkers. Overall, the centre has an average feel good rating, and is only rated as poor because of an absence of special features in the centre and street events.

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	6/26			7/26			8/26		
Percentage	23.08%			26.92%			30.77%		

Source: City of Westminster site survey July 2013
Note: Each issue is ranked in a scale 0 to 2, with 2 being the highest positive score achievable. Scores are provided from the adopted 2002 and 2007 Health Checks Surveys and a 2013 update to allow comparison to be made between the others results.

Table 5 Day Time Amenity within the Local Centre 2013

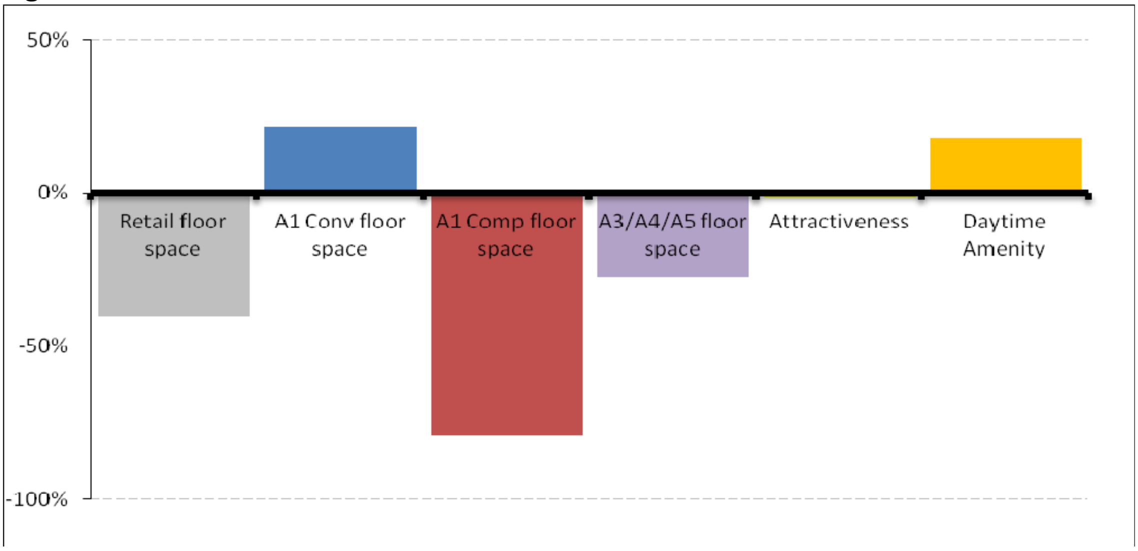
AMENITY - DAYTIME	1997			2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Overall environment of public areas in the centre												
General Cleanliness in Shopping Hours												
Presence of litter		N/A			X		X			X		
Presence of refuse bag		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)		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 eg illegally parked vehicles)		N/A		X			X			X		
Evidence of drunkenness, antisocial behaviour rowdiness		N/A		X			X			X		
Presence of rough sleepers / Presence of beggars		N/A		X			X			X		
Presence of street drinkers Evidence of touting (eg minicabs, ricksaws, prostitution, drug dealing, etc)		N/A		X			X			X		
Presence of illegal street traders e.g. counferteit 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 (eg flagship stores, buildings, etc)		N/A			X			X			X	
Promotion / Streets events		N/A				X			X			X
Feel good' factor of town centre		N/A			X			X			X	
Total		N/A			**32/46**			**34/46**			**34/46**	
Percentage		N/A			69.6%			73.9%			73.9%	

Source: City of Westminster site survey July 2013 / Note**:** Each issue is ranked in a scale 0 to 2, with 2 being the highest positive score achievable.

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



Pimlico is a reasonably small Local Centre that has around half of the retail floor space when compared to the overall average for the 39 local centres. This is also true for A1 comparison, and for food and drink floor space figures (A3/A4/A5), both of which are below the local centre average, likely due to the size of the centre. However, the A1 convenience floor space in the centre is higher than the local centre average. In terms of the rating of the physical environment, the centre has a slightly below average attractiveness rating, but a daytime amenity rating which is higher than the local centre average, illustrating a relatively attractive 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 or refused planning applications involving A-class uses within Pimlico Local Centre. Replacement services and community facilities under a D1 Use Class could be accommodated in the currently vacant (former library) 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**		**1,921**
		Total Convenience (A1)		**576**
		Total Comparison (A1)		**317**
		Total Service (A2)		**67**
		Total A3		**211.242**
		Total A4		**313**
		Total A5		**0**
		Total Sui Generis		**68**
		Total Vacant		**368**
	Retail Offer	**Total Number of Shop Units**	**19**	
		Total Number of A1 Units	**10**	
		a) Convenience shops	**6**	
		b) Department/principal stores	**0**	
		c) Prestige international shops	**0**	
		d) National comparison retailers	**0**	
		e) Specialist Independent shops	**0**	
		f) Independent shops	**4**	
		Total Comparison Multiples	**4**	
		Total Number of A2 Units	**1**	
		Total Number of A3 Units	**3**	
		Total Number of A4 Units	**2**	
		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**	**0**
HEALTH USES		**(clinics, surgeries etc.)**	**0**	**0**
HOTELS			**0**	**0**

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

Pimlico has changed to a limited extent since the last survey was carried out in this centre. There is one unit available at the moment due to the Pimlico Library relocation where the loss of community facility and servicing (are the main concerns. The ground floor vacant unit is believed to be a D1 Use Class and could represent an important change of the local services offered, although this loss has been offset by the reprovision of a larger, multi service library in the vicinity at Pimlico Academy & Adult Education Centre.

However, certain types of extensions and changes of use do not require full planning permission as they are classed as “permitted development” and recent changes to permitted development rights now allow town centre uses (A1, A2, A3, A4, A5, B1, D1 and D2) below a certain size to change temporarily to A1, A2, A3 or B1 for a period of two years. The impact of these changes on centres will be kept under review.

The Government are considering further changes to permitted development rights to allow shop units to change permanently to residential, banks and building societies. The impact of these changes will all be kept under review, and will most likely come to light in future iterations of this study.

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

Table 7 Views of Pimlico local centre

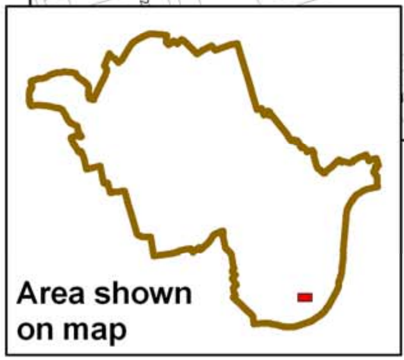
The core shopping frontage in the north of the local centre. Independent Florist Shop next to the Portman's Pharmacy.

The former public library (on the left) as a D1 Use Class vacant space available in Pimlico.

Part of the non-core frontage in the south of the local centre, illustrating important convenience shopping for local residence, but also the presence of some obstructions on the pavements.

Table 8 Goad Data 2013

					A1	A1	A2	A3	A4	B1	SG	Vacant
ADDRESS	**FASCIA**	**DESCRIPTION**	**USE**	**SQM**	**Conv.**	**Ind**		**Res/ Caf**	**Pub/ Bar**			
103 TACHBROOK STREET	PIMLICO BITS & PCs	COMPUTER REPAIR	A1	83		1						
AYLESFORD STREET	COUNCIL OFFICES	COUNCIL OFFICES	B1	77						1		
99 TACHBROOK STREET	CILA HAIRDRESSING	HAIRDRESSING	A1	67		1						
5 LUPUS STREET	PIMLICO VILLAGE	CAFE	A3	57				1				
6 LUPUS STREET	LAUNDRETTE	LAUNDERETTE	SG	68							1	
TACHBROOK STREET	VACANT	VACANT	Vac.	323								1
3 LUPUS STREET	TOP CURRY CENTRE	INDIAN RESTAURANT	A3	67				1				
2 LUPUS STREET	QUALITY FRUIT	GREENGROCER	A1	97	1							
7 LUPUS STREET	GREATWAY FOOD STORE	CONVENIENCE STORE	A1	54	1							
4 LUPUS STREET	WINE RACK	OFF LICENCE	A1	124	1							
35 - 41 ST GEORGES SQUARE	RESIDENTIAL	DWELLINGS	C3	491								
1 LUPUS STREET	THE GALLERY	PUBLIC HOUSE	A4	126					1			
8 LUPUS STREET	WILLIAM HILL	BETTING OFFICE	A2	67			1					
101 TACHBROOK STREET	TACHBROOK BAKERY & PATISSERIE	BAKER	A1	75	1							
3 - 33 ST GEORGES SQUARE	RESIDENTIAL	DWELLINGS	C3	1757								
BESSBOROUGH STREET	OFFICE	OFFICE	B1	63						1		
BESSBOROUGH STREET	VACANT	VACANT	Vac.	45								1
2 BESSBOROUGH STREET	LONDON UNDERGROUND	TUBE STATION		316								
93 - 95 TACHBROOK STREET	PORTMAN`S PHARMACY	CHEMIST	A1	149	1							
87 TACHBROOK STREET	VAUXHALL CAFE	CAFE	A3	87				1				
91 TACHBROOK STREET	MEMENTO FLOWERS	FLORIST	A1	61		1						
85 TACHBROOK STREET	PRIDE OF PIMLICO	PUBLIC HOUSE	A4	187					1			
89 TACHBROOK STREET	EXPERT CLEANERS	DRY CLEANING	A1	107		1						
97 TACHBROOK STREET	PIMLICO SELF SERVICE	CONVENIENCE STORE	A1	76	1							



Source: GOAD Retail Survey 2013

Local Centre: Pimlico

Local Shopping Centre Boundary

A1: Retail

A2: Financial & Professional

A3: Restaurant/Café

A4: Pub/Bar

ASG: Sui Generis

B1: Office

UC: Unclassified

0 20 40

Metres

N

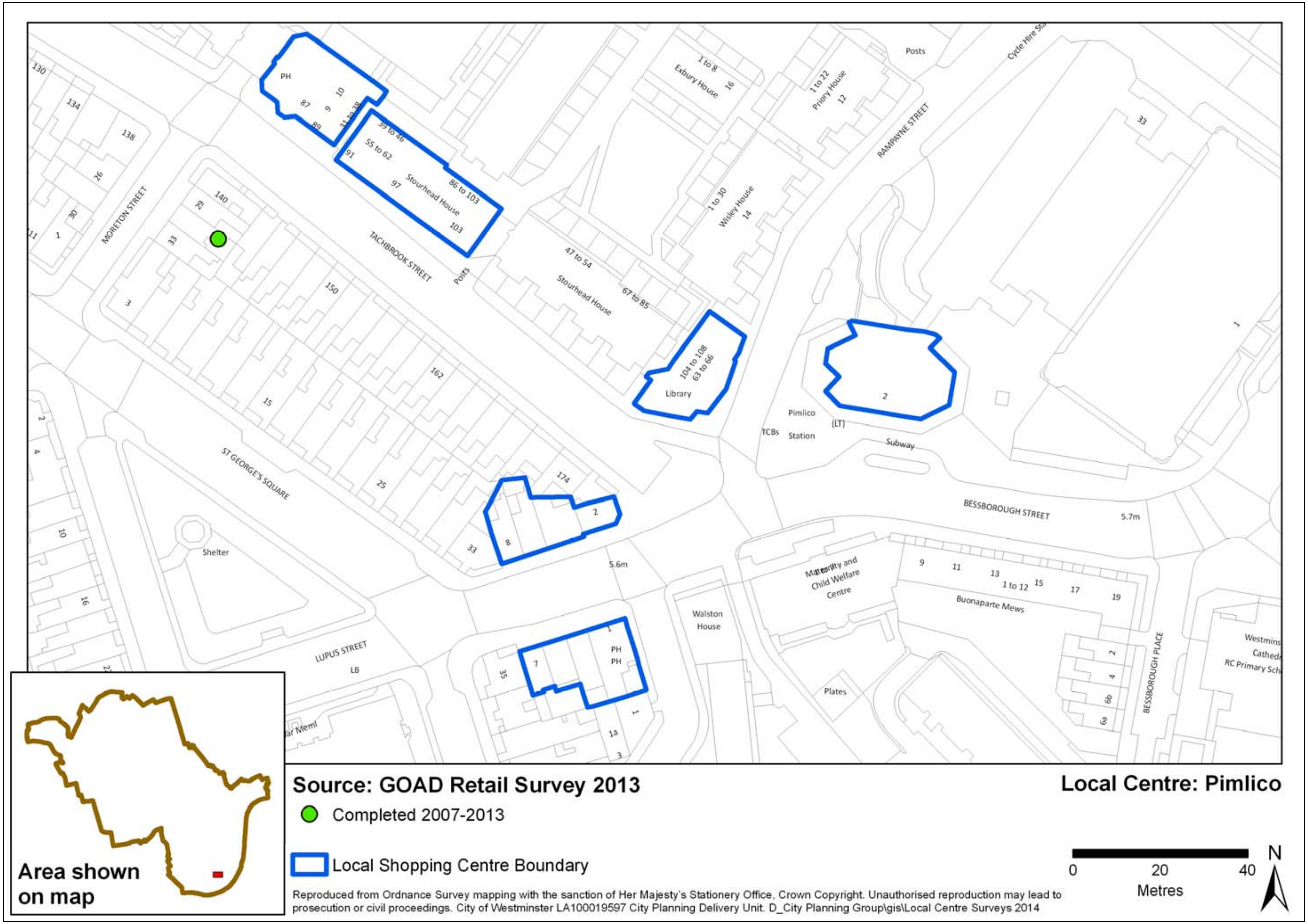

Source: GOAD Retail Survey 2013
Completed 2007-2013
Local Shopping Centre Boundary
Local Centre: Pimlico
Area shown on map
0
20
40
Metres
N
TACHBROOK STREET
MORETON STREET
ST GEORGE'S SQUARE
LUPUS STREET
BESSBOROUGH STREET
BESSBOROUGH PLACE
RAMPAYNE STREET
Stourhead House
Exbury House
Priory House
Wisley House
Library
Pimlico
Station
(LT)
TCBs
Subway
Shelter
Walston
House
Child Welfare
Centre
Buonaparte Mews
Plates
Posts
PH
5.6m
5.7m
LB
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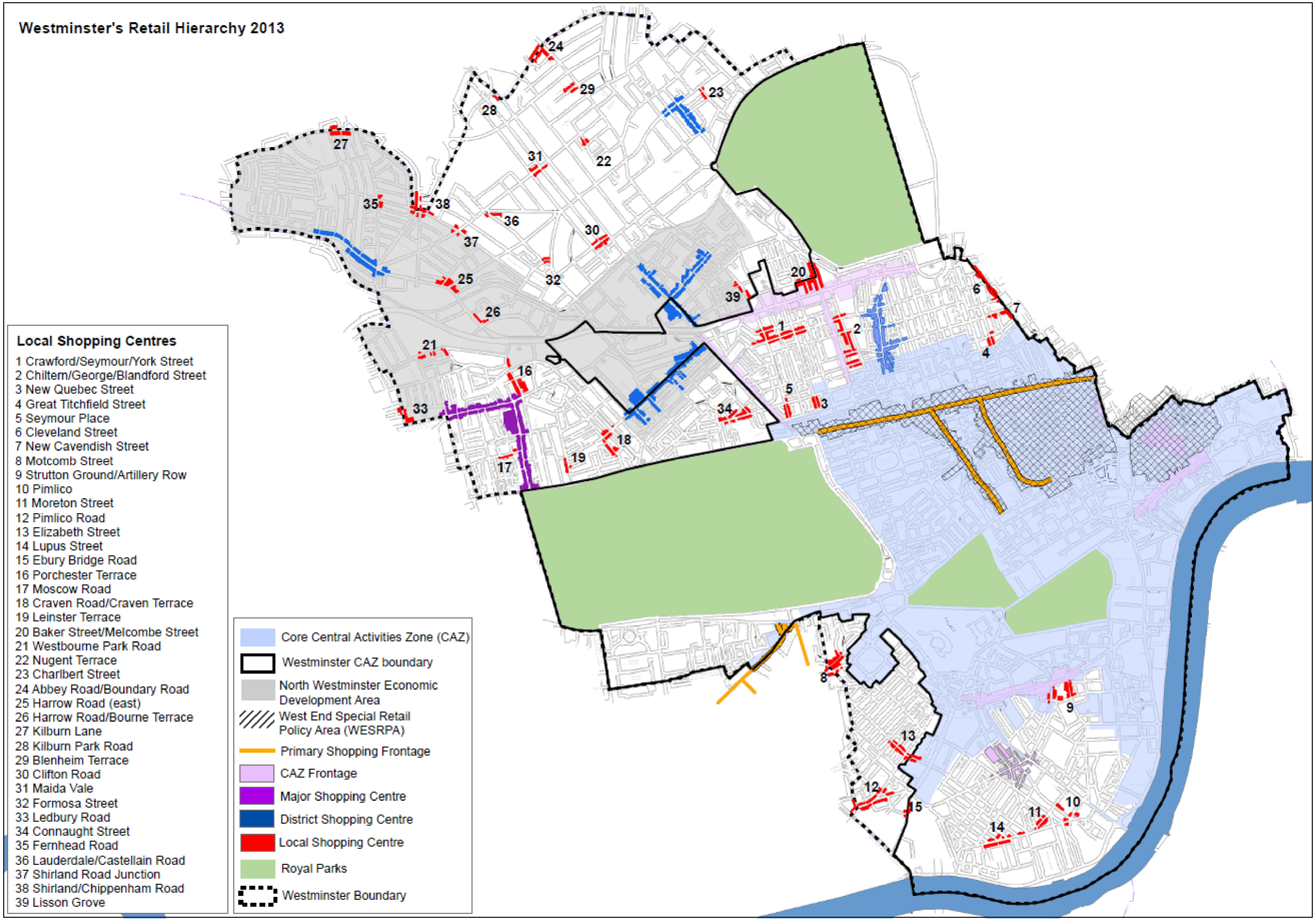
Figure 8 Westminster wide shopping centre boundaries plan



ealth 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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Shopping Centre Health Check Survey 2014

Local Centre 13: Pimlico Road

Contents

Tables

Figures

(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.

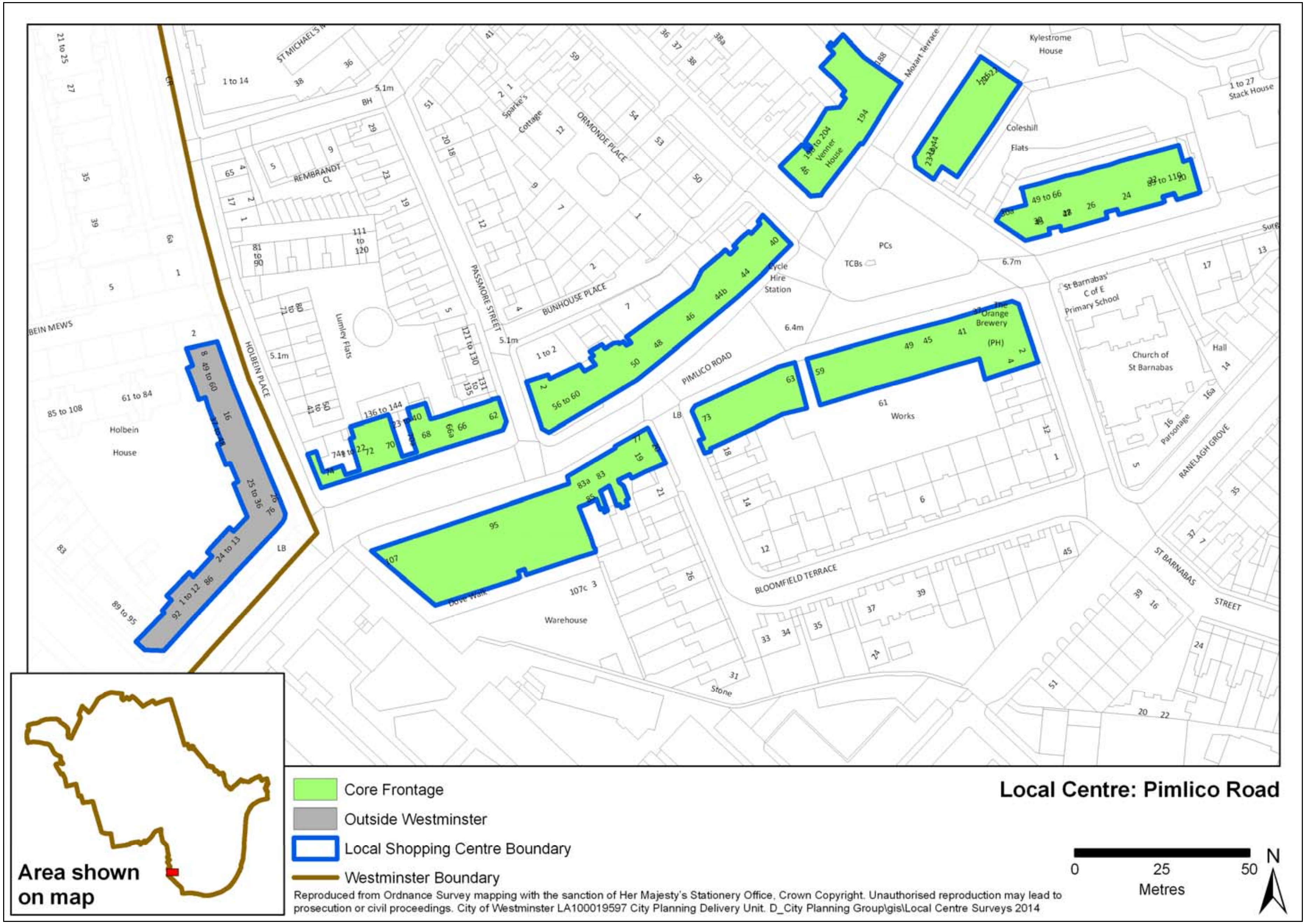
Local Centre **12: Pimlico Road**

1. Introduction

1.1 Location

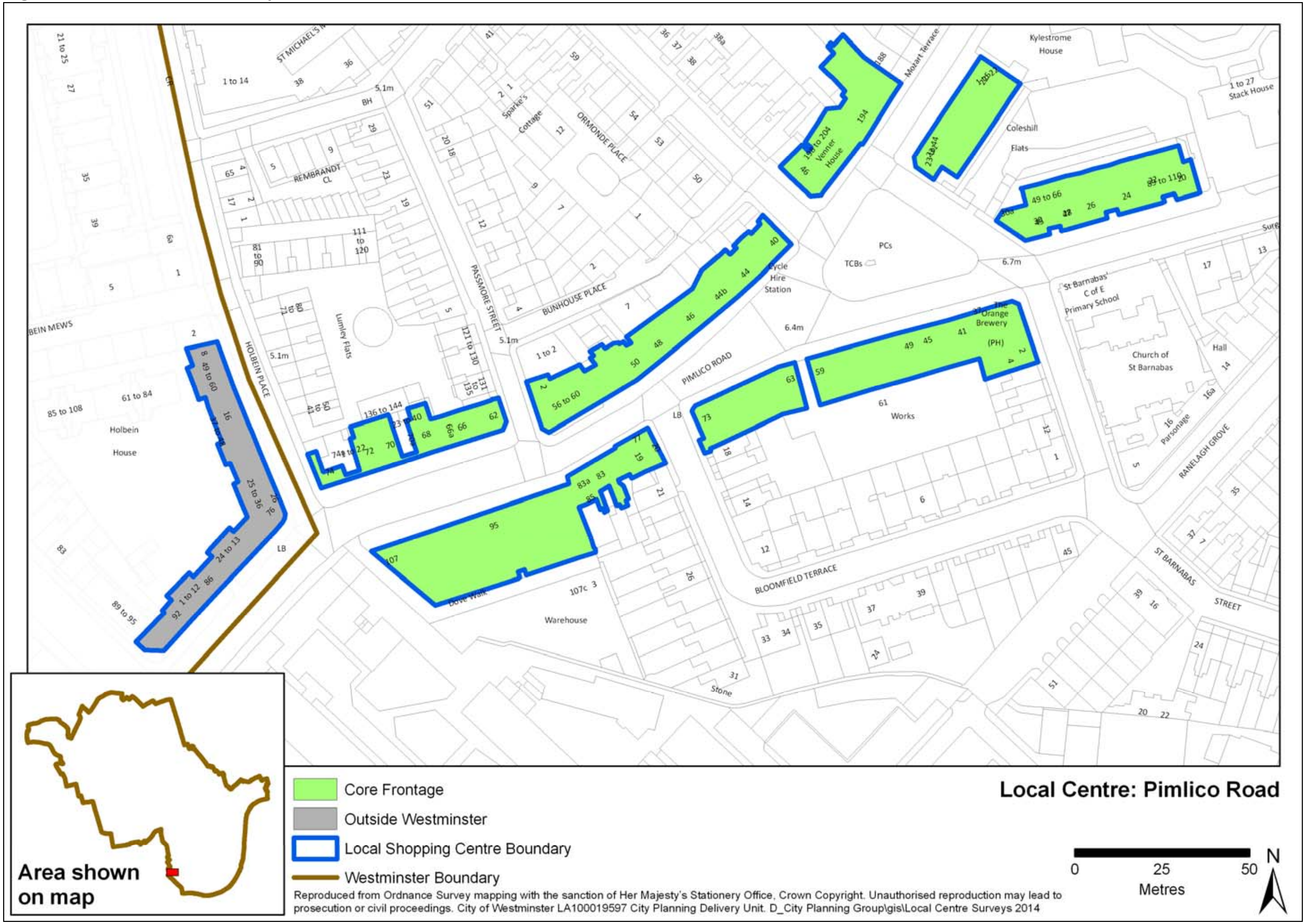
Pimlico Road is a large linear local centre located in the south of Westminster on the boundary between Westminster and Kensington and Chelsea. The local centre is close to Victoria Coach Station, Chelsea Barracks and Sloane Square (see

Figure 1: Local Centre Boundary 2013



). The centre primarily serves local residents and workers, but also attracts visitors from a wider area with a distinct range of specialist and independent retailers and a high quality food and drink offer. The catchment area of the centre is limited by the proximity of the Kings Road, and several other smaller local centres in the area.

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		45	66	66	67
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*0*
	National retailers	*0*	*2*	*2*	*0*
	Specialist Independent	*35*	*56*	*56*	*56*
	Independent	*7*	*6*	*7*	*8*
	Convenience	*3*	*2*	*1*	*3*
Class A2	Financial & Professional	1	1	1	2
Food & Drink		0	7	7	6
Class A3	*Restaurant/Café*	*n/a*	*6*	*6*	*4*
Class A4	*Pubs/Bars*	*n/a*	*1*	*1*	*1*
Class A5	*Takeaway*	*n/a*	*0*	*0*	*0*
	Takeaway/Restaurant	*0*	*0*	*0*	*1*
Sui Generis		0	0	0	1
Vacant Units		5	4	3	0
Arts/Culture		0	0	0	0
Health uses		0	0	0	0
Hotels		0	0	0	0
TOTAL		**51**	**78**	**77**	**76**

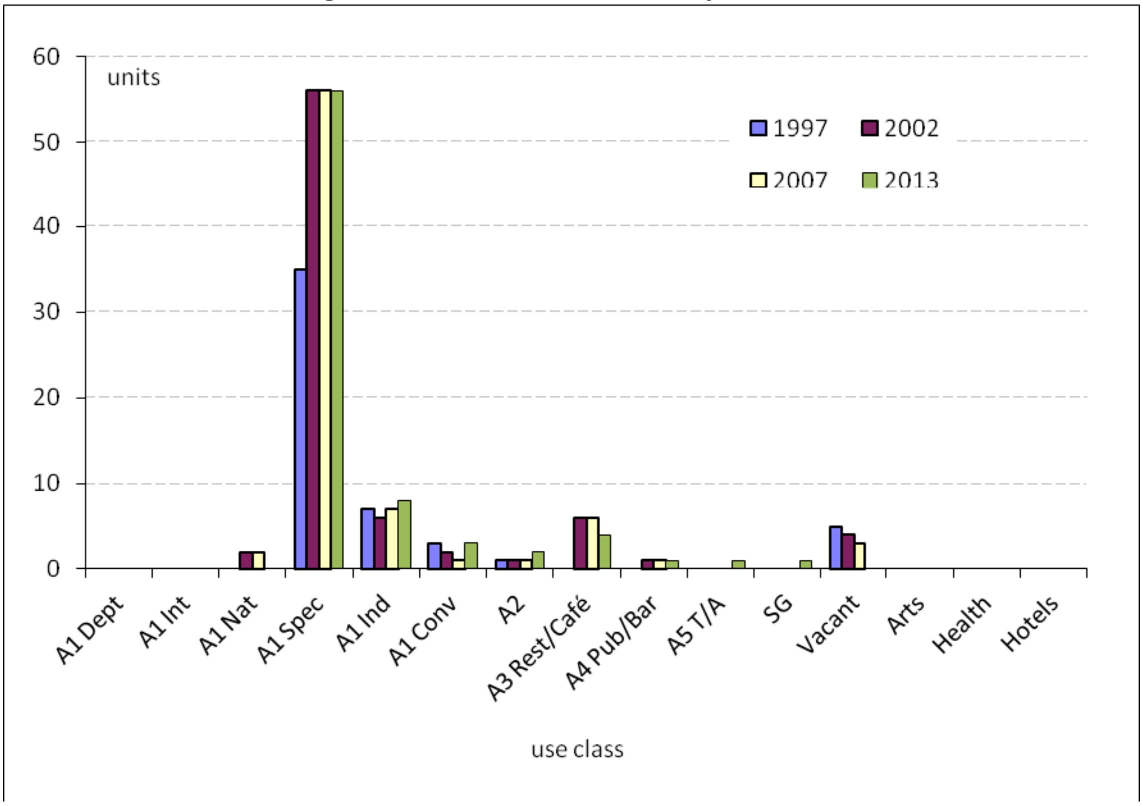
Source: WCC Land Use Survey July 2013

In total there are 76 retail units on the ground floor level, which is one less than recorded when the local centre was last surveyed in 2007, but still makes Pimlico Road one of the larger local centres in Westminster.

The number of A1 retail uses in Pimlico Road Local Shopping Centre has increased by two convenience units since 2007, reinforcing the dominance of this use class in the centre, where nearly 90% of units are A1. The number of A4 Use Class units has remained the same, while the number of A3 units has decreased by one. Interestingly the national retailers have decreased and disappeared in the area. Within class A1 uses, the number of independent retailers has increased by one and Pimlico Road is dominated by A1 specialist independent shops (see Figure 1 below).

Outside of A class retail uses, the centre has no arts or health uses although there is a hotel which is accessible above the A4 unit, the Orange Public House and Hotel, with an offer of four en suite bedrooms. A description of these Use Classes is included in the Glossary of Terms attached to this report.

Figure 1 Pimlico Road: Units by use class



2.2 Range of A1 Uses

Pimlico Road has no international retailers, department stores or national retailers. The make-up of the 67 Class A1 retail units is dominated by Specialist retailers, of which there are 56, along with 8 independent retailers and 3 convenience stores. The specialist retailers include a wide range of occupiers, however there is a high concentration of fine antique shops as well as furniture and interior design shops and commercial art galleries. The independent stores include florist and garden goods shop, clothes and ladies wear shops, a bed linen shop and a jewellery shop. The convenience stores include a wine and groceries shop, hairdressers and dry cleaners. The high proportion of comparison shops and no multiple retailers suggests that Pimlico Road serves local residents and specialist shoppers and indicates that it is best known for its vast range of antiques and interior design shops. The centre also contains the large Travis Perkins timber/construction industry goods yard, located at the back of Pimlico Road (south side).

2.3 Total Retail Floor space

In total, Pimlico Road has 8,027 sqm of retail floor space (broken down in Table 2, which is above the average of 3,188 sqm for the 39 Local Centres in Westminster. Pimlico Road is dominated by A1 specialist floor space, accounting for 70% of the total retail floor space in this centre (see Figure 3 below). Almost 10% of the floorspace is A3 restaurants/cafes including several very popular restaurants such as the French restaurant Poule au Pot. There is a small proportion of class A4 pub/bar floorspace with reasonably low levels recorded for the other use classes. Conversely the centre has a lower than average proportion of A1 convenience floor space (4%) than other local centres in Westminster.

Figure 3 Pimlico Road Retail Floor Space 2013

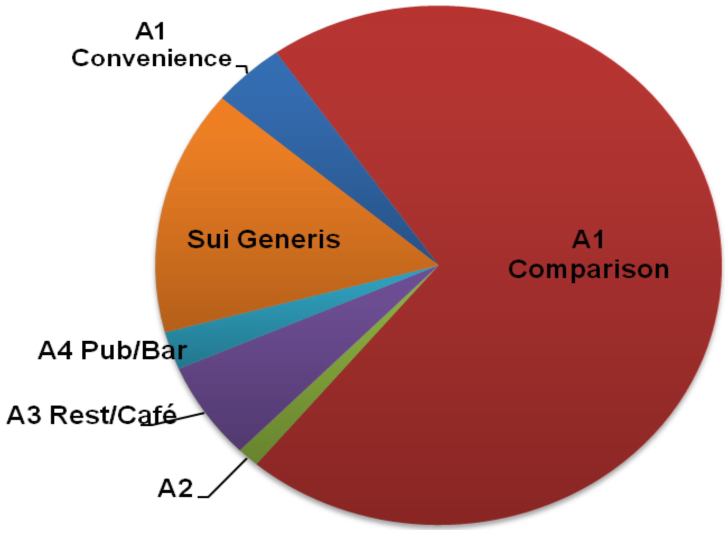


Table 2 Total Retail Floor space 2013

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2014)
A1 Convenience	334	4.16%	14.85%
A1 Comparison	5688	70.86%	35.18%
A2	100	1.25%	11.16%
A3 Rest/Café	490	6.10%	17.41%
A4 Pub/Bar	189	2.36%	5.13%
Sui Generis	1225	15.26%	3.90%
Vacant	0	0.00%	8.55%
Health	0	0.00%	1.96%
Hotels	0	0.00%	0.45%
Art	0	0.00%	1.33%
Leisure	0	0.00%	0.06%
Total	**8,027**	**100%**	**100%**

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

Pimlico Road is a Local Centre with a vast range of specialist independent retailers. There are no banks or building societies, and two Class A2 uses in the local centre. The low proportion of food shops and the absence of any community facilities mean that the Local Centre does not provide the same range and selection found in other large Local Centres or District Centres, as the centre is obviously geared towards a concentration of specific types of independent retailers.

2.4 Proportion of Vacant Street Level Property

There are no vacant units in Pimlico Road, illustrating the health of the centre. This represents a significant improvement since 2007 when three units were vacant. The local centre average across Westminster as a whole is 8%, and therefore Pimlico Road is performing very well in this respect.

Table 3 Level of Retail Vacant Street Level Property 2013

	% Vacant 1997	% Vacant 2002	% Vacant 2007	% Vacant 2013	% Average Local Centre 2013
Pimlico Road	8.8% (5 units)	5.1% (4 units)	3.9% (3 units)	0.% (0 units)	8% (6 units)

Source: City of Westminster GIS System and site survey July 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 July 2013.

3.2 Accessibility on foot and by public transport

Pimlico Road is located roughly 5 minutes walk from Sloane Square London Underground station, which is located to the north of the local centre. The centre is also roughly 10-15 minutes' walk from Victoria mainline and London Underground stations, and 5-10 minutes' walk from Victoria Coach Station. Several bus routes also run through and past the local centre with numbers 11, 211 and 239 running along Pimlico Road, while routes 137, 360 and 452 run along the neighbouring Chelsea Bridge 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 centre offers a good range of attractions. This score is slightly above the score registered in the 2007 report. This is significantly higher than the Local Centre average of 31%, and ranks Pimlico Road 8th of the 39 Local Centres in Westminster.

Pimlico Road has a poor provision of multiple retailers and is under-served in local convenience shopping and services provision although Pimlico Farmers' Market takes place every Saturday in the Orange or Mozart Square which enhances the offer and contributes to the vitality of this local shopping centre. There are neither leisure facilities, cultural/community events nor bank/building society provision. The centre's main strengths are the good provision of specialist shops (interior design, art, antiques and fine furniture shops), the quality of the retail environment and the provision of restaurants.

4.2 Daytime Amenity

Pimlico Road is a very attractive Local Shopping Centre, with a day time amenity rating of 87% compared with the average for all Local Centres of 68%, and was ranked 3rd out of the 39 Local Centres in Westminster. The centre is only rated as being poor in terms of the promotion streets events although there is a weekly farmers market every Saturday morning, and the particular strength of the centre is in the categories detailing the overall environment and cleanliness in the centre where all categories are rated as good. The security categories are rated between good and average which represents an improvement in 2013. Overall, the centre has an average feel good rating and more than a half of all 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)	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	9/26			11/26			11/26		
Percentage	34.62%			42.31%			42.31%		

Source: City of Westminster site survey July 2013
Note: Each issue is ranked in a scale 0 to 2, with 2 being the highest positive score achievable. Scores are provided from the adopted 2002 and 2007 Health Checks Surveys and a 2013 update to allow comparison to be made between the others results.

Table 5 Day Time Amenity within the Local Centre 2013

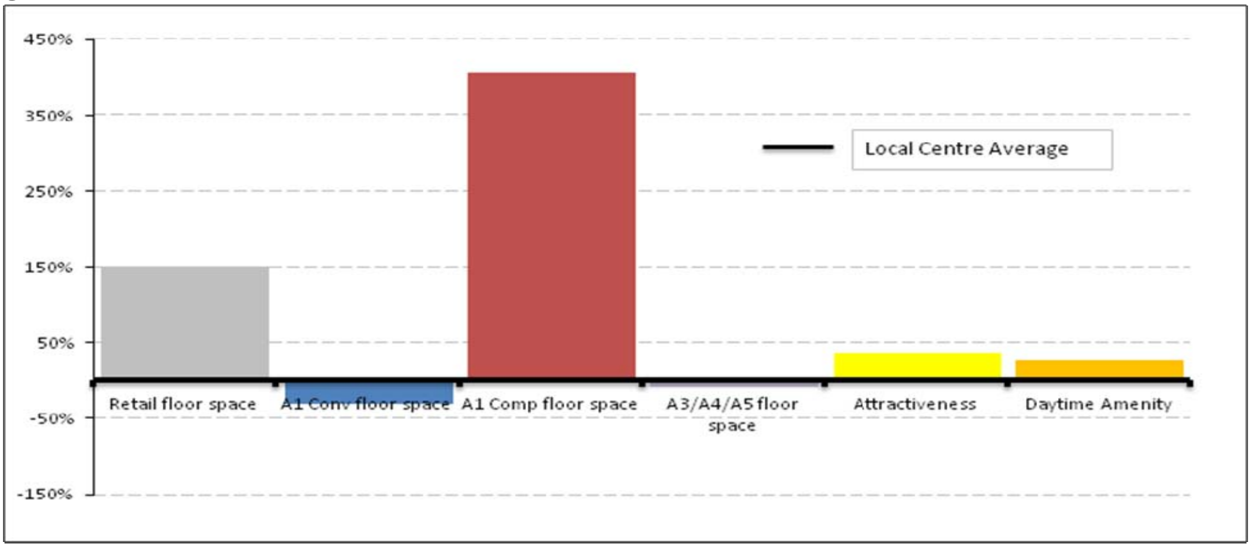
AMENITY - DAYTIME	1997			2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Overall environment of public areas in the centre												
General Cleanliness in Shopping Hours												
Presence of litter		N/A		X			X			X		
Presence of refuse bag		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		X		X			X			X		
Quality of Buildings	X			X			X			X		
Special features (pedestrianisation, street furniture)		X		X			X			X		
Impact of vacant sites	X			X			X			X		
Security		X										
Evidence of Vandalism and Graffiti (incl. on street furniture)		N/A		X			X			X		
Security during shopping hours (availability, access, security, etc)		X			X			X		X		
Ease of passage for pedestrians (incl. presence of obstacles eg illegally parked vehicles)		N/A			X			X			X	
Evidence of drunkenness, antisocial behaviour rowdiness		N/A			X			X		X		
Presence of rough sleepers / Presence of beggars		N/A		X / X			X / X			X / X		
Presence of street drinkers Evidence of touting (eg minicabs, ricksaws, prostitution, drug dealing, etc)		N/A		X		X	X		X	X X		
Presence of illegal street traders e.g. counferteit goods, hot dogs, peanuts, etc		N/A		X			X			X		
Effectiveness of any deterrent measures (CCTV, police patrols, door security, etc)		X			X			X			X	
Quality of street lighting		X			X			X			X	
Safety perception in shopping hours	X			X				X		X		
Identity of town centre												
Features which identify the centre (eg flagship stores, buildings, etc)		X			X			X			X	
Promotion / Streets events			X		X			X				X
Feel good' factor of town centre	X			X				X		X		
Total		**16/26**			**37/46**			**35/46**			**40/46**	
Percentage		62.0%			80.4%			76.1%			87.0%	

Source: City of Westminster site survey July 2013 / Note**:** Each issue is ranked in a scale 0 to 2, with 2 being the highest positive score achievable.

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2013

Figure 3: Deviation of centre from the mean for Local Centres 2013



Pimlico Road is a very 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, and is in fact the largest centre in terms of retail floor space. However, the centre has a below average amount of A1 convenience floor space. The centre is however dominated by A1 comparison floor space, which is over five times the local centre average. Food and drink floor space figures (A3/A4/A5) are also slightly higher than the average. The centre also performs well in terms of its physical environment ratings, with above average ratings for both attractiveness and daytime amenity illustrating the quality of the retail environment.

5.2 Strengths, Weaknesses, Opportunities and Threats

Figure 4 SWOT analysis

6. Future capacity

6.1 Potential Capacity for Growth

Between 2007 and 2013, there were a few full permitted planning applications involving A-class uses within Pimlico Road Local Centre. Most of them included installation of new shop fronts and some alterations to shop front. Also, there were a few planning applications involving use of an area of the public highway at 30a Pimlico Road for the display of flowers and 44b Pimlico Road (farm shop and cafe) for the placing of tables and chairs. Another planning application was permitted to use the Orange Square as weekly Saturday farmers' market.

6.2 Development Proposal

There is a new development proposed on the site of the former Chelsea Barracks, immediately to the south east of Pimlico Road. Although there is a considerable amount of uncertainty, Chelsea Barracks site is likely to be redeveloped in order to provide a residential led mixed-used development of strategic importance, bringing a large number of new residents to the area, which is an opportunity for the centre. The outline planning permission (2011) includes provision of C3, C1, D1, D1 Use Classes and flexible retail uses (A1, A2 or A3 provision) that could represent an opportunity for the increase of convenience shops and services provision for Pimlico Road Local Shopping Centre.

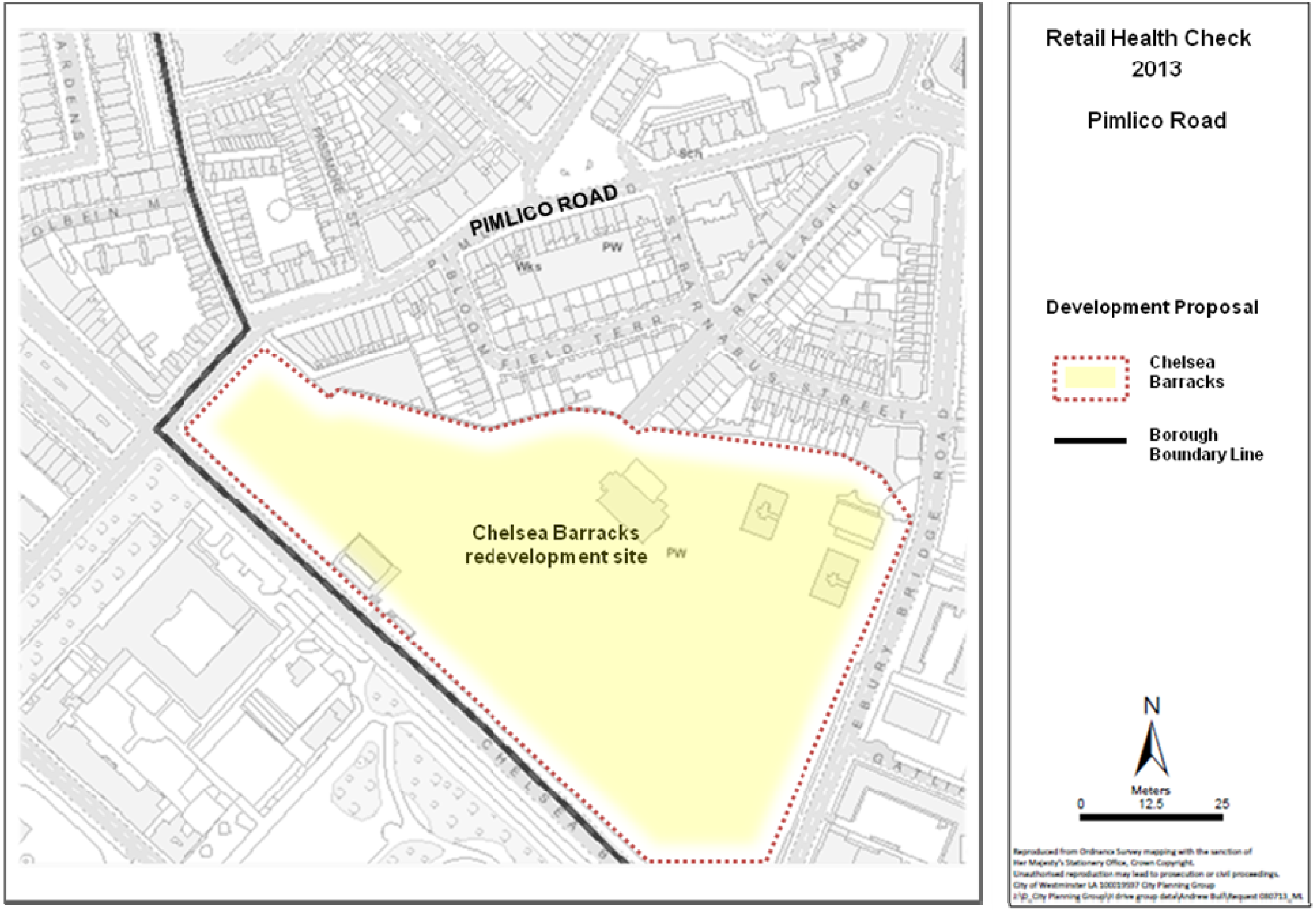
In terms of retail use, the proposal looks after a minimum increase of 1,126 sqm of A1 or A2 retail floorspace and 1,126 sqm of A3 retail floorspace. This is anticipated to be provided in the form of a small convenience supermarket and small scale retail units located most likely on Ebury Bridge Road on the eastern side of the site away from Pimlico Road, which will complement existing retail offer in Pimlico Road Local Centre.

6.3 Recommendations

- Give priority to A1 convenience shop units and A2 Class Use to promote the retail mix;
- To provide or support affordable shop units suitable for small or independent retailers and service outlets.
- To strengthen and promote the retail mix offer.

Figure 2 illustrates the boundaries of the Chelsea Barracks proposal site.

Figure 2 Development Proposal near Pimlico Road Local Shopping Centre



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**		**8,027**
		Total Convenience (A1)		**334**
		Total Comparison (A1)		**5,688**
		Total Service (A2)		**100**
		Total A3		**392**
		Total A4		**189**
		Total A5		**98**
		Total Sui Generis		**1,225**
		Total Vacant		**0**
	Retail Offer	**Total Number of Shop Units**	**76**	
		Total Number of A1 Units	**67**	
		a) Convenience shops	**3**	
		b) Department/principal stores	**0**	
		c) Prestige international shops	**0**	
		d) National comparison retailers	**0**	
		e) Specialist Independent shops	**56**	
		f) Independent shops	**8**	
		Total Comparison Multiples	**64**	
		Total Number of A2 Units	**2**	
		Total Number of A3 Units	**4**	
		Total Number of A4 Units	**1**	
		Total Number of A5 Units	**1**	
		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**	**0**
HEALTH USES		**(clinics, surgeries etc.)**	**0**	**0**
HOTELS			**0**	**0**

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

Little has changed in Pimlico Road Local Centre since the last survey was carried out in this centre. Chelsea Barracks future should be taken into account for the potential increased customer base and retail offer that this could provide.

However, certain types of extensions and changes of use do not require full planning permission as they are classed as "permitted development" and recent changes to permitted development rights now allow town centre uses (A1, A2, A3, A4, A5, B1, D1 and D2) below a certain size to change temporarily to A1, A2, A3 or B1 for a period of two years. The effect of this will be kept under review.

The Government are considering further changes to permitted development rights to allow shop units to change permanently to residential, banks and building societies. These changes will all be kept under review.

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 Pimlico Road local centre

Table 7 Views of Pimlico Road Local Centre

Attractive frontages and a quiet street scene at the east end of the local centre.
Planning permission granted for the use of an area of the public highway to display flowers and plants, flower carts and work table in connection with flower shop.

Specialist shops in the centre of the local centre, contributing to the attractive streetscape in the local centre.

Vacant unit in the west corner near the Orange or Mozart Square and a busy street scene of the local centre.

A3 Cafe restaurant (farm shop and cafe) near the Orange Square.
Planning permission granted for the use of an area of the public highway for the placing of 10 tables surrounded by a border of planters.

The Orange Public House and Hotel.

Galleries A1 where mainly displaying art for sale to the general public and further specialist shops at the west end of the Pimlico Road local centre, illustrating the main function and its dominant uses.

More Galleries and specialist shops at the west end of local centre.

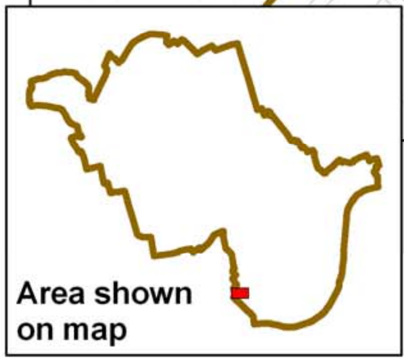
Expansion of one specialist store at the west end of the local centre.

Former betting office unit (blue facade) and vacant unit that represent a loss of the single A2 Use Class offered in the local centre.

Table 8 Goad Data 2013

ADDRESS	FASCIA	DESCRIPTION	USE	SQM	A1 Conv.	A1 Spec.	A1 Ind	A2	A3 Res/Caf	A4 Pub/Bar	A3 Rest/TA	S G
PIMLICO ROAD	PULLMAN EDITIONS	ART GALLERY (RETAIL)	A1	34		1						
76 - 78 PIMLICO ROAD	ROSE UNIACKE	ANTIQUES	A1	102		1						
8 HOLBEIN PLACE	HILARY BATSTONE	ANTIQUES	A1	42		1						
10 HOLBEIN PLACE	NUMBER 10 HAIRDRESSING	HAIRDRESSING	A1	46			1					
90 - 92 PIMLICO ROAD	GAUNTLET	ANTIQUES	A1	66		1						
80 - 82 PIMLICO ROAD	WESTENHOLZ ANTIQUES	ANTIQUES	A1	77		1						
24 HOLBEIN PLACE	ODYSSEY FINE ARTS	ART GALLERY (RETAIL)	A1	37		1						
16 HOLBEIN PLACE	BENNISON FABRICS	HOUSEHOLD TEXTILES	A1	46		1						
84 PIMLICO ROAD	88 GALLERY	ART GALLERY (RETAIL)	A1	39		1						
74 PIMLICO ROAD	JOHN KING	ART GALLERY (RETAIL)	A1	49		1						
97 LOWER SLOANE STREET	HEMISPHERE GALLERY	ANTIQUES	A1	49		1						
86 - 88 PIMLICO ROAD	88 GALLERY	ART GALLERY (RETAIL)	A1	74		1						
18 - 22 HOLBEIN PLACE	COMO LARIO	ITALIAN RESTAURANT	A3	104					1			
12 - 14 HOLBEIN PLACE	NICHOLAS HASLAM	INTERIOR DECORATIONS	A1	73		1						
65 PIMLICO ROAD	DAVID THOMAS JEWELLERS	JEWELLER	A1	44		1						
73 PIMLICO ROAD	KESHISHIAN	ANTIQUES	A1	74		1						
45 PIMLICO ROAD	THE BIGGEST BLANKET COMPANY	BEDS & BEDDING	A1	48		1						
70 PIMLICO ROAD	JULIAN SIMON FINE ART	ART GALLERY (RETAIL)	A1	54		1						
103 PIMLICO ROAD	ARTHUR BRETT & SON	FURNITURE	A1	80		1						
44 PIMLICO ROAD	HUSHH...	BEAUTY SALON	A2	50				1				
66 PIMLICO ROAD	ANNO DOMINI ANTIQUES	ANTIQUES	A1	75		1						
77 - 79 PIMLICO ROAD	DALE ROGERS	ANTIQUES	A1	115		1						
59 PIMLICO ROAD	COOTE & BERNARDI	FURNITURE	A1	75		1						
69 PIMLICO ROAD	RAMSAY PRINTS	ART GALLERY (RETAIL)	A1	62		1						
87 PIMLICO ROAD	TINELLO	ITALIAN RESTAURANT	A3	116					1			
62 - 64 PIMLICO ROAD	MARK RANSOM	ART GALLERY (RETAIL)	A1	84		1						
68 PIMLICO ROAD	NICHOLAS GIFFORD MEAD	ANTIQUES	A1	97		1						
46 PIMLICO ROAD	LAMBERTY	ANTIQUES	A1	225		1						
51 PIMLICO ROAD	HUNAN	CHINESE RESTAURANT	A3	71					1			
97 PIMLICO ROAD	JAMB	ANTIQUES	A1	79		1						
101 - 99 PIMLICO ROAD	PROMEMORIA	FURNITURE	A1	154		1						
40 PIMLICO ROAD	KRYSTALS EXPRESS	CONVENIENCE STORE	A1	95	1							
93 PIMLICO ROAD	CHRISTOPHER HOWE ANTIQUES	ANTIQUES	A1	86		1						
72 PIMLICO ROAD	ANTHONY OUTRED	ANTIQUES	A1	99		1						
44B PIMLICO ROAD	DAYLESFORD ORGANIC	DELICATESSEN	A1	169	1							
54 PIMLICO ROAD	CZECH & SPEAKE	BATHROOM FURNITURE	A1	118		1						
89 - 91 PIMLICO ROAD	PLUS ONE GALLERY	ART GALLERY (RETAIL)	A1	179		1						
67 PIMLICO ROAD	CORAL	BETTING OFFICE	A2	50				1				
107 PIMLICO ROAD	POGGEN POHL	KITCHEN FURNITURE	A1	104		1						
83 PIMLICO ROAD	OSSOWSKI	ART GALLERY (RETAIL)	A1	57		1						
105 PIMLICO ROAD	MARK RANSOM	ART GALLERY (RETAIL)	A1	80		1						

57 PIMLICO ROAD	SANAIY ORIENTAL CARPETS	CARPETS & FLOORING	A1	46		1						
42 PIMLICO ROAD	ZUBER	WALLPAPER & PAINT	A1	93			1					
49 PIMLICO ROAD	BUTTERCUP	DRY CLEANING	A1	74			1					
85 PIMLICO ROAD	CIANCIMINO	FURNITURE	A1	73		1						
48A PIMLICO ROAD	JOANNA WOOD	INTERIOR DECORATIONS	A1	259		1						
95 PIMLICO ROAD	ROSS HAMILTON	ART GALLERY (RETAIL)	A1	92		1						
50 - 52 PIMLICO ROAD	SOANE	ANTIQUES	A1	145		1						
81 PIMLICO ROAD	JANE CHURCHILL	INTERIOR DECORATIONS	A1	52		1						
71 PIMLICO ROAD	CHRISTOPHER BUTTERWORTH	ART GALLERY (RETAIL)	A1	50		1						
53 - 55 PIMLICO ROAD	STARBUCKS	COFFEE SHOP	A3	98							1	
56 - 60 PIMLICO ROAD	LINLEY	FURNITURE	A1	395		1						
61 - 63 PIMLICO ROAD	TRAVIS PERKINS	BUILDERS MERCHANT	SG	1225								1
37 - 39 PIMLICO ROAD	THE ORANGE	PUBLIC HOUSE	A4	189						1		
41 PIMLICO ROAD	BLENHEIM CARPET CO	CARPETS & FLOORING	A1	45			1					
43 PIMLICO ROAD	HUMPHREY CARRASCO	ANTIQUES	A1	60		1						
2 ST BARNABAS STREET	LEONIE BROWN INTERIORS	INTERIOR DECORATIONS	A1	9		1						
4 ST BARNABAS STREET	THE DINING CHAIR CO	FURNITURE	A1	56		1						
MOZART TERRACE , EBURY STREET	TALISMAN	INTERIOR DECORATIONS	A1	56		1						
204 EBURY STREET	NICHOLAS HASLAM	INTERIOR DECORATIONS	A1	55		1						
46 BOURNE STREET	COLLECTION PIERRE	FURNITURE	A1	64		1						
231 EBURY STREET	LA POULE AU POT	FRENCH RESTAURANT	A3	101					1			
198 EBURY STREET	WILLIAM CURLEY	CONFECTIONERY & BISCUITS	A1	70	1							
190 - 194A MOZART TERRACE, EBURY STREET	MARSTON & LANGINGER	GARDEN GOODS	A1	242			1					
200 EBURY STREET	EBURY GALLERIES	ART GALLERY (RETAIL)	A1	88		1						
30 PIMLICO ROAD	MICHAEL REEVES	INTERIOR DECORATIONS	A1	88		1						
30A PIMLICO ROAD	WILD AT HEART	FLORIST	A1	56			1					
229 EBURY STREET	TOMASZ STARZEWSKI	INTERIOR DECORATIONS	A1	99		1						
227 EBURY STREET	PATRICK JEFFERSON	ANTIQUES	A1	103		1						
20A PIMLICO ROAD	TIMOTHY LANGSTON	ANTIQUES	A1	51		1						
20 PIMLICO ROAD	WESTENHOLZ	ANTIQUES	A1	106		1						
24 PIMLICO ROAD	MOLOH	LADIES WEAR	A1	102			1					
28 PIMLICO ROAD	GORDON WATSON	ANTIQUES	A1	106		1						
26 PIMLICO ROAD	GALLERY 25	ART GALLERY (RETAIL)	A1	103		1						
225 EBURY STREET	SEMMALINA	CHILDRENS WEAR	A1	100			1					
22 PIMLICO ROAD	LUKE IRWIN	INTERIOR DECORATIONS	A1	101		1						



Source: GOAD Retail Survey 2013

Local Centre: Pimlico Road

- Local Shopping Centre Boundary
- A1: Retail
- A2: Financial & Professional
- A3: Restaurant/Café
- A4: Pub/Bar
- Westminster Boundary

0 25 50
Metres

N

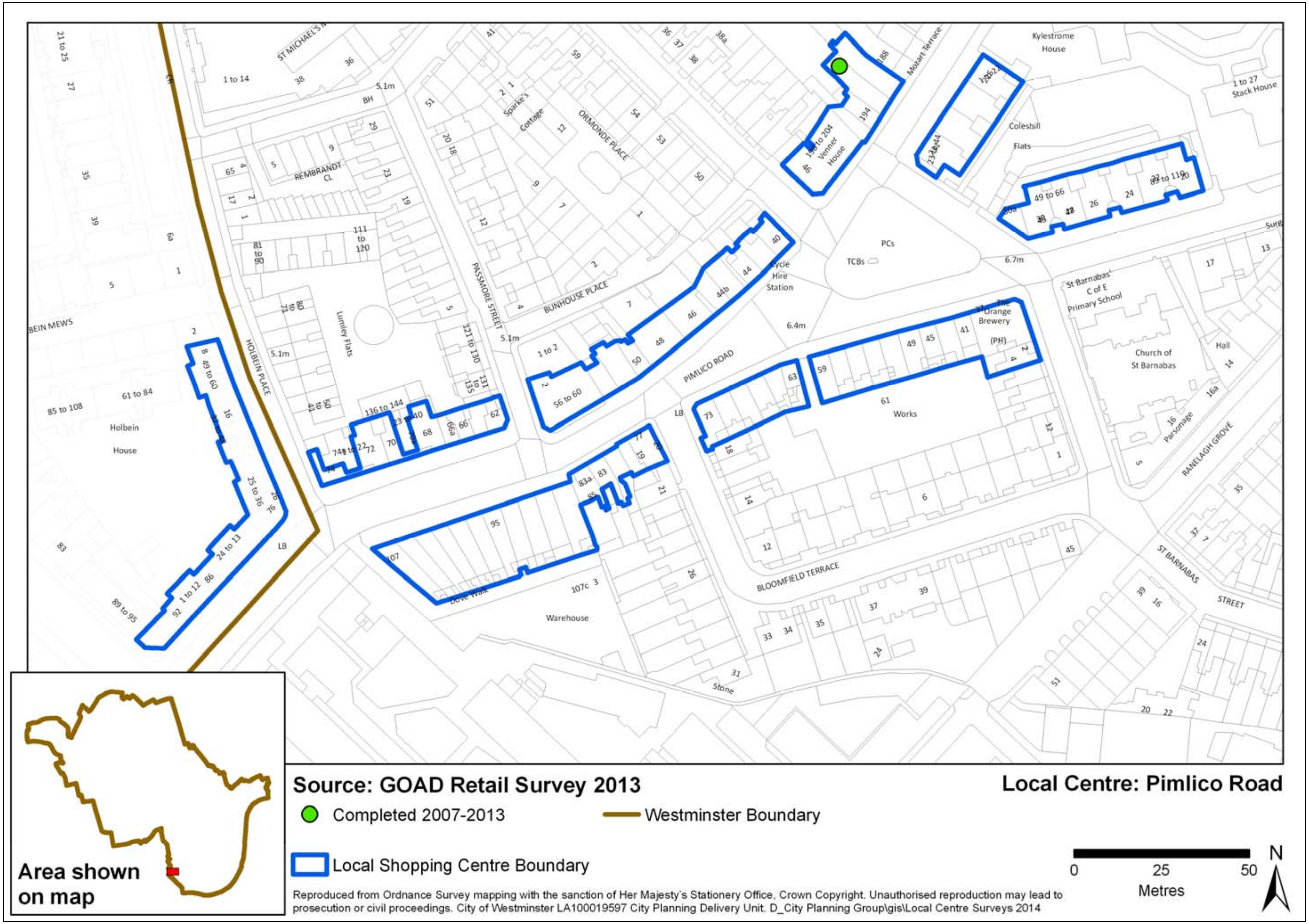
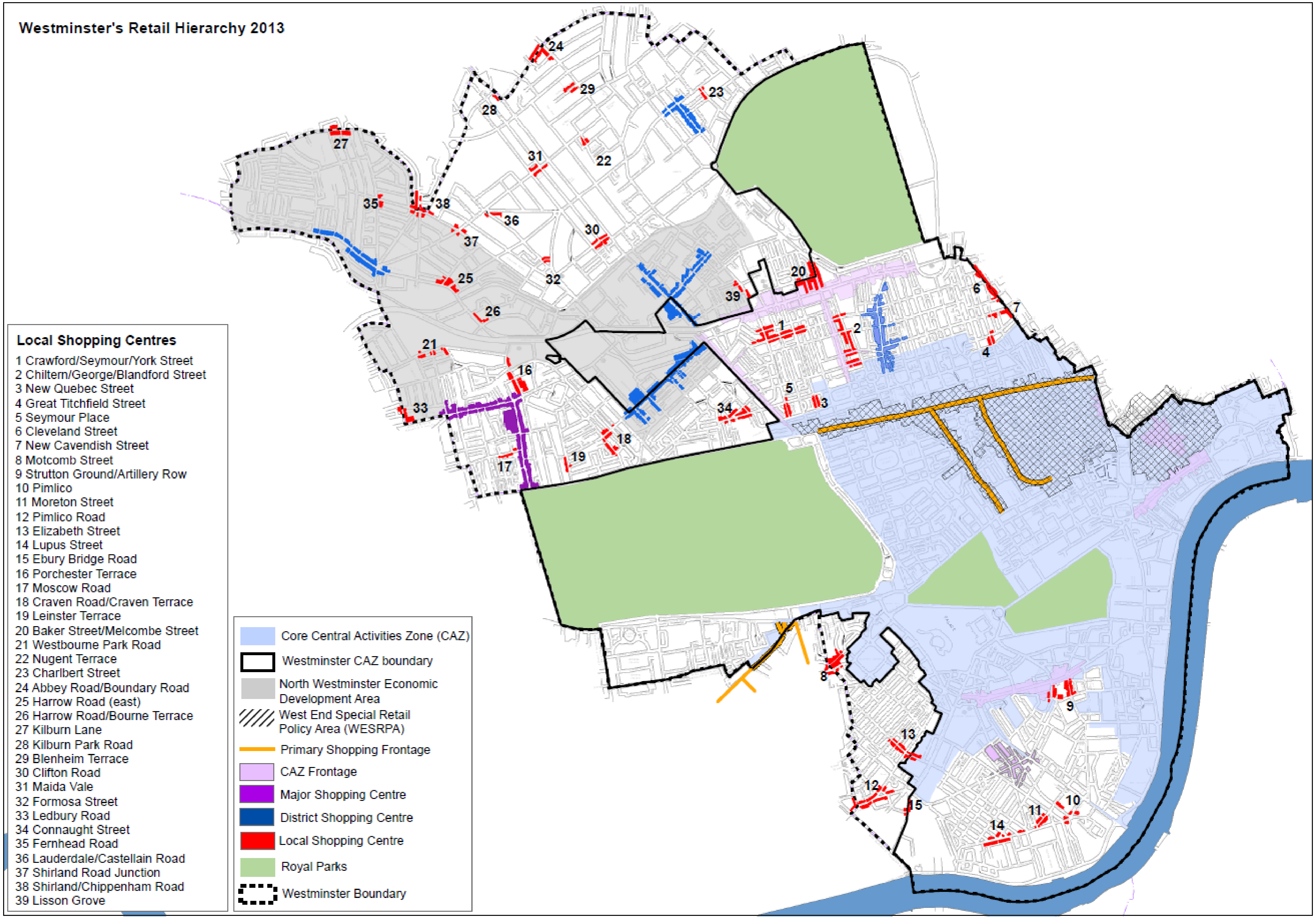

Source: GOAD Retail Survey 2013
Local Centre: Pimlico Road
Completed 2007-2013
Westminster Boundary
Local Shopping Centre Boundary
0 25 50
Metres
N
Area shown on map
Reproduced from Ordnance Survey mapping with the sanction of Her Majesty's Stationery Office, Crown Copyright. Unauthorised reproduction may lead to prosecution or civil proceedings. City of Westminster LA100019597 City Planning Delivery Unit. D_City Planning Group\gis\Local Centre Surveys 2014
PIMLICO ROAD
BLOOMFIELD TERRACE
PASSMORE STREET
HOLBEIN PLACE
BUNHOUSE PLACE
ORMONDE PLACE
REMBRANDT CL
RANELAGH GROVE
ST BARNABAS STREET
Lumley Flats
Holbein House
Venner House
Coleshill Flats
Kylestrome House
St Barnabas' C of E Primary School
Church of St Barnabas
The Orange Brewery (PH)
Works
Warehouse
Cycle Hire Station
Dove Walk

Figure 3 Westminster wide shopping centre boundaries plan



ealth 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

Shopping Centre Health Check Survey 2014

Local Centre 14: Strutton Ground

Contents

Tables

Figures

(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 **14: Strutton Ground**

1. Introduction

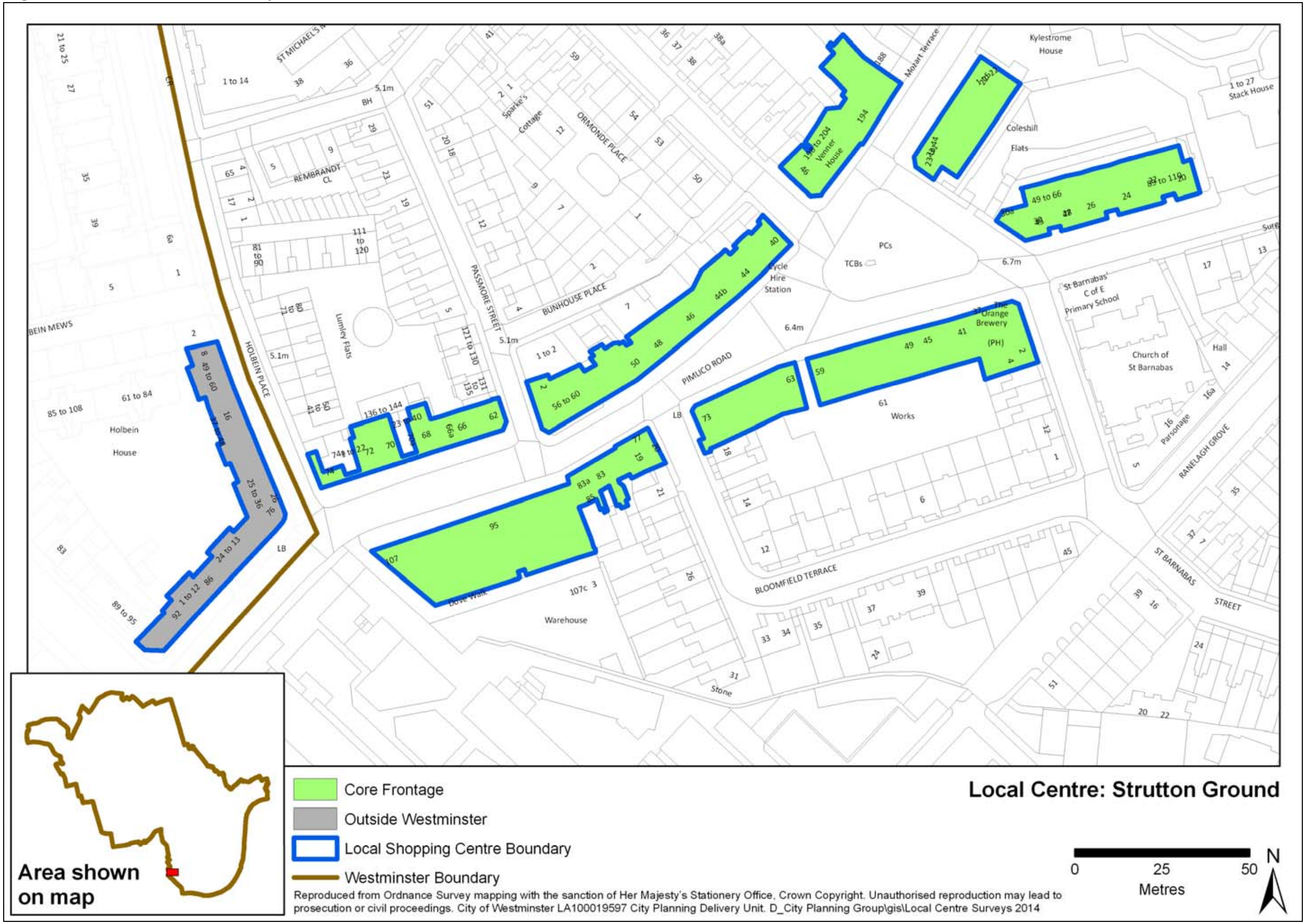
1.1 Location

This medium sized Local Centre is located in the south of Westminster, close to Victoria Street, Parliament Square and St James Park (**Error! Reference source not found.**). The centre serves residents and workers in the Victoria area, and its catchment area is limited by its proximity to Victoria Street, however the centre has a very distinct offer and target market (see Westminster wide shopping centre boundaries plan – Figure 8). The centre takes in two principal streets of very different character, Strutton Ground and Artillery Row.

The centre has a vibrant hot food and convenience shopping based street market stretching the entire length of Strutton Ground, which is pedestrianised during the working day. Opening hours and the retail/service offer tends to fit with the worker based population meaning the centre is much quieter in the evening than during the day.

The centre is located next to a number of large office blocks and large residential developments, while being easily accessed via both London Underground (St James's Park LU station), and bus routes running along Victoria Street.

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		37	32	46	32
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*0*
	National retailers	*1*	*5*	*4*	*2*
	Specialist Independent	*4*	*0*	*1*	*5*
	Independent	*22*	*18*	*31*	*18*
	Convenience	*10*	*9*	*10*	*7*
Class A2	Financial & Professional	6	2	5	7
Food & Drink		0	8	10	21
Class A3	*Restaurant/Café*	*n/a*	*4*	*4*	*11*
Class A4	*Pubs/Bars*	*n/a*	*2*	*4*	*3*
Class A5	*Takeaway*	*n/a*	*2*	*2*	*7*
	Takeaway/Restaurant	*0*	*0*	*0*	*0*
Sui Generis		1	0	0	0
Vacant Units		3	1	0	4
Arts/Culture		0	0	0	0
Health uses		2	0	0	0
Hotels		0	0	0	0
TOTAL		**49**	**43**	**61**	**64**

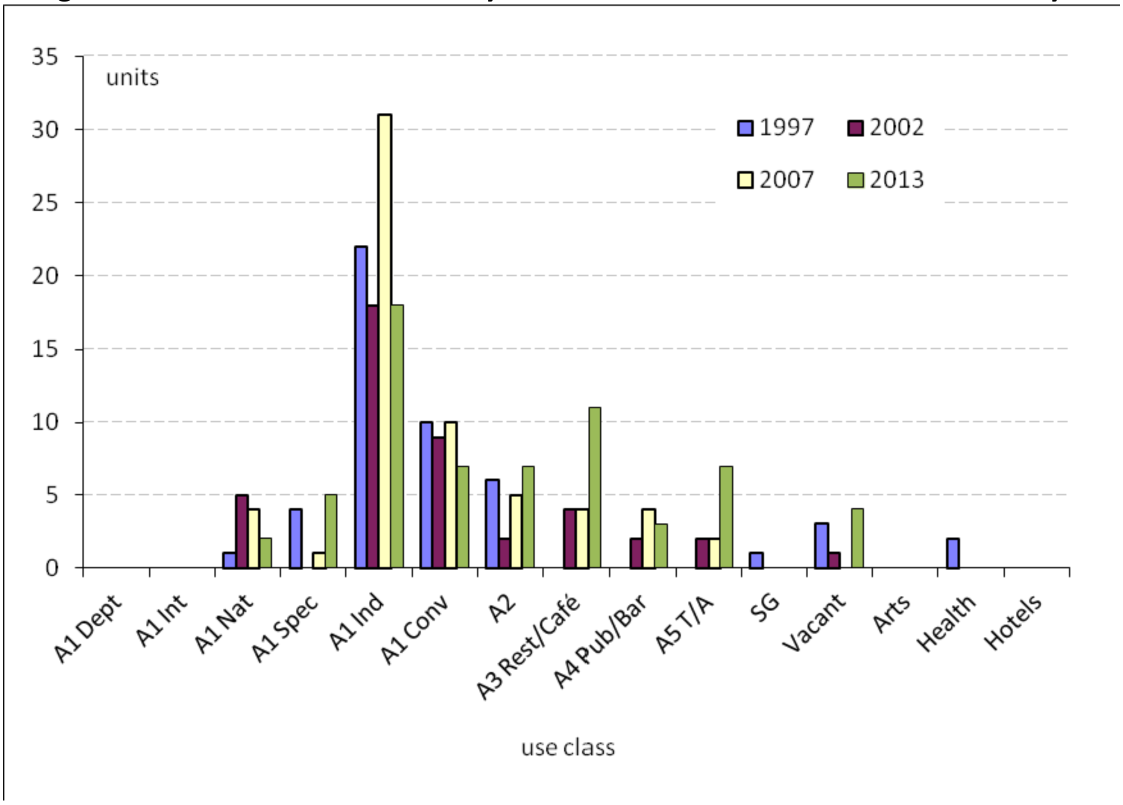
Source: WCC Land Use Survey August 2013

Within the Strutton Ground Local Centre Boundary there are 64 units in total. The number of A1 retail uses in Strutton Ground has decreased by 14 units since 2007. This could be due to the reclassification and uncertainty over a number of units that sell food, as to whether they are A1 or A3 units, which will vary on a case by case basis and can lead to inconsistency in reporting.

The number of Class A2 uses has decreased by 2 units while the number of Class A3/A4 and A5 uses has increased by 11 units, most likely due to reclassifications. With A1 uses, there was a loss of 2 National retailer stores and 13 independent retailer units but a gain of 4 specialist retail shops. The number and configuration of restaurant/cafes/bars has increased by 9 units and the number of vacant units has increased by 4 units since 2007, although units rarely remain vacant for long in this centre.

Outside of A-class retail uses within the local centre boundary, the centre does not contain any hotels, health uses or arts uses and it remains the same since 2007 as shown on Figure 1. A description of these Use Classes is included in the Glossary of Terms attached to this report.

Figure 1 Strutton Ground: Units by use class within the local centre boundary



2.2 Range of A1 Uses

Strutton Ground has no international retailers, but does contain three national retailers. The centre has 32 Class A1 retail units including 7 convenience stores, 18 independent retailers and 5 specialist retailers. The national retailers include a Robert Dyas, an Oxfam Books charity shop and an EAT Sandwich Bar. The independent stores include several shoes stores, a few clothing shops, a home and entertainment supply store, an electrical and gas appliances facility and a book store. The convenience shops include several dry cleaners, travel agents, hair dressers, some food shops, a newsagent and a chemist store. The high proportion of comparison shops and no multiple retailers suggests that Strutton Ground serves local residents with a mix of convenience and comparison shopping facilities. A much wider range of retail outlets is found on the neighbouring Victoria Street.

2.3 Total Retail Floor space

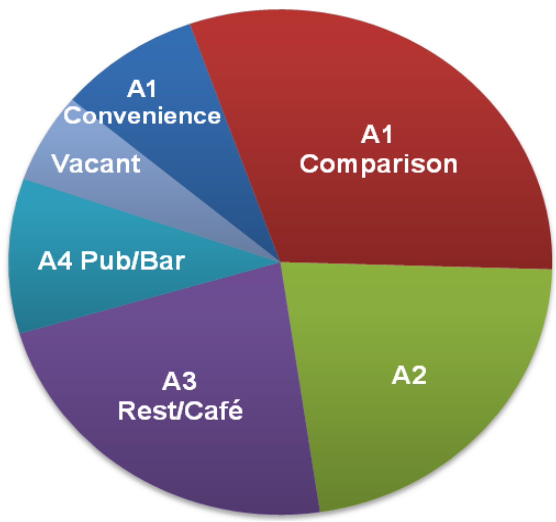
Total retail floor space in Strutton Ground is broken down in Table 2. In total, the Strutton Ground local centre has 6,469 sqm of retail floor space, which is above the average of 3,188 sqm for the 39 Local Centres in the City (2007 Health Check Reports). A1 national, convenience and comparison floor space is dominant in the centre (39%), accounting for almost a half of the total. This local centre has a comparable proportion of vacant space which represents almost 6% of the total retail floorspace in the local centre. The centre has nine A3 Restaurants/Cafes, three A4 pubs/bars and seven A5 Take-Away uses, with floor spaces higher than the Local Centre average 2007. Conversely the centre has a slightly lower than average proportion of A1 comparison floor space.

Table 2 Total Retail Floor space 2013 within the local centre boundary

Use Class	Floor Space (sqm)	% of Total Floor Space (2013)	All local centres average floor space % (2014)
A1 Convenience	549	8.49%	14.85%
A1 Comparison	1996	30.86%	35.18%
A2	1437	22.21%	11.16%
A3 Rest/Café	1473	22.77%	17.41%
A4 Pub/Bar	641	9.92%	5.13%
Sui Generis	0	0.00%	3.90%
Vacant	372	5.75%	8.55%
Health	0	0.00%	1.96%
Hotels	0	0.00%	0.45%
Art	0	0.00%	1.33%
Leisure	0	0.00%	0.06%
Total	**6,469**	**100%**	**100%**

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

Figure 3: Strutton Ground Retail Floor Space 2013



Strutton Ground is a Local Centre with a selection of local services and food shops. There is one bank and one betting office and the remainder of the Class A2 uses are estate agents. Overall, the Local Centre does provide a good range and selection of shops and services. It is important to maintain the existing local range of convenience shops in the Strutton Ground Local Centre as they encourage walking, and make city life more practical and attractive.

2.4 Proportion of Vacant Street Level Property

The percentage vacancy rate in Strutton Ground is slightly lower than the average rate for Local Centres in Westminster as shown in **Table 3**. The vacancy rate has increased significantly by 4 vacant units since 2007. Two out of the four vacant units are mainly concentrated at the west of the local centre (where core CAZ policies apply) and the rest are spread on Strutton Ground. These units were however subject to redevelopment at the time of the survey (Reference number 12/09782/FULL).

Table 3 Level of Vacant Street Level Property 2013

	% Vacant 1997	% Vacant 2002	% Vacant 2007	% Vacant 2013	% Local Centre 2007
Strutton Ground	5.3% (3 units)	2.3% (1 unit)	0% (0 units)	6.3% (4 units)	8% (6 units)

Source: City of Westminster GIS System and site survey August 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 August 2013.

3.2 Accessibility on foot and by public transport

Strutton Ground local centre is located roughly 10 minutes walk from Victoria mainline, London Underground (Victoria, District and Circle Lines) and Bus stations, and is also 10 minutes walk from Westminster London Underground station (Jubilee, District, Circle lines). However the closest underground station is St James Park (District and Circle lines), which is five minutes walk away. The bus route 507 runs through the centre and several other routes run next to the centre along Victoria Street including the numbers 11, 148, 24, and 211 all of which serve various parts of the city, making the centre quite accessible by public transport.

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 50%, meaning that the centre offers a good range of attractions. This is higher than the Local Centre average of 31%. The Strutton Ground local centre has a poor provision of multiple retailers, cultural/community events, sport and leisure facilities but it has had a bank/building society provision since 2007. The centre’s main strengths are the large number of convenience stores and the presence of a weekly vibrant street market. The main weakness is the provision of community and cultural facilities.

4.2 Daytime Amenity

Strutton Ground is a relatively attractive Local Centre. The centre’s day time amenity rating is 41.3% which is below than the average for all Local Centres of 68% but is rated ‘good’ in terms of the quality of buildings and the presence of special features. Categories rated as ‘poor’ in the centre include the presence of litter, refuse bags and other debris/ food containers on the street, beggars, rough sleepers, and easy access for pedestrians. Most other categories are 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)	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	13/26			14/26			13/26		
Percentage	50.00%			53.85%			50.00%		

Source: City of Westminster site survey August 2013

Note: Each issue is ranked in a scale 0 to 2, with 2 being the highest positive score achievable. Scores are provided from the adopted 2002 and 2007 Health Checks Surveys and a 2013 update to allow comparison to be made between the others results.

Table 5 Day Time Amenity within the Local Centre 2013

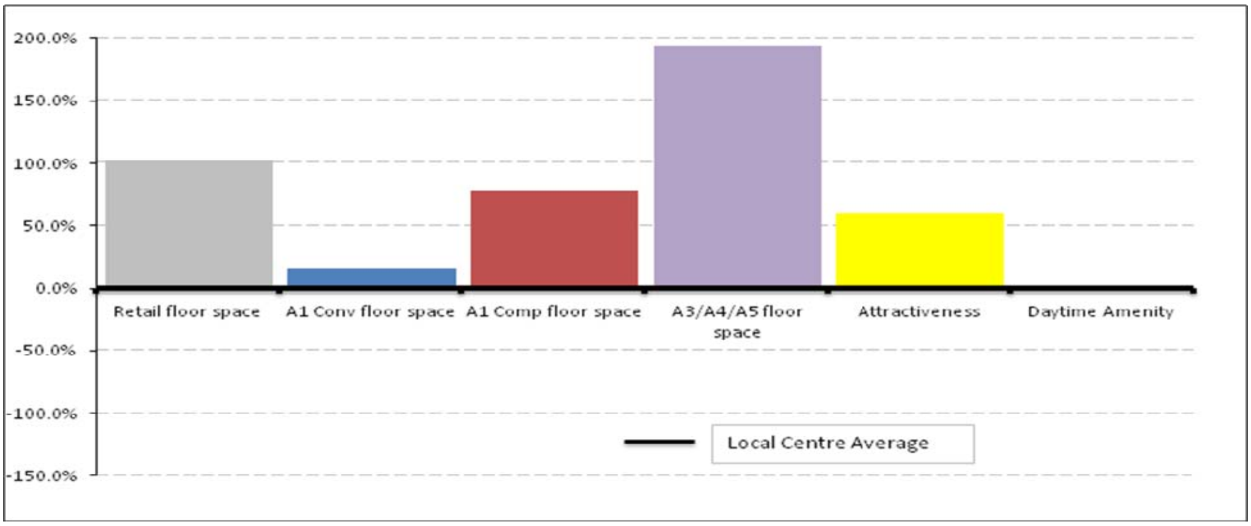
AMENITY – DAYTIME	2002			2007			2013		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Overall environment of public areas in the centre									
General Cleanliness in Shopping Hours:									
Presence of litter		X				X			X
Presence of refuse bags on the street			X			X			X
Evidence 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	33/46			30/46			19/46		
Percentage	71.7%			65.2%			41.3%		

Source: City of Westminster site survey August 2013 / Note**:** Each issue is ranked in a scale 0 to 2, with 2 being the highest positive score achievable. Scores are provided from the adopted 2002 and 2007 Health Checks Surveys and a 2013 update to allow comparison to be made between the others results.

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2007

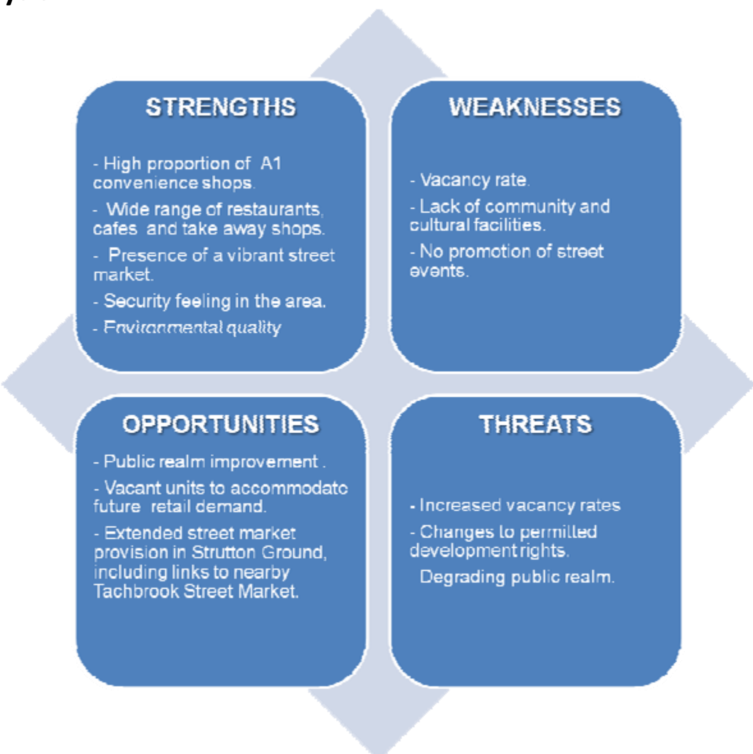
Figure 4: Deviation of centre from the mean for Local Centres 2013



Strutton Ground 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. This is also true for A1 convenience and comparison floor space figures, and for food and drink floor space figures (A3/A4/A5).

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 three permitted planning applications in Strutton Ground involving A-class uses. The first application entailed the continued use of an area of the public highway measuring 1m x 4.5m for the placing of three tables and nine chairs in connection with an existing café (Reference: 13/03748/TCH). The second permitted planning application involved the continued use of ground and basement as retail/delicatessen, Class A1 (reference: 12/06266/CLOPUD). The third (12/09782/FULL) proposes a residential redevelopment with 190 sqm A1/B1 of which equates to a loss of at least 83 sqm A1 Class use. Also, there is a pending decision for a planning application that involved an installation of new shopfront and signage (reference: 13/06911/FULL).

There were also two refused planning applications, one for a change of use A1 to A2 which might have represented a loss of an A1 Class use unit and would have harmed the retail character and function of the area (reference: 11/01842/FULL). The second refusal was for a change of use (current A3) to A5 hot food take-away (Class A5) and full height extract duct to rear elevation (reference: 10/10184/FULL).

6.2 Development Proposal

A proposed planning application for a Sainsbury’s local convenience store at Rochester Row which is near the surrounded areas of the Strutton Ground local Centre was initially refused (reference: 12/03338/FULL). An appeal decision was subsequently allowed and the planning application has now been granted (reference: APP/X5990/A/13/2191133). This development will represent a loss of some clients that would prefer to shop in the proposed Sainsbury’s but it will not represent a big impact on the actual retail activities around the Strutton Ground Local Centre as it is not easily reachable for pedestrians, and the wide offer of the Strutton Ground Market will prevail as a first choice of shopping around that area. The offer will also be more attuned to local residents doing convenience shopping, whereas much of Strutton Ground in particular is aimed more at workers. Artillery Row offers more comparison and service shopping and is therefore unlikely to be affected. The size of the local customer market is large enough (an growing) to accommodate growth in retail generally.

6.3 Strutton Ground Market

Strutton Ground is one of the most centrally located street markets in London, geared towards hot food for daytime visitors and some comparison and convenience goods. It lies close to Victoria Street (is visible from the main street) and offers a wide selection of hot and fresh foods, affordable clothes, household goods and other everyday items. The market currently operates between 8am-3pm on weekdays only.

The market sits on a cobbled section of Strutton Ground that is currently in a bad state of repair. Although the paved section at the northern end of Strutton Ground has recently been upgraded, the Southern section, south of Old Pye Street, offers significant scope for improvement.

The road surface here is shallow, laying as it does above vaults and basements below. However, there may be scope to raise the height of the current road slightly and include within any repaving works, additional facilities for the market traders, such as electricity and lighting. The estimated cost for such works is estimated to be in the region of £800,000.

Improvements to Strutton Ground could help to attract additional traders and improve the overall retail offer of the area, attracting more shoppers and bring new businesses into the area. Increasing activity in an area also helps to deter anti-social behaviour.

There are a number of fixed pitches in Strutton Ground (i.e. where the trader has rights to continue trading) and demand for additional pitches is high. The Council currently receives a large number of applications for the sale of hot food and beverages. As such, options for extending the hours and days of operation of the market could be explored, possibly providing a specialist food market during weekdays and into the evening, and a specialist antiques or other niche style market to act as a wider draw at weekends.

Another option would be to make Strutton Ground market more of a high-end market due to the high profile of workers around the area, and to link it to the nearby Tachbrook Street market, to encourage visitors to visit both together.

Quality control and management of street markets in any arrangement will be key to their future success.

6.4 Recommendations

- Reduce the pedestrian and vehicle conflicts caused by traders at Strutton Ground Market and keep organised time-scheduled hours for loading and unloading goods from vehicles to stands and vice versa.
- Day to day management is needed to assist with setting up and taking down the market.
- Propose a signage designation for the market around the area to attract workers at lunchtime into the area.
- Market traders should have their own refuse area inside their stands in order to avoid any obstacles caused by the rubbish bins next to the stands that reduce the quality of the market.

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**		**5,665**
		Total Convenience (A1)		1,423
		Total Comparison (A1)		722
		Total Service (A2)		643
		Total A3		563
		Total A4		641
		Total A5		0
		Total Sui Generis (petrol station)		674
		Total Vacant		509
	Retail Offer	**Total Number of Shop Units**	**61**	
		Total Number of A1 Units	**33**	
		a) Convenience shops	19	
		b) Department/principal stores	0	
		c) Prestige international shops	0	
		d) National comparison retailers	3	
		e) Specialist Independent shops	1	
		f) Independent shops	10	
		Total Comparison Multiples	14	
		Total Number of A2 Units	**4**	
		Total Number of A3 Units	**9**	
		Total Number of A4 Units	**3**	
		Total Number of A5 Units	**7**	
		Total Number of Sui Generis	**0**	
		Total Number of Vacant Units	**5**	
	Market	Days of operation	5	
		Number of stalls	23	
	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’, as it was when previously surveyed in 2007.

Certain types of extensions and changes of use do not require full planning permission as they are classed as "permitted development" and recent changes to permitted development rights now allow town centre uses (A1, A2, A3, A4, A5, B1, D1 and D2) below a certain size to change temporarily to A1, A2, A3 or B1 for a period of two years. This could impact on the land use mix here and will be kept under review.

The Government are considering further changes to permitted development rights to allow shop units to change permanently to residential, banks and building societies. These changes will all be kept under review.

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 Local Centre 14: Strutton Ground / Artillery Grow

Table 7: Views of the Strutton Ground Local Shopping Centre

Attractive core shopping frontages on the south east side of the local centre in Strutton Ground.

An attractive non-core shopping frontage at Artillery Row, including valuable local services such as a bank and a national retailer shop.

Vacant unit at the core shopping frontage in the local centre, which used to be an independent retail shop and is now under refurbishment.

Refuse on the pathway in Strutton Ground caused by the vibrant street market in the centre.

The street market and core shopping frontages on Strutton Ground. The varied quality of the pavement can be seen here.

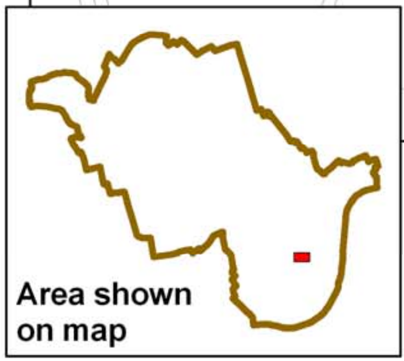
The core shopping frontage on Strutton Ground, which includes some independent retailer units.

Table 8: Goad Data 2013

Local Shopping Centre	Use Class	Street Number	Road Name	Postcode	Name	Primary Activity	Area sqm	Goad Number
Strutton Ground	A3		GREYCOAT PLACE	SW1P 1SB	CAFE XLNT	CAFE	30.89	601814
Strutton Ground	B1	10	GREYCOAT PLACE	SW1P 1SB		OFFICE	528.22	309660
Strutton Ground	A1		GREYCOAT PLACE	SW1P 1SB	COSTCUTTER	CONVENIENCE STORE	46.76	309668
Strutton Ground			ARTILLERY ROW	SW1P 1RH		ENTRANCE	14.49	0
Strutton Ground	B1	4	GREYCOAT PLACE	SW1P 1SB		OFFICE	768.99	309633
Strutton Ground	A4	2	GREENCOAT PLACE	SW1P 1PJ	THE GREENCOAT BOY	PUBLIC HOUSE	160.32	498050
Strutton Ground			GREYCOAT PLACE	SW1P 1SB		GARAGES	169.51	0
Strutton Ground	A3		GREYCOAT PLACE	SW1P 1SB	CAFE FRESCO	CAFE	81.63	309675
Strutton Ground	A3	16	ARTILLERY ROW	SW1P 1RZ	CAFE HAMLET	CAFE	71.65	309673
Strutton Ground	A2	12	GREYCOAT PLACE	SW1P 1SB	HATHAWAYS	ESTATE AGENT	101.92	309669
Strutton Ground		16	STRUTTON GROUND	SW1P 2HP		ENTRANCE	15.39	0
Strutton Ground	A4	17 - 19	ARTILLERY ROW	SW1P 1RH	THE SLUG & LETTUCE	PUBLIC HOUSE	327.65	309626
Strutton Ground	A1	21	ARTILLERY ROW	SW1P 1RH	SEW.	CLOTHING ALTERATIONS	34.67	309661
Strutton Ground	A1	24	STRUTTON GROUND	SW1P 2HR	WHY NOT	HAIRDRESSING	108.44	309570
Strutton Ground	B1		STRUTTON GROUND	SW1V 1JT		OFFICE	264.73	309532
Strutton Ground	A1	35	STRUTTON GROUND	SW1P 2HY	GO GLAM	HAIRDRESSING	58.10	309573
Strutton Ground	A3	40	STRUTTON GROUND	SW1P 2HR	EXPRESS COFFEE CO	CAFE	57.00	309659
Strutton Ground	A1	4	STRUTTON GROUND	SW1P 2HP		LEONIDAS	121.68	309486
Strutton Ground	A1	30	STRUTTON GROUND	SW1P 2HR	STEP IN SHOES	SHOES	46.88	309606
Strutton Ground	A1	23	ARTILLERY ROW	SW1P 1RH	SAACHA`S	HAIRDRESSING	32.19	309665
Strutton Ground	A3	29	STRUTTON GROUND	SW1P 2HY	BLANCHE EATERY	COFFEE SHOP	73.14	309542
Strutton Ground	B1		ARTILLERY ROW	SW1P 1RH		OFFICE	138.69	309653
Strutton Ground	A1	8	ARTILLERY ROW	SW1P 1RZ		VACANT	145.28	309656
Strutton Ground			ARTILLERY ROW	SW1P 1RH		ENTRANCE	10.37	0
Strutton Ground	A1	6	ARTILLERY ROW	SW1P 1RZ		VACANT	55.02	309642
Strutton Ground			ARTILLERY ROW	SW1P 1RH		ENTRANCE	34.47	0
Strutton Ground			STRUTTON GROUND	SW1P 2HP		ENTRANCE	21.28	0
Strutton Ground			ARTILLERY ROW	SW1P 1RH		DWELLINGS	151.46	0
Strutton Ground		10	ARTILLERY ROW	SW1P 1RH		ENTRANCE	78.17	0
Strutton Ground		4	ARTILLERY ROW	SW1P 1RZ		ENTRANCE	110.56	0
Strutton Ground	A1	31	STRUTTON GROUND	SW1P 2HY	DISCOUNT SHOE SALES	SHOES	59.31	309553
Strutton Ground	A1	7	ARTILLERY ROW	SW1P 1RH	CITY CUTS	HAIRDRESSING	41.79	309552
Strutton Ground	A1	33	STRUTTON GROUND	SW1P 2HY	STAR PHARMACY	CHEMIST	69.41	309561
Strutton Ground	A1	28	STRUTTON GROUND	SW1P 2HR	VICTORIA NEWSAGENTS	NEWSAGENT	60.10	309594
Strutton Ground	A5	36	STRUTTON GROUND	SW1P 2HR	THAI HOUSE	TAKE AWAY	91.29	309647
Strutton Ground	A5	3	ARTILLERY ROW	SW1P 1RH	IDEAL SANDWICH BAR	TAKE AWAY	37.31	309529
Strutton Ground	A1	1	ARTILLERY ROW	SW1P 1RH	SW1 DIGITAL	HOME ENTERTAINMENT	36.62	309522

Local Shopping Centre	Use Class	Street Number	Road Name	Postcode	Name	Primary Activity	Area sqm	Goad Number
Strutton Ground	A1	32	STRUTTON GROUND	SW1P 2HR	STAR DRY CLEANERS	DRY CLEANING	99.19	309623
Strutton Ground	A1	23	STRUTTON GROUND	SW1P 2HZ	COSTCUTTER	CONVENIENCE STORE	56.80	309521
Strutton Ground	A5	38	STRUTTON GROUND	SW1P 2HR	THE LAUGHING HALIBUT	FISH & CHIPS	88.83	309657
Strutton Ground	A5	1A	GREYCOAT PLACE	SW1P 1SB	PIZZETTA	TAKE AWAY	54.75	309664
Strutton Ground	A5	14	STRUTTON GROUND	SW1P 2HP	SIMPLY SANDWICHES	TAKE AWAY	98.43	309526
Strutton Ground	A1	34	STRUTTON GROUND	SW1P 2HR	OXFAM BOOKS	CHARITY SHOP	85.33	309636
Strutton Ground	A1	21	STRUTTON GROUND	SW1P 2HY	IMPERIALE CAESER	MENS WEAR	56.96	309518
Strutton Ground			STRUTTON GROUND	SW1P 2HP		ENTRANCE	24.01	0
Strutton Ground			ARTILLERY ROW	SW1P 1RH		ENTRANCE	47.27	0
Strutton Ground	A1	27	STRUTTON GROUND	SW1P 2HY	GORDONS THE JEWELLERS	JEWELLER	82.09	309533
Strutton Ground	A5	10	STRUTTON GROUND	SW1P 2HP	LE PAIN DU JOUR	TAKE AWAY	139.80	309515
Strutton Ground	A1	1	GREYCOAT PLACE	SW1P 1SB	DEMES	NEWSAGENT	41.95	309662
Strutton Ground	A1	23	STRUTTON GROUND	SW1P 2HZ	RUSH	HAIRDRESSING	59.45	498046
Strutton Ground	A1	15 - 17	ARTILLERY ROW	SW1P 1RT	ROBERT DYAS	VARIETY STORE	174.87	309607
Strutton Ground	B1		STRUTTON GROUND	SW1V 1JT		OFFICE	315.95	309591
Strutton Ground	A1	11	ARTILLERY ROW	SW1P 1RH	J MCCARTHY	JEWELLER	65.49	309575
Strutton Ground	A2	13	ARTILLERY ROW	SW1P 1RH	BARCLAYS	BANK	365.10	309593
Strutton Ground	A1	18 - 20	STRUTTON GROUND	SW1P 2HP	CLEAN `N` PRESS	DRY CLEANING	72.99	309541
Strutton Ground	A1	5	ARTILLERY ROW	SW1P 1RH	FLIGHT CENTRE	TRAVEL AGENT	61.67	309544
Strutton Ground	A1	12	STRUTTON GROUND	SW1P 2HP	GREGGS	BAKER	146.58	309519
Strutton Ground	A2	22	STRUTTON GROUND	SW1P 2HR	WILLIAM HILL	BETTING OFFICE	108.31	309558
Strutton Ground	A1	56	GREAT PETER STREET	SW1P 2HD	4 FELLAS	HAIRDRESSING	32.93	637644
Strutton Ground	A1	58	GREAT PETER STREET	SW1P 2HD		VACANT	50.17	309634
Strutton Ground	A1	50 - 52	GREAT PETER STREET	SW1P 2HD	TOOL SHOP	DIY	160.00	309603
Strutton Ground	A3	51	STRUTTON GROUND	SW1P 2HY	PRONTO GRILL BAR	EUROPEAN RESTAURANT	51.25	309651
Strutton Ground	A3	37	STRUTTON GROUND	SW1P 2HY	GOURMET BUFFET	CHINESE RESTAURANT	66.51	309582
Strutton Ground	A1	39	STRUTTON GROUND	SW1P 2HY	SUBWAY	SANDWICH BAR	154.17	309587
Strutton Ground	B1	5 - 6	ST MATTHEW STREET	SW1P 2JT		OFFICE	155.82	309564
Strutton Ground	A1	41	STRUTTON GROUND	SW1P 2HY	THE BOOK WAREHOUSE	BOOKS	111.12	309595
Strutton Ground	A1	49	STRUTTON GROUND	SW1P 2HY	HOUSEWARE CENTRE	HOUSEHOLD GOODS	81.44	309639
Strutton Ground	A1	43 - 45	STRUTTON GROUND	SW1P 2HY	JESSOPS	VACANT	176.83	309602
Strutton Ground	A3	19	STRUTTON GROUND	SW1P 2HY	PLUM	CAFE	51.75	309514
Strutton Ground	A1	3	STRUTTON GROUND	SW1P 2HX	EAT	SANDWICH BAR	81.81	309446
Strutton Ground	A4	2	STRUTTON GROUND	SW1P 2HP	THE STRUTTON ARMS	PUBLIC HOUSE	153.45	309470
Strutton Ground	A1	6	STRUTTON GROUND	SW1P 2HP	STILES	BAKER	127.32	309499
Strutton Ground	A1	17	STRUTTON GROUND	SW1P 2HY	FRENCH KISS	CLOTHING	53.83	309507
Strutton Ground	A1	11 - 13	STRUTTON GROUND	SW1P 2HY	ST. JAMES BEAUTY SALON	BEAUTY SALON	57.96	309491

Local Shopping Centre	Use Class	Street Number	Road Name	Postcode	Name	Primary Activity	Area sqm	Goad Number
Strutton Ground	A2	7	STRUTTON GROUND	SW1P 2HY	CHELSEA BUILDING SOCIETY	BUILDING SOCIETY	68.14	309472
Strutton Ground	A3	15	STRUTTON GROUND	SW1P 2HY	CRUSSH	JUICE BAR	78.92	309492
Strutton Ground	A1	8	STRUTTON GROUND	SW1P 2HP	RYNESS LIGHTING & ELECTRICAL	ELECTRICAL & GAS APPLIANCES	135.64	309508
Strutton Ground	B1		ST MATTHEW STREET	SW1P 2JT		OFFICE	428.72	309488
Strutton Ground	A3		GREYCOAT PLACE	SW1P 1SB	CAFE XLNT	CAFE	30.89	601814



Source: GOAD Retail Survey 2013

Local Centre: Strutton Ground

Local Shopping Centre Boundary

A1: Retail

A2: Financial & Professional

A3: Restaurant/Café

A4: Pub/Bar

A5: Take Away

B1: Office

0 20 40 Metres

N

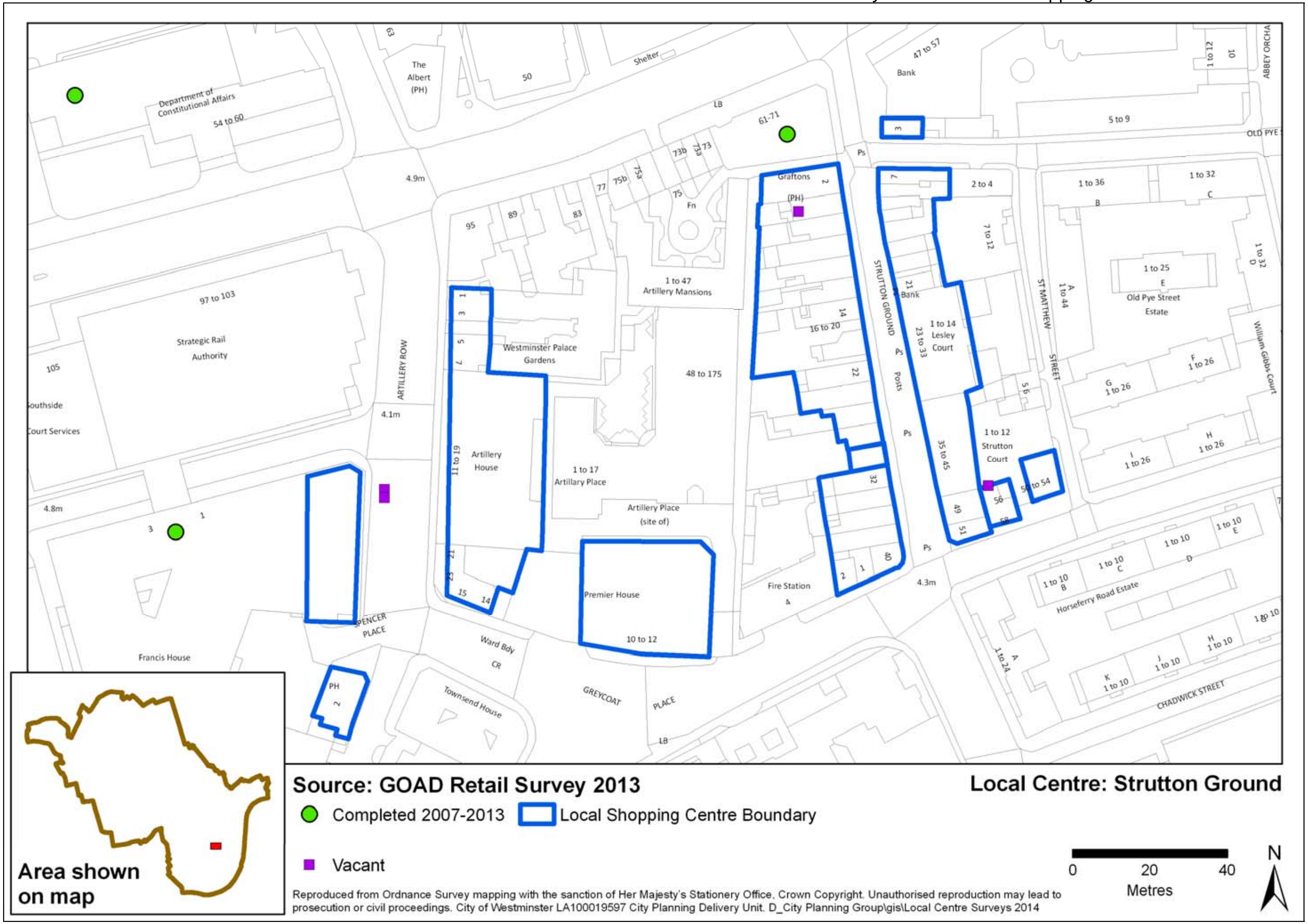

Source: GOAD Retail Survey 2013
Local Centre: Strutton Ground
Completed 2007-2013
Local Shopping Centre Boundary
Vacant
Area shown on map
0
20
40
Metres
N
STRUTTON GROUND
ARTILLERY ROW
ST MATTHEW STREET
GREYCOAT PLACE
SPENCER PLACE
CHADWICK STREET
OLD PYE
Westminster Palace Gardens
Artillery House
Artillery Mansions
Premier House
Fire Station
Lesley Court
Strutton Court
Strategic Rail Authority
Department of Constitutional Affairs
Francis House
Townsend House
Old Pye Street Estate
Horseferry Road Estate
William Gibbs Court
Graftons (PH)
The Albert (PH)
Artillery Place (site of)
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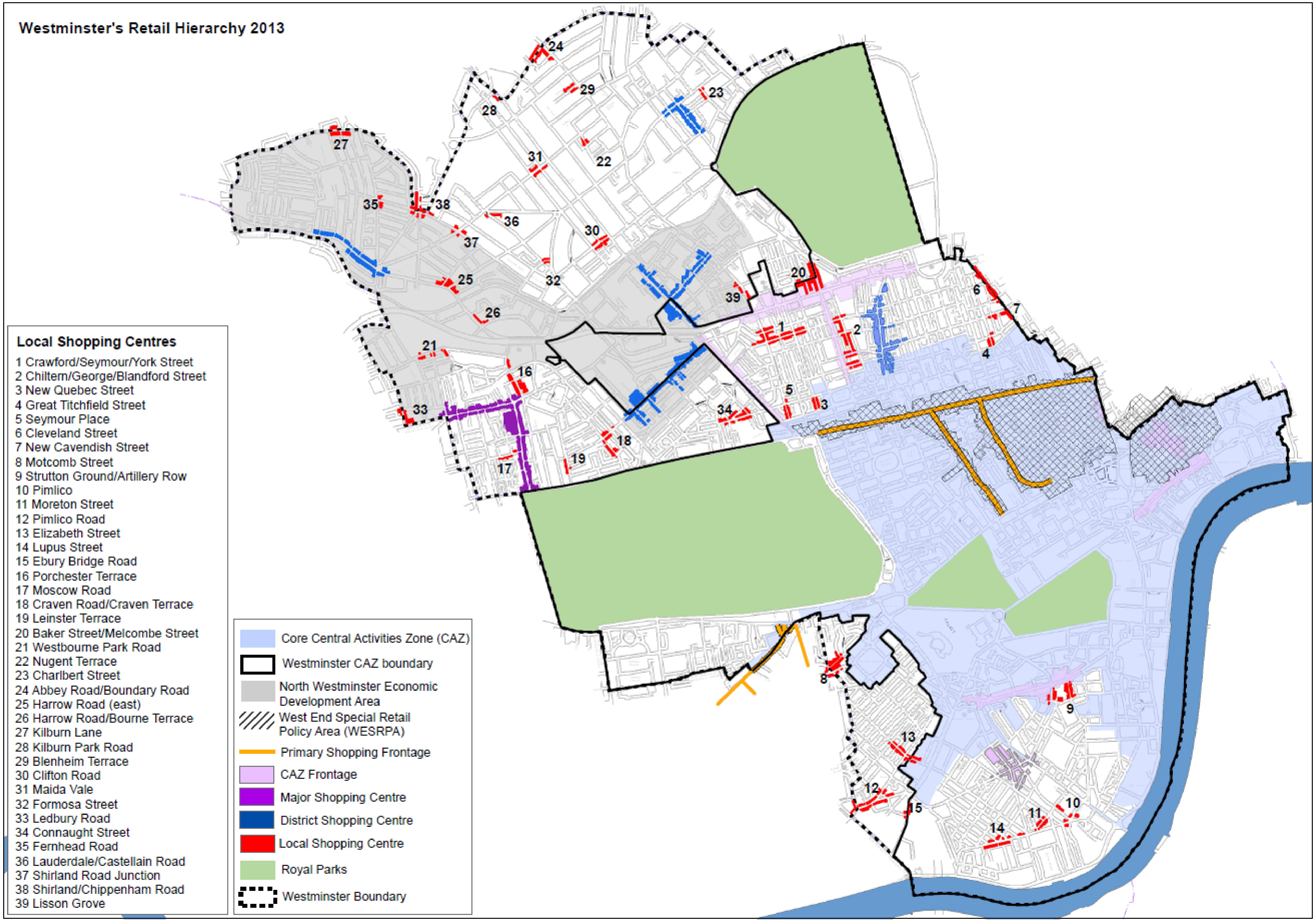
Figure 8 Westminster wide shopping centre boundaries plan



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 15: Chiltern Street, George Street & Blandford 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 **15: Chiltern Street/George Street/Blandford Street**

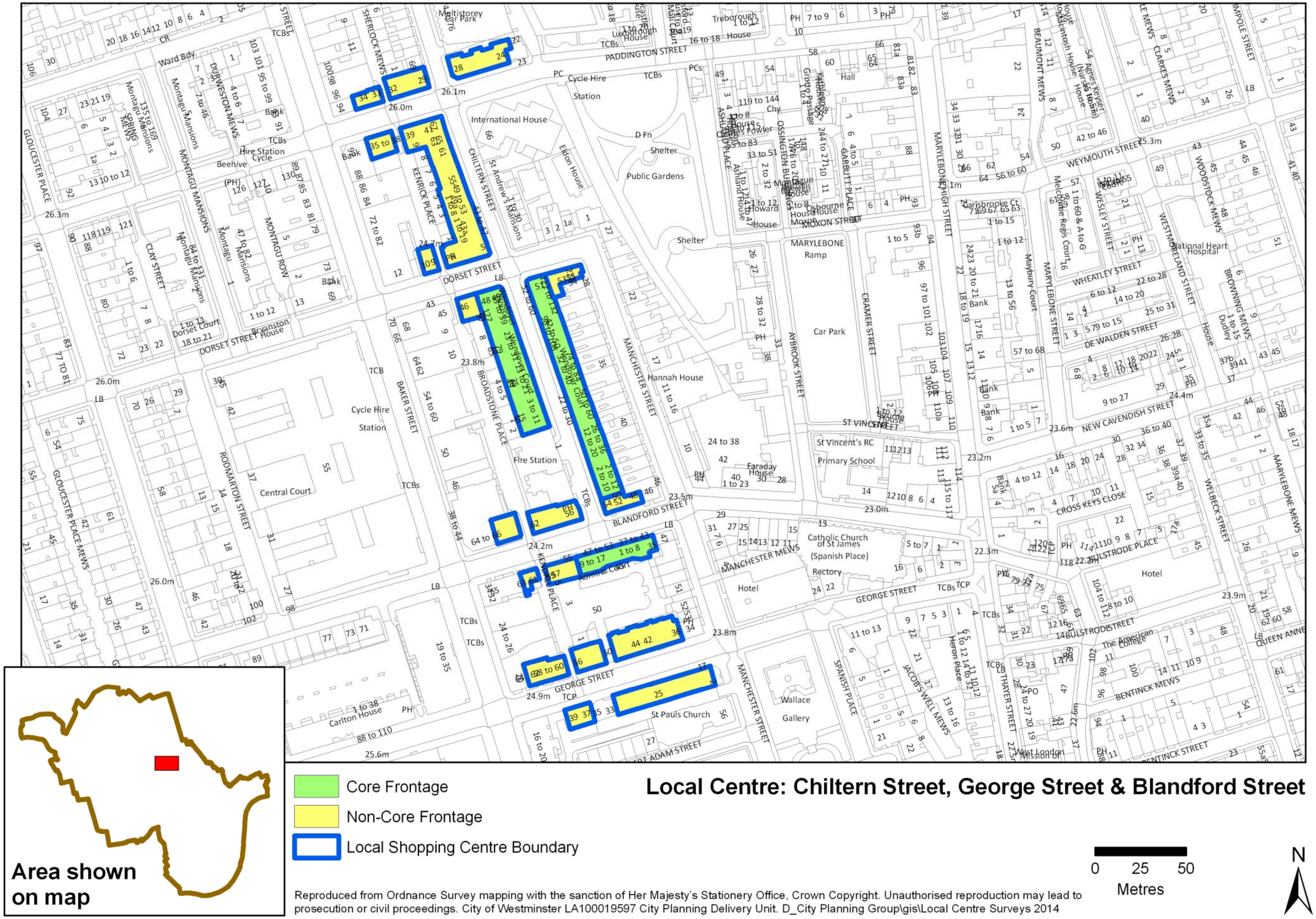
1. Introduction

1.1 Location

This large local centre is located in the centre of Westminster in the Marylebone part of the wider Central Activities Zone CAZ), and in the vicinity of Oxford Street to the south and Baker Street directly to the west. The University of Westminster is also located at the north of the local centre.

The local centre mainly serves residents, workers and tourists in the Baker Street area, however this is a rapidly changing centre due to a number of recent developments, and offers a number of specialist retailers that generate purpose visits. The catchment area of the centre is limited by its proximity to the larger Marylebone High Street district centre to the East, Baker Street to the west and several other local centres in the vicinity (see map).

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		50	64	65	66
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*0*
	National retailers	*0*	*2*	*2*	*1*
	Specialist Independent	*27*	*36*	*38*	*38*
	Independent	*18*	*23*	*22*	*23*
	Convenience	*5*	*3*	*3*	*4*
Class A2	Financial & Professional	3	10	10	11
Food & Drink		0	19	21	15
Class A3	*Restaurant/Café*	*n/a*	*17*	*18*	*13*
Class A4	*Pubs/Bars*	*n/a*	*2*	*3*	*2*
Class A5	*Takeaway*	*n/a*	*0*	*0*	*0*
	Takeaway/Restaurant	*0*	*0*	*0*	*0*
Sui Generis		0	0	0	0
Vacant Units		5	9	7	15
Arts/Culture		0	0	0	0
Health uses		3	4	4	3
Hotels		0	0	0	0
TOTAL		**61**	**106**	**107**	**110**

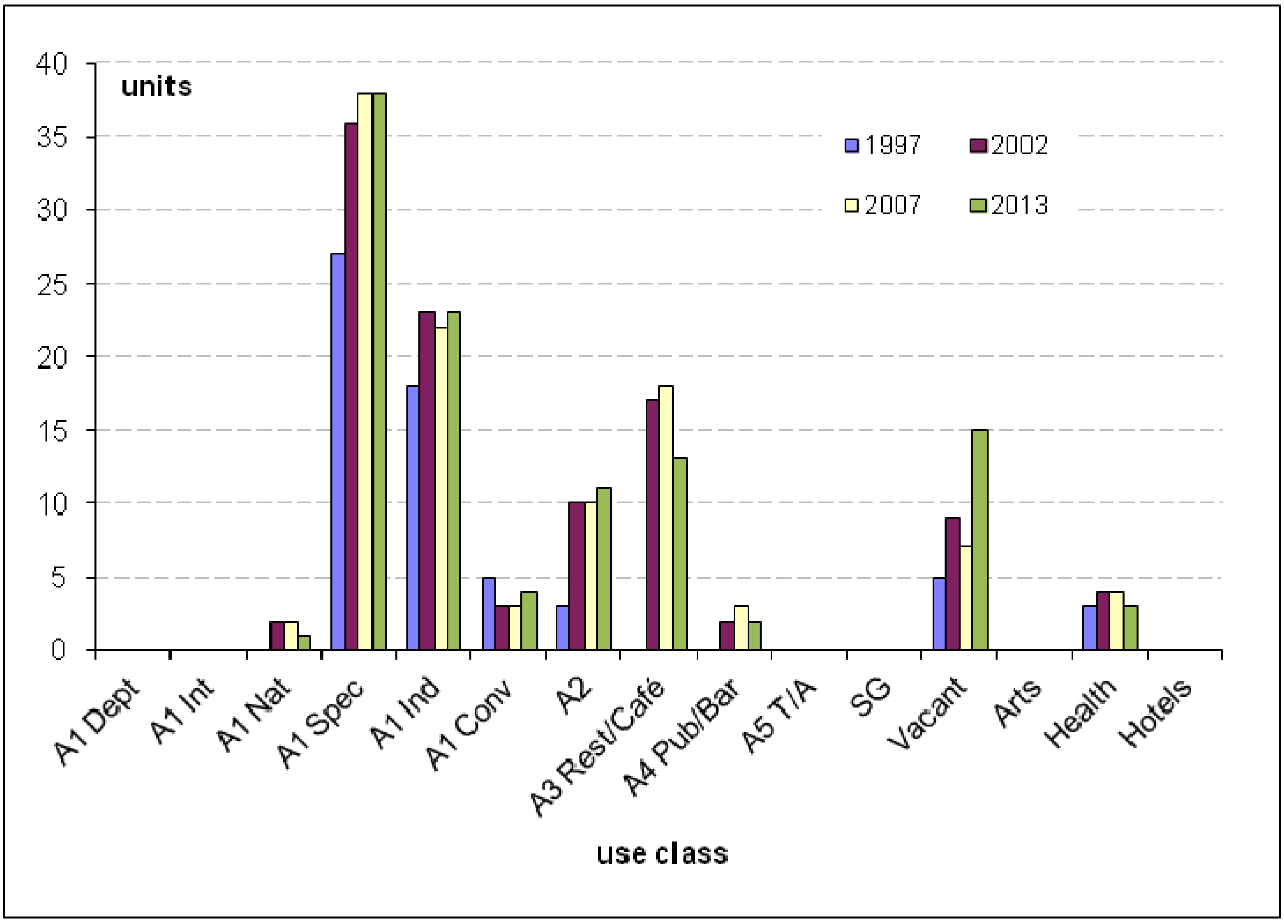
Source: WCC Land Use Survey December 2013

Chiltern Street is one of the largest local centres with 110 units in total (three units missed off in previous surveys). Five units on Paddington Street/Chiltern Street have been demolished as part of the Chiltern Street Car Park redevelopment and will be replaced (recorded as vacant above).

The number of A1 retail uses has increased by one unit since 2007, with an A1 convenience store (corner newsagents shop at 67 Chiltern Street) added to the survey. The A-class uses have remained broadly stable since 1997, and are the majority use in the centre, accounting for around three quarters of the units when vacant units are taken into account. Food and drink uses then make up the next most significant proportion of units, with 15 in total, with a very limited number of other uses.

Vacant units are much higher than in previous surveys. However, this includes five units which have been demolished and are being replaced and eight of the other vacant units were being refurbished at the time of survey.

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



2.2 Range of A1 Uses

Chiltern St/George St/Blandford St has only one national retailer. The centre has 66 occupied Class A1 retail units including 4 convenience stores, 38 specialist retailers and 23 independent retailers. The specialist retailers include clothes shops (including a number of specialist wedding shops), art galleries, antique shops and furniture retailers. The independent stores include hairdressers and dry cleaners. The high proportion of comparison shops and only one multiple retailer suggests that Chiltern St/George St/Blandford St serves specialist shoppers and local residents. Bridal wear and haute couture specialist shops feature strongly in this centre and are supported by shoe shops, jewellers and florists. Menswear shops also offer unique collections not found on the high street.

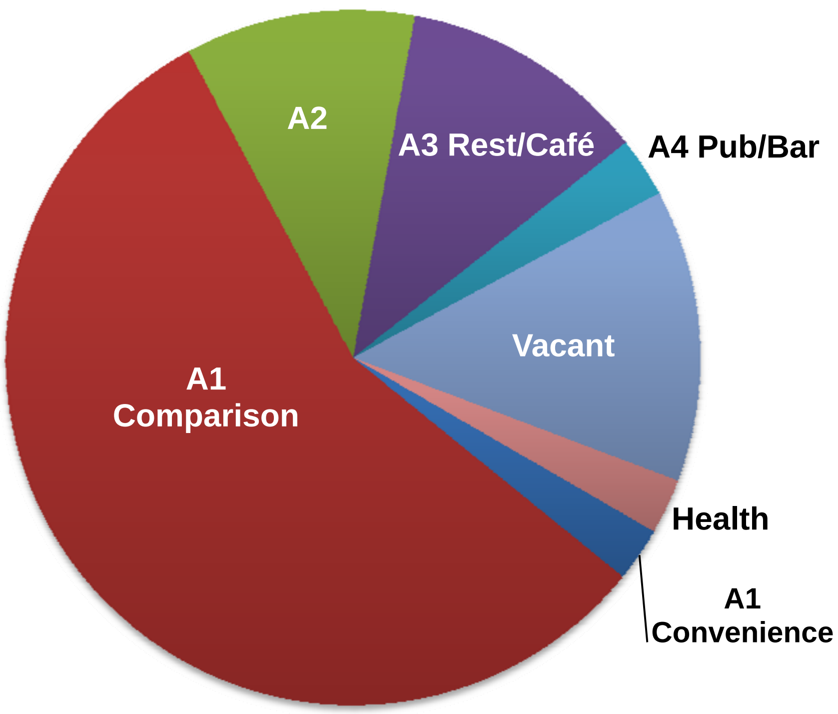
2.3 Total Retail Floor space

Total retail floor space in Chiltern St/George St/Blandford St is broken down in Table 2 and the pie chart below. In total, Chiltern St/George St/Blandford St has 8,145 sqm of retail floor space, which is well above the average of 3,188 sqm for the 39 Local Centres in the City. A1 specialist floorspace and A1 independent floorspace predominate in Chiltern St/George St/Blandford St with 56% of the total. This is above the shopping centre average of 35%. The 15 A3/A4 restaurant/café/pub uses occupy 14% of total floor space with A2 occupying 11%. Vacant floor space accounts for 15% of the total but this includes five demolished units which are being replaced and most of the other vacant floorspace is being refurbished ready for new tenants.

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	2.52%	14.9%
A1 Comparison	4587	56.32%	35.2%
A2	871	10.69%	11.2%
A3 Rest/Café/TA	938	11.52%	17.4%
A4 Pub/Bar	226	2.77%	5.1%
Sui Generis	0	0.00%	3.9%
Vacant	1108	13.60%	8.6%
Health	210	2.58%	2.0%
Hotels	0	0.00%	0.5%
Art	0	0.00%	1.3%
Leisure	0	0.00%	0.1%
Total	**8,145**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



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

Chiltern St/George St/Blandford St 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 solicitors. This is one of the largest local centres in Westminster and therefore provides a good range and selection of services compared to other Local Centres or District Centres.

2.4 Proportion of Vacant Street Level Property

The unit vacancy rate in Cleveland Street is higher than the average rate for Local Centres in the City, as shown in Table 3. The vacancy rate has doubled since 2007 and now stands at almost twice the local centre average of 8%. The 15 vacant units are spread throughout the centre, but there is a cluster of five demolished units at the Chiltern Street Car Park redevelopment site. Eight of the other vacant units are being refurbished for re-let. The vacant units do not appear to be affecting the vibrancy of 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**
8.2% (5) units	**8.5% (9) units**	**6.5% (7) units**	**13.6% (15) units**	**8% (10 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 cold, weekday afternoon in December 2013.

3.2 Accessibility on foot and by public transport

The centre is accessible by a number of different methods. The closest London Underground Station is Baker Street (Jubilee, Bakerloo, Circle, Hammersmith & City, Metropolitan lines) which is a five minute walk from the centre. Although no bus routes pass through the centre itself, nine routes serve neighbouring Baker Street including route numbers 2, 13, 113, 139 and 189 which serve different parts of the city. Oxford Street with its numerous bus routes and Bond Street tube station are also 10 minutes walk to the south. The centre is adjacent to Marylebone Road which is served by other main bus routes and is one of the main arterial roads in London (A40).

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 50%, meaning that the centre offers a good selection of shops and services. This rating is higher than the Local Centre average of 31%, and ranks Chiltern St/George St/Blandford St =1st out of the 39 Local Centres in the City. The centre's main strengths are the prominence of independent and specialist clothes shops with a good mix of food and drink premises to serve shoppers and locals. Part of the centre's attractiveness comes from the well maintained and traditional shop fronts helping make a good quality retail environment. Chiltern St/George St/Blandford St has a poor provision of multiple retailers and, cultural/community events, sport and leisure facilities and bank/building society provision. However, due to its central location these facilities can be found close by on Oxford Street and in other close by shopping centres such as Marylebone High Street. This local centre now feels like it benefits from its proximity to the highly successful Marylebone High Street (Central Activities Zone Frontage) which is also characterised by a high quality retail environment.

4.2 Daytime Amenity

Chiltern Street/George Street/Blandford Street is an attractive Local Centre, with a high day time amenity rating of 78.3% compared with the average for all Local Centres of 68%, and is ranked =10th out of the 39 Local Centres in the City. The centre has a high 'feel good factor' as it is clean and well maintained. The centre's rating is good in terms of the absence of litter, refuse bags, street fouling, beggars, vandalism, antisocial behaviour, rough sleepers, street drinkers, touting and illegal street traders. Although the vacancy rate is the highest it has been, it does not detract from the centres vibrancy with vacant units being refurbished to a high standard. Categories rated as ‘poor’ include special features in the centre and the absence of street events. The remainder of the categories are rated as ‘average’, including several general cleanliness categories and several 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	11/26			11/26			13/26		
Percentage	42.31%			42.31%			50.00%		

Source: City of Westminster site survey December 2013

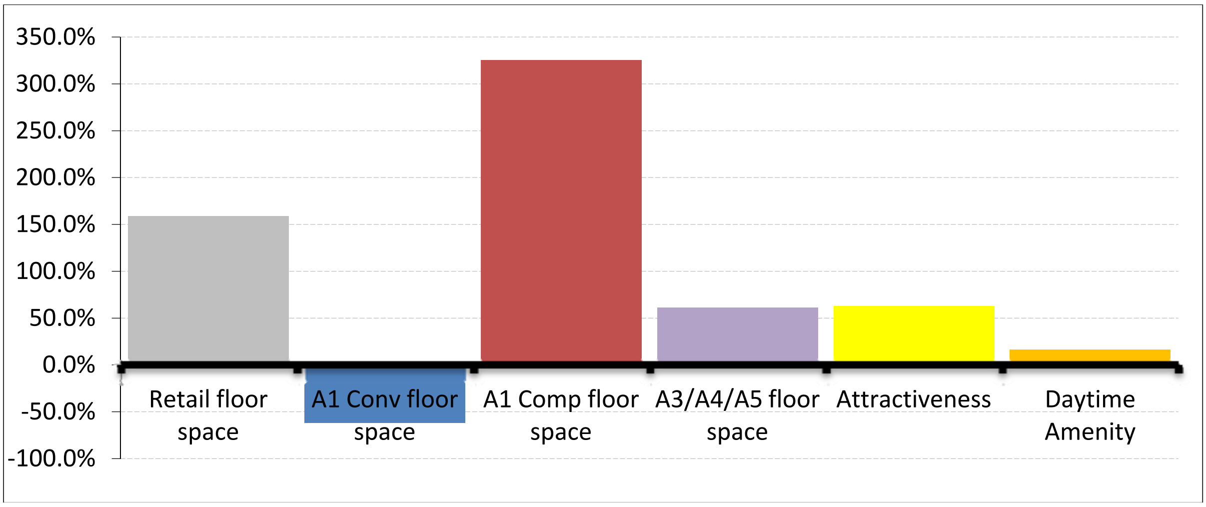
Table 5: Day Time Amenity within the Local Centre 2013

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	**30/46**			**30/46**			**36/46**		
Percentage	**65.2%**			**65.2%**			**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



Chiltern Street/George Street/Blandford Street 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. This is also true for A1 comparison floor space figures, and for food and drink floor space figures (A3/A4/A5), however convenience shopping is less than half of the overall average. In terms of the rating of the physical environment, the centre has a higher than average attractiveness rating. The daytime amenity score is marginally above the local centre average as discussed.

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, and one refused application involving A-class uses in the centre. Two of the permitted applications entailed changes of use to A2-class beauty salons, and the third application entailed the continued use of premises as an A3 class restaurant with a function room in the basement. The refused application was for a change of use of the basement from A1 to a beauty salon.

The former Chiltern Street Car Park site is under construction and will provide 191 sqm of A1 retail floor space and over a 1,000 sqm of gym and health related floorspace replacing a pub and A3 uses. A 27 bed hotel is also near completion in Chiltern Street which will also provide customers for the local shops and eating and drinking venues. Eight of the vacant units are being refurbished and will also provide high quality retail floorspace.

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**		**8,145**
		Total Convenience (A1)		**205**
		Total Comparison (A1)		**4,587**
		Total Service (A2)		**871**
		Total A3		**938**
		Total A4		**226**
		Total A5		**0**
		Total Sui Generis		**0**
		Total Vacant		**1108**
	Retail Offer	**Total Number of Shop Units**	**110**	
		Total Number of A1 Units	**66**	
		a) Convenience shops	**4**	
		b) Department/principal stores	**0**	
		c) Prestige international shops	**0**	
		d) National comparison retailers	**1**	
		e) Specialist Independent shops	**38**	
		f) Independent shops	**23**	
		Total Comparison Multiples	**62**	
		Total Number of A2 Units	**11**	
		Total Number of A3 Units	**13**	
		Total Number of A4 Units	**2**	
		Total Number of A5 Units	**0**	
		Total Number of Sui Generis	**0**	
		Total Number of Vacant	**15**	
	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.)**	**3**	
HOTELS			**1**	**3,393**

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

Views of Chiltern Street/George Street/Blandford Street local centre

Specialist shops in the core frontage of the centre, such as clothing and wedding shops on Chiltern Street, which figure heavily in the local centre.

An attractive, well kept shop front and streetscape on Blandford Street, in the non-core frontage area.

Well kept shop frontages and streetscape in the non-core shopping frontage area of George Street.

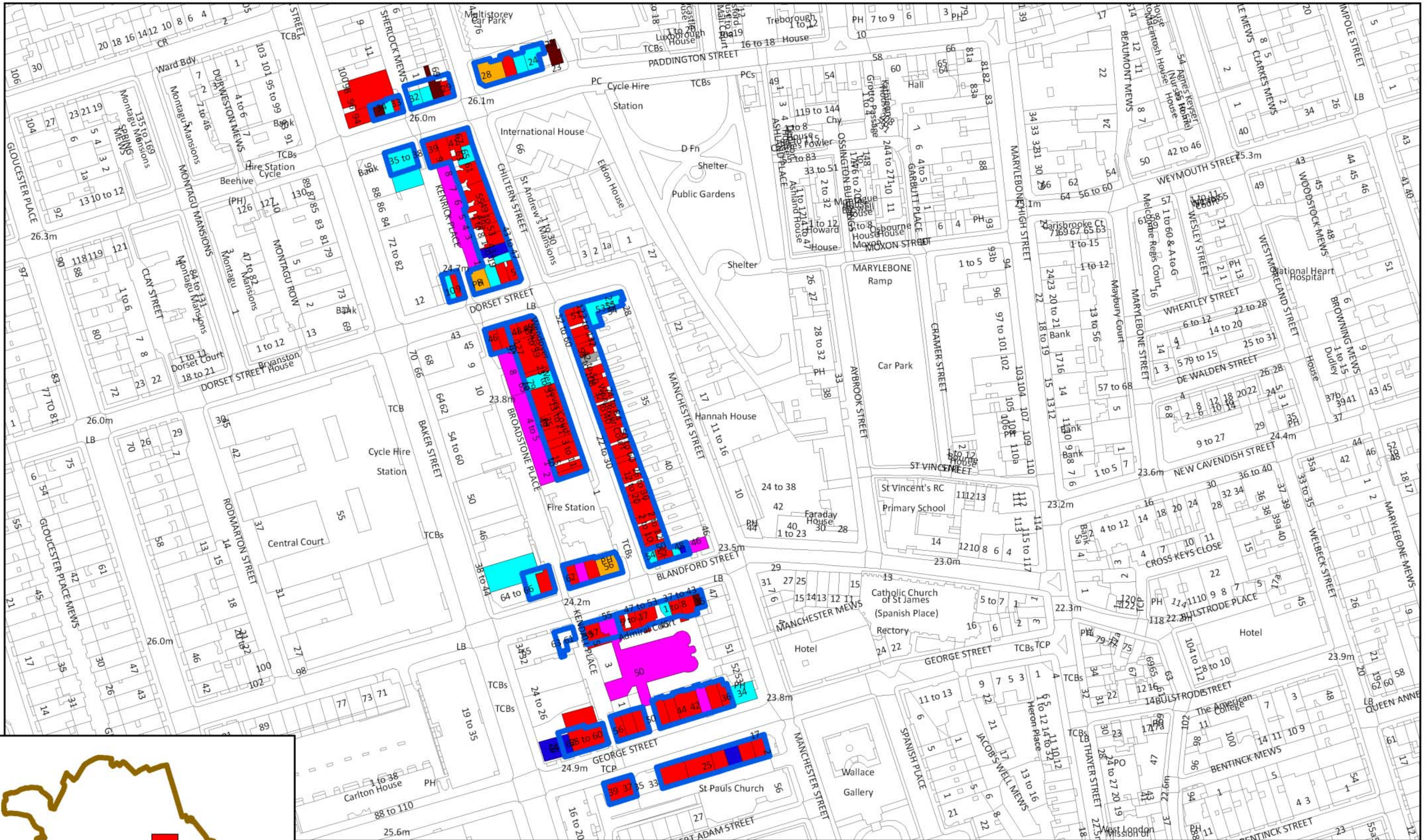
Table 7 Land Use Table (Westminster land use survey 2013)

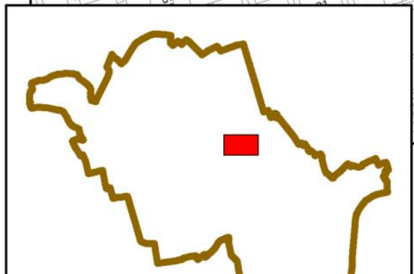
					A1	A1	A1	A1		A3	A4	B1	Vacant	Health	2013 Use
ADDRESS	**FASCIA**	**DESCRIPTION**	**USE**	**SQM**	**Conv.**	**Nat.**	**Spec.**	**Ind**	**A2**	**Res/Caf**	**Pub/Bar**				
37BLANDFORD STREET	London Centre of Trichology	Health	D1	96										1	A1 Ind
39BLANDFORD STREET	JS Couture	Bridal Wear	A1 Ind	126				1							A1 Ind
41BLANDFORD STREET	Vacant	Vacant	Vacant	30									1		A1 Spec
43BLANDFORD STREET	Il Baretto	Restaurant	A3 Rest/Café	37						1					A3 Rest/Café
45BLANDFORD STREET		Entrance		29											
47BLANDFORD STREET	Frescobol Carioca	Menswear	A1 Spec	46			1								Vacant
48BLANDFORD STREET	Door steps	Sandwich Bar	A1 Ind	48				1							A1 Ind
48ABLANDFORD STREET	Faradays	Estate Agency	A2	26					1						A2
49BLANDFORD STREET	Platinum Properties	Estate Agency	A2	50					1						Vacant
50BLANDFORD STREET	L'Homme Exchange	Menswear	A1 Spec	35			1								A1 Spec
51BLANDFORD STREET	Fabulous Nails	Nail Bar	A1 Ind	50				1							Vacant
52BLANDFORD STREET	Catwalk	Ladieswear	A1 Spec	29			1								A1 Spec
53BLANDFORD STREET	Charlie Kingham	Furniture	A1 Spec	50			1								A3 Rest/Café
54BLANDFORD STREET	Tasty Corner	Café/Takeaway	A1 Ind	43				1							A1 Ind
55BLANDFORD STREET	Berkeley Partnership	Office	B1	93								1			B1
56BLANDFORD STREET	Bok Bar	Public House	A4 Pub/Bar	120							1				A4 Pub/Bar
57BLANDFORD STREET	Robert Tausig	Electrical Goods	A1 Ind	93				1							A1 Ind
58BLANDFORD STREET	Vacant	Vacant	Vacant	63									1		A1 Ind
60-62BLANDFORD STREET	Vacant	Vacant	Vacant	126									1		A3 Rest/Café
64BLANDFORD STREET	Blandford Hair and Beauty	Hairdressing	A1 Ind	185				1							A1 Ind
2CHILTERN STREET	Archer Adams	Menswear	A1 Ind	54				1							A1 Spec
3CHILTERN STREET	Elizabeth Todd	Bridal Wear	A1 Spec	68			1								A1 Spec
4CHILTERN STREET	Mario`s Barber Shop	Mens Hairdressing	A1 Ind	56				1							A1 Ind
5CHILTERN STREET	Bharti Vyas Paramedical & Beauty Centre	Beauty Salon	A2	55					1						A2
6CHILTERN STREET	Shreeji	Confectionery Tobacconist & Newsagent	A1 Conv	49	1										A1 Conv
7-9CHILTERN STREET	Grey Flannel	Menswear	A1 Spec	113			1								A1 Spec
8CHILTERN STREET	Trunk	Menswear	A1 Ind	49				1							A1 Spec
10CHILTERN STREET	Vacant	Vacant	Vacant	53									1		A1 Spec
11CHILTERN STREET	By Storm	Furniture	A1 Spec	69			1								A1 Spec
12CHILTERN STREET	Vacant	Vacant	Vacant	50									1		A1 Spec

13-15CHILTERN STREET	Sunspel	Clothes Shop	A1 Spec	130			1								Vacant
14CHILTERN STREET	Jas	Music Shop	A1 Spec	52			1								A1 Spec
16CHILTERN STREET	Claude Gallery	Antiques	A1 Spec	53			1								A1 Spec
17CHILTERN STREET	Stephanie Allin Couture	Ladies Wear	A1 Spec	66			1								A1 Spec
18CHILTERN STREET	Monocle Cafe	Coffee Shop	A1 Ind	51				1							A1 Ind
19-25CHILTERN STREET	Long Tall Sally	Ladies Wear	A1 Nat	206		1									A1 Nat
20CHILTERN STREET	Bridal Rogue Gallery	Bridal Wear	A1 Spec	50			1								A1 Spec
22CHILTERN STREET	Bridal Rogue Gallery	Bridal Wear	A1 Spec	53			1								A1 Spec
24CHILTERN STREET	Bharti Vyas Paramedical & Beauty Centre	Beauty Salon	A2	54					1						A2
26CHILTERN STREET	Cadenheads	Whiskey Dealer	A1 Spec	52			1								A1 Spec
27CHILTERN STREET	Chiltern Rooms Café	Cafeteria	A3 Rest/Café	57						1					A3 Rest/Café
28-30CHILTERN STREET	Crispins Cobbler	Footwear	A1 Spec	93			1								A1 Spec
29CHILTERN STREET	Mouki	Jewellery	A1 Spec	73			1								Health
31-35CHILTERN STREET	T W Howarth & Co	Musical Instruments	A1 Spec	170			1								A1 Spec
32CHILTERN STREET	Jason's	Hairdressing	A1 Ind	51				1							A1 Ind
34CHILTERN STREET	Trunk Labs	Mens accessories	A1 Spec	55			1								A1 Spec
36CHILTERN STREET	Cire Trudon	Candle Shop	A1 Spec	43			1								A1 Spec
37CHILTERN STREET	T W Howarth & Co	Musical Instruments	A1 Spec	69			1								A1 Spec
38CHILTERN STREET	By Appointment By Design	Florist and Wedding Planners	A1 Spec	47			1								A1 Spec
39CHILTERN STREET	Totally	Shoe Shop	A1 Spec	65			1								A1 Spec
40-42CHILTERN STREET	Sahara	Ladies Wear	A1 Spec	108			1								A1 Spec
43CHILTERN STREET	Diwan I Am	Restaurant	A3 Rest/Café	72						1					A3 Rest/Café
44CHILTERN STREET	Magnums	Shoes	A1 Spec	50			1								A1 Spec
45CHILTERN STREET	Globe Apartments	Estate Agency	A2	79					1						A2
46CHILTERN STREET	John Simons	Menswear	A1 Ind	48				1							A1 Ind
47CHILTERN STREET	Billie Currie	Beauty Salon	A2	78					1						A2
48CHILTERN STREET	White Rose	Dry Cleaning	A1 Ind	48				1							A1 Ind
49CHILTERN STREET	GV Art	Art Gallery	A1 Spec	78			1								A3 Rest/Café
50CHILTERN STREET	Pauline Burrows	Ladies Wear	A1 Spec	78			1								

51CHILTERN STREET	A&D Gallery	Art Gallery	A1 Spec	82			1								A1 Spec
52CHILTERN STREET	Chiltern Natural Health	Chinese Medical Centre	Health	53										1	Health
53CHILTERN STREET	Websters	Ironmongery	A1 Spec	81			1								A1 Spec
54CHILTERN STREET	Vacant	Vacant	Vacant	49									1		A1 Spec
55-57CHILTERN STREET	Around Wine	Wine	A1 Spec	136			1								A1 Spec
56CHILTERN STREET	General Leather	Leather Goods	A1 Ind	55				1							A1 Ind
58CHILTERN STREET	Kohatu and Petros	Jewellery	A1 Spec	38			1								A1 Spec
59CHILTERN STREET	Leticia Haut	Hair & Beauty	A1 Spec	75			1								B1
60CHILTERN STREET	W1 Beauty	Hair & Beauty	A1 Ind	43				1							A1 Ind
61CHILTERN STREET	Leticia Haut	Hair & Beauty	A1 Spec	67			1								A2
65CHILTERN STREET	Blandfords	Restaurant	A3 Rest/Café	73						1					A3 Rest/Café
67CHILTERN STREET	Fabels	Newsagent	A1 Conv	43	1										
5DORSET STREET	Vacant	Vacant	Vacant	60									1		A2
6DORSET STREET	Wave Technology	Graphic Designer	B1	53								1			B1
7DORSET STREET	Original Tangines	Restaurant	A3 Rest/Café	65						1					A3 Rest/Café
8DORSET STREET	Barley Mow	Public House	A4 Pub/Bar	106							1				A4 Pub/Bar
9DORSET STREET	Welbeck Cleaners	Dry Cleaning	A1 Ind	58				1							A1 Ind
10DORSET STREET	Anacapri	Restaurant	A3 Rest/Café	56						1					A3 Rest/Café
43DORSET STREET		Entrance		303											
45DORSET STREET	Office		B1	74								1			B1
46DORSET STREET	Alisha	Convenience Store	A1 Conv	70	1										A1 Conv
47DORSET STREET	The Widescreen Centre	Telescopes	A1 Spec	39			1								
48DORSET STREET	Nordic Bakery	Bakers/Cafe	A3 Rest/Café	44						1					A1 Spec
55DORSET STREET	Hardys	Restaurant	A3 Rest/Café	173						1					A3 Rest/Café
17GEORGE STREET	Vacant	Vacant	Vacant	77									1		A1 Spec
19GEORGE STREET	Vacant	Vacant	Vacant	77									1		A1 Ind
21GEORGE STREET	Hamilton	Estate Agency	A2	77					1						A2
23GEORGE STREET	Manmade	Barbers	A1 Ind	76				1							A1 Spec
25-27GEORGE STREET	Skin Oasis	Beauty Salon	A2	150					1						Vacant
29-31GEORGE STREET	Casa Bella	Furniture	A1 Spec	153			1								A1 Spec
34GEORGE STREET	Defune	Restaurant	A3 Rest/Café	0						1					A3 Rest/Café
35GEORGE STREET	Office entrance	Office	b1	143								1			A1 Nat
36GEORGE STREET	Ultratone bodyshapers	Beauty Salon	A2	67					1						A2
37-39 GEORGE STREET	China Eastern Travel Agent	Travel Agency	A2	156					1						A2
38GEORGE STREET	Helen	Ladieswear	A1 Spec	84			1								A1 Spec

40GEORGE STREET	Proven	Offices	B1	75								1			B1
42-44GEORGE STREET	Gielly Green	Hairdressers	A1 Ind	164				1							Vacant
46GEORGE STREET	Dukiana	Bedroom Furniture	A1 Spec	73			1								A1 Spec
48GEORGE STREET	Paul Bennett	Antiques	A1 Spec	83			1								A1 Spec
50GEORGE STREET	Colliers	Offices		126											
52GEORGE STREET	Jonathan Potter Gallery	Art Shop	A1 Spec	74			1								A1 Spec
54GEORGE STREET	Alberre Odette	Clothes Shop	A1 Ind	75				1							A1 Ind
56GEORGE STREET	Anthony Yacomie	Hairdressers	A1 Ind	66				1							A1 Ind
58-60GEORGE STREET	Daniel Galvin	Hairdressers	A1 Ind	54				1							A1 Ind
23PADDINGTON STREET	Demolished	Demolished	Vacant	50									1		Health
24PADDINGTON STREET	Demolished	Demolished	Vacant	104									1		A3 Rest/Café
25PADDINGTON STREET	Demolished	Demolished	Vacant	61									1		A3 Rest/Café
26PADDINGTON STREET	Demolished	Demolished	Vacant	73									1		Health
27-28PADDINGTON STREET	Demolished	Demolished	Vacant	156									1		A3 Pub/Bar
29PADDINGTON STREET	AD Foods	Convenience Store	A1 Conv	43	1										A1 Conv
30PADDINGTON STREET	Dentalcare Marylebone	Health	Health	61										1	Vacant
31PADDINGTON STREET	Fresco	Café	A3 Rest/Café	44						1					A3 Rest/Café
32PADDINGTON STREET	Casa Becci	Restaurant	A3 Rest/Café	62						1					A3 Rest/Café
33PADDINGTON STREET	Quality Shoe Care	Footwear	A1 Ind	35				1							A1 Ind
34PADDINGTON STREET	Tasty Inn	Restaurant	A3 Rest/Café	88						1					A3 Rest/Café
36-38PADDINGTON STREET	Zizzi	Restaurant	A3 Rest/Café	167						1					A3 Rest/Café
39PADDINGTON STREET	Vacant	Vacant	Vacant	79									1		A3 Rest/Café
40PADDINGTON STREET	Debonaire	Dry Cleaning	A1 Ind	73				1							A1 Ind
41PADDINGTON STREET	Elements	Beauty Salon	A2	79					1						A1 Ind



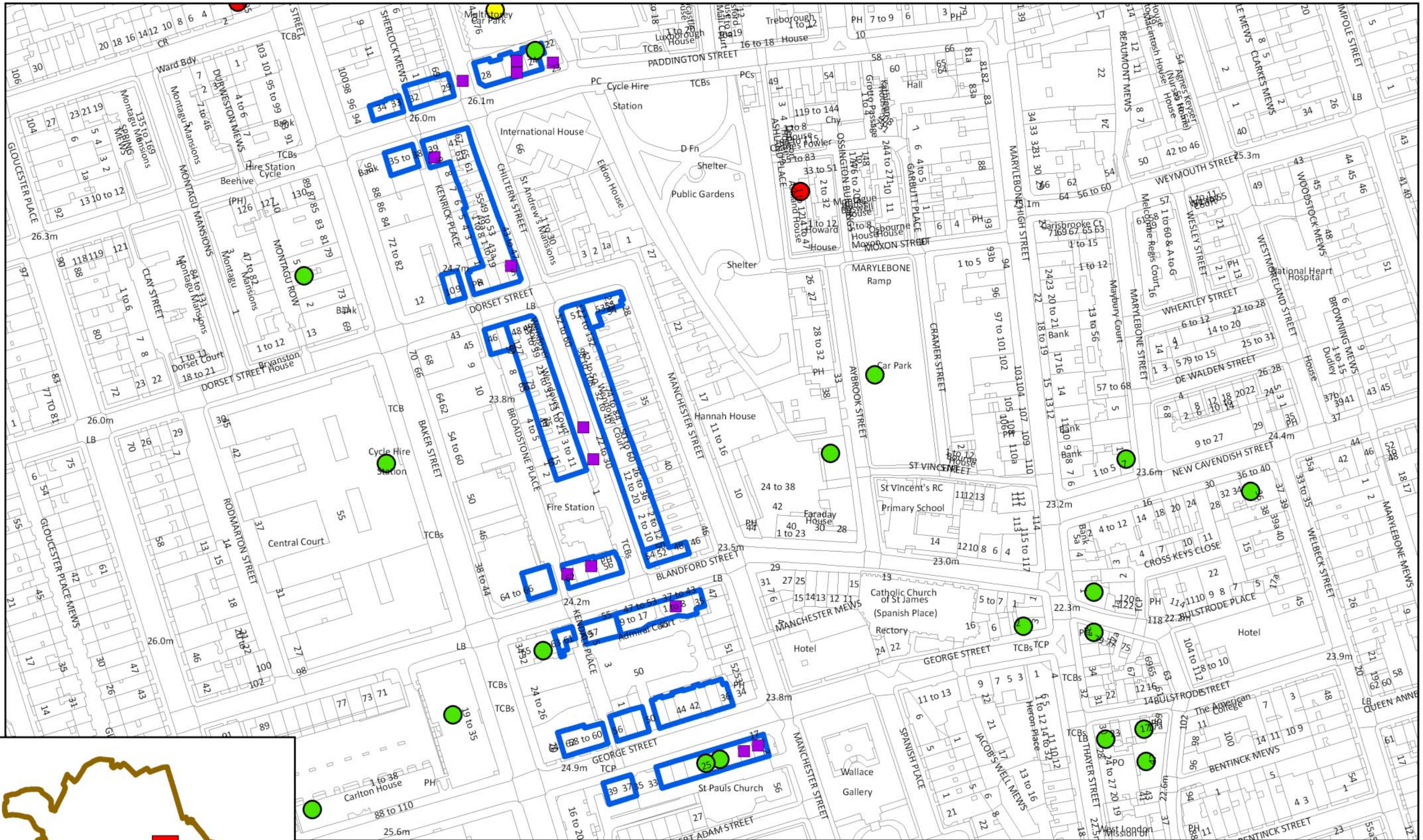


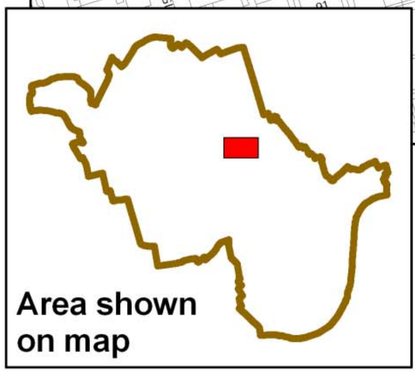
Source: GOAD Retail Survey 2013

Local Centre: Chiltern Street, George Street & Blandford Street

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

0 25 50 100 Metres N





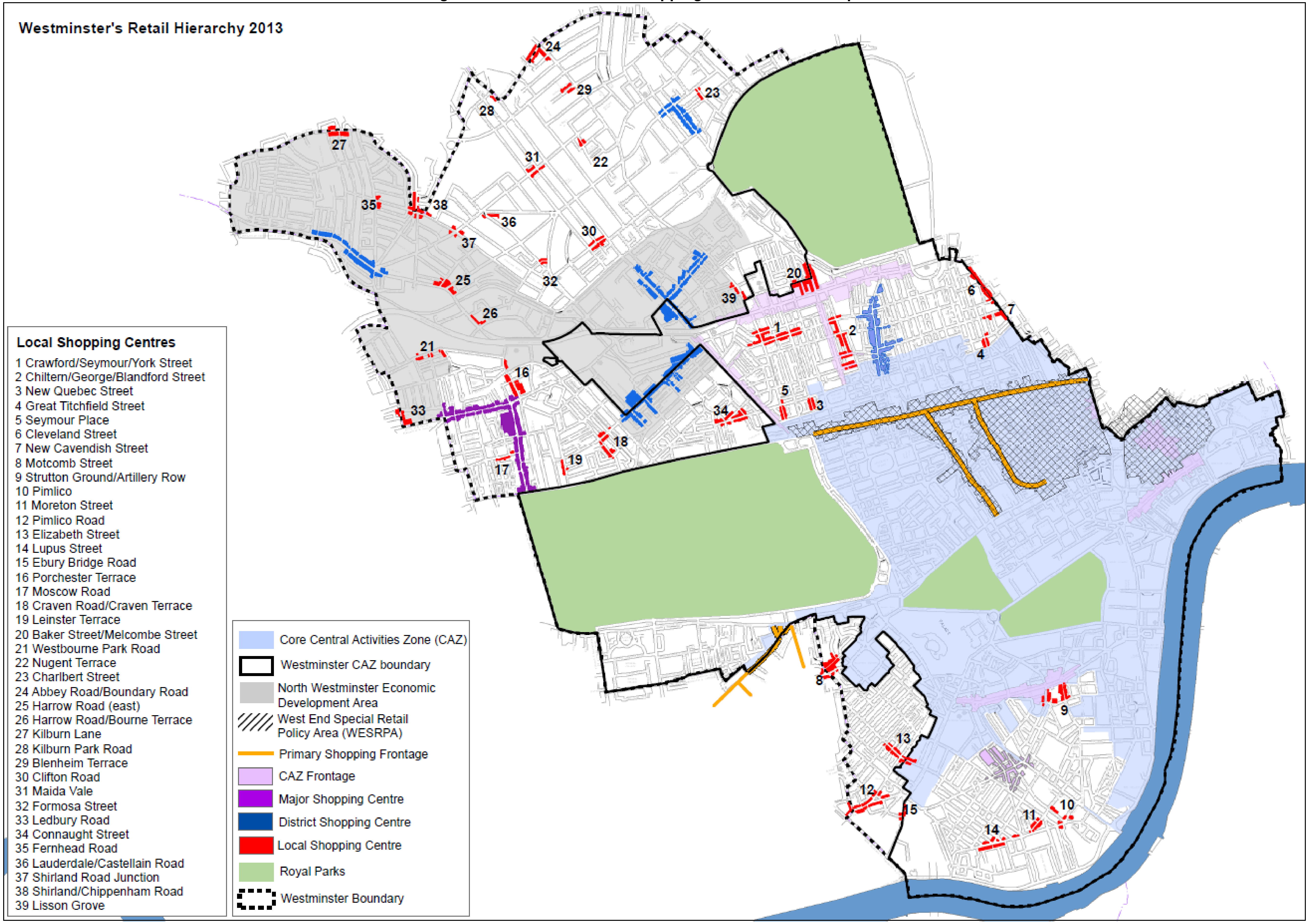
Source: GOAD Retail Survey 2013

Local Centre: Chiltern Street, George Street & Blandford Street

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

0 25 50 100
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 16: Cleveland 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 **16: Cleveland Street**

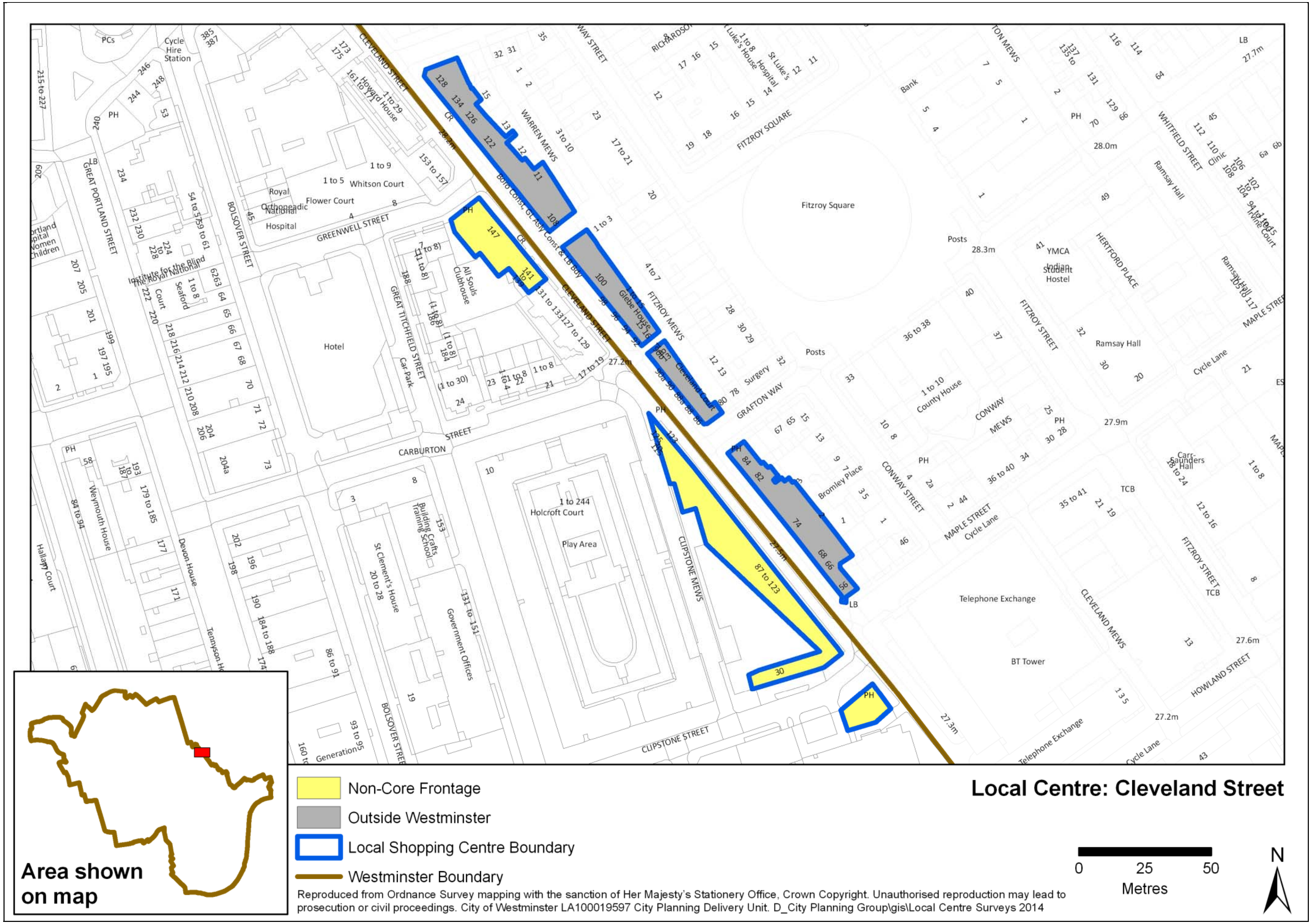
1. Introduction

1.1 Location

This medium sized local centre is located on the eastern fringe of the Marylebone part of the wider Central Activities Zone, parallel to Tottenham Court Road and Great Portland Street in the east of Westminster, on the border with Camden to the east. The centre is linear and runs between Great Portland Street to the north and Clipstone Street to the South.

The centre is close to Regent's Park and Oxford Street however is quite unobtrusive, both of which limit the catchment area of the centre, along with several nearby local centres such as Great Titchfield Street and New Cavendish Street.

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		N/A	17	16	10
	Department/principle stores	*N/A*	*0*	*0*	*0*
	International retailers	*N/A*	*0*	*0*	*0*
	National retailers	*N/A*	*0*	*0*	*0*
	Specialist Independent	*N/A*	*2*	*2*	*1*
	Independent	*N/A*	*12*	*11*	*6*
	Convenience	*N/A*	*3*	*3*	*3*
Class A2	Financial & Professional	N/A	1	2	2
Food & Drink		N/A	14	13	15
Class A3	*Restaurant/Café*	*N/A*	*9*	*10*	*10*
Class A4	*Pubs/Bars*	*N/A*	*3*	*2*	*3*
Class A5	*Takeaway*	*N/A*	*2*	*1*	*1*
	Takeaway/Restaurant	*N/A*	*0*	*0*	*1*
Sui Generis		N/A	3	4	2
Vacant Units		N/A	4	9	11
Arts/Culture		N/A	0	0	0
Health uses		N/A	1	1	2
Hotels		N/A	0	0	0
TOTAL		**N/A**	**40**	**45**	**42**

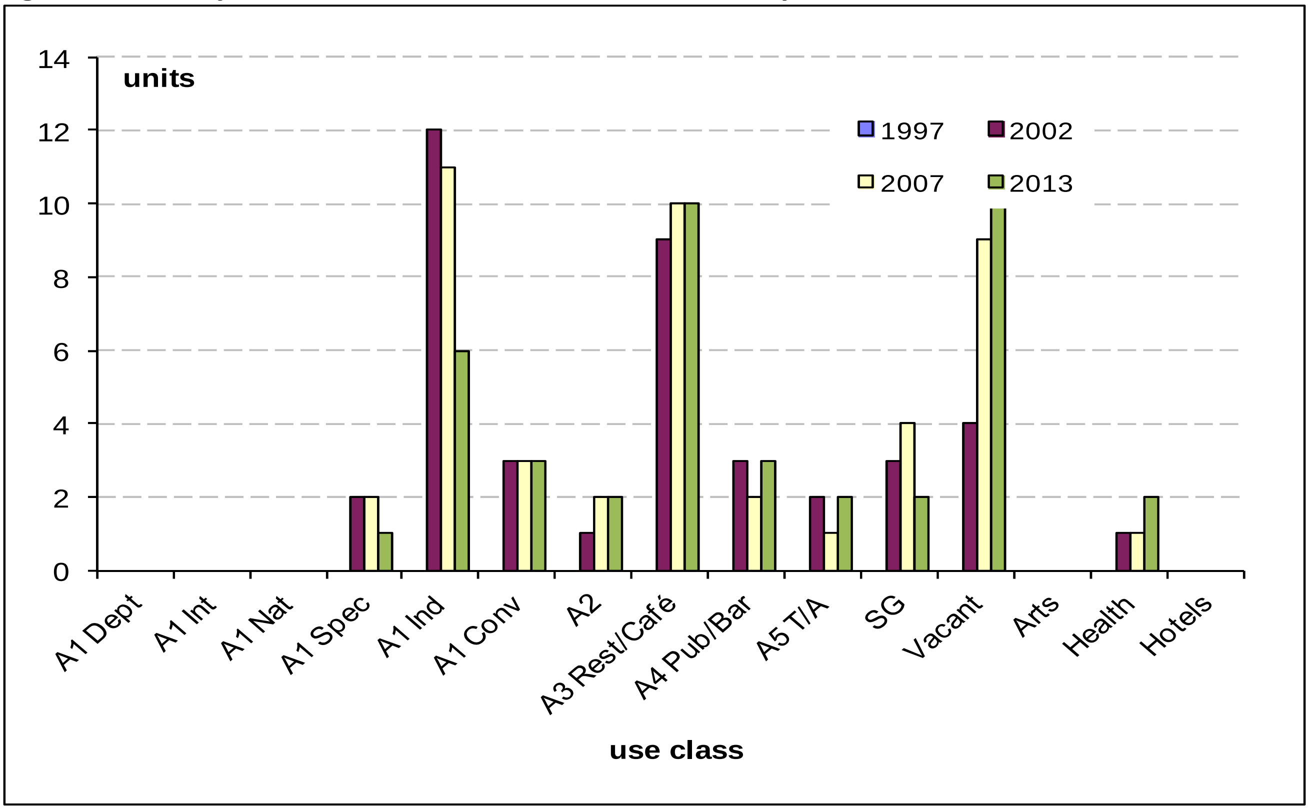
Source: WCC Land Use Survey December 2013

In total there are 42 units, which is a decrease of three units from the previous survey in 2007.

The number of A1 retail uses has decreased by six units since 2007. The number of Class A2 uses has stayed the same and the number of Class A3 uses has increased by two units. The A1 uses structure has changed significantly as four independent units have closed.

The centre has no hotels or Arts space but another dentist has opened which increases the health use. The vacant units have increased by two to eleven, potentially due to upcoming redevelopment works in the street.

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



2.2 Range of A1 Uses

Cleveland Street contains no department stores or international or national retailers. The centre has 10 Class A1 retail units including 3 convenience stores, a specialist retailer and 6 independent retailers. The specialist retailer's consists of a tailor. The independent stores include hairdressers, dry cleaners and several fabric shops. The high proportion of comparison shops and no multiple retailers suggests that Cleveland Street serves local residents with a mix of convenience and comparison shopping facilities.

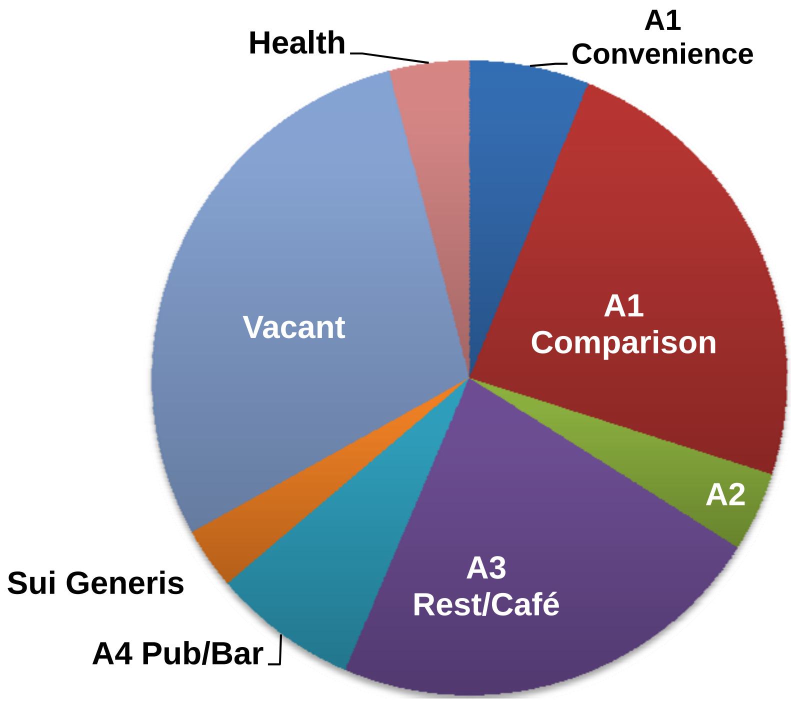
2.3 Total Retail Floor space

Total retail floor space in Cleveland Street is broken down in Table 2. In total, Cleveland Street has 3,194 sqm of retail floor space, which is above the average of 3,188 sqm for the 39 Local Centres in the City. Cleveland Street has a high proportion of A1 comparison floor space, accounting for over a quarter of the total. The centre has comparable amounts of A3 and Vacant floor space. The centre also has three A4 pubs and two A5 takeaway, with floor spaces around the Local Centre average. Conversely the centre has a slightly lower than average proportion of A1 comparison floor space, 23% 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	195	6.11%	14.9%
A1 Comparison	761	23.81%	35.2%
A2	130	4.06%	11.2%
A3 Rest/Café	716	22.42%	17.4%
A4 Pub/Bar	236	7.39%	5.1%
Sui Generis	100	3.13%	3.9%
Vacant	927	29.01%	8.6%
Health	130	4.07%	2.0%
Hotels	0	0.00%	0.5%
Art	0	0.00%	1.3%
Leisure	0	0.00%	0.1%
Total	**3,194**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



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

Cleveland Street is a Local Centre with a selection of local services, food shops and comparison shops. There is a very good selection of class A3 Restaurants/Café's in the centre. There are no banks or building societies and only two class A2 uses: an estate agent and a betting shop. 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 in Cleveland Street is higher than the average rate for Local Centres in the City, as shown in Table 3. The vacancy rate has increased significantly since 2007 and now stands at more than three times the local centre average of 8%. The eleven vacant units are spread throughout the centre, and are all located at ground floor level. 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	10.00% (4) units	20.00% (9) units	26.19% (11) 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 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

Cleveland Street local centre is located roughly two minutes walk from Great Portland Street London Underground station (Circle, Hammersmith & City, Metropolitan lines), which lies at the northern end of Cleveland Street. The centre is also roughly five minutes walk from Warren Street London Underground station (Northern and Victoria lines). The north of Cleveland Street meets Euston Road (A501), which is one of the main arterial roads through the centre of London. Although no bus routes pass down Cleveland Street itself, several serve surrounding streets, such as Great Portland Street which is served by routes 88, 453 and C2, and the Euston Road which is served by routes 18, 27, 205 and 453.

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 34.6%, meaning that the centre is reasonably attractive. This rating is higher than the Local Centre average of 31%, and ranks Cleveland Street =17th out of the 39 Local Centres in the City. Cleveland Street has a poor provision of multiple retailers, cultural/community events, sport and leisure facilities and bank/building society provision. The main strengths of the centre are the provision of independent shops and the quality and number of restaurants. The remainder of the categories are rated as average.

4.2 Daytime Amenity

Cleveland Street's amenity rating has decreased from the previous survey in 2007. The centre's day time amenity rating is 59% compared with the average for all Local Centres of 68%, and is ranked =31st out of the 39 Local Centres in the City. The centre is only rated as 'poor' in two categories, the quality of the buildings and the evidence of dog fouling. In five of the twelve security categories including the ease of passage for pedestrians, evidence of drunkenness, rough sleepers and street drinkers it is rated as 'good'. The remaining majority of the 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 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	9/26			9/26			9/26		
Percentage	34.62%			34.62%			34.62%		

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	26/46			29/46			27/46		
Percentage	56.5%			63.0%			58.7%		

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

Cleveland Street is an average sized Local Centre that has a slightly higher amount of total retail floor space when compared to the overall average for the 39 local centres. Within this, the centre has a significantly lower than average amount of occupied A1 convenience floor space and levels of A1 comparison. The A3/A4 and A5 food and drink floor space is however higher than the average. In terms of the rating of the physical environment, the centre has a higher than average score for attractiveness illustrating the good quality of the retail environment.

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 planning applications submitted.

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**		**3,194**
		Total Convenience (A1)		**195**
		Total Comparison (A1)		**761**
		Total Service (A2)		**130**
		Total A3		**614**
		Total A4		**236**
		Total A5		**102**
		Total Sui Generis		**100**
		Total Vacant		**927**
	Retail Offer	**Total Number of Shop Units**	**42**	
		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	**10**	
		Total Number of A4 Units	**3**	
		Total Number of A5 Units	**2**	
		Total Number of Sui Generis	**2**	
		Total Number of Vacant	**11**	
	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.)**	**2**	**130**
HOTELS			**0**	

In terms of its vitality and viability, and general economic health this centre is considered to be ’in decline’, a worsening of the situation in 2007 when the centre was ‘in decline’. This is mainly due to the high vacancy rate, which is a significant increase on the results from the previous survey 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 Cleveland Street local centre

The distinctive 1960's purpose built covered walkway section of the local shopping centre.

Vacant shop units in the local centre, of which there are several.

A public house and other shop units in the north section of the local centre, with a very different character to the southern covered section of the centre.

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

					A1	A1	A1		A3	A4	A3	A3	B1	S G	Vacant	Health	2007 Use
ADDRESS	**FASCIA**	**DESCRIPTION**	**USE**	**SQM**	**Conv.**	**Spec.**	**Ind**	**A2**	**Res/Caf**	**Pub/Bar**	**Takeaw.**	**Rest/TA**					
62-64CLEVELAND STREET	Vasis	RESTAURANT	A3 Rest/Café	68					1								A3 Rest/Café
66CLEVELAND STREET	Paul Kitson	Tailor	A1 Spec	54		1											A1 Ind
68CLEVELAND STREET	Babylon Tower	SANDWICH BAR	A3 Rest/Café	67					1								A1 Ind
70CLEVELAND STREET	Brazil Gourmet	Bakery	A1 Conv	60	1												SG
72CLEVELAND STREET	Raag	RESTAURANT	A3 Rest/Café	63					1								A3 Rest/Café
74CLEVELAND STREET	Dental Care	DENTAL CLINIC	Health	57												1	Vacant
76CLEVELAND STREET	Office	OFFICE	B1	63									1				B1
78CLEVELAND STREET	CLEVELAND HAIR	HAIRDRESSERS	A1 Ind	72			1										A1 Ind
80CLEVELAND STREET	Motzart	RESTAURANT	A3 Rest/Café	61					1								A3 Rest/Café
82CLEVELAND STREET	Fish Bar	FISH & CHIP SHOP	A3 T/A	53							1						A3 T/A
84CLEVELAND STREET	VACANT	VACANT PUBLIC HOUSE	Vacant	75											1		Vacant
85CLEVELAND STREET	TOWER	PUBLIC HOUSE	A3 Pub/Bar	40						1							A3 Pub/Bar
86CLEVELAND STREET	MONTE BLANCO	RESTAURANT	A3 Rest/Café	46					1								A3 Rest/Café
87-89CLEVELAND STREET	THE NETWORK	OFFICES	B1	91									1				B1
86-88ACLEVELAND STREET	RED & WHITE	LAUNDERETTE	SG	53										1			SG
88BCLEVELAND STREET	Brodies	SHOE REPAIRS	A1 Ind	29			1										A1 Ind
90CLEVELAND STREET	FITZROY	DRY CLEANERS	A1 Ind	35			1										A1 Ind
90ACLEVELAND STREET	Cleavland News	NEWSAGENTS	A1 Conv	37	1												A1 Conv
90BCLEVELAND STREET	Sensations	SANDWICH BAR	A3 Rest/Café	44					1								A1 Ind
91-93CLEVELAND STREET	CONNEXION COMMUNICATION	OFFICES	B1	100									1				B1
92CLEVELAND STREET	Cut & Colour	Hairdressers	A1 Ind	47			1										A1 Ind
94CLEVELAND STREET	9/r	Offices	B1	53									1				A1 Ind
95CLEVELAND STREET	TOWER	NEWSAGENTS	A1 Conv	98	1												A1 Conv
96CLEVELAND STREET	THE 4 LATERNS RESTAURANT	RESTAURANT	A3 Rest/Café	67					1								A3 Rest/Café
97-101CLEVELAND STREET	Vision IPTV	OFFICES	B1	150									1				Vacant
98CLEVELAND STREET	Health & Beauty	Health	A2	56				1									A2
100CLEVELAND STREET	Oriental Dragon	RESTAURANT	A3 Rest/Café	79					1								A3 Rest/Café
102CLEVELAND STREET	CLEVELAND DENTAL CLINIC	DENTAL CLINIC	Health	73												1	Health
103CLEVELAND STREET	WESTERN PRINTERS	STATIONERY	A1 Ind	101			1										A1 Ind
104CLEVELAND STREET	VACANT	VACANT	Vacant	79											1		Vacant

105CLEVELAND STREET	VACANT	VACANT	Vacant	101											1		Vacant
106CLEVELAND STREET	NORMAN LYONS & CO	CLOTHING	A1 Ind	423			1										A1 Ind
107CLEVELAND STREET	CORAL BETTING SHOP	BETTING SHOP	A2	74				1									A2
108CLEVELAND STREET	Vacant	Vacant	Vacant	65											1		A3 Rest/Café
109CLEVELAND STREET	WALK IN TV	OFFICES	B1	74									1				Vacant
110CLEVELAND STREET	Vacant	UNDER ALTERATION	Vacant	71											1		Vacant
111-113CLEVELAND STREET	Vacant	Vacant	Vacant	97											1		A1 Conv
112CLEVELAND STREET	Residential	Residential		70													A1 Ind
114CLEVELAND STREET	No Name	Offices	B1	81									1				A1 Spec
115CLEVELAND STREET	VACANT	VACANT	Vacant	106											1		Vacant
116CLEVELAND STREET	VACANT	Vacant	Vacant	53											1		B1
118CLEVELAND STREET	Residential	RESIDENTIAL		47													
120CLEVELAND STREET	VACANT	RESIDENTIAL/OFFICE		54											1		
122CLEVELAND STREET	VACANT	RESIDENTIAL/OFFICE		52											1		
123-125CLEVELAND STREET	Jet Lag	Sports Bar	A3 Pub Bar	108						1							A3 Pub Bar
124CLEVELAND STREET	LA CAVALLERIA RUSTICANA	RESTAURANT	A3 Rest/Café	47					1								A3 Rest/Café
126CLEVELAND STREET	Café Zilli	RESTAURANT	A3 Rest/Café	49								1					A3 Rest/Café
128-134CLEVELAND STREET	Office	OFFICES	B1	246									1				B1
135CLEVELAND STREET	Residential	RESIDENTIAL		131													
137CLEVELAND STREET	Residential	RESIDENTIAL		131													
139CLEVELAND STREET	Residential	RESIDENTIAL		50													
141CLEVELAND STREET	ALL SOULS CLUBHOUSE	CHRISTIAN COMMUNITY CENTRE	SG	47										1			
143CLEVELAND STREET	Residential	Residential		79													A1 Spec
145CLEVELAND STREET	M&Z	RESTAURANT	A3 Rest/Café	72					1								A3 Rest/Café
147CLEVELAND STREET	Residential	RESIDENTIAL		85													
149CLEVELAND STREET	Residential	RESIDENTIAL		75													
151CLEVELAND STREET	GEORGE & DRAGON	PUBLIC HOUSE	A3 Pub/Bar	88						1							A3 Pub/Bar
30CLIPSTONE STREET	site of BP PETROL STATION	Vacant	Vacant	174											1		SG
UNITS IN BRENT					3	1	6	2	10	3	1	1	8	2	11	2	

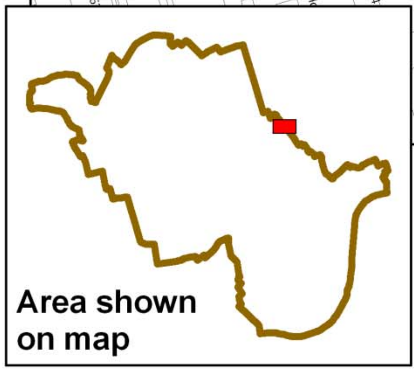
Source: GOAD Retail Survey 2013

Local Centre: Cleveland Street

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

0 25 50
Metres

N



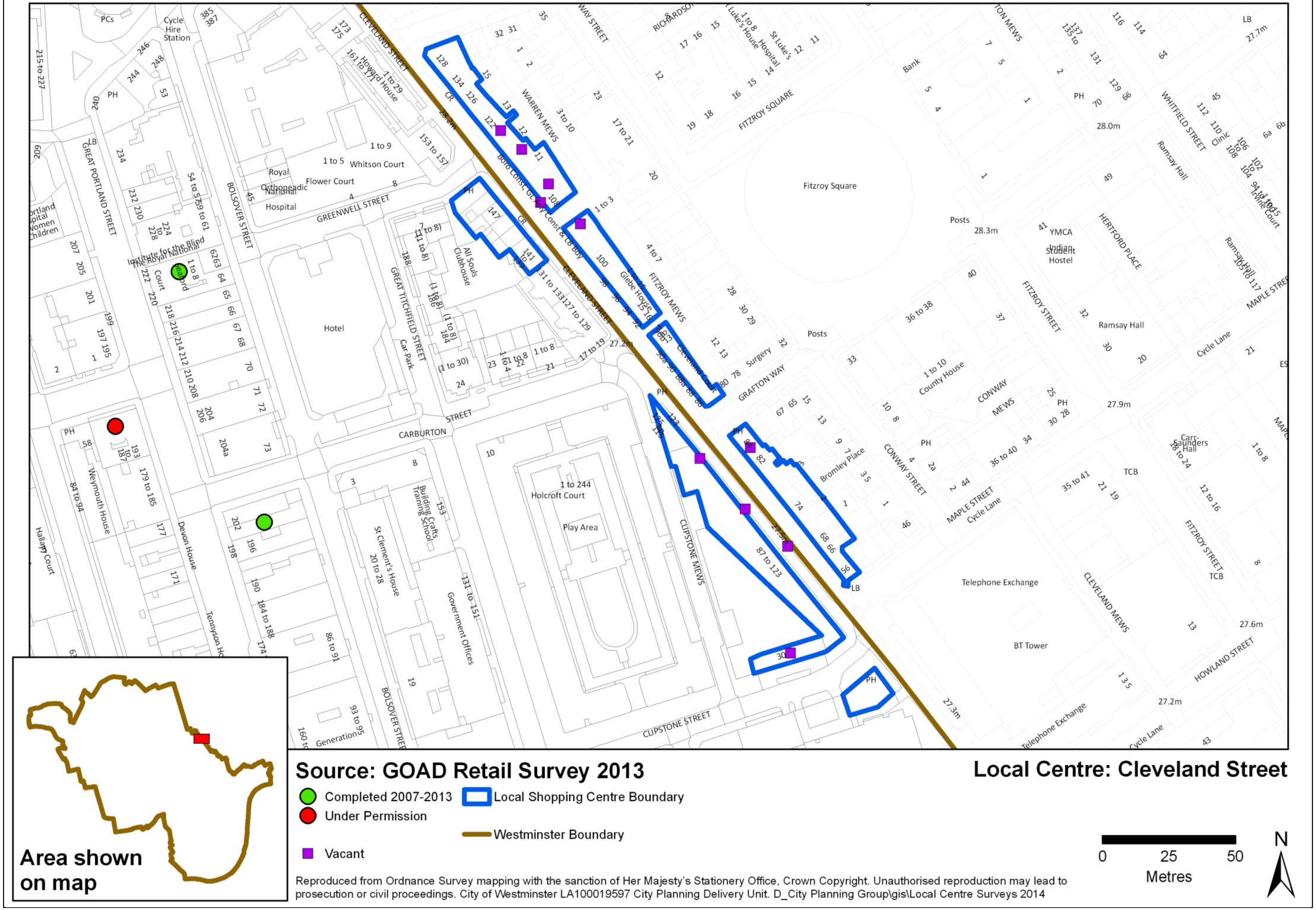


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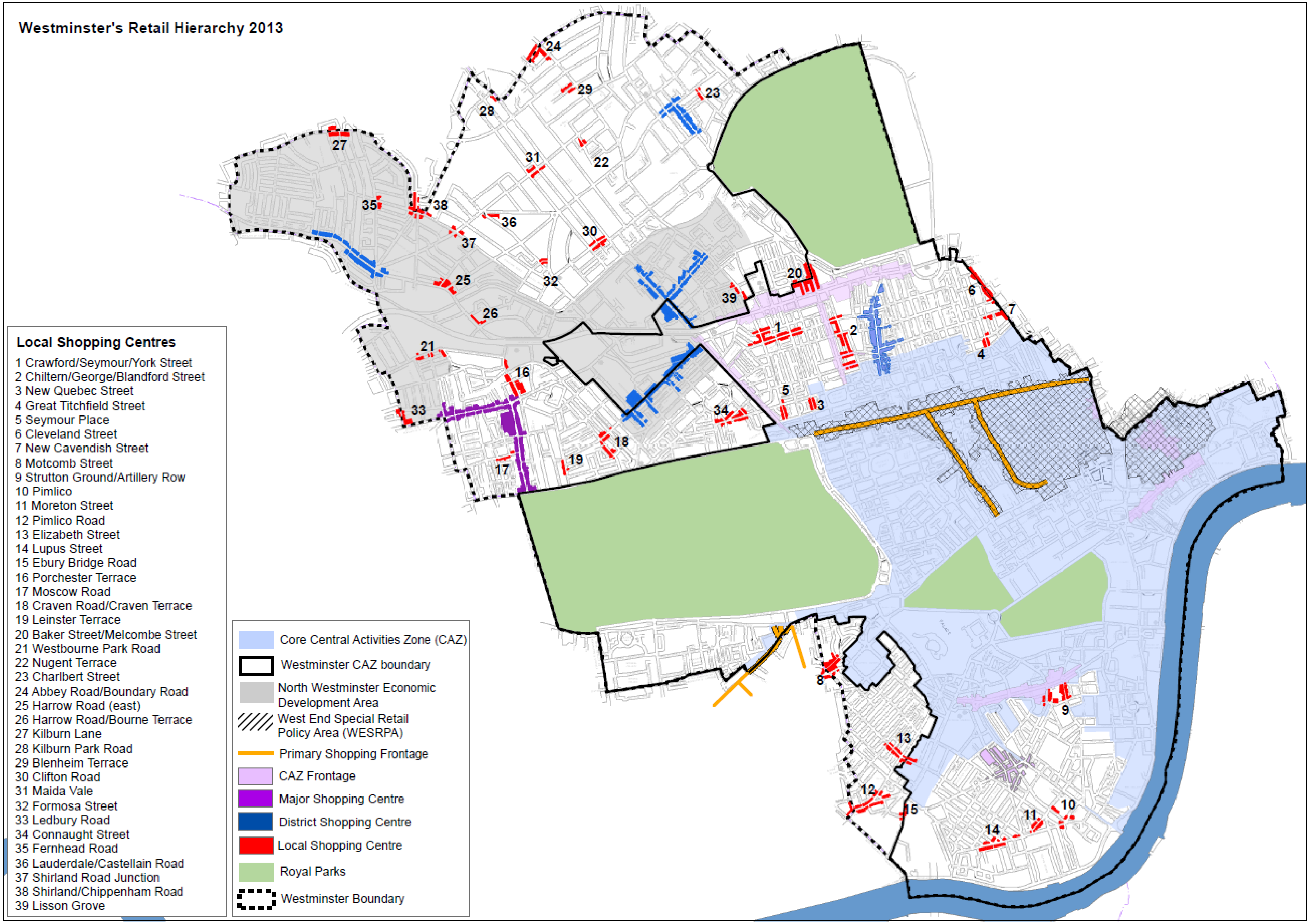
Figure 7 Westminster wide shopping centre boundaries plan



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
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 17: Crawford Street, Seymour Place & York 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 17**: Crawford Street, Seymour Place and York Street**

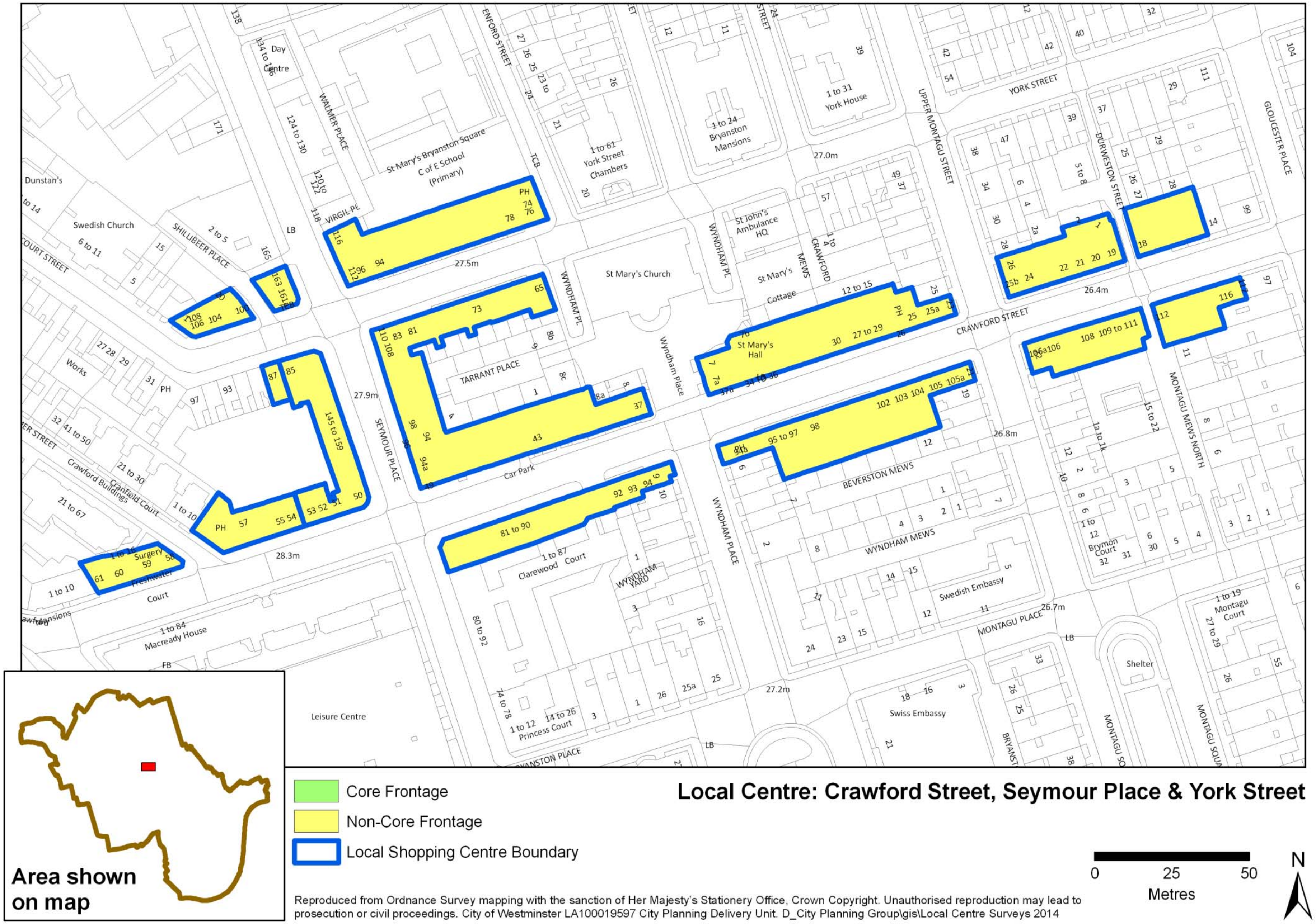
1. Introduction

1.1 Location

Crawford Street, Seymour Place and York Street is a large local centre located to the south of Marylebone Road and to the west of Baker Street. The local centre comprises a network of streets, although the majority of units front both sides of Crawford Street.

The centre is in the Marylebone part of the Central Activities Zone, and is located in a predominantly residential area although there are some commercial uses throughout Marylebone. The centre is accessible via the nearby Marylebone mainline and London Underground Station (Chiltern Railways, Bakerloo Line), and by buses along Marylebone Road to the north and Baker Street to the east.

Figure 1: Local Centre Boundary 2013



2 Land Use

2.1 Range of Uses

Table 1 shows that the Crawford Street, Seymour Place and York Street Local Centre comprises a range of shopping and other town centre uses.

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

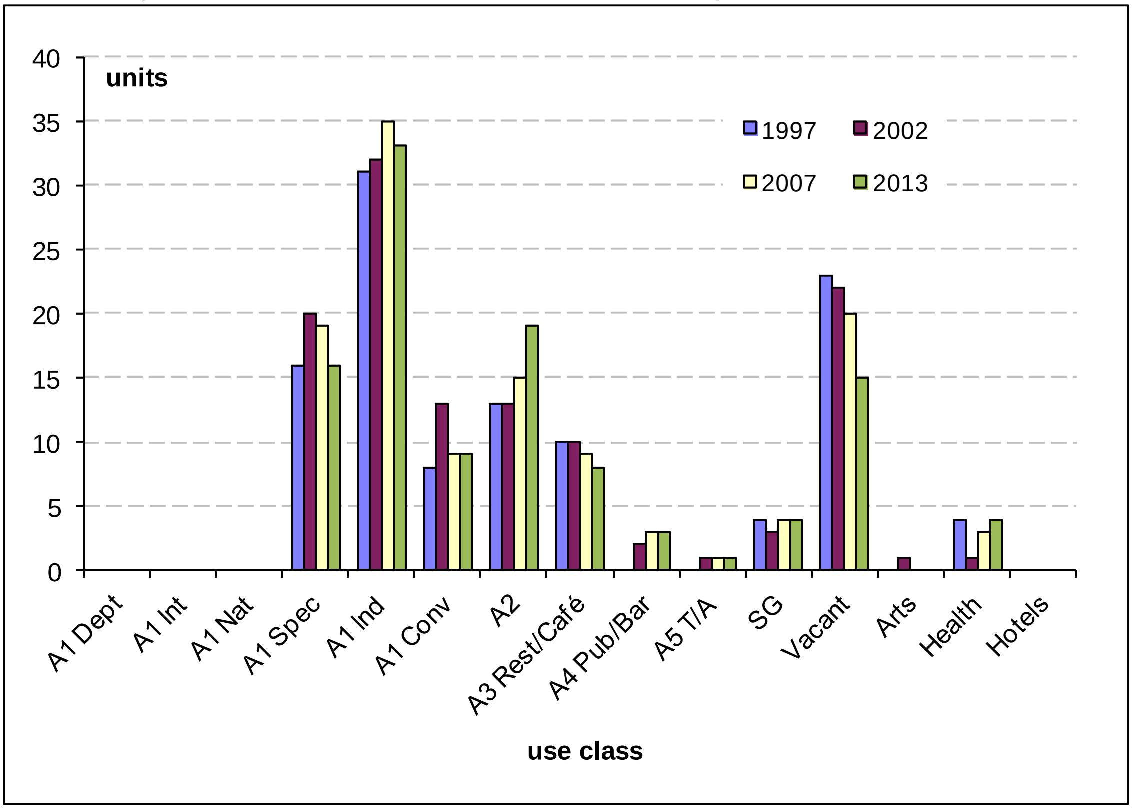
Use Class		**No. of Units 1997**	**No. of Units 2002**	**No. of Units 2007**	**No. of Units 2013**
Class A1 Retail		55	65	63	58
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*0*
	National retailers	*0*	*0*	*0*	*0*
	Specialist Independent	*16*	*20*	*19*	*16*
	Independent	*31*	*32*	*35*	*33*
	Convenience	*8*	*13*	*9*	*9*
Class A2	Financial & Professional	13	13	15	19
Food & Drink		10	13	13	12
Class A3	*Restaurant/Café*	*10*	*10*	*9*	*8*
Class A4	*Pubs/Bars*	*N/A*	*2*	*3*	*3*
Class A5	*Takeaway*	*N/A*	*1*	*1*	*0*
	Takeaway/Restaurant				*1*
Sui Generis		4	3	4	4
Vacant Units		23	22	20	15
Arts/Culture		0	1	0	0
Health uses		4	1	3	4
Hotels		0	0	0	0
TOTAL		**109**	**118**	**118**	**112**

Source: WCC Land Use Survey December 2013

The Local Centre contains 112 units in total, a reduction from 2007 resulting from the amalgamation of eight units into four. Note that the total number of units in the 2007 survey cannot be relied upon. It appears that two residential units were mistakenly recorded as being vacant and a further two units had been duplicated; these four units have been discounted from the 2013 survey.

A comparison between the 2007 and 2013 surveys indicates that the Local Centre has experienced a high degree of turnover in terms of retail uses interchanging between units. The overall quantity within categories of A1 retail and A3-5 food and drink has remained fairly constant with occupied A1 units accounting for over half the units in the centre. The number of specialist retailers has reduced to 16, however the opening of a perfume boutique (in place of a former camera/audio vision shop) has resulted in a high-end addition to York Street. The number of class A2 units has increased significantly from 15 to 19 since the 2007 survey. A restaurant has become vacant since 2007, although the total number of vacant units has reduced from 20 to 15. The centre now accommodates four health uses, compared to three in 2007, following the change of use from a hair salon to consulting rooms. There are no arts/culture uses or hotels within this Local Centre.

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



2.2 Range of A1 Uses

More than half of the class A1 retail units are independent shops and over a quarter are specialist shops. The independent shops sell a range of goods, such as interior furnishings, kitchen appliances and hardware, along with numerous hair/nail salons. The specialist shops also offer a diverse range, including homemade beds, mirrors and fishing equipment. A chemist, butchers and newsagents are included within the convenience shops category. There are no department, international or national retailers present within the Local Centre.

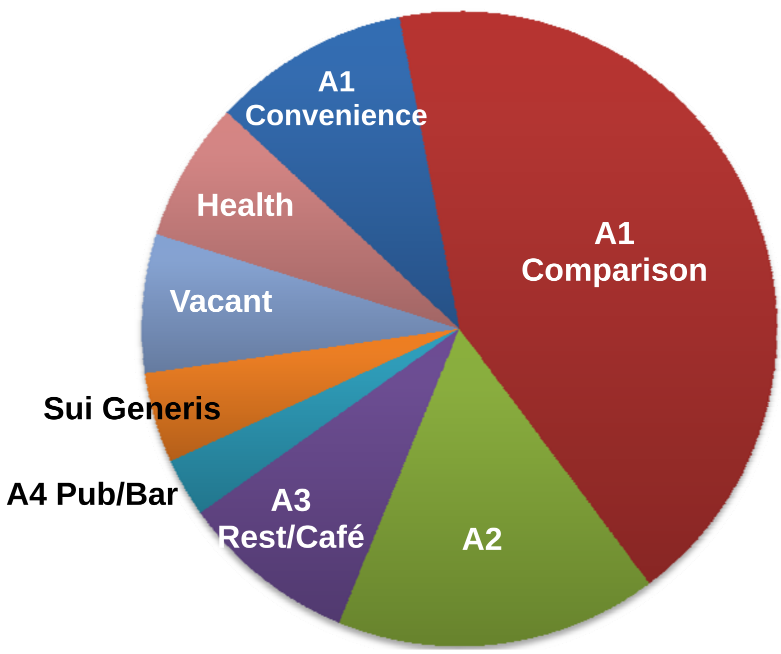
2.3 Total Retail Floor Space

Total retail floor space in the Crawford Street, Seymour Place and York Street Local Centre is broken down in Table 2. In total, the centre has 9,154 sqm of retail floor space, which is above the average of 3,188 sqm for the 39 Local Centres in the City, making it one of the largest local centres in Westminster. The centre has a high proportion of A1 comparison floor space and comparable proportions of A2 floor space. The remaining use classes are relatively minor in terms of their contribution to the total. The centre contains three pub/bars but this is still lower than the Local Centre average. The centre also contains a significantly lower than average proportion of convenience retail floor space, 10% compared to the Local Centre average of 15%.

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	918	10.03%	14.9%
A1 Comparison	3921	42.83%	35.2%
A2	1500	16.39%	11.2%
A3 Rest/Café/TA	822	8.98%	17.4%
A4 Pub/Bar	274	2.99%	5.1%
Sui Generis	421	4.60%	3.9%
Vacant	647	7.07%	8.6%
Health	652	7.12%	2.0%
Hotels	0	0.00%	0.5%
Art	0	0.00%	1.3%
Leisure	0	0.00%	0.1%
Total	**9,154**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



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

Table 2 shows that A1 uses make up over half of the total floorspace, with comparison dominating over convenience retail, while A2 and A3-A4 uses represent 16% and 9% of the total floorspace respectively. Units tend to be consistent in size, although there are several larger units on Crawford Street.

2.4 Proportion of Vacant Street Level Property

The unit vacancy rate in the Local Centre is higher than the average rate for Local Centres in the City, as shown in Table 3. The vacancy rate has steadily declined since 1997, however still remains high.

Table 3: Level of Vacant Street Level Property 2013

% Vacant Units				% Local Centre Average
1997	**2002**	**2007**	**2013**	**2013**
21.21% (23) units	**18.64% (22) units**	**16.95% (20) units**	**13.39% (15) units**	**8% (10 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 active in terms of pedestrian vibrancy when the Health Check Survey was carried out on a pleasant, weekday morning in February 2014.

3.2 Accessibility on foot and by public transport

The Crawford Street, Seymour Place and York Street Local Centre is located within a five minute walk of Marylebone mainline rail station and underground station. Although no bus routes pass directly along the Local Centre, bus services can be accessed within a three minute walk, with several routes passing along Marylebone Road to the north, and Baker Stret and Gloucester Place to the east. Baker Street London Underground station is also around five minute walk from 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 Table 4 below. The centre's overall score for attractions is 30.8%, meaning that the environmental quality and range of attractions is average. The rating is in line with the Local Centre average of 31%, and ranks 15th out of the 39 Local Centres in the City. The Local Centre is rated as good concerning the prominence of independent and specialist shops. The availability of food shopping, along with the quality of the retail environment, restaurants and employment/office space is rated as average. The remaining aspects of the Local Centre's attractions and environmental quality are rated as poor. Note that the only change related to the downgrading from good to poor of the availability of sports and leisure facilities. A former gym at 109 Crawford Street, which most likely occupied the basement level, does not have a frontage to Crawford Street.

4.2 Daytime Amenity

Crawford Street, Seymour Place and York Street comprises a pleasant Local Centre with a daytime amenity rating of 64.6%, compared with the average for all Local Centres of 68%, and is ranked =19th out of the 39 Local Centres in the City. The daytime amenity rating has remained unchanged since 2007. The Local Centre is relatively clean and tidy and it is perceived to be very safe. The overall 'feel good' factor of the Local Centre 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			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	**11/26**			**11/26**			**9/26**		
Percentage	**42.31%**			**42.31%**			**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	**30/46**			**32/46**			**32/46**		
Percentage	**65.2%**			**69.6%**			**69.6%**		

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

Crawford Street, Seymour Place and York Street is a large Local Centre that is has an above average amount of retail floor space. This is comprised of the A3/ A4 and A5. The physical environment, both the attractiveness rating and the daytime amenity rating are above the Local Centre average, illustrated by the ranking mentioned earlier.

5.2 Strengths, Weaknesses, Opportunities and Threats

SWOT analysis

6. Future capacity

6.1 Potential Capacity for Growth

Located approximately 200m to the east of the Local Centre, the redevelopment of 74-76 Chiltern Street and International House will result in an additional 115 new flats. This will undoubtedly increase the immediate customer base and prosperity of the Local 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**		9,154
		Total Convenience (A1)		918
		Total Comparison (A1)		3,921
		Total Service (A2)		1,500
		Total A3		541
		Total A4		274
		Total A5		281
		Total Sui Generis		421
		Total Vacant		647
	Retail Offer	**Total Number of Shop Units**	112	
		Total Number of A1 Units	58	
		a) Convenience shops	9	
		b) Department/principal stores	0	
		c) Prestige international shops	0	
		d) National comparison retailers	0	
		e) Specialist Independent shops	16	
		f) Independent shops	33	
		Total Comparison Multiples	49	
		Total Number of A2 Units	19	
		Total Number of A3 Units	8	
		Total Number of A4 Units	3	
		Total Number of A5 Units	1	
		Total Number of Sui Generis	4	
		Total Number of Vacant	15	
	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.)**	2	130
HOTELS			0	

In terms of its vitality, viability and general economic health, overall this centre is considered to remained unchanged since 2007, when it was rated as ‘neutral’. There has been a high turnover in terms of retail uses interchanging between units, however class A2 units have increased, while the vacancy rate has decreased. The relatively high daytime amenity rating has been maintained. There are many independent and specialist shops which are likely to draw on a catchment area beyond the immediate area.

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 Crawford Street, Seymour Place and York Street Local Centre

Part of the non-core shopping frontage on Crawford Street.

The daytime amenity rating is considered to be relatively high, as in this image of Seymour Place.

The attractive and well kept shop fronts and streetscape along York Street, at the north of the local centre.

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

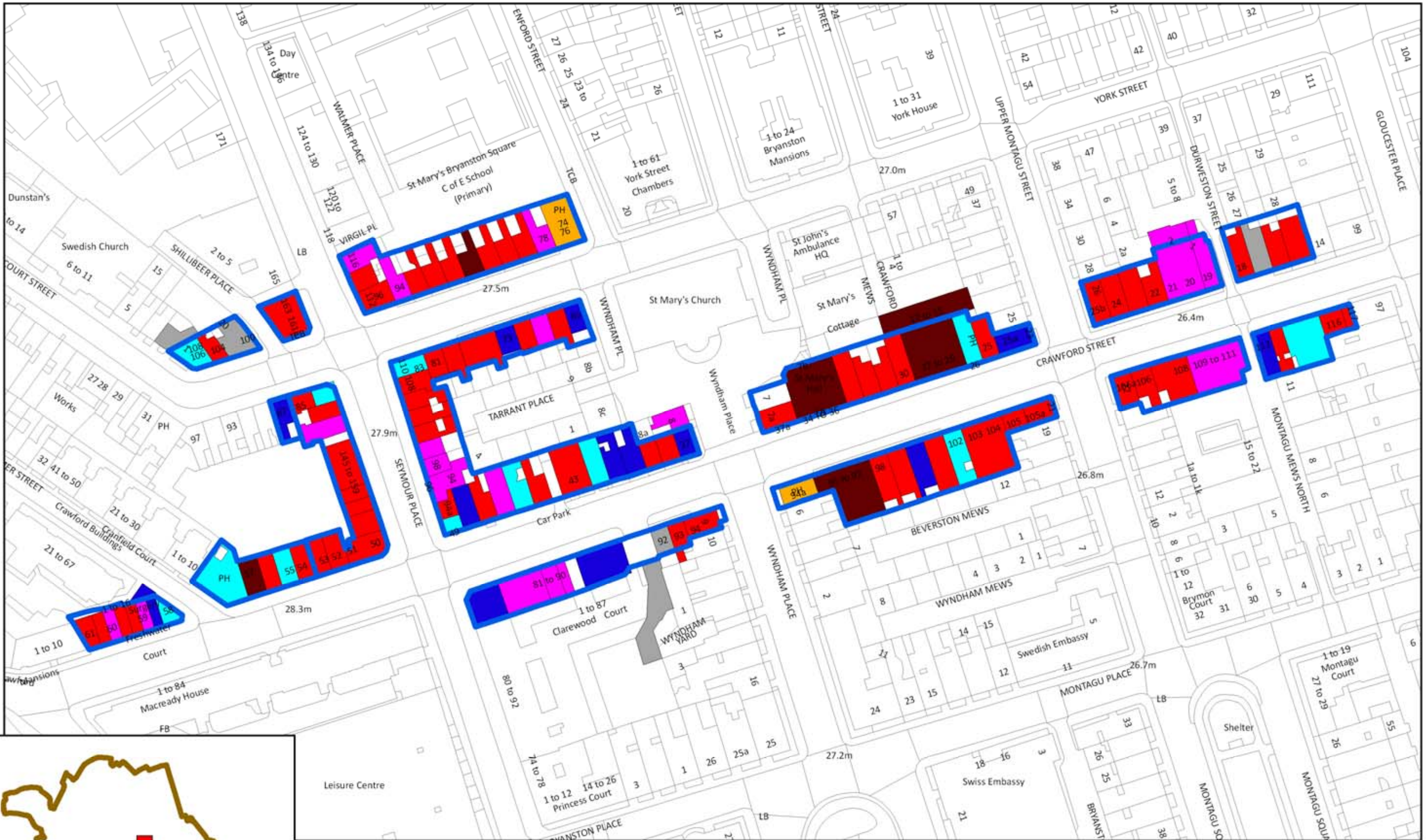
ADDRESS	FASCIA	DESCRIPTION	USE	SQM	A1 Conv.	A1 Spec.	A1 Ind	A2	A3 Res/Caf	A4 Pub/Bar	A3 Rest/TA	B1	SG	Vacant	Health	2007 Use
100-102YORK STREET	Vacant	Vacant	Vacant	98										1		Vacant
100ASEYMOUR PLACE	Res	Res														
100CRAWFORD STREET	TKD SOLICITORS	SOLICITORS	A2	94				1								A2
100SEYMOUR PLACE	Res	Res														
101CRAWFORD STREET	JANNAT	HAIR & BEAUTY	A1 Ind	101			1									A1 Ind
102CRAWFORD STREET	MONA'S CAFE	SANDWICH BAR	A1 Ind	94			1									A1 Ind
102SEYMOUR PLACE	ALEX PARAMITHAS & CO	ACCOUNTANT	A2	67				1								A1 Ind
103-104CRAWFORD STREET	MAJESTIC WINE WAREHOUSE	WINE SHOP	A1 Spec	252		1										A1 Conv
104SEYMOUR PLACE	NAZEMI PROPERTY CONSULTANTS	MAINTENANCE COMPANY	A2	62				1								A1 Ind
104YORK STREET	B & K BOUTIQUE	Salon	A1 Ind	47			1									A1 Ind
105ACRAWFORD STREET	MEACHER HIGGINS THOMAS	PHARMACY	A1 Conv	54	1											A1 Conv
105CRAWFORD STREET	VACANT	VACANT	Vacant	41										1		B1
106-108YORK STREET	ENTRE NOUS	RESTAURANT	A3 Rest/Café	66					1							A3 Rest/Café
106ACRAWFORD STREET	PHIL BARKER LTD	MUSICAL INSTRUMENTS	A1 Spec	61		1										A1 Spec
106CRAWFORD STREET	WIN HEMMINK	CLOTHING	A1 Spec	77		1										A1 Spec
106SEYMOUR PLACE	CITY MINI MARKET	SUPERMARKET	A1 Conv	63	1											A1 Conv
107CRAWFORD STREET *	MCGLASHANS INTERIORS	INTERIOR FUNISHING	A1 Ind	143			1									Vacant
108CRAWFORD STREET *	MCGLASHANS INTERIORS	INTERIOR FUNISHING	A1 Ind	0												Vacant
108SEYMOUR PLACE	VACANT	VACANT	Vacant	55										1		A3 Rest/Café
109CRAWFORD STREET	TOTALLY FIT	GYM	D2													D2
110-111 CRAWFORD STREET	PRESTMAN GOODE	OFFICE	B1	202								1				B1
110SEYMOUR PLACE	EDDIES FOOD BAR	SNACK BAR	A3 Rest/Café	51					1							A3 Rest/Café
112CRAWFORD STREET	SENATOR ESTATES	ESTATE AGENTS	A2	68				1								A2
112SEYMOUR PLACE	VACANT (UNDER CONSTRUCTION)	Vacant	Vacant	67										1		Vacant
113CRAWFORD STREET	DIGIMAX	GRAPHIC DESIGN AGENCY	A2	57				1								Vacant
114CRAWFORD STREET *	MONKEY AND ME	RESTAURANT	A3 Rest/Café	160					1							A3 Rest/Café
114SEYMOUR PLACE	SHANNA SHEEL	RESTAURANT	A3 Rest/Café	64					1							A3 Rest/Café
115CRAWFORD STREET *	MONKEY AND ME	RESTAURANT		0												A3 Rest/Café

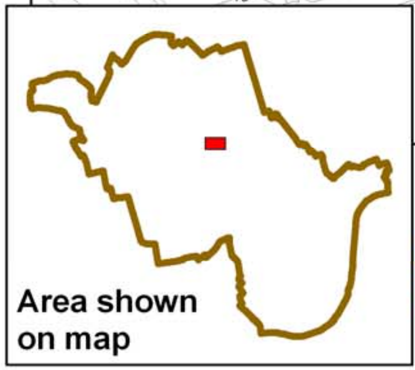
116CRAWFORD STREET	CRAWFORD FOOD, WINE & NEWS	CONVENIENCE STORE	A1 Conv	49	1											B1
116SEYMOUR PLACE	LONDON CENTRAL PORTFOLIO LTD	OFFICE	B1	63								1				B1
117CRAWFORD STREET	TONY'S BARBERS	HAIRDRESSERS	A1 Ind	20			1									A1 Ind
145SEYMOUR PLACE	SEYMOUR NEWS	NEWSAGENT	A1 Conv	337	1											A1 Conv
147SEYMOUR PLACE	CASA SPA	HEALTH AND BEAUTY	A1 Ind	36			1									A1 Ind
149SEYMOUR PLACE	SPACE CUCINA	KITCHEN APPLICANCES	A1 Ind	36			1									Vacant
14CRAWFORD STREET		VACANT	Vacant	0										1		Vacant
151-153SEYMOUR PLACE	REDMOUNT DIY	DIY SHOP	A1 Ind	123			1									A1 Ind
155ASEYMOUR PLACE	REDMOUNT	CERAMIC TILE SHOP	A1 Ind	76			1									A1 Ind
155SEYMOUR PLACE		ENTRANCE														
157SEYMOUR PLACE	SEYMOUR CLEANERS / SEYMOUR INTERIORS	DRY CLEANERS / CURTAIN SHOP	A1 Ind	44			1									A1 Ind
159SEYMOUR PLACE	CAFE BOLERO	CAFE	A3 Rest/Café	38					1							A1 Ind
15CRAWFORD STREET	CHARLES BURNAND	BOUTIQUE SHOP	A1 Ind	112			1									A2
161ASEYMOUR PLACE *	MIRROR MAN INTERIORS	MIRROR SHOP	A1 Spec	125		1										Vacant
163SEYMOUR PLACE *	MIRROR MAN INTERIORS	MIRROR SHOP		0												Vacant
16CRAWFORD STREET	CUBE GALLERY	ART GALLERY (RETAIL)	A1 Spec	86		1										A1 Spec
17CRAWFORD STREET	ALLIED SELF DRIVE	CAR HIRE	SG	87									1			SG
18CRAWFORD STREET	VACANT	VACANT	Vacant	89										1		A1 Spec
19-21CRAWFORD STREET	UPS / MAILBOXES / FEDEX	COURIER SERVICE	A1 Spec	263		1										A1 Spec
22CRAWFORD STREET	MASTERCLEAN	DRYCLEANER	A1 Ind	80			1									A1 Ind
23CRAWFORD STREET	VACANT	VACANT	Vacant	78										1		A1 Ind
24ACRAWFORD STREET *	HARDWARE DIY TOOL SHOP	HARDWARE	A1 Ind	0												A1 Ind
24CRAWFORD STREET *	HARDWARE DIY TOOL SHOP	HARDWARE	A1 Ind	145			1									A1 Ind
25ACRAWFORD STREET	RF / MAX	ESTATE AGENTS	A2	71				1								A2
25BCRAWFORD STREET	TATIANA'S GARDEN	FLORIST	A1 Ind	72			1									A1 Ind
25CRAWFORD STREET	GREENFIELDS	BUTCHERS/GROCERS	A1 Conv	67	1											A1 Conv
26CRAWFORD STREET	TWO POINT	PUBLIC HOUSE	A3 Pub/Bar	75						1						A3 Pub/Bar
27-29CRAWFORD STREET	ST JOHNS AMBULANCE TRAINING CENTRE	FIRST AID TRAINING CENTRE	D1	250											1	D1
30CRAWFORD STREET	KIERAN GROUP	HAIRDRESSERS	A1 Ind	81			1									A1 Ind

31CRAWFORD STREET	YAZCO CARPETS	CARPET SHOP	A1 Spec	85		1										A1 Spec
32CRAWFORD STREET	TOTALLY SWEDISH	DELICATESSEN	A1 Conv	85	1											A1 Conv
33CRAWFORD STREET	MARBLE ARCH	BATHROOMS AND TILES	A1 Ind	84			1									A1 Ind
34-36CRAWFORD STREET	ST MARY'S HALL	SCHOOL		240												
37ACRAWFORD STREET	CRAWFORD STREET OPTICIANS	OPTICIANS	A1 Ind	68			1									Vacant
37CRAWFORD STREET	MOSS BEACHLEY & MULLER	SOLICITORS	A2	48				1								A2
38CRAWFORD STREET	Crystal Palace	HAIRDRESSERS	A1 Ind	47			1									A1 Ind
39CRAWFORD STREET	HAMMAM	NAIL SALON	A1 Ind	43			1									A1 Spec
40CRAWFORD STREET	MARBLE ARCH PROPERTIES	ESTATE MANAGEMENT	A2	85				1								A2
41CRAWFORD STREET	BLANK	ART GALLERY (RETAIL)	A1 Spec	78		1										A1 Ind
42CRAWFORD STREET	THAI RICE	RESTAURANT	A3 Rest/Café	79					1							A3 Rest/Café
43ACRAWFORD STREET	KARIZMA	RESTAURANT (ENTRANCE TO BASEMENT)	A3 Rest/Café						1							A3 Rest/Café
43CRAWFORD STREET	FOREMOST LEISURE HOLDINGS LTD	OFFICE	B1	136								1				Vacant
44CRAWFORD STREET	BLANK	OFFICE	B1	82								1				A2
45CRAWFORD STREET	HELLENIC RESTAURANT	RESTAURANT	A3 Rest/Café	83					1							A3 Rest/Café
46CRAWFORD STREET	BLANK	ESTATE AGENTS	A2	81				1								B1
47CRAWFORD STREET	CENTRAL PLUMBING HEATING BATHROOM	HARDWARE	A1 Ind	73			1									A1 Ind
48CRAWFORD STREET	CUMBERLAND	EMPLOYMENT AGENCY	A2	66				1								Vacant
49CRAWFORD STREET	CAFFEE L'ANGELO BIANCO	SANDWICH BAR	A1 Ind	61			1									A1 Ind
50-51CRAWFORD STREET	MULTIVISION	AUDIOVISUAL AND SATELLITE TV SUBSCRIPTIONS	A1 Ind	85			1									A1 Spec
52CRAWFORD STREET	ALMADINA SUPERMARKET	BUTCHERS	A1 Conv	114	1											A1 Conv
53CRAWFORD STREET	SUPER CLEAN	DRY CLEANERS AND LAUNDERETTE	A1 Ind	57			1									A1 Ind
54CRAWFORD STREET	GORNTYP	HEALTH & BEAUTY	A2	116				1								A2
55CRAWFORD STREET	AL MADINA EXPRESS	CAFÉ (A1)	A1 Ind	57			1									A1 Ind
56CRAWFORD STREET	SEYMOUR PHARMACY	CHEMIST	A1 Conv	119	1											A1 Conv
57CRAWFORD STREET	CRESCENT DENTAL CLINIC	DENTIST	D1	66											1	D1
58ACRAWFORD STREET	INTERCAPITAL	ESTATE AGENTS	A2	47				1								A2
58BCRAWFORD STREET		OFFICES	B1	33								1				B1
58CRAWFORD STREET	GULF DELIGHTS	CAFÉ/TAKEAWAY	A3 Rest/TA	281							1					A3 Rest/TA
59BCRAWFORD STREET	SASHA	NAIL SALON	A1 Ind	34			1									A1 Ind
59CRAWFORD STREET		NEWSAGENTS	A1 Conv	30	1											A1 Conv
60ACRAWFORD STREET	VACANT	VACANT	Vacant	32										1		A1 Ind
60CRAWFORD STREET	VACANT	VACANT	Vacant	30										1		A1 Ind
61CRAWFORD STREET	GMG BEAUTY SALON	HAIR AND NAIL SALON	A1 Ind	47			1									Vacant

65YORK STREET	LONDON EXECUTIVE	ESTATE AGENTS	A2	66				1								A2
67YORK STREET	O'REILLEY'S FISHING	FISHING EQUIPMENT	A1 Spec	55		1										A1 Spec
69YORK STREET	THE COMMERCE PARTNERSHIP	VACANT	Vacant	50										1		A1 Ind
6WYNDHAM PLACE		OFFICE	B1	0								1				B1
71YORK STREET	LITTLE SHOE SHOP	FOOTWEAR	A1 Spec	50		1										A1 Spec
73YORK STREET	IMPERIAL ESTATES	ESTATE AGENTS	A2	53				1								A2
74-76YORK STREET	TEMPERANCE	PUBLIC HOUSE	A3 Pub/Bar	123						1						A3 Pub/Bar
75YORK STREET *	SCOTT HOWARD	CHAIRS	A1 Spec	107		1										A1 Spec
77YORK STREET *	SCOTT HOWARD	CHAIRS		0												Vacant
78YORK STREET	BLANK	OFFICE	B1	83								1				B1
79YORK STREET	LA BELLE OF LONDON	CLOTHES SHIOP	A1 Ind	54			1									A1 Spec
7WYNDHAM PLACE		VACANT	Vacant	67										1		Vacant
80YORK STREET	EXECUTIVE CAMERAS	CAMERA HIRE	A1 Spec													A1 Spec
80YORK STREET	SHAY & BLUE	FRAGRANCE SHOP	A1 Spec	79		1										A1 Spec
81-82CRAWFORD STREET	YORK ESTATES	ESTATE AGENTS	A2	110				1								A2
81YORK STREET	STOCKWELL CARPETS	CARPET SHOP	A1 Spec	51		1										A1 Spec
82YORK STREET	NAIL STATION	NAIL SALON	A1 Ind	78			1									A1 Spec
83-87CRAWFORD STREET	DESIRABLE	OFFICES	B1	137								1				B1
83YORK STREET	Res	Res	Res	51												Res
84YORK STREET	RL FLOWER DESIGN	FLORIST	A1 Spec	78		1										A1 Spec
85YORK STREET	B INSTITUTE	ART	SG	207									1			SG
86YORK STREET	LONDON VETERINARY CLINIC	VETS	SG	85									1			SG
87YORK STREET	CASTLE REAGH	ESTATE AGENTS	A2	75				1								A2
88-90CRAWFORD STREET	CAMERON BAUM	ACCOUNTANT	A2	147				1								A2
88YORK STREET	THE CRUISE PEOPLE LTD	TRAVEL AGENTS	A1 Ind	79			1									A1 Ind
89YORK STREET	Res	VACANT	Vacant											1		Vacant
90YORK STREET	EMPORIUM TREATMENT CLINIC	HAIRDRESSERS	A1 Ind	82			1									A1 Ind
91CRAWFORD STREET		ENTRANCE														
91YORK STREET	res	VACANT	Vacant											1		Vacant
92CRAWFORD STREET	CENTRAL WASH	LAUNDERETTE	SG	42									1			SG
92YORK STREET	CELLO	HAIRDRESSERS	A1 Ind	76			1									A1 Ind
93CRAWFORD STREET	CRAWFORD TAILORS	TAILORS	A1 Spec	40		1										A1 Spec
93YORK STREET	res	VACANT	Vacant											1		Vacant
94-96SEYMOUR PLACE	BLANK	ESTATE AGENTS	A2	111				1								B1
94ACRAWFORD STREET	DUKE OF WELLINGTON	PUBLIC HOUSE	A3 Pub/Bar	76						1						A3 Pub/Bar
94ASEYMOUR PLACE	REGENT DRY CLEANERS	DRY CLEANERS	A1 Ind	34			1									A1 Ind
94CRAWFORD STREET	MJM HAIR & BEAUTY SALON	HAIRDRESSERS	A1 Ind	69			1									A1 Ind

94YORK STREET	SMART	UNIVERSITY PLACEMENT	A2	76				1								A1 Ind
95-97CRAWFORD STREET	CRAWFORD STREET SURGERY	HEALTH CENTRE	Health	243											1	Health
98CRAWFORD STREET	CHARTERHOUSE CLINIC	CONSULTING ROOMS	Health	93											1	A1 Ind
98SEYMOUR PLACE	BLANK	VACANT	Vacant	40										1		A2
99CRAWFORD STREET	MARSHALL & STEWART	HANDMADE BEDS	A1 Spec	96		1										A1 Spec





Source: GOAD Retail Survey 2013 Local Centre: Crawford Street, Seymour Place & York Street

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

0 25 50
Metres
N

Area shown on map

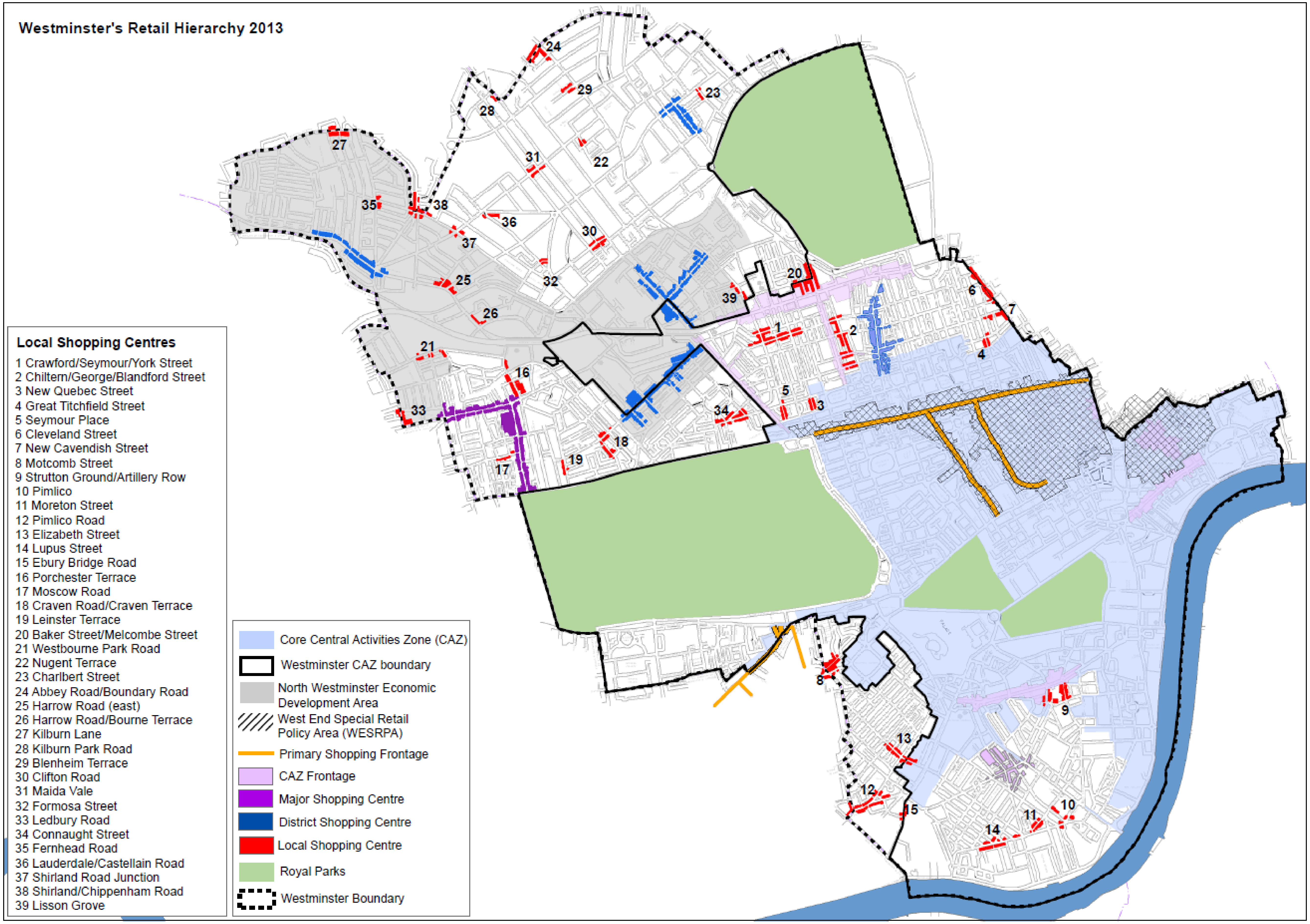
Source: GOAD Retail Survey 2013

Local Centre: Crawford Street, Seymour Place & York Street

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

0 25 50
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
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City of Westminster

Shopping Centre Health Check Survey 2014

Local Centre 18: Great Titchfield 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 **18: Great Titchfield Street**

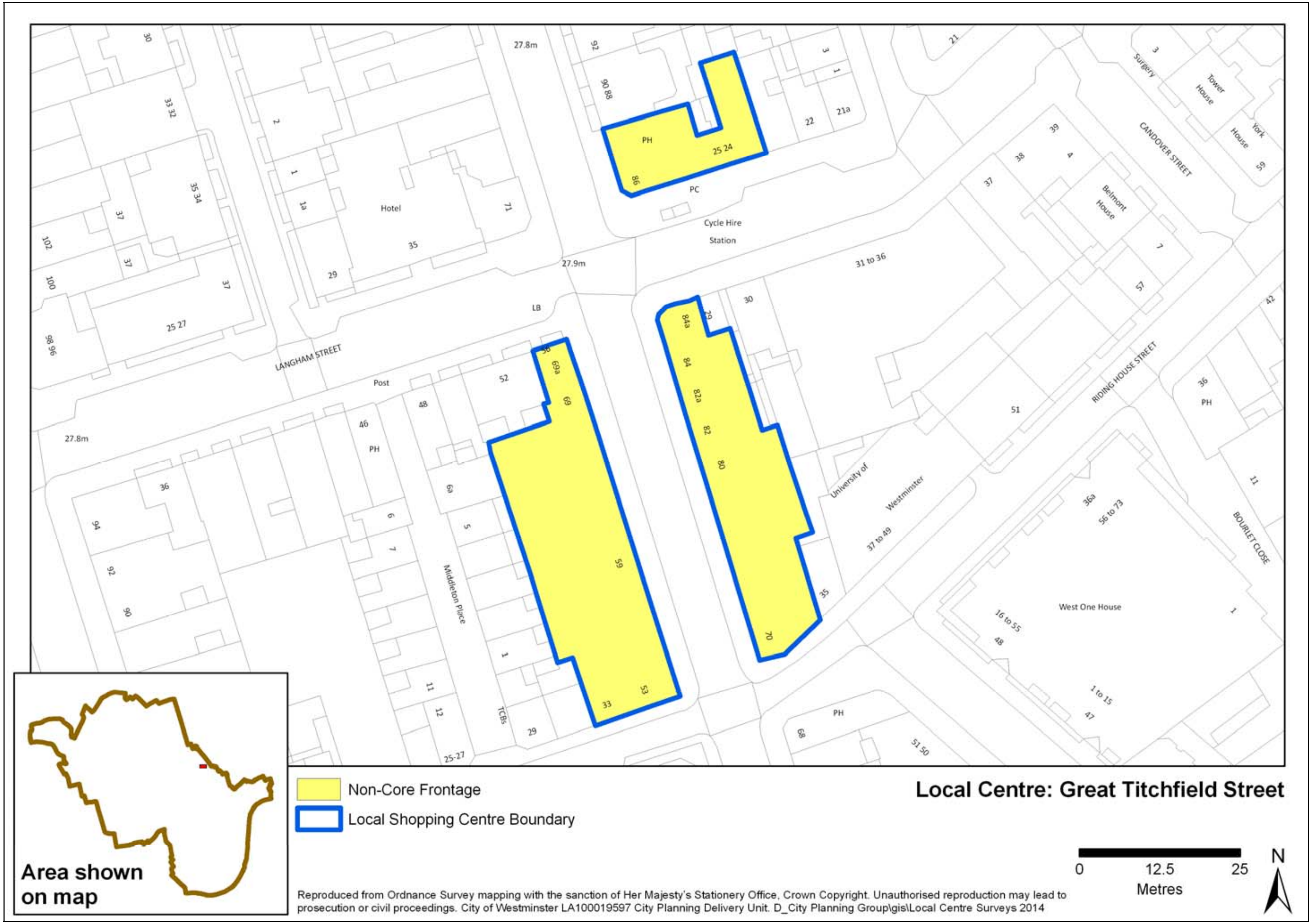
1. Introduction

1.1 Location

Great Titchfield Street is a relatively small local centre located in the Eastern part of Marylebone, one of the wider parts of the Central Activities Zone in Westminster. The centre is a short walk from Oxford Street, which is located to the south of the centre, and the main BBC building on Portland Place to the west. The area is a mix of residential and commercial uses including offices and embassies/diplomatic uses, and several buildings of the University of Westminster.

The local centre encompasses units on Foley Street as well as the main focus of Great Titchfield Street. The centre's catchment area is limited by its proximity to Oxford Street, Regent Street, Charlotte Street, and by several other local centres in the area including Cleveland Street and New Cavendish Street.

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		N/A	9	12	11
	Department/principle stores	*N/A*	*0*	*0*	*0*
	International retailers	*N/A*	*0*	*0*	*0*
	National retailers	*N/A*	*1*	*1*	*1*
	Specialist Independent	*N/A*	*0*	*0*	*0*
	Independent	*N/A*	*5*	*8*	*7*
	Convenience	*N/A*	*3*	*3*	*3*
Class A2	Financial & Professional	N/A	2	2	5
Food & Drink		N/A	12	11	10
Class A3	*Restaurant/Café*	*N/A*	*9*	*8*	*7*
Class A4	*Pubs/Bars*	*N/A*	*1*	*1*	*1*
Class A5	*Takeaway*	*N/A*	*2*	*2*	*2*
	Takeaway/Restaurant	*N/A*			*0*
Sui Generis		N/A	2	3	2
Vacant Units		N/A	4	3	2
Arts/Culture		N/A	2	0	0
Health uses		N/A	0	0	0
Hotels		N/A	0	0	0
TOTAL		**N/A**	**31**	**31**	**30**

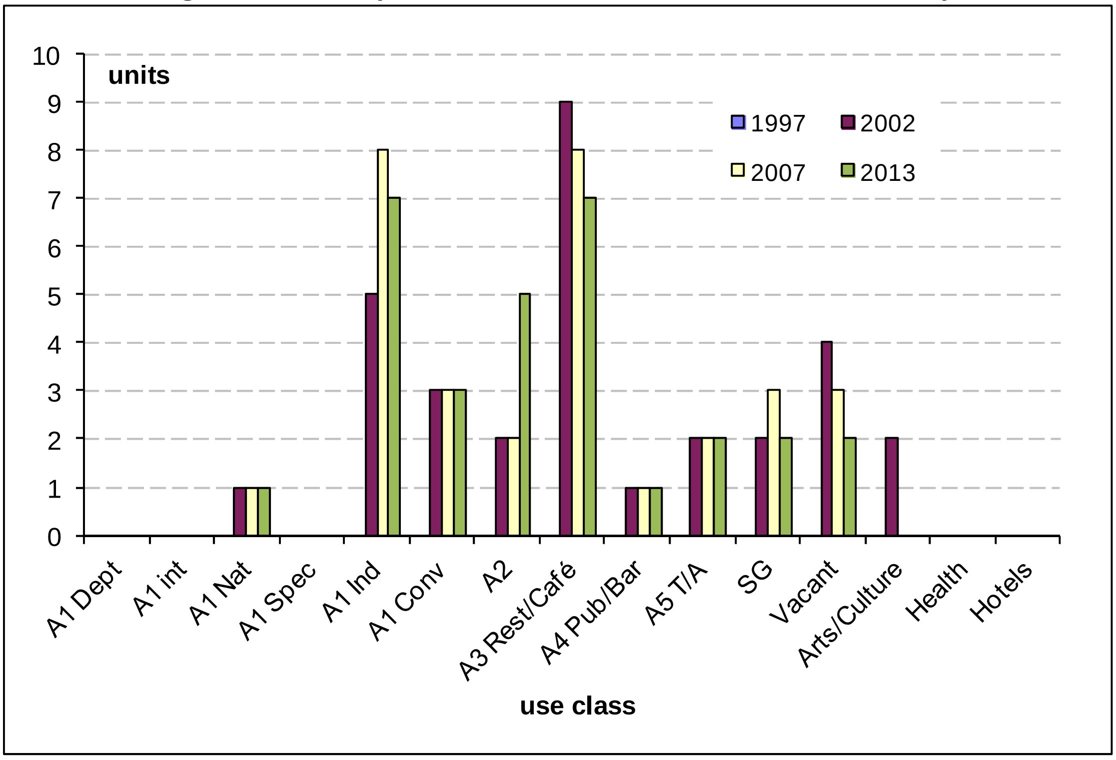
Source: WCC Land Use Survey December 2013

In total there are 30 units, which is a decrease of one unit from the previous survey in 2007.

The number of A1 retail uses have decreased by one unit since 2007. The number of Class A2 uses has increased by three and the number of Class A3 uses has decreased by one unit. The A1 uses structure has changed slightly with the loss of one independent retailer. Overall the main uses are A1 and food and drink uses, which together account for two thirds of the units in the centre.

The centre has no hotels, arts or health uses. The vacant units have decreased by one since 2007 and represent a small proportion of units in the centre.

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



2.2 Range of A1 Uses

Great Titchfield Street has no department stores, international or specialist retailers, but does contain one national chain, which is a national printer. The centre has 11 Class A1 retail units including 7 independent retailers, 3 convenience stores, and one national retailer as mentioned. The independent retailers include clothes shops, and several hairdressers. The high proportion of comparison shops and no multiple retailers suggests that Great Titchfield Street serves local residents with a mix of convenience and comparison shopping facilities.

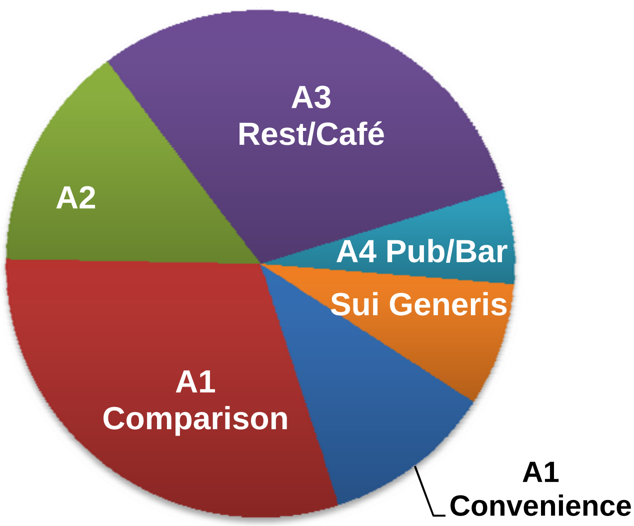
2.3 Total Retail Floor space

Total retail floor space in Great Titchfield Street is broken down below. In total, the centre has 2,378 sqm of retail floor space, which is below the average of 3,188 sqm for the 39 Local Centres in the City. A1 Independent floor space accounts for over a quarter of the grand total and there are comparable proportions of A1 convenience, A3, A4 and SG floor space. It also has a popular A4 pub/bar and 2 A5 takeaways, with floor spaces around the Local Centre average. The centre has a slightly lower than average proportion of A1 comparison floor space, 29% 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	249	10.47%	14.9%
A1 Comparison	695	29.22%	35.2%
A2	331	13.92%	11.2%
A3 Rest/Café/TA	700.9	29.48%	17.4%
A4 Pub/Bar	138	5.80%	5.1%
Sui Generis	181	7.61%	3.9%
Vacant	83	3.49%	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	**2,378**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



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

Great Titchfield Street is a Local Centre with a selection of local services and food shops. There are no banks or building societies, but there is a parcel delivery shop and two photographers/ consultants. 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 in Great Titchfield Street is under the average rate for Local Centres in the City, as shown in Table 3. The vacancy rate has decreased since 2007. The two 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	12.90% (4) units	9.68% (3) units	6.67% (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 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 Oxford Circus (Central, Bakerloo, Victoria lines), which is roughly 5-10 minutes walk. Although no bus routes run directly through the centre itself, many serve the surrounding area, such as routes 88, 453 and C2 which serve the neighbouring Portland Place/Regent Street, and 15 routes serve nearby Oxford Street, which cover many parts 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 4 below. The centre's overall score for attractions is 50%, meaning that this is one of the most attractive of Westminster's local centres. The rating is much higher than the Local Centre average of 31%, and means the centre is ranked =9th out of the 39 Local Centres in the City. The centre has an average provision of multiple retailers but poor cultural/community events, sport and leisure facilities and bank/building society provision. The centre's main strength is its good provision of food shops, and independent shops.

4.2 Daytime Amenity

Great Titchfield Street is an attractive Local Centre, with a day time amenity rating of 73.9% compared with the average for all Local Centres of 68%, and is ranked =13th out of the 39 Local Centres in the City. The centre's rating is good in terms of the quality of buildings, and for ten 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 presence of CCTV / police patrols and an identifying feature. There is however a subterranean street toilet that has been converted into a coffee shop which if included into the local centre boundary would raise the amenity level.

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	9/26			12/26			11/26		
Percentage	34.60%			46.10%			42.31%		

Source: City of Westminster site survey December 2013

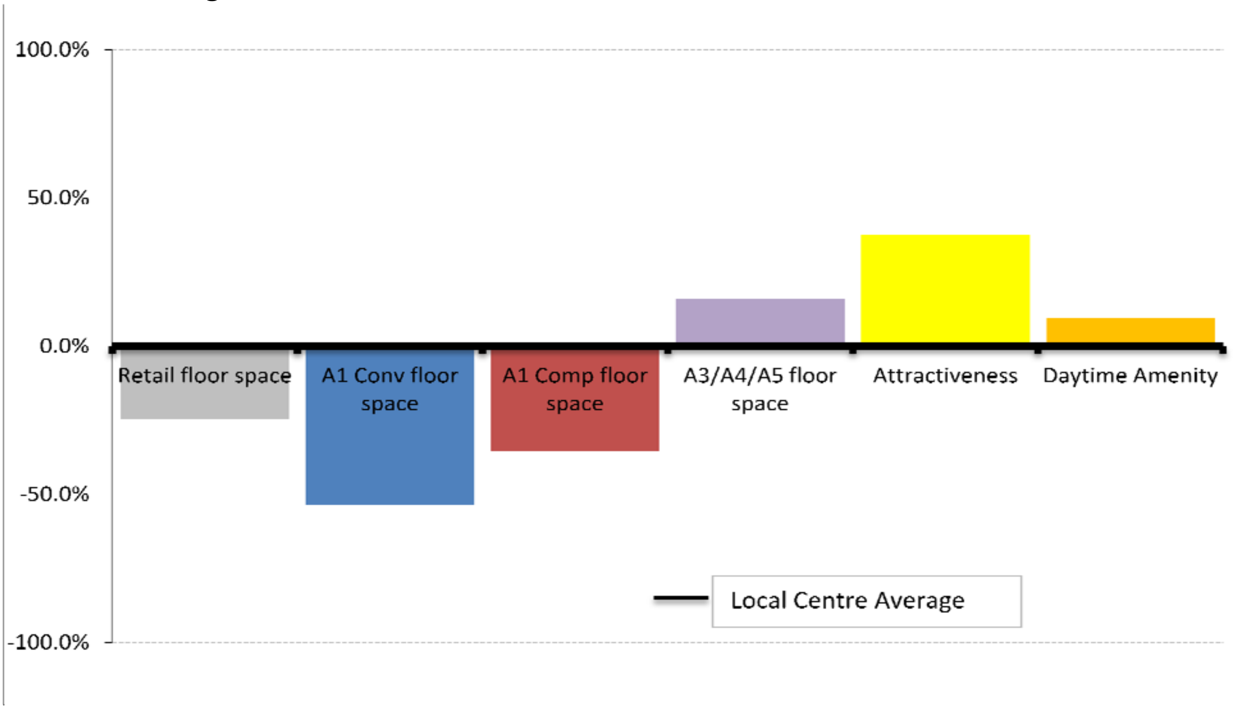
Table 5: Day Time Amenity within the Local Centre 2013

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	36/46			38/46			34/46		
Percentage	78.3%			82.6%			73.9%		

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2013

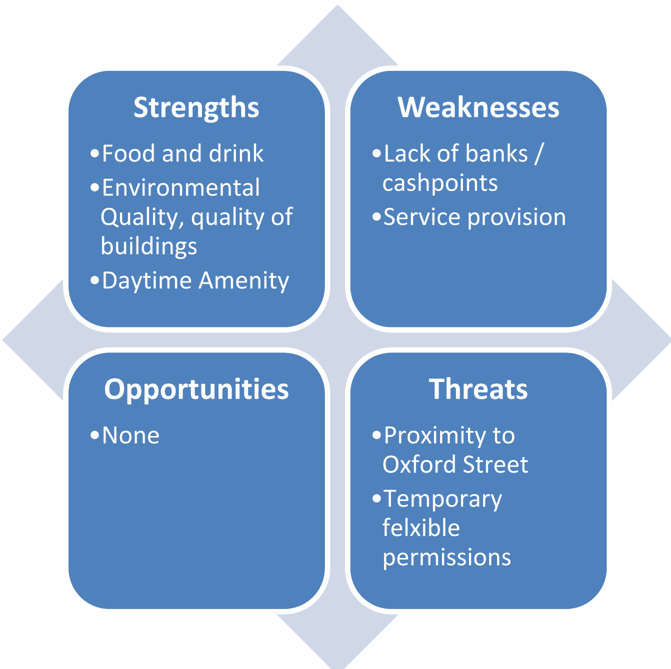
Figure 4: Deviation of centre from the mean for Local Centres 2013



Great Titchfield Street is a reasonably small Local Centre with a total retail floor space that is roughly half of the overall average for the 39 local centres. This is also true for A1 convenience and comparison floor space figures all of which are lower than average due to the size of the centre. In terms of the rating of the physical environment, the centre has an attractiveness rating that is considerably higher than the local centre average, as well as a positive daytime amenity rating, both of which illustrate the attractiveness of the shopping environment.

5.2 Strengths, Weaknesses, Opportunities and Threats

SWOT analysis



6. Future capacity

6.1 Potential Capacity for Growth

Between 2007 and 2013, there were five permitted planning applications in and in close proximity to the local centre boundary, involving two A-class uses above the ground floor changing to D1 (Dentists) an extension increasing the A1 space. A change of use application for a retail art gallery and a former public toilet conversion into a coffee shop.

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**		**2,378**
		Total Convenience (A1)		**249**
		Total Comparison (A1)		**695**
		Total Service (A2)		**331**
		Total A3		**502**
		Total A4		**138**
		Total A5		**199**
		Toral Arts		**181**
		Total Vacant		**83**
	Retail Offer	**Total Number of Shop Units**	**30**	
		Total Number of A1 Units	**11**	
		a) Convenience shops	**3**	
		b) Department/principal stores	**0**	
		c) Prestige international shops	**0**	
		d) National comparison retailers	**1**	
		e) Specialist Independent shops	**0**	
		f) Independent shops	**7**	
		Total Comparison Multiples	**8**	
		Total Number of A2 Units	**5**	
		Total Number of A3 Units	**7**	
		Total Number of A4 Units	**1**	
		Total Number of A5 Units	**2**	
		Total Number of Sui Generis	**2**	
		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’, as it was when last surveyed in 2007.

Appendices

Views of Great Titchfield Street local centre

The east side of Great Titchfield Street, showing food and drink uses in the centre.

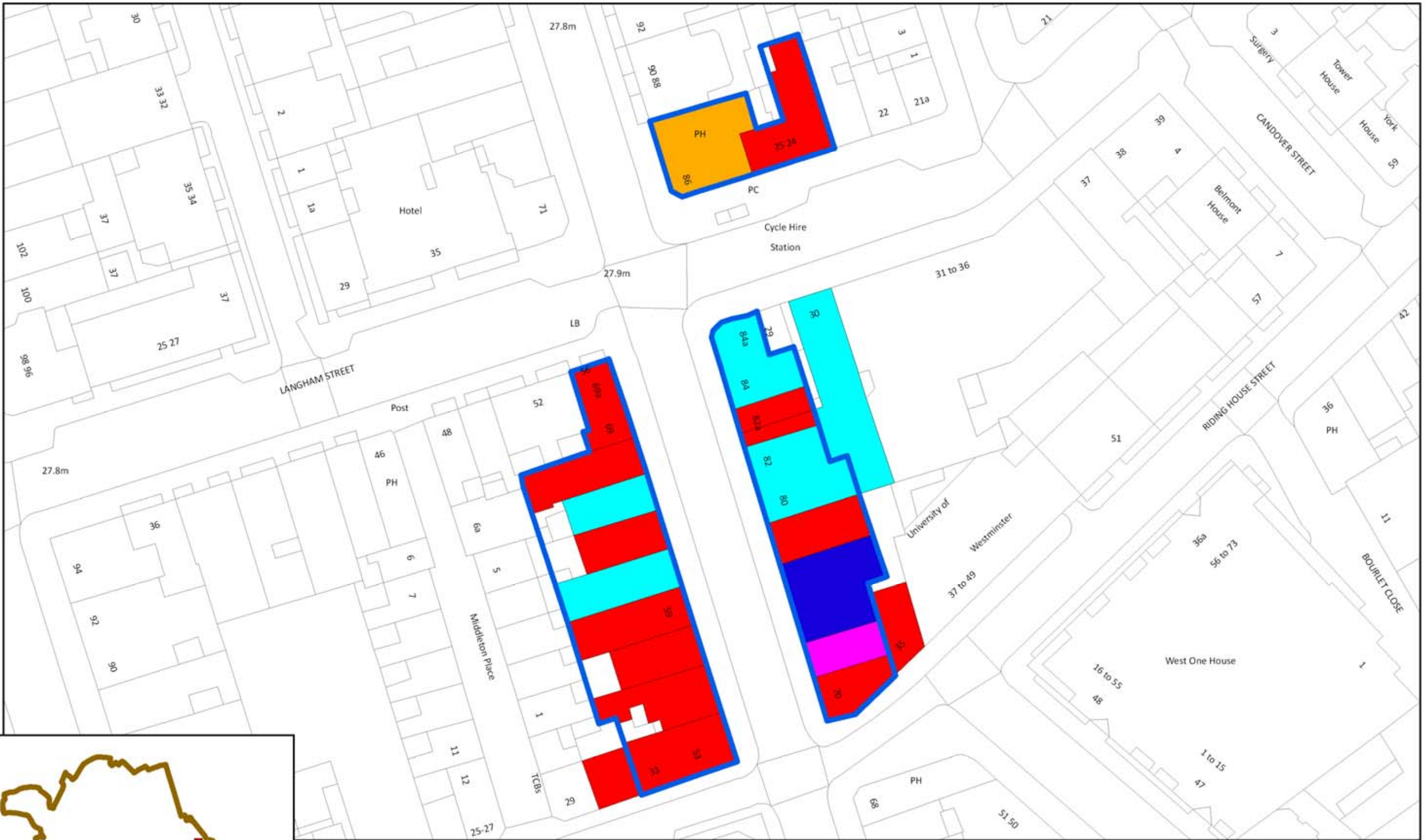
The northern part of the local centre with a reasonably attractive public house, which however contributes to street litter.

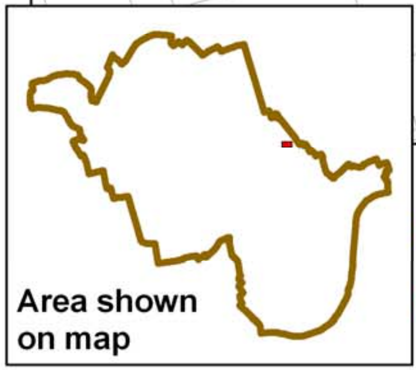
The west side of Great Titchfield Street, illustrating the narrow pavements in the centre, along with refuse left on the street and other clutter.

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

					A1	A1	A1	A2	A3	A4	A3	B1	S G	Vacant	
ADDRESS	**FASCIA**	**DESCRIPTION**	**USE**	**SQM**	**Conv.**	**Nat.**	**Ind**		**Res/Caf**	**Pub/Bar**	**Takeaw.**				**2007 Use**
53GREAT TITCHFIELD STREET	Hunza	LADIESWEAR (WHOLESALE)	SG	102									1		SG
55GREAT TITCHFIELD STREET	KALL KWIK	PRINTING	A1 Nat	108		1									A1 Nat
57GREAT TITCHFIELD STREET	Kube	Hairdresser	A1 Ind	93			1								A1 Ind
59GREAT TITCHFIELD STREET	Dewar Studios	Photographer / Consultant	A1 Spec.	92				1							Vacant
61GREAT TITCHFIELD STREET	Scandanavian Kitchen	Café/Deli	A1 Ind	91			1								A1 Ind
63GREAT TITCHFIELD STREET	Zack	Clothes Shop	A1 Ind	94			1								A1 Ind
65GREAT TITCHFIELD STREET	Shikara	RESTAURANT	A3 Rest/Café	83					1						A3 Rest/Café
67GREAT TITCHFIELD STREET	Krypton	Hairdresser	A1 Ind	88			1								A1 Ind
69GREAT TITCHFIELD STREET	Crispins	SUPERMARKET	A1 Conv	67	1										A1 Conv
70GREAT TITCHFIELD STREET	SHIV	CHEMIST	A1 Conv	58	1										A1 Conv
71GREAT TITCHFIELD STREET	Bellareia	Restaurant	A3 Rest/Café	79					1						A3 Rest/Café
72GREAT TITCHFIELD STREET	Mailboxes etc.	Postoffice	A2	54				1							A1 Ind
73GREAT TITCHFIELD STREET	Black Arts Company	Theatre company / rehursal space	B1	57								1			Vacant
74GREAT TITCHFIELD STREET	WISE BUDDHA CREATIVE	BROADCASTING	B1	57								1			B1
75GREAT TITCHFIELD STREET	Pure Space	Fashion Photographer	A2	90				1							A1 Ind
76GREAT TITCHFIELD STREET	WISE BUDDHA CREATIVE	BROADCASTING	B1	83								1			B1
77GREAT TITCHFIELD STREET	Shoe Gallery	Shoe Shop	A1 Spec.	128			1								D1
78GREAT TITCHFIELD STREET	ANN REEVES	CLOTHING (WHOLESALE)	SG	79									1		SG
80GREAT TITCHFIELD STREET	EFES	TAKEAWAY	A3 T/A	74							1				A3 T/A
82GREAT TITCHFIELD STREET	EFES	RESTAURANT	A3 Rest/Café	56					1						A3 Rest/Café
82AGREAT TITCHFIELD STREET	Nails Boutique	Boutique	A1 Ind	59			1								A1 Ind
84GREAT TITCHFIELD STREET	SERGIOS	RESTAURANT	A3 Rest/Café	101					1						A3 Rest/Café
86GREAT TITCHFIELD STREET	CROWN & SCEPTRE	PUBLIC HOUSE	A3 Pub/Bar	138						1					A3 Pub/Bar
21FOLEY STREET	Bonnie Gull	RESTAURANT	A3 Rest/Café	95.9					1						A3 Rest/Café
22FOLEY STREET	Vacant	Vacant	Vacant	43										1	A2
23FOLEY STREET	Thai Street	RESTAURANT	A3 Rest/Café	76					1						A3 Rest/Café
24-25FOLEY STREET	WEST ONE NEWS LTD	NEWSAGENTS	A1 Conv	124	1										A1 Conv
37FOLEY STREET	Domino's Pizza	Pizza Take Away	A3 T/A	125							1				A3 T/A
38FOLEY STREET	Hair +	Barbers	A1 Ind	33.8			1								A1 Ind
38aFOLEY STREET	LDG Estate Agents	Estate Agent	A2					1							Vacant

39FOLEY STREET	LDG Estate Agents	Estate Agent	A2	95				1							A2
1HANSON STREET	Ship's Gallery	Café	A3 Rest/Café	11					1						A3 Rest/Café
3HANSON STREET	Fancy a baby sitter	OFFICE	B1	40.6								1			B1
5HANSON STREET	Vacant	Vacant	Vacant	40										1	A3 Rest/Café
7HANSON STREET	Curb Media	OFFICE	B1	40								1			B1
4CANDOVER STREET	OFFICE	OFFICE	B1									1			B1
Out of Boundary					3	1	7	5	7	1	2	6	2	2	





Source: GOAD Retail Survey 2013

Local Centre: Great Titchfield Street

Local Shopping Centre Boundary

A1: Retail

A2: Financial & Professional

A3: Restaurant/Café

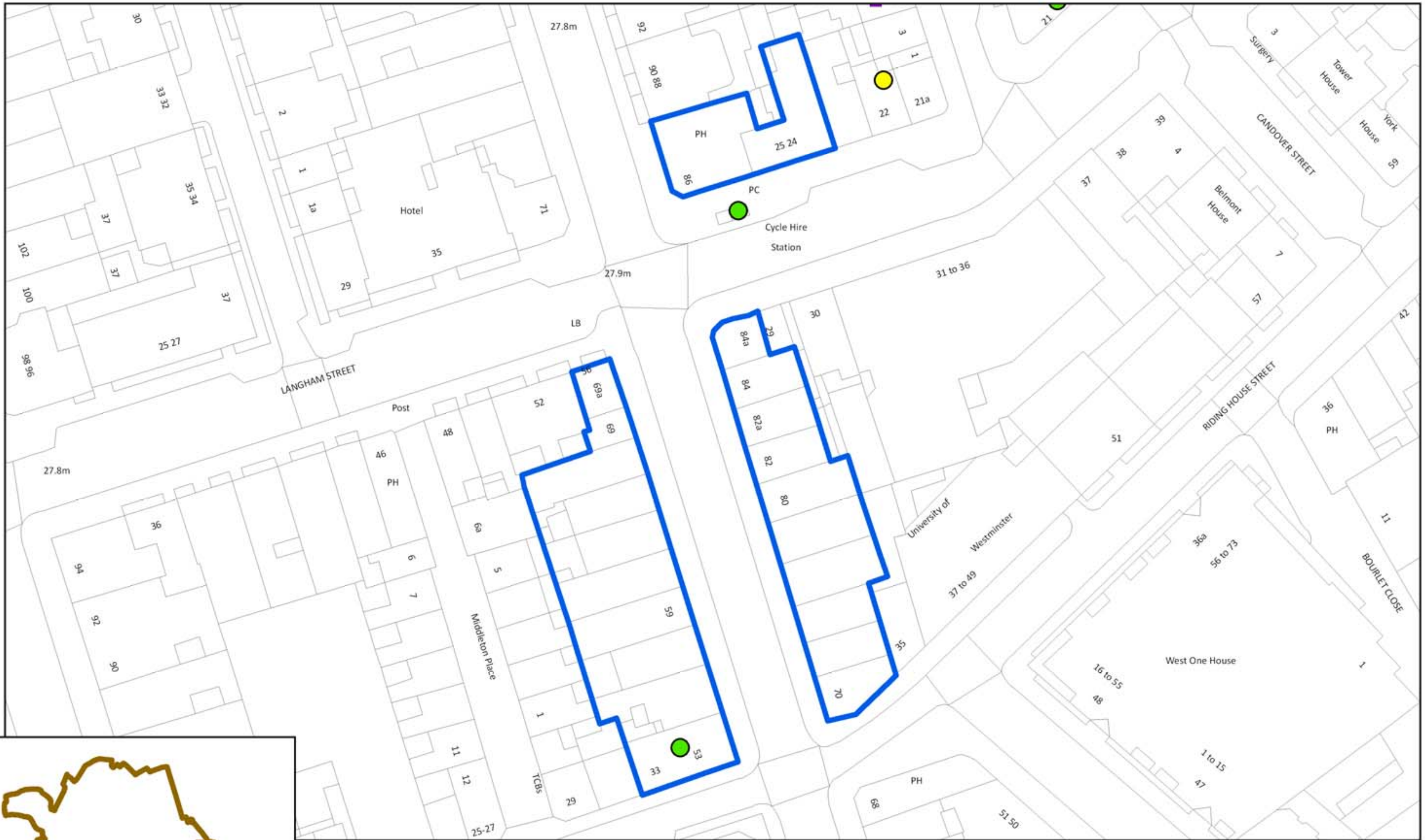
A4: Pub/Bar

B1: Office

0 10 20

Metres

N



Source: GOAD Retail Survey 2013

Local Centre: Great Titchfield Street

Completed 2007-2013

Vacant

Under Construction

Local Shopping Centre Boundary

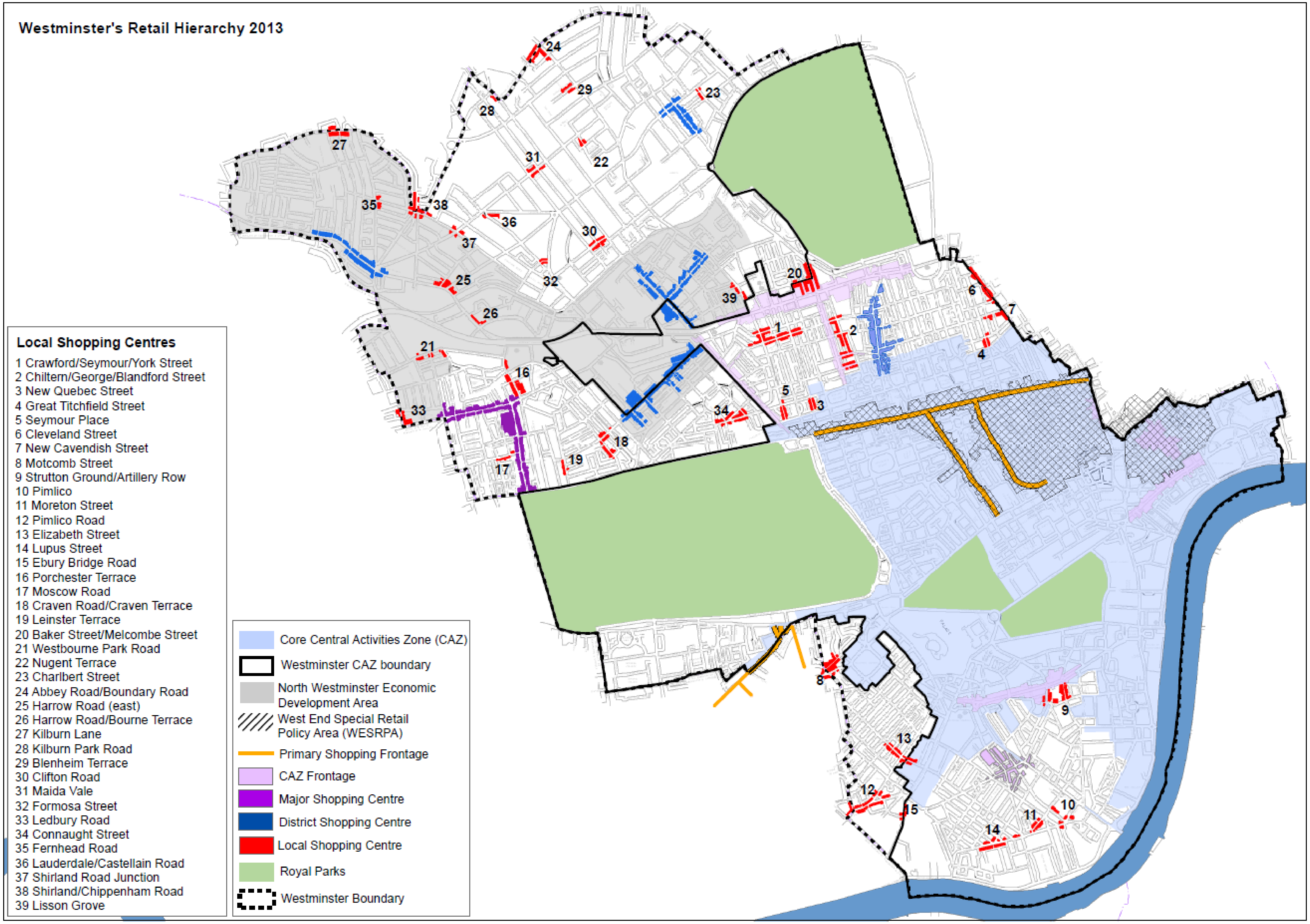
0 10 20

Metres

N

Area shown on map

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 19: New Cavendish 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 **19: New Cavendish Street**

1. Introduction

1.1 Location

New Cavendish Street is a medium sized local centre in the east of Westminster, on the boundary with the London Borough of Camden. The centre extends along New Cavendish Street and also partially down Cleveland Street. The centre is close to the University of Westminster, the London Telecom tower and Tottenham Court Road. The catchment area of the centre is limited by its proximity to Charlotte Street, and two other local centres that sandwich New Cavendish Street, with Cleveland Street local centre to the north and Gt Titchfield Street 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		N/A	9	8	5
	Department/principle stores	*N/A*	*0*	*0*	*0*
	International retailers	*N/A*	*0*	*0*	*0*
	National retailers	*N/A*	*1*	*0*	*0*
	Specialist Independent	*N/A*	*3*	*2*	*1*
	Independent	*N/A*	*3*	*3*	*2*
	Convenience	*N/A*	*2*	*3*	*2*
Class A2	Financial & Professional	N/A	0	0	3
Food & Drink		N/A	9	12	12
Class A3	*Restaurant/Café*	*N/A*	*5*	*8*	*8*
Class A4	*Pubs/Bars*	*N/A*	*2*	*2*	*2*
Class A5	*Takeaway*	*N/A*	*1*	*1*	*1*
	Takeaway/Restaurant	*N/A*	*1*	*1*	*1*
Sui Generis		N/A	2	2	2
Vacant Units		N/A	0	1	3
Arts/Culture		N/A	1	0	0
Health uses		N/A	0	0	0
Hotels		N/A	0	0	0
TOTAL		**N/A**	**21**	**23**	**25**

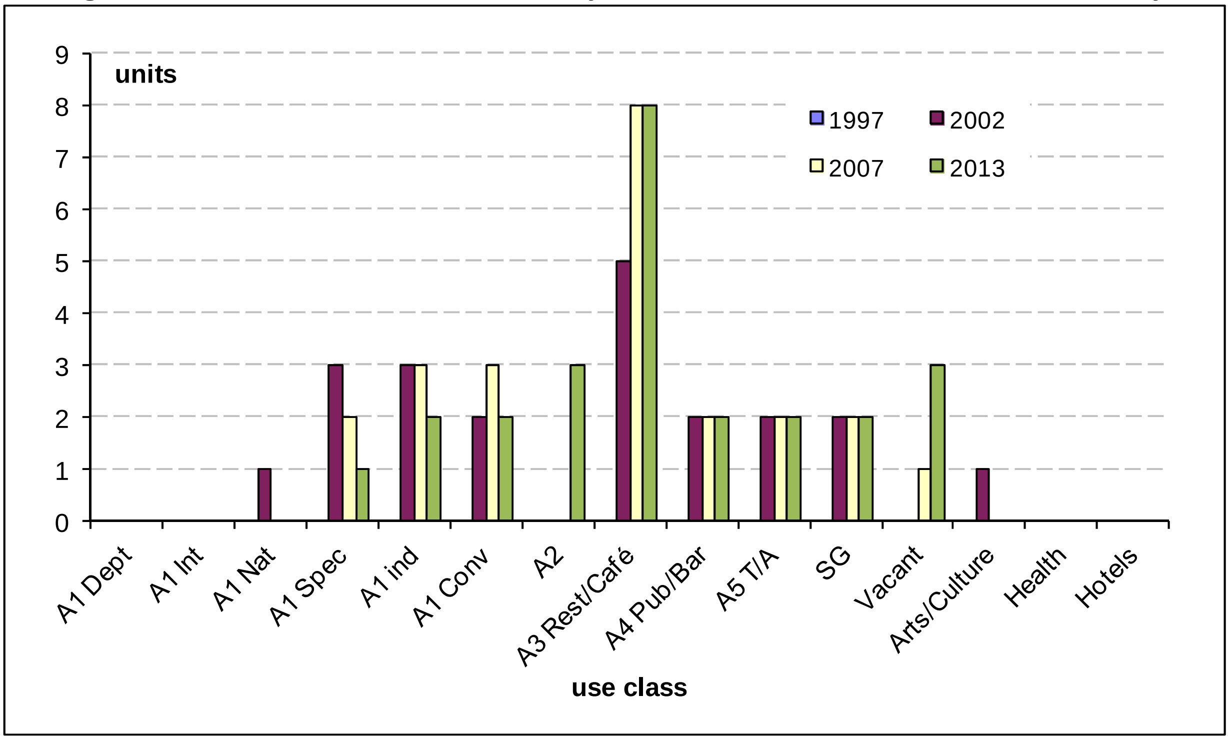
Source: WCC Land Use Survey December 2013

In total there are 25 units, which is an increase of two units from the previous survey in 2007.

The number of A1 retail uses has decreased by three units since 2007, and A1 now only represents one in every five units in the centre. Food and drink is the dominant use class, particularly restaurants and cafe's, which account for nearly half the units in the centre. The number of Class A2 has also increased by three units while the number of vacant units has increased, and the number of sui generis units has remained constant.

The centre has no hotels, health or Arts uses.

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



2.2 Range of A1 Uses

New Cavendish Street has no international, national retailers or department stores. The centre has 5 Class A1 retail units including 2 convenience stores, 1 specialist retailers and 2 independent retailers. The specialist retailer is a bike shop. The independent stores include a hairdressers and a sandwich bar. A new Tesco and sandwich shop have opened up next to the local centre boundary this will be in direct competition with the A1 Convenience retailers, and should potentially be included in the centre as an extension to the frontage/centre boundary.

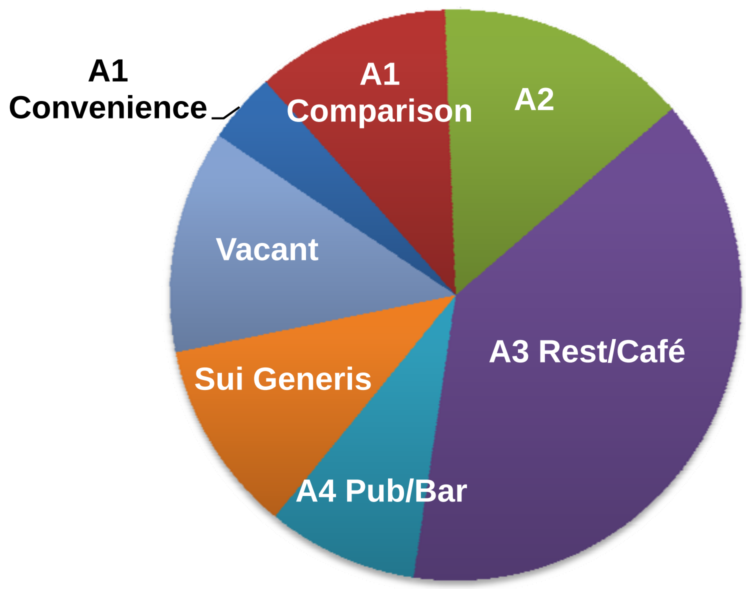
2.3 Total Retail Floor space

Total retail floor space in New Cavendish Street is broken down in Table 2. In total, New Cavendish Street has 2,100 sqm of retail floor space, which is below the average of 3,188 sqm for the 39 Local Centres in the City. New Cavendish Street has a comparable proportion of A3 Restaurant/Café and Sui Generis floor space, which together account for nearly 50% of the total. After this, A1 independent, A1 specialist and A5 Take-away all have similar floor space figures. The centre contains 2 A4 pubs and 2 A5 takeaways, and the A5 floor space is well above the overall local centre average. Conversely the centre has a lower than average proportion of A1 comparison 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	84	4.00%	14.9%
A1 Comparison	230	10.95%	35.2%
A2	300	14.29%	11.2%
A3 Rest/Café/TA	812	38.67%	17.4%
A4 Pub/Bar	179	8.52%	5.1%
Sui Generis	229	10.90%	3.9%
Vacant	266	12.67%	8.6%
Health	0	0%	2.0%
Hotels	0	0%	0.5%
Art	0	0%	1.3%
Leisure	0	0%	0.1%
Total	**2,100**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



New Cavendish Street is a Local Centre with a selection of local services and food shops, with a large food and drink presence as a proportion of the uses and floor space. However, there are now 3 class A2 uses in the centre an estate agent, a specialist travel agent and a pet groomers. 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 in New Cavendish Street is higher than the average rate for Local Centres in the City, as shown in Table 3. The vacancy rate has increased since 2002, when there were no vacant units in the centre, but is still below the Local Centre average of 9%. 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	0.00% (0) units	4.35% (1) units	12.00% (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 medium 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 closest London Underground Station to New Cavendish Street is Great Portland Street (Metropolitan, Hammersmith & City, Circle lines), which is located roughly 5-10 minutes walk north of the centre. This tube station is situated on one of the main arterial roads through the centre of London, the A501 Marylebone/Euston Road. The centre is also roughly 10 minutes walk from Oxford Circus tube station (Central, Bakerloo, Victoria lines), which is located to the south of the centre. In terms of bus routes, although no buses run directly through the local centre, there are many routes that run adjacent to the centre. For example routes 88, 453 and C2 run along Portland Place to the west, and routes 10, 14, 24, 29, 73, 134 and 390 run along Tottenham Court Road 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 Table 4 below. The centre's overall score for attractions is 30.8%, meaning that the centre offers few attractions. This is slightly higher than the Local Centre average of 31%, and ranks New Cavendish Street =20th out of the 39 Local Centres in the City. New Cavendish Street has a poor provision of multiple retailers, cultural/community events, sport and leisure facilities, local services and bank/building society provision. The centre's main strength is its good provision of café's and restaurants, and now with the new Tesco an adequate provision of other local retail uses.

4.2 Daytime Amenity

On the day the Survey was conducted there was a large construction site just outside of the shopping centre boundary, this reflected negatively on the survey as there was litter, street obstacles and other negative factors lowering the amenity rating from 65% to 48%. Compared with the average for all Local Centres of 68%, New Cavendish Street is ranked =34th out of the 39 Local Centres in the City. The centre's rating is good in 8 of the 12 security ratings including the evidence of graffiti, drunkenness, rough sleepers and beggars, street drinkers and touting. The centre has an average overall *'feel good factor'*. The centre is only rated as being 'poor' in terms of the number of promotions/ street events, and due to the construction in 8 cleanliness 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	7/26			8/26			8/26		
Percentage	26.92%			30.77%			30.77%		

Source: City of Westminster site survey November 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	28/46			30/46			22/46		
Percentage	60.9%			65.2%			47.8%		

5. Performance of the Centre

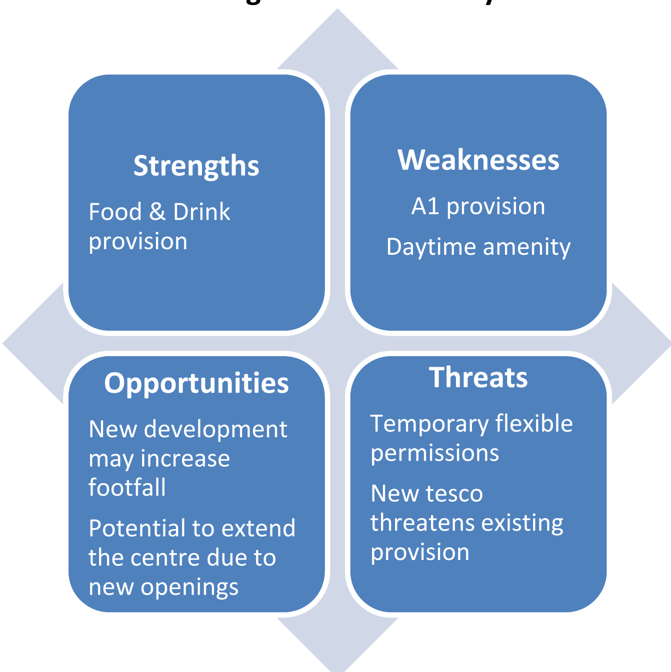
5.1 Relative Performance of the Local Centre 2013

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

New Cavendish Street 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 averages. However, food and drink floor space figures (A3/A4/A5) are higher than the average. In terms of the rating of the physical environment, the centre has an attractiveness rating on par with the centre average while the daytime amenity rating is slightly lower than the overall local centre averages, illustrating the reasonable quality of the shopping 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 was only one permitted planning applications in the shopping centre boundary of a A1 Convenience store changing use to an A2 Pet Groomers, Outside of the boundary a new Tesco supermarket and a takeaway restaurant were built.

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**		**2,100**
		Total Convenience (A1)		**84**
		Total Comparison (A1)		**327**
		Total Service (A2)		**300**
		Total A3		**543**
		Total A4		**179**
		Total A5		**269**
		Total Sui Generis		**229**
		Total Vacant		**266**
	Retail Offer	**Total Number of Shop Units**	**25**	
		Total Number of A1 Units	**6**	
		a) Convenience shops	**2**	
		b) Department/principal stores	**0**	
		c) Prestige international shops	**0**	
		d) National comparison retailers	**0**	
		e) Specialist Independent shops	**1**	
		f) Independent shops	**3**	
		Total Comparison Multiples	**4**	
		Total Number of A2 Units	**2**	
		Total Number of A3 Units	**8**	
		Total Number of A4 Units	**2**	
		Total Number of A5 Units	**2**	
		Total Number of Sui Generis	**2**	
		Total Number of Vacant	**3**	
	Market	**Days of operation**	**0**	
		Number of stalls	**0**	
	Proposals	**Changes of use A1 to A2**	**1**	**97**
		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’, 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 New Cavendish Street local centre

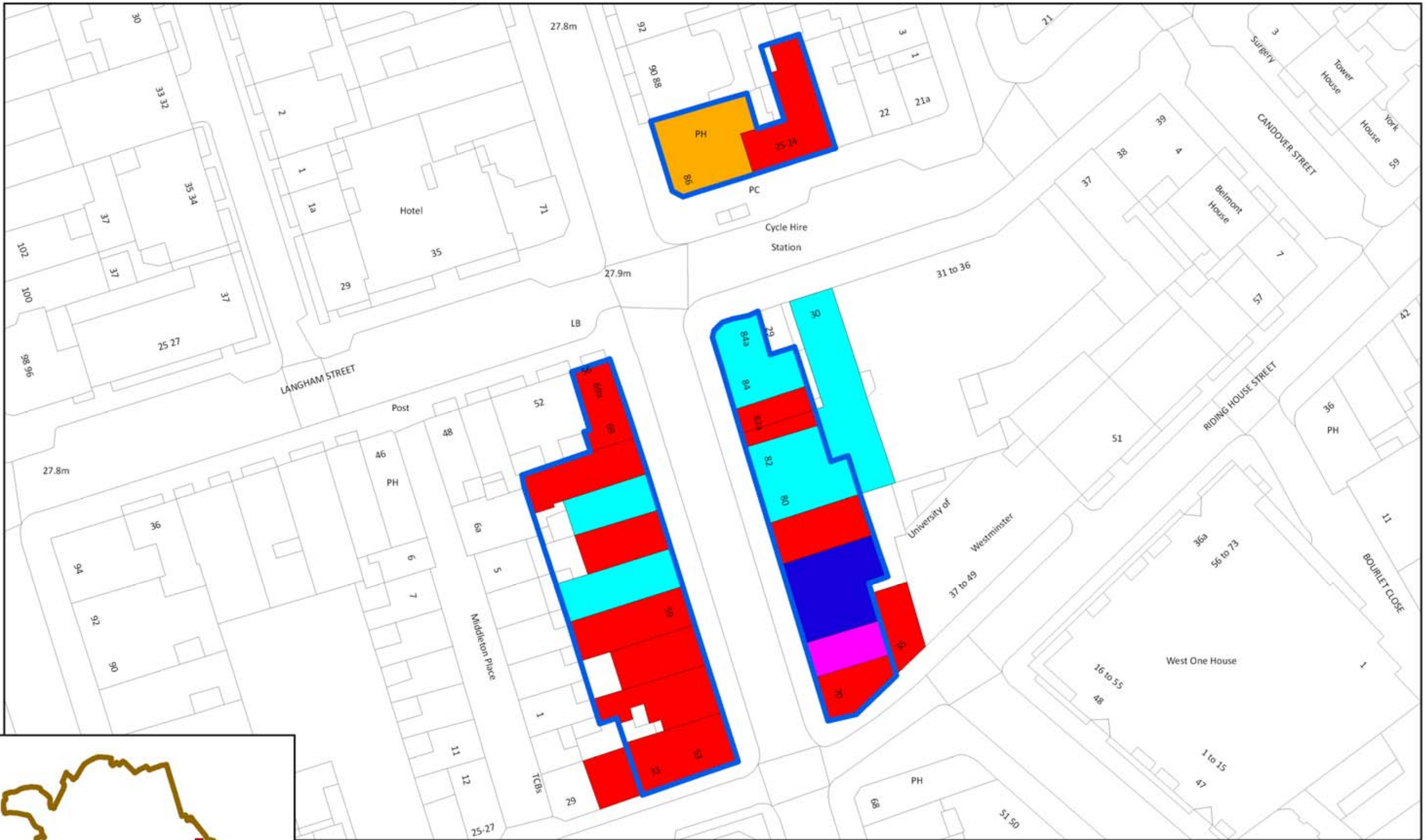
The Cleveland Street frontage, showing clutter on the narrow pavement and the presence of some refuse.

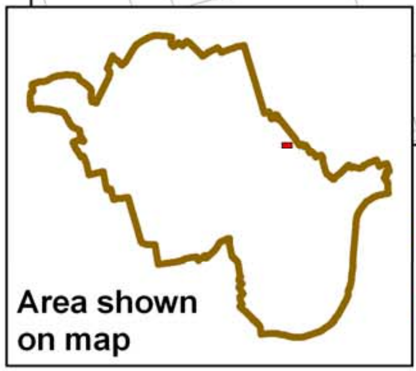
The New Cavendish Street frontages, showing the narrow pavement and variety of uses.

A more attractive part of the local centre at the west end of New Cavendish Street, with a well kept, attractive public house frontage.

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

ADDRESS	FASCIA	DESCRIPTION	Use	SQM	Conv.	Spec.	Ind	A2	Res/Caf	Pub/Bar	Takeaw.	Rest/TA				
132NEW CAVENDISH STREET	THE CONVENIENCE STORE	NEWSAGENTS	A1 Conv	60	1											A1 Conv
134NEW CAVENDISH STREET	THE SHIP	PUBLIC HOUSE	A3 Pub/Bar	76						1						A3 Pub/Bar
136-138NEW CAVENDISH STREET	CYCLE CENTRE	BIKE SHOP	A1 Spec	106		1										A1 Spec
140NEW CAVENDISH STREET	Travel Agents	Travel Agents	A2	87				1								B1
142-144NEW CAVENDISH STREET	Pretzel Films	PR Agency	B1	369									1			SG
146NEW CAVENDISH STREET	DIVA	LADIESWEAR (WHOLESALE)	SG	108										1		SG
150NEW CAVENDISH STREET	Trims & Treats	Pet Groomers	A2	97				1								A1 Conv
154NEW CAVENDISH STREET	Café	Café	A3 Rest/Café	98					1							A1 Spec
156NEW CAVENDISH STREET	Chris Dedman	Estate Agent	A2	116				1								A1 Ind
158NEW CAVENDISH STREET	Doorway	CAFÉ	A3 Rest/Café	0					1							A3 Rest/Café
160NEW CAVENDISH STREET	Chillies	RESTAURANT	A3 Rest/Café	99					1							A3 Rest/Café
162NEW CAVENDISH STREET	TAPROBAR	RESTAURANT & TAKEAWAY	A3 Rest/TA	189								1				A3 Rest/TA
164NEW CAVENDISH STREET	TOWER	MENS HAIRDRESSERS	A1 Ind	65			1									A1 Ind
166NEW CAVENDISH STREET	MANE	GIFTS & HAIR PRODUCTS	A1 Ind	59			1									A1 Ind
168NEW CAVENDISH STREET	Chi Café	CAFÉ	A3 Rest/Café	26					1							A3 Rest/Café
45CLEVELAND STREET	VACANT	OFFICES	Vacant	75											1	B1
47CLEVELAND STREET	VACANT	OFFICES	Vacant	151											1	B1
49-51CLEVELAND STREET	Fashion Wholesaler	Clothing	SG	121										1		Vacant
53CLEVELAND STREET	Archipelligo	RESTAURANT	A3 Rest/Café	76					1							A3 Rest/Café
55CLEVELAND STREET	MENARA	RESTAURANT/TAKEAWAY	A3 T/A	80							1					A3 T/A
57CLEVELAND STREET	RAGAM	RESTAURANT	A3 Rest/Café	125					1							A3 Rest/Café
59CLEVELAND STREET	CAFFEE MACCHITA	CAFÉ	A3 Rest/Café	31					1							A3 Rest/Café
61CLEVELAND STREET	ISHTAS	CAFÉ	A3 Rest/Café	88					1							A3 Rest/Café
63CLEVELAND STREET	ANILS	NEWSAGENTS	A1 Conv	24	1											A1 Conv
1FOLEY STREET	KING & QUEEN	PUBLIC HOUSE	A3 Pub/Bar	103						1						A3 Pub/Bar
29HANSON STREET	Vacant	VACANT	Vacant	40											1	A3 Rest/Café





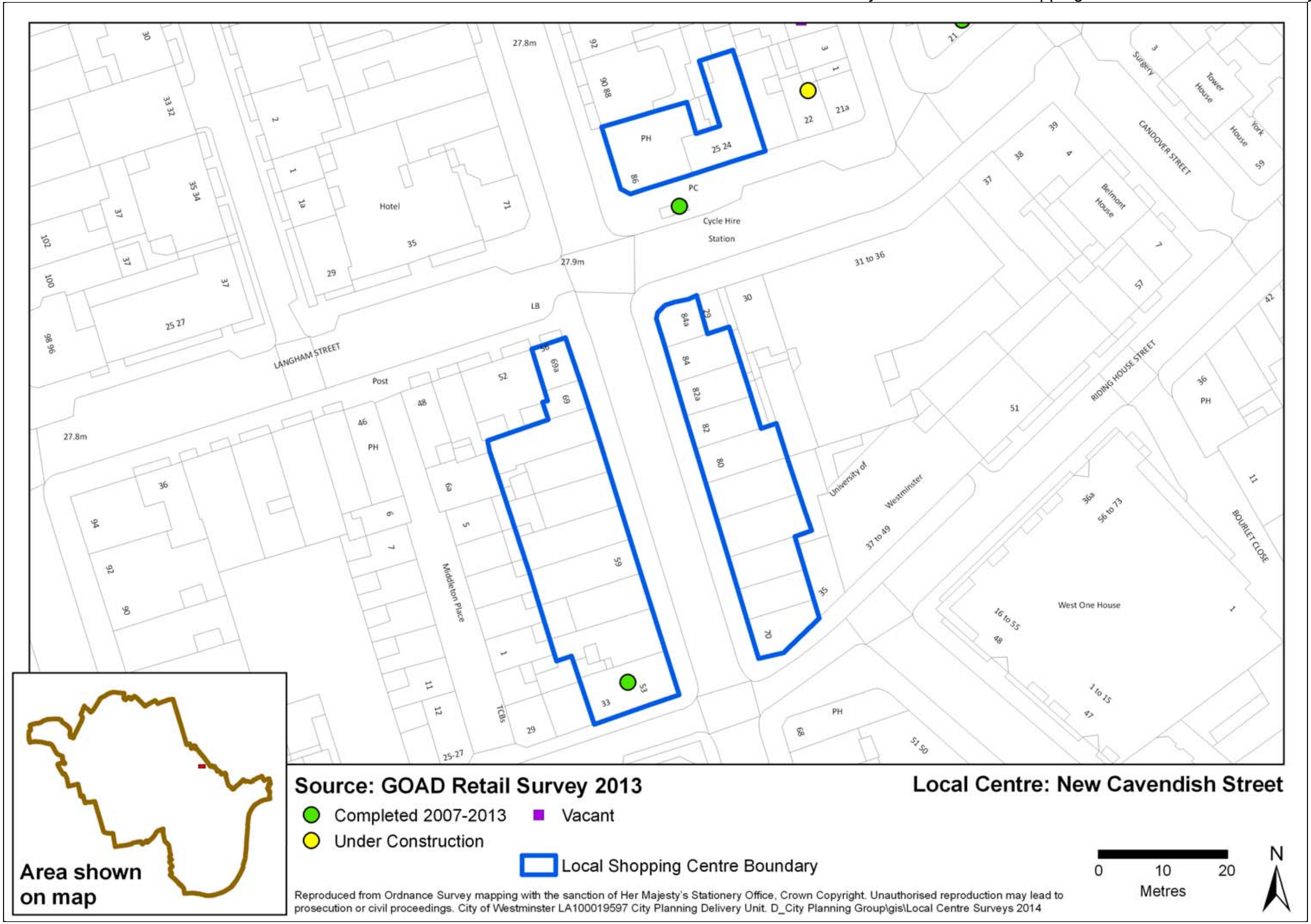
Source: GOAD Retail Survey 2013

Local Centre: New Cavendish Street

- Local Shopping Centre Boundary
- A1: Retail
- A2: Financial & Professional
- A3: Restaurant/Café
- A4: Pub/Bar
- B1: Office

0 10 20
Metres

N



Source: GOAD Retail Survey 2013

Local Centre: New Cavendish Street

Completed 2007-2013

Vacant

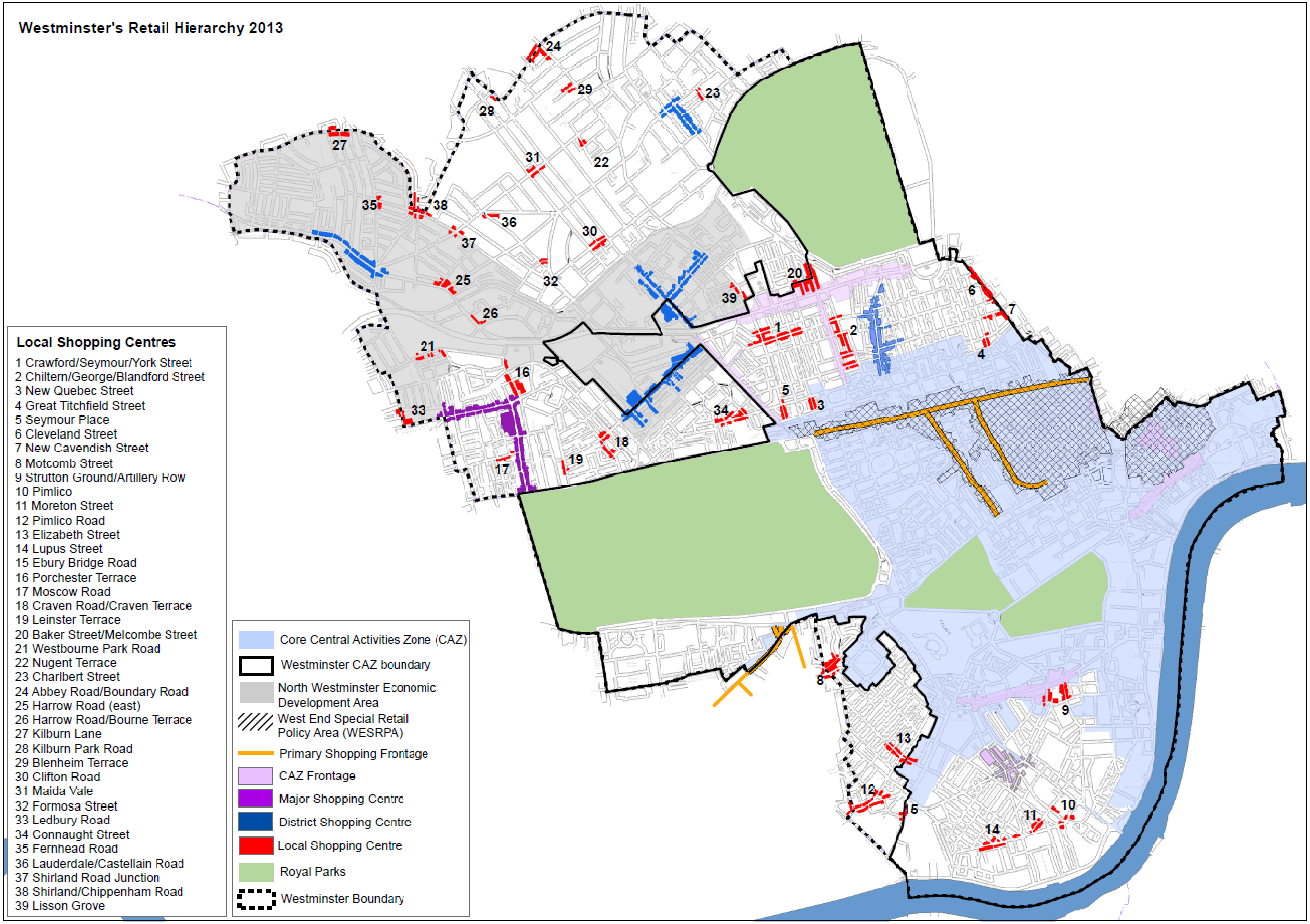
Under Construction

Local Shopping Centre Boundary

0 10 20 Metres

N

Figure 1 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 20: New Quebec 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 **20: New Quebec Street**

1. Introduction

1.1 Location

New Quebec Street is a very small linear local centre located in the centre of Westminster, to the north west of Oxford Street, north of Marble Arch and to the east of Edgware Road. The centre is located in the Marylebone wider part of the Central Activities Zone, and is a couple of minutes walk from Marble Arch London Underground Station.

The centre's catchment is restricted by its proximity to Oxford Street, Edgware Road and Baker Street CAZ frontages. New Quebec Street is also close to Seymour Place, Connaught Street and Crawford St/ York St/Seymour St local centres.

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		0	6	12	11
	Department/principle stores	*0*	*0*	*0*	*0*
	International retailers	*0*	*0*	*0*	*0*
	National retailers	*0*	*0*	*0*	*0*
	Specialist Independent	*0*	*4*	*10*	*10*
	Independent	*0*	*1*	*2*	*1*
	Convenience	*0*	*1*	*0*	*0*
Class A2	Financial & Professional	0	0	1	2
Food & Drink		0	5	6	6
Class A3	*Restaurant/Café*	*0*	*4*	*5*	*5*
Class A4	*Pubs/Bars*	*0*	*1*	*1*	*1*
Class A5	*Takeaway*	*0*	*0*	*0*	*0*
	Takeaway/Restaurant				*0*
Sui Generis		0	1	1	1
Vacant Units		0	8	3	3
Arts/Culture		0	0	0	0
Health uses		0	0	0	0
Hotels		0	0	0	0
TOTAL		**0**	**20**	**23**	**23**

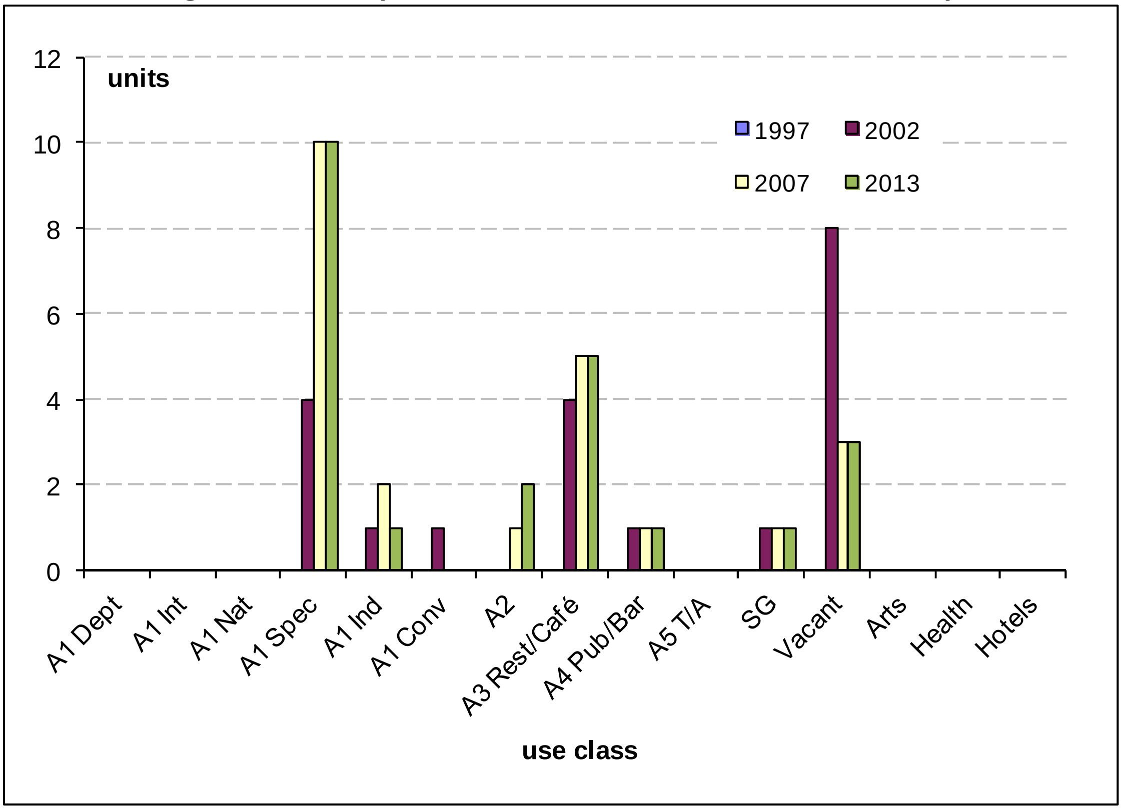
Source: WCC Land Use Survey December 2013

In total there are 23 units, which is constant from the previous survey in 2007.

The number of A1 retail uses have decreased by one unit since 2007, however this remains the main use class with A1 accounting for nearly half of the units in the centre. The number of Class A2 uses has increased by a unit and the number of Class A3 uses has remained the same, with a good number of cafe and restaurant uses located in the centre. The A1 uses structure has changed slightly with the loss of one independent retailer.

The centre has no hotels, health or arts uses. The vacant units remained constant at three units.

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



2.2 Range of A1 Uses

New Quebec Street has no international or national retailers. The centre has 11 Class A1 retail units comprising 10 specialist retailers and 1 independent retailer. The specialist retailers include clothes shops, electronics retailers and furniture shops. The independent store is a hairdressers. The high proportion of comparison shops and no multiple retailers suggests that New Quebec Street serves local residents with a mix of comparison shopping facilities. The absence of A1 convenience shops means that food shopping is not a feature of the centre and therefore not necessarily aimed at local residents for day to day shopping needs.

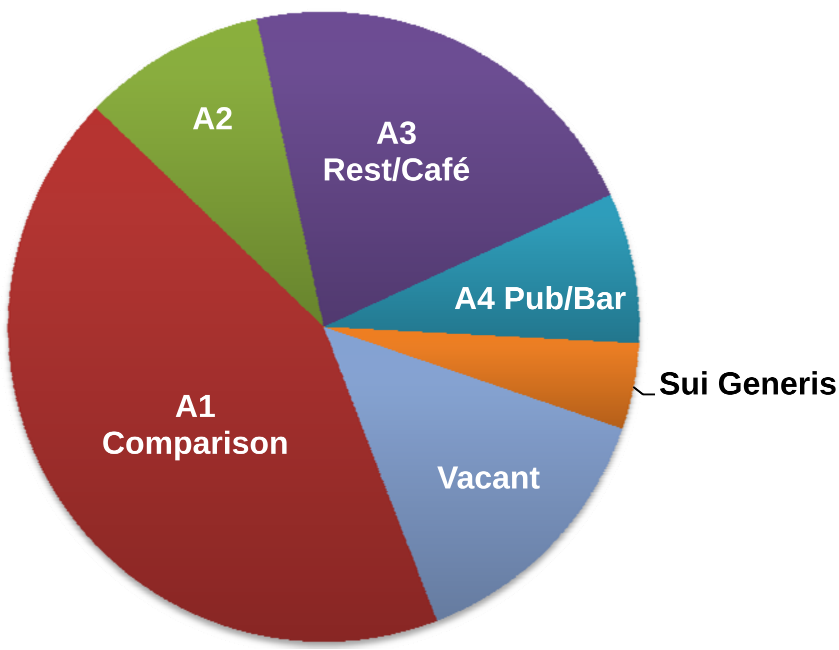
2.3 Total Retail Floor space

Total retail floor space is broken down in Table 2. In total, New Quebec Street has 1,724 sqm of retail floor space, which is below the average of 3,188 sqm for the 39 Local Centres in the City. New Quebec Street has a very high proportion of A1 specialist floor space, and high levels of A3 floor space, which together account for over two thirds of the total. The centre also contains one A4 pub/bar use but no takeaways, lower than the Local Centre average. Conversely the centre has a higher than average proportion of A1 comparison floor space, of 43% 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	0	0.00%	14.9%
A1 Comparison	742	43.04%	35.2%
A2	162	9.40%	11.2%
A3 Rest/Café/TA	371	21.52%	17.4%
A4 Pub/Bar	133	7.71%	5.1%
Sui Generis	76	4.41%	3.9%
Vacant	240	13.92%	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	**1,724**	**100%**	**100%**

Figure 3: Retail Floorspace 2013 within the local centre boundary



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

New Quebec Street is a Local Centre with a selection of local services and shops, however there are no food shops in the centre, and no banks or building societies. 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 remained constant since 2007. The three 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	40.00% (8) units	13.04% (3) units	13.04% (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 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 a few minutes walk away. Although no bus routes pass through the centre itself, many pass very close to the centre, including 10 routes that serve Gloucester Place to the east and over 15 routes that serve Oxford Street to the south, and numerous others serving Edgware Road to the west. The centre is very close to several main roads including Edgware Road (A5) and Oxford Street (A40).

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 very limited attractions. The rating is lower than the Local Centre average of 31%, and means the centre is ranked =25th 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 specialist shops.

4.2 Daytime Amenity

New Quebec Street is an attractive Local Centre, with a day time amenity rating of 61% compared with the average for all Local Centres of 68%, and is ranked =30th out of the 39 Local Centres in the City. The centre's rating is good in terms of the quality of buildings, and for seven 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 a large amount of street litter on the day the survey was conducted.

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

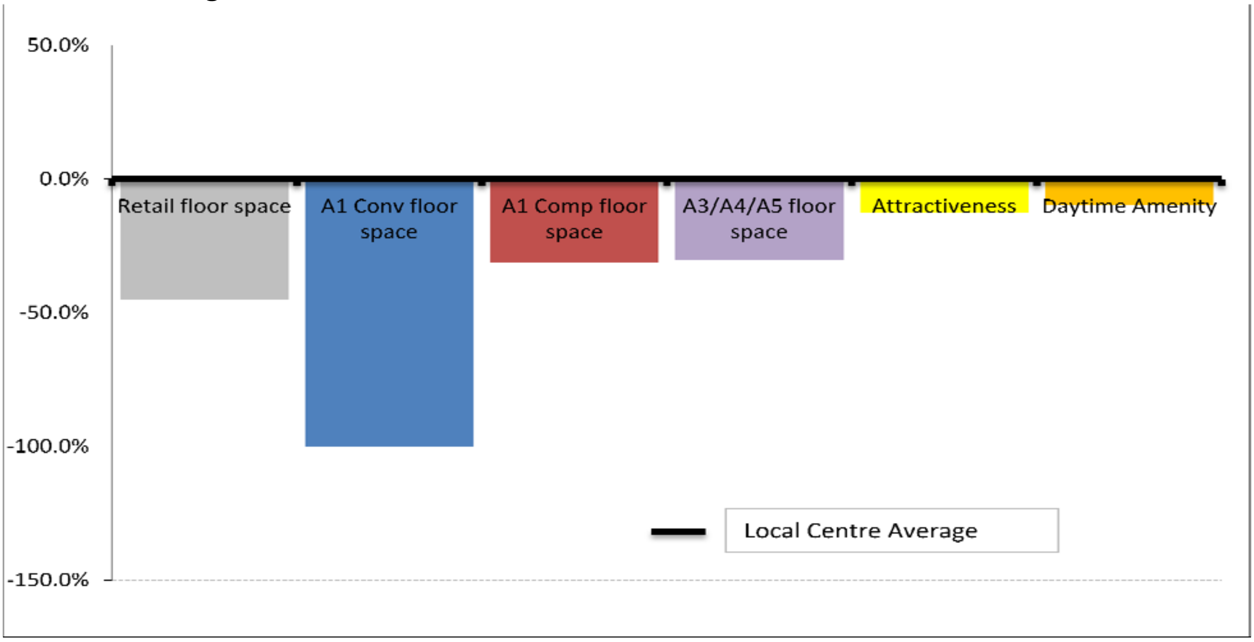
Table 5: Day Time Amenity within the Local Centre 2013

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	34/46			37/46			28/46		
Percentage	73.9%			80.4%			60.9%		

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



New Quebec Street 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. This is also true for A1 convenience floor space of which there is none in the centre, and comparison and food and drink (A3/A4/A5) floor space figures, which have below average amounts due to the size of the centre. In terms of the rating of the physical environment, the centre has a slightly below average attractiveness rating and daytime amenity rating.

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 just outside the local boundary in Seymour Street, involving a A2 changing to a dentist (D1) and a new A1 unit.

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**		**1,724**
		Total Convenience (A1)		**0**
		Total Comparison (A1)		**742**
		Total Service (A2)		**162**
		Total A3		**371**
		Total A4		**133**
		Total A5		**0**
		Total Sui Generis		**76**
		Total Vacant		**240**
	Retail Offer	**Total Number of Shop Units**	**23**	
		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	**10**	
		f) Independent shops	**1**	
		Total Comparison Multiples	**11**	
		Total Number of A2 Units	**2**	
		Total Number of A3 Units	**5**	
		Total Number of A4 Units	**1**	
		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**	**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’, however the amenity and attractiveness have dropped when compared against the other 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 New Quebec Street local centre

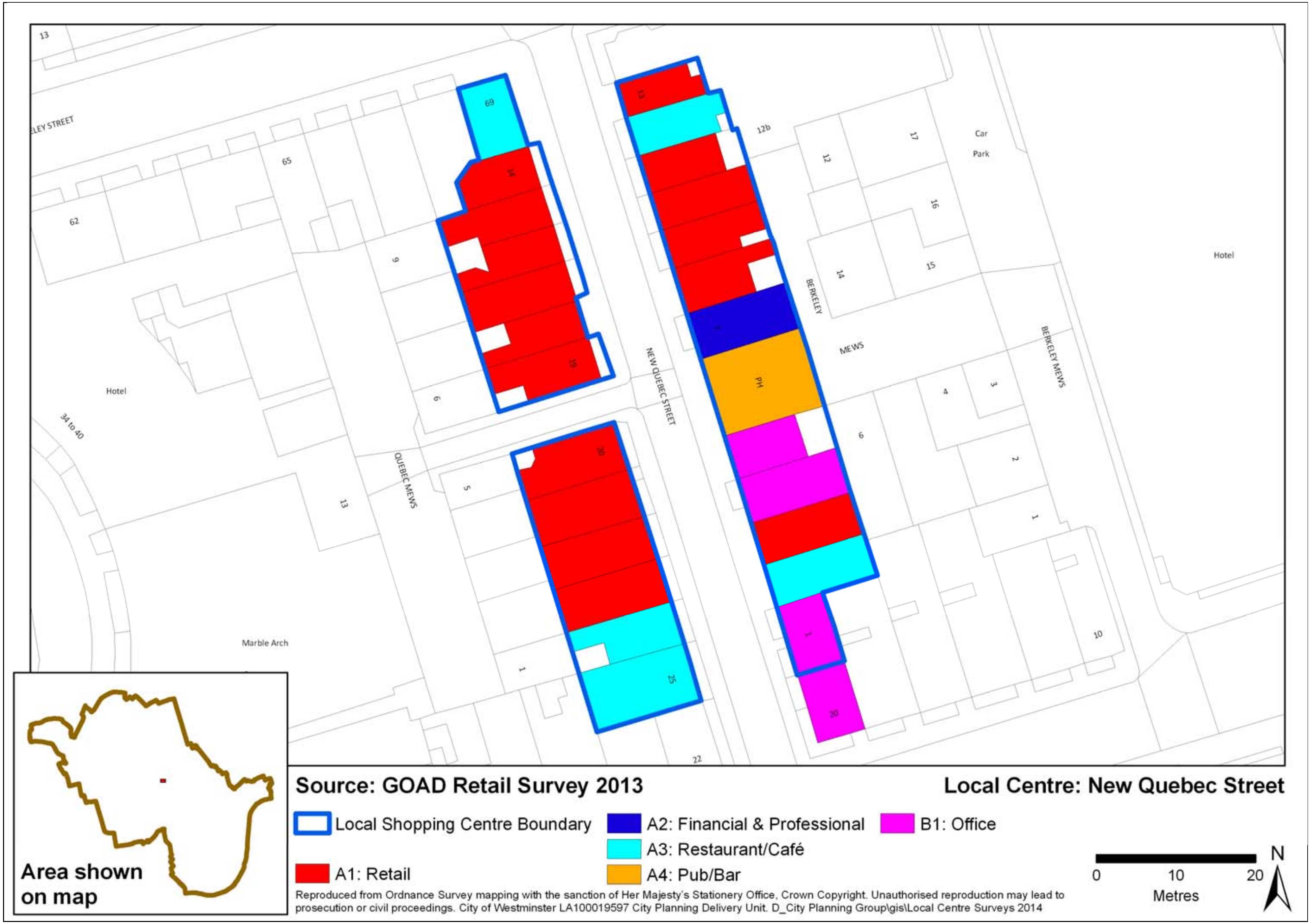
Attractive, well maintained shop fronts and general streetscape on the west side of the local centre.

Vacant units in the centre, on the east side of the local centre.

Attractive shop fronts and a well maintained streetscape at the north end of the local centre.

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

ADDRESS	FASCIA	DESCRIPTION	USE	SQM	A1 Spec.	A1 Ind	A2	A3 Res/Caf	A4 Pub/Bar	B1	S G	Vacant	2007 Use
1NEW QUEBEC STREET		Offices	B1	55						1			B1
2NEW QUEBEC STREET	Red Sun	Restaurant	A3 Rest/Café	72				1					A3 Rest/Café
3NEW QUEBEC STREET	SUZANNAH	Ladies Clothes	A1 Spec	72	1								A1 Spec
4NEW QUEBEC STREET	MAA MAA	Offices	B1	77						1			B1
5NEW QUEBEC STREET		Offices	B1	73						1			B1
6NEW QUEBEC STREET	Bricklayers Arms	Public House	A3 Pub/Bar	133					1				A3 Pub/Bar
7NEW QUEBEC STREET	Richard James & Company	Estate Agents	A2	78			1						A2
8NEW QUEBEC STREET	Aristocrats	Dry cleaners/ Launderette	SG	76							1		SG
9NEW QUEBEC STREET	JAMES BERNARD	FLORIST	A1 Spec	65	1								Vacant
10NEW QUEBEC STREET	Carlos Remes	Lighting	A1 Spec	62	1								A1 Spec
11NEW QUEBEC STREET	Walrus Systems	Hi Fi Equipment	A1 Spec	63	1								A1 Spec
12NEW QUEBEC STREET	Arabesque	Restaurant	A3 Rest/Café	62				1					A3 Rest/Café
13NEW QUEBEC STREET	NIGEL RAYMENT	Bridal	A1 Spec	49	1								A1 Ind
14NEW QUEBEC STREET	ALTERATIONS BOUTIQUE	Bridal	A1 Spec	60	1								Vacant
15NEW QUEBEC STREET	Opticians	Opticians	A1 Spec	74	1								A1 Spec
16NEW QUEBEC STREET	Elisak	Clothes	Vacant	73								1	Vacant
17NEW QUEBEC STREET	Amir	Hairdressers	A1 Ind	79		1							A1 Ind
18NEW QUEBEC STREET	paolita	swimmwear	A1 Spec	65	1								A1 Spec
19NEW QUEBEC STREET	vacant	vacant	Vacant	84								1	A1 Spec
20NEW QUEBEC STREET	vacant	vacant	Vacant	83								1	A1 Spec
21NEW QUEBEC STREET	greenhouse	spa	A2	84			1						A1 Spec
22NEW QUEBEC STREET	Philglas & Swiggot	Wine Shop	A1 Spec	76	1								A1 Spec
23NEW QUEBEC STREET	Rohen Chen	Clothes	A1 Spec	77	1								A1 Spec
24NEW QUEBEC STREET	Marble Arch News	Café	A3 Rest/Café	74				1					A3 Rest/Café
25NEW QUEBEC STREET	Zaynai	Restaurant	A3 Rest/Café	104				1					A3 Rest/Café
69UPPER BERKELEY STREET	La Masseria	Delicatessen/Café	A3 Rest/Café	59				1					A3 Rest/Café



Source: GOAD Retail Survey 2013

Local Centre: New Quebec Street

Local Shopping Centre Boundary
A1: Retail
A2: Financial & Professional
A3: Restaurant/Café
A4: Pub/Bar
B1: Office

0 10 20 Metres

N

Source: GOAD Retail Survey 2013

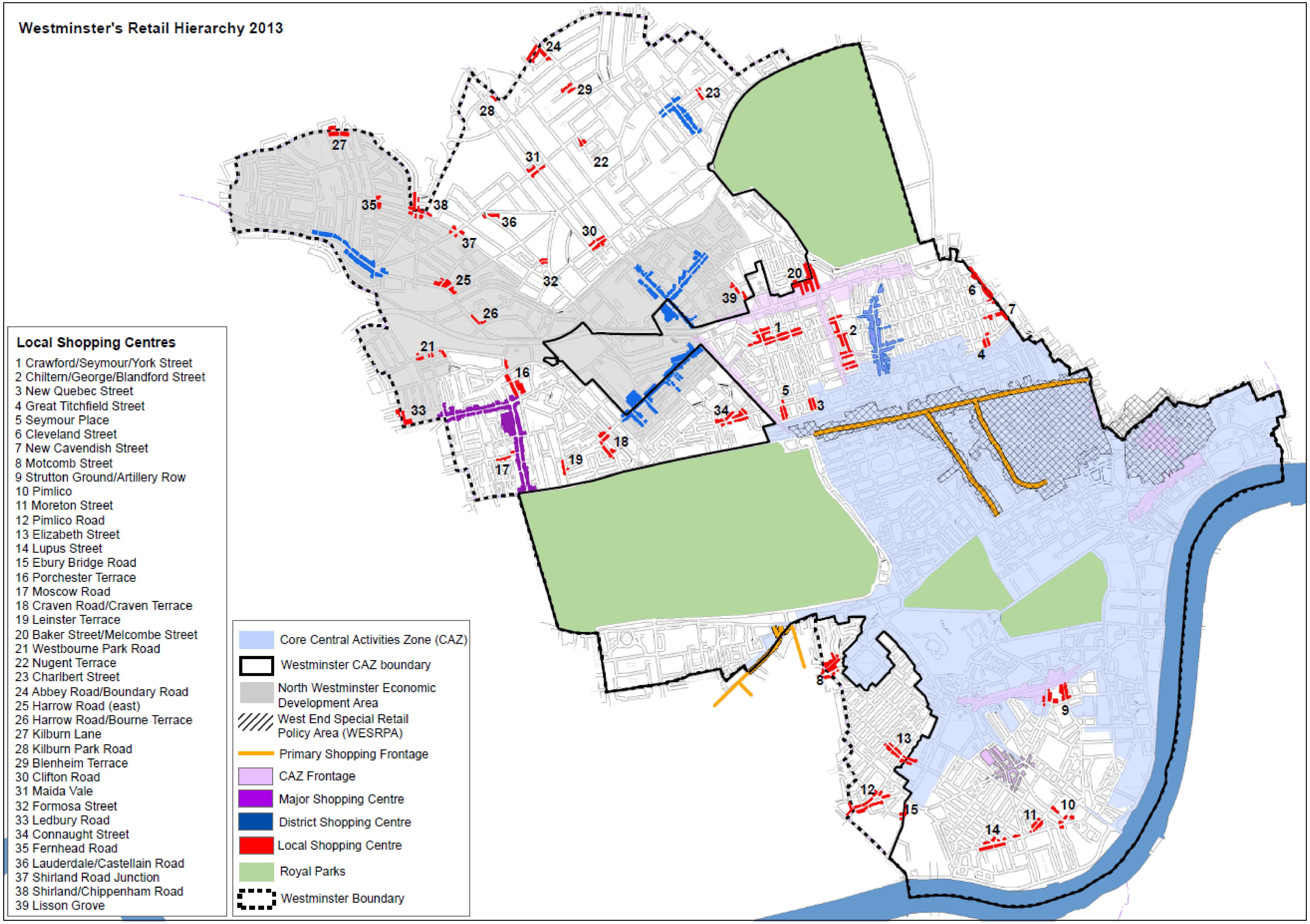
Local Centre: New Quebec Street

Completed 2007-2013

Local Shopping Centre Boundary

Vacant

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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