

**London-wide Town Centre Health Checks  
2006 Analysis**

January 2007



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**Greater London Authority  
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<a href="http://www.london.gov.uk/mayor/strategies/sds/town_centre_assessment.jsp">http://www.london.gov.uk/mayor/strategies/sds/town_centre_assessment.jsp</a>	

# Executive Summary

## Introduction

- i. London has a complex pattern of town centres which are recognised and supported by the London Plan. They play a fundamental role in providing for the needs of Londoners and visitors through retail, leisure, employment and a range of other service provision. The London Plan<sup>1</sup> emphasises the strategic importance of town centres and sets out policies to maximise choice and promote sustainable access to goods and services. The Plan identifies five broad types of town centre within London: International, Metropolitan, Major, District and Neighbourhood centres.
- ii. The need for a more sensitive and better informed town centre network was a major concern of the London Plan's Examination in Public. The importance of Town Centre Health Checks in monitoring the health of London's town centre network is underscored in the Plan, which states:

*A centre's role should be tested through regular town centre 'healthchecks' and centres can be reclassified in the light of these through Sub-Regional Development Frameworks and subsequent reviews or alterations to this plan and DPDs. This process should ensure that the network is sufficiently flexible to accommodate change in the role of centres and their relationships to one another.*

- iii. This round of Health Checks are the latest in a series undertaken in 1994 and 1999/2000. They are part of the wider town centre assessment<sup>2</sup> undertaken by the Greater London Authority (GLA) in order to assess the network and make provision for future development requirements. This studies of comparison and convenience goods floorspace requirements.
- iv. The town centre assessment will be used to inform alterations to the London Plan<sup>3</sup>, Sub-Regional Development Frameworks (SRDF)<sup>4</sup> and Supplementary Planning Guidance on town centre, retail and leisure issues (forthcoming)<sup>5</sup> as well as boroughs development plan documents.
- v. Data have been gathered from borough surveys and London-wide sources of data available to the GLA. These health checks have been devised to assess town centre:
  - Scale and function
  - Capacity
  - Financial performance
  - Accessibility
  - Town centre initiatives
  - Environment and amenity

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<sup>1</sup> See <http://www.london.gov.uk/mayor/planning/strategy.jsp>

<sup>2</sup> See [http://www.london.gov.uk/mayor/strategies/sds/town\\_centre\\_assessment.jsp](http://www.london.gov.uk/mayor/strategies/sds/town_centre_assessment.jsp)

<sup>3</sup> See <http://www.london.gov.uk/mayor/strategies/sds/further-alts/docs.jsp>

<sup>4</sup> See <http://www.london.gov.uk/mayor/planning/srdf/index.jsp>

<sup>5</sup> See <http://www.london.gov.uk/mayor/strategies/sds/spg.jsp>

The main findings set out in Section 3 of this report and the Key Issues set out below follow this structure. Analysis of findings from a range of indicators is important in considering how the network is functioning and the potential for changes to it.

## **Key Issues**

### Scale and Function

- vi. London's International, Metropolitan, Major and District town centres accommodate over 10,000,000 square metres (Sq M) floorspace<sup>6</sup> (retail, leisure and vacant floorspace), of which approximately 6,300,000 Sq M is in retail use. There is also significant provision in the numerous neighbourhood centres identified at borough level.
- vii. The largest centres are London's International and Metropolitan centres. Some Major town centres (Uxbridge, Angel and Camden) also provide significant floorspace, similar in scale to smaller Metropolitan centres. In Angel and Camden the overall floorspace comprises significant leisure floorspace compared to Metropolitan centres where the role of retail is greater. While Wembley and Stratford are both relatively small Major centres they are currently subject to regeneration and expansion which is further developing their scale and function.
- viii. Some District centres (particularly the Isle of Dogs, Swiss Cottage and Fulham Road West<sup>7</sup>) are large in comparison to smaller Major centres. In the Isle of Dogs however, retail makes up a relatively low proportion of floorspace (most floorspace is in office use and leisure is relatively high).
- ix. District centres play a particular role in providing sustainable access to goods and services, especially convenience goods. In Major and Metropolitan centres the role of comparison goods provision is greater. Some centres play a specialist role for example Portobello Road which caters for specific markets in comparison goods. Town centres can also enhance local distinctiveness.
- x. Leisure services<sup>8</sup> can add vitality and viability to a centre and can contribute to London's world city role. Centres with the greatest leisure floorspace are the West End, Croydon, Angel and Camden Town. Metropolitan centres play a particularly significant role in leisure provision, as do centres in around the Central Activities Zone (CAZ). Centres in the City of London and Isle of Dogs have significant leisure services floorspace related to the high levels of office employment in these areas. Some centres provide specialist leisure roles, for example through opportunities for dining or the provision of a large cinema<sup>9</sup>.

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<sup>6</sup> Information from GLA-sourced data which provide information for all town centres. See Paragraph 3.2.

<sup>7</sup> While a combined centre of Elephant and Castle and Walworth Road provides a large floorspace this is subject to consideration as to whether it is functioning as a single centre. This is detailed in Section 4 of this study.

<sup>8</sup> See paragraph 3.21

<sup>9</sup> Analysis of the role of leisure services in the town centre network is further explored in the Best Practice Guidance Managing the Night Time Economy: <http://www.london.gov.uk/mayor/strategies/sds/bpg.jsp>

- xi. There are a range of markets of different sizes across the town centre network. Data on educational, health, civic and community facilities was insufficient to undertake comprehensive analysis of their distribution across London's town centre network.
- xii. Office floorspace is concentrated in the CAZ, Isle of Dogs (Canary Wharf) and the City Fringe areas although there some limited provision in Metropolitan and Major centres. Town centres also provide a significant spatial concentration of employment in a range of sectors. Convenience and public service employment is particularly important in District and Major centres and comparison goods retailing employment in the Metropolitan and International centres.

### Capacity

- xiii. Identifying capacity in London's town centre network is an essential element of the London-wide town centre health checks. As part of the wider London Town Centre Assessment<sup>10</sup> it is designed to enable reconciliation between the identified floorspace need (comparison and convenience goods studies) and available town centre capacity. Boroughs were invited to draw on their own research<sup>11</sup> to identify capacity through four sources: Unimplemented Planning Permissions; UDP designations; Undesignated Vacant Premises; Undesignated Vacant Sites. This was supplemented by GLA-sourced data.
- xiv. The health checks identified over 2 million Sq M of such capacity across London. Boroughs identified approximately 300,000 Sq M in London's International, Metropolitan and Major town centres through unimplemented planning permissions (primarily retail) and over 1 million Sq M in District centres. Over 750,000 Sq M was identified through UDP designations and a further 80,000 Sq M through vacant sites and premises. Significant vacant floorspace capacity was identified, particularly in larger town centres where the overall level of floorspace is also higher.
- xv. Further analysis of capacity and reconciliation with retail need will be undertaken through the SRDF process and supplementary planning guidance.

### Financial Performance

- xvi. Turnover in London's town centre network is estimated to be over £23 billion per annum<sup>12</sup> with the largest turnover in the International centres, followed by Metropolitan centres. Some Major centres in and around the CAZ and parts of west London have particularly high levels of turnover. Comparison goods turnover is generally highest in Metropolitan centres although King's Road East, Kensington High Street, Bexleyheath, Richmond, Wimbledon and Victoria Street are comparable. Convenience goods turnover is usually dependant on the presence of a large supermarket or similar, and is also high in the West End. Turnover in restaurants, licensed premises, arts, culture and entertainment is highest in the West End, followed by Metropolitan centres and other centres with a specialist role.

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<sup>10</sup> See reports at [http://www.london.gov.uk/mayor/strategies/sds/town\\_centre\\_assessment.jsp](http://www.london.gov.uk/mayor/strategies/sds/town_centre_assessment.jsp)

<sup>11</sup> Not all boroughs responded with data for all centres and these figures are therefore likely to underestimate capacity in London's town centre network. This is detailed in Section 3 of this report.

<sup>12</sup> Information from GLA-sourced data which provide information for all town centres. See Paragraph 3.68

- xvii. Retail rents are significantly higher in the International centres than Metropolitan and Major centres. Some District and Major centres including King's Road, Kensington High Street, New Malden and the Isle of Dogs as well as others in and around the CAZ have high rental levels. Rental levels have generally increased over the period 1998-2005. Average rents are highest in the CAZ and adjacent centres.

#### Accessibility

- xviii. Town centres in London are key nodes for public transport, although accessibility does not necessarily relate to the town centre hierarchy. Centres in and around CAZ have the highest public transport accessibility and Metropolitan centres are also notably high. Some Major centres have relatively low levels of accessibility and the Mayor supports improving access to and within centres by public transport. Public transport accessibility impacts the health of town centres, allowing them perform a wider role and have a larger catchment area.
- xix. Levels of car parking are generally higher in the Metropolitan centres than other centres in the network, while centres outside central London appear to provide more cycle parking facilities than those in central London.

#### Town Centre Initiatives

- xx. Around 70% of town centres for which borough information was provided employ a town centre manager, or have a consultancy group or town centre strategy. Most Metropolitan centres have all three. In some centres other initiatives are being employed or strategies are integrated with other local authority policies.

#### Environment and Amenity

- xxi. About half of town centres in London appear to collect data on accidents, while slightly more collect data on crime. Around half of centres also appear to have undertaken attitudinal surveys, although the health checks did not seek detailed information on these.

### **Conclusions and Implications for the Town Centre Network**

- xxii. The value of, and need for, London-wide town centre health checks is recognised as an important part of wider town centre assessments. They will continue to be undertaken at regular intervals. Improvements to the process will be sought to make it more efficient and to ensure the quality of the data and integration with other data sources.
- xxiii. The town centre network is dynamic and the scale, role and function of centres will change over time. Strategic changes to the network are addressed through the London Plan and SRDFs. Assessment of the roles of centres was made based on a number of key factors which characterise the different categories of centre.
- xxiv. A number of centres appear to be functioning at a different level to their current classification in a range of indicators. Uxbridge appears to be performing the

role of a Metropolitan centre and the indicators suggest that it should be considered for designation as a Metropolitan centre. Similarly, the Isle of Dogs is currently a District centre, although with the significant commuter catchment appears to be functioning as a Major centre in some indicators and should be considered for reclassification. Some indicators suggest Swiss Cottage/Finchley Road may be operating above the District level, and the potential change in role will continue to be monitored closely. Similarly, Wandsworth will also be monitored to confirm whether it is continuing to function as a Major centre.

- xxv. London Borough of Southwark has suggested that regeneration proposals will lead to Elephant and Castle and Walworth Road being amalgamated into a single Major centre, rather than the two current District centres. The health checks indicate they are still functioning as separate District centres but will be kept under review. Similarly health checks will continue to review whether Ealing is operating as a single Metropolitan centre (current classification) or two separate centres (Ealing Broadway and West Ealing).
- xxvi. On the basis of these health checks, Erith and Leyton have been identified for classification as District centres in the London Plan. Continuing regeneration and redevelopment in other town centres across London will necessitate future review of their role and function.
- xxvii. A number of District centres in the CAZ are strongly linked to CAZ-related functions of the surrounding area. A more appropriate approach to categorise these as CAZ Frontages is being progressed through the London Plan Further Alterations.

# 1. Introduction

## 1a. Policy context

- 1.1 The London Plan highlights the importance of Town Centre Health Checks in terms of the monitoring of London's town centre network, ensuring the vitality and viability of individual centres and bringing forward sufficient capacity to accommodate the projected levels of need for different land uses.
- 1.2 These London-wide health checks are intended to:
  - assess the vitality and viability of town centres and in particular identify capacity of different centres to meet Londoner's likely future needs;
  - inform the review of Unitary Development Plans (UDPs) and preparation of Local Development Frameworks (LDFs);
  - assist review of the town centre network in London as part of Sub-Regional Development Frameworks (SRDFs) and inform the review of the London Plan;
  - contribute to inter-regional working through a more co-ordinated approach to town centre development and retail and leisure provision across the wider city region;
  - draw on existing sources, and ensure that data collection is as streamlined as possible and benefits both local and strategic stakeholders.
- 1.3 The health checks will monitor the scale, role and function of centres within the town centre network in accordance with policies 3D.1 and 3D.2 of the London Plan which states:

*"The Mayor will and boroughs should... undertake regular town centre health checks" (Policy 3D.1)*

*"A centre's role should be tested through regular town centre 'health checks' and centres can be reclassified in the light of these through Sub-Regional Development Frameworks and subsequent reviews or alterations to this plan and UDPs. This process should ensure that the network is sufficiently flexible to accommodate change in the role of centres and their relationships to one another" (Paragraph 3.227)*

*"The GLA will work in partnership with boroughs and other relevant agencies to identify the capacity of different centres to meet Londoners' likely future needs in the light of the broader objectives of this plan. Capacity will be identified through 'health checks', which will be co-ordinated by the GLA" (Paragraph 6, Annex 1)*

- 1.4 Planning Policy Statement (PPS) 6 recognises the importance of undertaking town centre health checks. It advocates a pro-active, plan-led approach to town centre development, stating:

*"Comprehensive, relevant and up-to-date monitoring is essential to the effective planning and management of town centres. It should be used to inform the review of site allocations and town centre policies and enable*

*early signs of change of town centres to be identified and appropriate action to be taken” (Paragraph 4.1)*

- 1.5 PPS6 lists a number of key indicators on which information should be collected to measure the vitality, viability and monitor the health of town centres (and in this instance the London town centre network). Table 1.1 shows how these key indicators translate into information collected in the London-wide strategic health checks.

**Table 1.1: Key Indicators (PPS6) and use in London-wide strategic town centre health checks**

**Diversity of main town centre uses**

Data sought on floorspace and outlet numbers for comparison and convenience goods retail, service retail, leisure facilities, offices and vacant premises. Data sought on specific outlet indicators of health (e.g. department stores).

**The amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations**

**Not included in London-wide town centre health checks.**

**The potential capacity for growth or change of centres in the network**

**Data sought on capacity to accommodate further growth through unimplemented planning permissions, UDP/LDF site allocations, vacant premises and vacant sites in town centres**

**Retailer representation and intentions to change representation**

No specific information collected on retailer representation at the local scale

**Shopping rents**

Data sought on rents from retail, office, industrial and leisure premises

**Proportion of vacant street level property**

Data sought through capacity information for vacant premises

**Commercial yields on non-domestic property**

Data sought on yields from retail, office, industrial and leisure premises

**Pedestrian flows (footfall)**

Data sought on pedestrian flows where collected by borough

**Accessibility**

Data sought on accessibility by public transport, car parking, facilities for cyclists and disabled people

**Customer and residents’ views and behaviour\***

**Perception of safety and occurrence of crime\***

**State of the town centre environmental quality\***

\* These indicators should be assessed through local health checks

- 1.6 These strategic town centre health checks are a continuation of the series started by the London Planning Advisory Committee (LPAC) and partially updated in 1999/2000. The revised methodology for the 2004 London town centre health checks were developed in consultation with the ALG and the London boroughs and are set out in Section 2a.
- 1.7 Keeping the health checks up to date and ensuring the quality of data has historically proven problematic. Although the 2004 health checks make a step forward there remain deficiencies in the data. Up to date monitoring of London's town centres is a major concern of the Mayor in light of the London Plan and with regard to the Government's Planning Policy Statement (PPS) 6 (see paragraph 1.4 and Section 4C).
- 1.8 Monitoring the health of town centres and how this changes over time should be used to inform the review of site allocations and town centre policies in LDFs. The London-wide health checks in particular assist in informing LDF and strategic spatial policy through the London Plan review process and SRDFs.
- 1.9 The results of the health checks and complementary retail need assessments<sup>13</sup> will enable boroughs and the GLA to systematically consider the roles of centres relative to those identified in the London town centre network. Set against town centre need estimates, the health checks also provide a broad statistical overview showing how far the town centre network might absorb projected growth in comparison goods expenditure. Reconciliation of need and demand will also need to be undertaken by boroughs at the local level. Forthcoming Supplementary Planning Guidance (Retail and Town Centres) and SRDFs provide a strategic context for these local assessments.
- 1.10 Draft Further Alterations to the London Plan<sup>14</sup> propose changes to policies supporting town centres which relate to these health checks, including:
  - encouraging net additions to town centre capacity where appropriate to their role in the overall network (3D.1);
  - seeking integrated strategic and local consumer need and capacity assessments to be undertaken, as well as health checks (3D.1)<sup>15</sup>;
  - encouraging additional comparison goods capacity in larger town centres and convenience goods capacity in smaller centres of appropriate scale, especially District centres, to secure a sustainable pattern of retail provision (3D.2);
- 1.11 The draft Further Alterations encourage Development Plan Policies to provide for a range of town centre activities, enhance the competitiveness and quality of retail offer and support their key role in developing a sense of place and identity for sustainable local communities

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<sup>13</sup> See: [http://www.london.gov.uk/mayor/strategies/sds/town\\_centre\\_assessment.jsp](http://www.london.gov.uk/mayor/strategies/sds/town_centre_assessment.jsp)

<sup>14</sup> See <http://www.london.gov.uk/mayor/strategies/sds/further-alt/ docs.jsp>

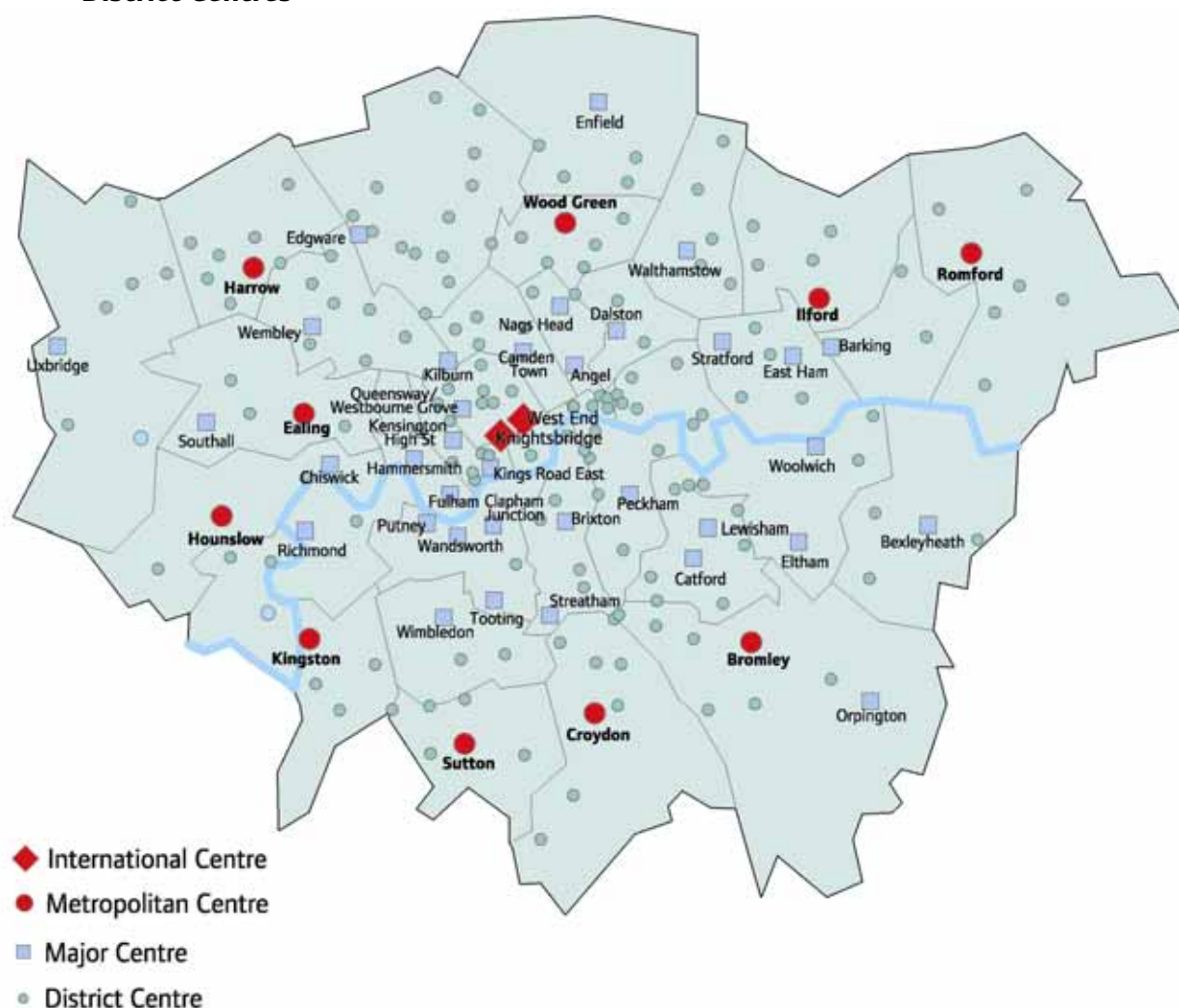
<sup>15</sup> The GLA has undertaken studies of Comparison and Convenience Goods Floorspace Need in London available at: [http://www.london.gov.uk/mayor/strategies/sds/town\\_centre\\_assessment.jsp](http://www.london.gov.uk/mayor/strategies/sds/town_centre_assessment.jsp)

1.12 These health checks therefore directly relate to national and regional policy requirements and bear directly on local and strategic policy development.

### London’s Town Centre Network

1.13 London has a complex pattern of town centres. Each centre performs a different function broadly categorised as International, Metropolitan, Major, District and local centres. Annex 1 of the London Plan sets out this categorisation. The current round of health checks has informed the proposals for the Further Alterations to the London Plan to identify ‘specialist’ town centres and those which support strategically important clusters of night time activities.

**Figure 1.1: London’s network of International, Metropolitan, Major and District Centres**



Source: Map 3D.1, London Plan

1.14 The need for a more sensitive and better informed town centre network was a major concern of the London Plan’s Examination in Public. In particular it was noted that although analysis of the demand for town centre floorspace had been undertaken, this had not been reconciled with available capacity in the town centre network. This is of particular importance in ensuring the

application of the sequential test which seeks to locate appropriate development on sites within town centres before considering edge-of-centre locations or out of centre development in line with PPS6 and Policy 3D.2 of the London Plan.

## **1b. Structure of report**

- 1.15 This report summarises the main conclusions of the London-wide Town Centre Health Check. It includes data provided by boroughs as well as additional data collated by the GLA. Chapter 2 describes the methodology of the Health Check, and evaluates the responses received. Chapter 3 sets out the main findings. Chapter 4 outlines the implications of this for London's Town Centre Network (Chapter 4) which have been taken into account in preparation of the Further Alterations to the London Plan.
- 1.16 The Annexes comprise:
- Annex 1 – List of London's International, Metropolitan, Major and District centres;
  - Annex 2 – a copy of the health check survey form and guidelines sent to boroughs for collection of data noting the questions referred to in Chapter 3;
  - Annex 3 – Centres where floorspace was estimated by GOAD (see Section 2C).
  - Annex 4 – summary tables of data referenced in Chapter 3;
  - Annex 5 – data tables, with all data returned by boroughs and obtained from other sources, including text answers to questions on the survey form. Electronic versions of these tables can be used to summarise and analyse information at a range of geographic levels;

## 2. Methodology

### 2a. Town Centre Health Check Survey Form

- 2.1 The survey is similar to the one used in the previous LPAC/GLA Town Centre Health Checks in 1994 and 1999/2000.
- 2.2 The health check form and guidance note are included at Annex 2. They ask a series of questions based on information requested in previous health checks and in general accordance with guidelines set out in PPS6.
- 2.3 For the purposes of the current town centre health checks these are grouped into the following categories:

<p><u>Scale and Function</u></p> <ul style="list-style-type: none"> <li>Retail Floorspace</li> <li>Retail Outlets</li> <li>Leisure, Culture and Arts Facilities</li> <li>Office Floorspace</li> <li>Education</li> <li>Health Facilities</li> <li>Civic and Community Facilities</li> <li>Markets</li> <li>Evening Shopping</li> <li>Sunday Shopping</li> <li>Office, Retail and Leisure Employment</li> </ul> <p><u>Capacity</u></p> <ul style="list-style-type: none"> <li>Sources of Capacity</li> <li>Capacity Study</li> </ul> <p><u>Financial Performance</u></p> <ul style="list-style-type: none"> <li>Retail and Leisure Turnover</li> <li>Shopping Yields</li> <li>Shopping Rents</li> </ul> <p><u>Accessibility</u></p> <ul style="list-style-type: none"> <li>Public Transport Accessibility</li> <li>Car Parking</li> <li>Shop Mobility Schemes</li> <li>Facilities for Cyclists</li> <li>Pedestrian Flows</li> </ul> <p><u>Town Centre Initiatives</u></p> <ul style="list-style-type: none"> <li>Town Centre Manager/Strategy/Initiatives</li> </ul> <p><u>Environment and Amenity</u></p> <ul style="list-style-type: none"> <li>Accidents</li> <li>Crime</li> <li>Attitudinal Studies</li> </ul>
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- 2.4 The objectives, methodology and survey forms have been developed in collaboration with the Association of London Government (ALG) and

Association of London Borough Planning Officers (ALBPO), and took into account reviews of the previous LPAC methodology<sup>16</sup>.

- 2.5 Details of the quality or attractiveness of a town centre through questions of retail, leisure and culture provision, accessibility, amenity, security and identity of town centres were not sought this time. This level of detail in town centre health checks is more appropriate for local health checks.
- 2.6 The revised survey strikes a balance between the desirability of information and the ability to collect the data. The health check forms were therefore streamlined in comparison to historic ones, focussing on matters of strategic importance. However it is recognised that there remains additional local information which may be desirable, for example town centre uses provided in edge- or out-of-centre locations, or a quantifiable indicator of attitudinal surveys undertaken at the local level and the quality of the town.
- 2.7 The combination of quantitative and qualitative data from borough returns has allowed strategic-level analysis of the health of London's town centre network. This analysis is identified in Section 3 of this document. It provides an overview of the data and assesses the patterns which can be seen in the responses received.

## **2b. Responses**

- 2.8 Annex 5 contains 'Full Data Tables' of survey form responses from boroughs. These tables include information not identified in the *summary* tables (included at Annex 4) and the tables in Section 3<sup>17</sup>.
- 2.9 Some form of response was received from 31 (out of 32) boroughs plus the City of London. Boroughs were asked to return a health check form for each centre listed in the London Plan, and for other centres if they considered it appropriate (for example large local/neighbourhood centres which may be considered for definition as district centres in the review of the London Plan). With a combination of GLA and borough data all centres in the London Plan are included in the health check database for at least some questions on the survey form.
- 2.10 While the general responses to the health check survey form has improved on previous surveys, the level of response to each question varied between boroughs and centres. Some of the data collected is incomplete and does not allow a comprehensive pan-London analysis. This issue is a key concern and will need to be addressed in future health checks.

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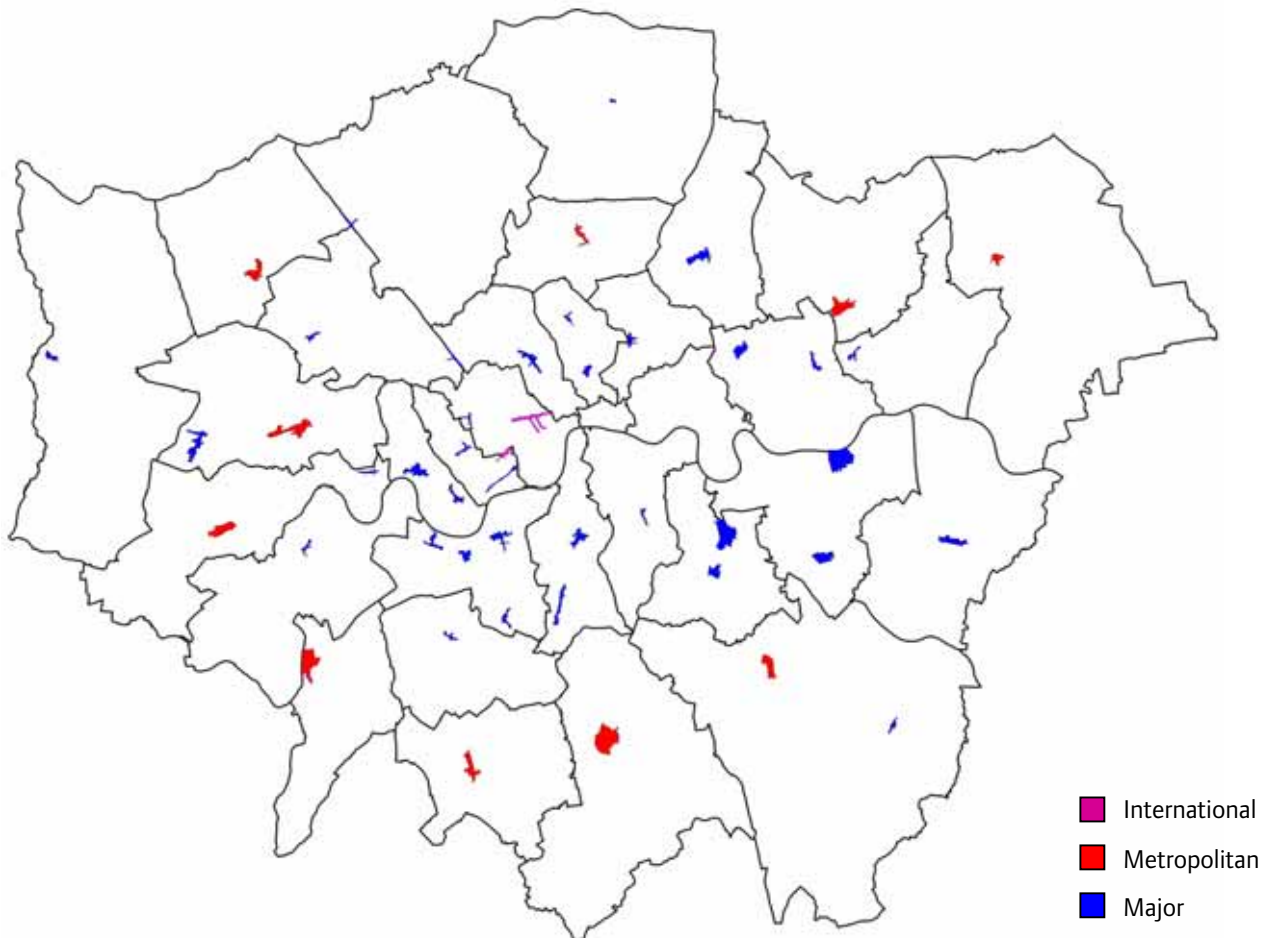
<sup>16</sup> Centre for Advanced Spatial Analysis (University College London), February 2000. Town Centre Vitality and Viability – a review of the Health Check Methodology (National Retail Planning Forum, 2000; available at <http://www.nrpf.org/healthcheck.pdf>).

<sup>17</sup> Electronic versions (in Microsoft Excel) are available which will allow data to be summarised and analysed in a more interactive way (for example by London Plan sub-region, borough, or classification/scale of centre).

## 2c. Data Sources

- 2.11 This study monitors the health of town centres by collating data from a number of sources. The main source of data is the survey form, and the questions on that form are the key indicators of health at the time of the survey. However, additional indicators have also been used in this study. These are identified below. For some questions on the survey form additional data has also been used in order to provide consistency across London.
- 2.12 Consistency and comparability among the data sets for the town centre health checks is a key priority to enable robust comparisons to be made between centres across London and over time. For the London-wide health checks in particular, data recorded should be based upon the same definition of the extent of the town centre. However, in practice there are different definitions of the town centre. Boroughs, for example, define their town centres in policy terms in their Unitary Development Plans (UDPs) or Local Development Frameworks (LDFs) and indicate boundaries on proposals maps. Some of the data sets in the health checks are collected on the basis of this definition. For a number of questions, the GLA sourced data from a consistent source across London in order to allow for comparability between centres.

**Figure 2.1: UDP/LDF-based boundaries of International, Metropolitan and Major town centres across London** (see paragraphs 2.12-2.14)



- 2.13 Figure 2.1 shows the boundaries (or boundaries defined by the GLA using town centre frontages as a proxy for boundaries - see paragraph 2.14) of the

International, Metropolitan and Major town centres across London as identified in borough UDPs/LDFs. This illustrates the differences in the way boroughs define town centre boundaries, and how these may be inconsistent with the size, role and function of the centre.

- 2.14 Where a development plan identified town centre/retail frontages instead of a town centre boundary these have been used as a proxy for developing a boundary polygon which could then be used to analyse geo-coded data such as planning decisions recorded through the London Development Database (LDD). This involved including the plot of land behind the frontage inside each polygon. Boundaries have only been developed for International, Metropolitan and Major centres and therefore capacity derived from LDD is not included for District centres.
- 2.15 Table 2.1 below shows the data sources used for each section of the survey form (identified in Section 2a). Data sources in addition to the survey form are set out in the following paragraphs.

**Table 2.1: Data sources used for analysis in this report (section 3)**

<b>Relevant Section</b>	<b>Survey Form</b>	<b>Additional Data Sources</b> (See additional information following)
<b>Scale and Function</b>		
Total Town Centre Floorspace	N/A	Experian GOAD data
Retail Floorspace	X	Experian GOAD data
Retail Outlets	X	Experian GOAD data
Leisure, Culture and Arts Facilities	✓	Experian GOAD data
Office Floorspace	X	CASA/ODPM data; Office Policy Review
Education	✓	
Health Facilities	✓	
Civic and Community Facilities	✓	
Markets	✓	
Evening Shopping	✓	
Sunday Shopping	✓	
Office, Retail and Leisure Employment	X	CASA/ODPM data
<b>Capacity</b>		
Sources of Capacity	✓	Experian GOAD vacancy floorspace data; London Development Database
Capacity Study	✓	
<b>Financial Performance</b>		
Retail and Leisure Turnover	N/A	Experian GOAD data
Shopping Yields	✓	
Shopping Rents	X	Colliers CRE Retail Rents Map 2005
<b>Accessibility</b>		
Public Transport Accessibility	N/A	Transport for London current PTAL
Car Parking	✓	
Shop Mobility Schemes	✓	
Facilities for Cyclists	✓	
Pedestrian Flows	✓	
<b>Town Centre Initiatives</b>		
Town Centre Manager/Strategy/Initiatives	✓	
<b>Environment and Amenity</b>		
Accidents	✓	
Crime	✓	
Attitudinal Studies	✓	

N/A indicates data not sought on survey form

2.16 **Experian GOAD data:** (Surveys range from 2001-2004) Additional floorspace and retail/leisure outlet data has been sourced from Experian GOAD and has been reconciled to the CASA/ODPM floorspace as shown in figure 2.2 below (see also paragraph 2.23). This data compliments the retail needs studies which have been undertaken by the GLA<sup>18</sup>.

<sup>18</sup> GLA, Sept 2004. London Town Centre Assessment (Stage 1): Comparison Goods Floorspace Need  
GLA, May 2005. London Town Centre Assessment (Stage 2): Convenience Goods Floorspace Need

**Figure 2.2: Example of how GOAD data has been reconciled to CASA/ODPM floorspace**

<i>CASA retail floorspace estimate</i>	<i>108,403</i>
Goad retail and retail service floorspace	86,372
ground floors	69,110
additional floors	17,262
Goad leisure service floorspace	16,650
Goad vacant retail floorspace	2,590
<i>Total adjusted Goad floorspace</i>	<i>105,612</i>

*Source: Mayor of London 2004, London Town Centre Assessment (Stage 1)*

- 2.17 Town centre boundaries are defined in borough UDPs/LDFs in a number of different ways. Some boroughs adopt a town centre boundary including retail, leisure and office uses, others focus on a retail core (see figure 2.1). Others focus on retail frontages. In order to conduct surveys on a consistent basis GOAD survey the largest 2,650 centres in the UK by turnover. This consistency in designation provides a coherent set of floorspace data across the town centre network in London.
- 2.18 Historically, boroughs have obtained floorspace data from a range of sources. These include CLUSTER data (London-wide dataset collected by Boroughs), commercial sources such as GOAD and, more recently, ODPM/CASA data<sup>19</sup>. This health check signalled the need for a more coordinated approach to collect comparable information.
- 2.19 Floorspace data compiled by the Valuation Office Agency (VOA) of the Inland Revenue was used as the source for CASA/ODPM. However, the Town and Country Planning Use Classes are not currently available in the VO data and therefore use classes had to be derived from the existing VO data classifications. CASA/ODPM used VO classifications to derive approximate floorspace by Use Class, and allows analysis for A1 (shops), A2 (financial and professional services), A3 (restaurants, bars and take aways)<sup>20</sup> and Offices. However it does not distinguish between comparison and convenience goods, or different leisure uses in terms of floorspace. In addition to this, data from CASA/ODPM does not cover all town centres identified in the London Plan.
- 2.20 Consideration is needed as to how town centre floorspace is measured in future health checks and whether policy-based town centre boundaries, or GOAD-based boundaries (or a combination of both) are used to measure floorspace at the strategic level. Consistency in methodology of floorspace estimation is important in understanding the network of centres across London.

<sup>19</sup> This data is available at <http://www.casa.ucl.ac.uk/towncentres/cd> and indicates statistics from a number of sources for Areas of Town Centre Activity and Retail Cores.

<sup>20</sup> A3 use class split into A3, A4 and A5 as of 21 April 2005, data from period when these were combined as A3.

- 2.21 Primary activities within the GOAD 'Leisure Services' category are identified in Table 2.2 below.

**Table 2.2: Categories identified in GOAD's Leisure Services**

Amusements	Chinese Take Away	Hall	Nightclub	Take Away
Bar	Cinema	Hotel	Pizza Restaurant	Theatre
Bar & Restaurant	Club	Ice Cream Parlour	Pizza Take Away	Ticket Agency
Betting Office	Coffee Shop	Ice Rink	Pool Club	Tourist Attraction
Bingo	Dancing School	Indian Restaurant	Public House	Vegetarian Restaurant
Bowling Alley	Entertainment Centre	Indian Take Away	Restaurant	Wine Bar
Box Office	Fast Food Restaurant	Internet Cafe	Sandwich Bar	Wine Bar & Restaurant
Cafe	Fish & Chips	Italian Restaurant	Snooker Club	
Casino	Fish Restaurant	Leisure Centre	Social Club	
Chinese Restaurant	Guest House	Mexican Restaurant	Sports Club	

- 2.22 Floorspace was estimated for centres not covered by GOAD. This was based on average sizes for similar retailers to those Experian (GOAD) know are in the centre. A list of these centres is included at Annex 3.
- 2.23 **CASA/ODPM data<sup>21</sup>**: Office floorspace (Valuation office floorspace data, 2000), office/retail/leisure employment data (Annual Business Inquiry - ABI/1, 1999) and turnover data (Annual Business Inquiry - ABI/2, 1999) have been supplemented/sourced by the CASA/ODPM study, for centres which are included in the CASA/ODPM dataset. However, the floorspace and employment data are not concurrent - the employment and turnover data are for 1999, while the floorspace data are as at 2000. They are also estimated and in some instances data is not disclosed<sup>22</sup>. In testing the health of centres, findings from the GLA's London Office Policy Review 2004 has also been used in assessing office floorspace.
- 2.24 **Sources of capacity**: Responses regarding physical capacity for future development in town centres is an important aspect of this study. However the responses received were not comprehensive. Additional information has been sourced from GOAD vacant floorspace data, and unimplemented permissions from London Development Database<sup>23</sup>. However, this information should be tested through local assessments of capacity in order to ensure that individual sites are not double counted.
- 2.25 GOAD data was allocated to town centres as set out in paragraph 2.16. Data from LDD was sourced and matched using GIS software. This enabled records which are geo-coded to be allocated to town centres based on the town centre boundaries (see figure 2.1) identified in UDPs or developed by the GLA

<sup>21</sup> See <http://www.casa.ucl.ac.uk/towncentres/cd/index.htm>

<sup>22</sup> 'Disclosive' indicates where the aggregate statistics for certain employment, turnover or floorspace categories are not provided since they are potentially disclosive (i.e. data for an individual company or building can be identified)

<sup>23</sup> See <http://www.london.gov.uk/mayor/ldd/index.jsp>

(paragraph 2.14 sets out how boundaries were developed by the GLA when not included in borough UDPs).

- 2.26 LDD data provided total net gain of floorspace or number of units (net gain) within a town centre for unimplemented planning permissions (where permission was granted but not started, constructed, expired or superseded) for retail (floorspace, Sq M), leisure (floorspace, Sq M), Housing (units) and Hotels (number of bedrooms). GOAD data provided vacant floorspace (Sq M) included which is in the 'other' category, as it does not allow differentiation between vacant retail, leisure, housing or hotel premises. LDD data was static as of August 2005.
- 2.27 **Retail Rents:** Data from the Colliers CRE Retail Rents Map 2005 has been used to supplement rental data provided by boroughs. Data returned on the survey forms was from different sources and inconsistent across different centres. The Colliers data also enables analysis over time as it includes retail rents data for each year from 1998.
- 2.28 **PTALs:** Public Transport Accessibility Level (PTAL data) for 2001 has been used to assess accessibility by public transport.
- 2.29 Because CASA/ODPM data, Colliers retail rents data and GOAD data are based on different boundaries and town centre names it was necessary to align these with the centres identified in the London Plan. This was achieved by cross-referencing the data and boundaries in the GOAD and ODPM datasets with boundaries provided by boroughs alongside the survey form.
- 2.30 **Public Transport:** Data is also supplemented by commentary from TfL's Town Centre Survey<sup>24</sup> which assessed modes of transport used by people to access town centres. The following centres were used to identify overall findings which are partly used in this report: Bromley, Eltham, Harrow, Ilford, Peckham, Dalston, Feltham, Harlesden, High Street Kensington, Kingston, West End (Oxford Street and Regent Street).

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<sup>24</sup> Town Centres Survey, available at <http://www.tfl.gov.uk/buses/pdfdocs/town-centres-survey.pdf>

## 3. Main Survey Findings

### 3a. Scale and Function

#### Total Floorspace, Retail Floorspace and Retail Outlets

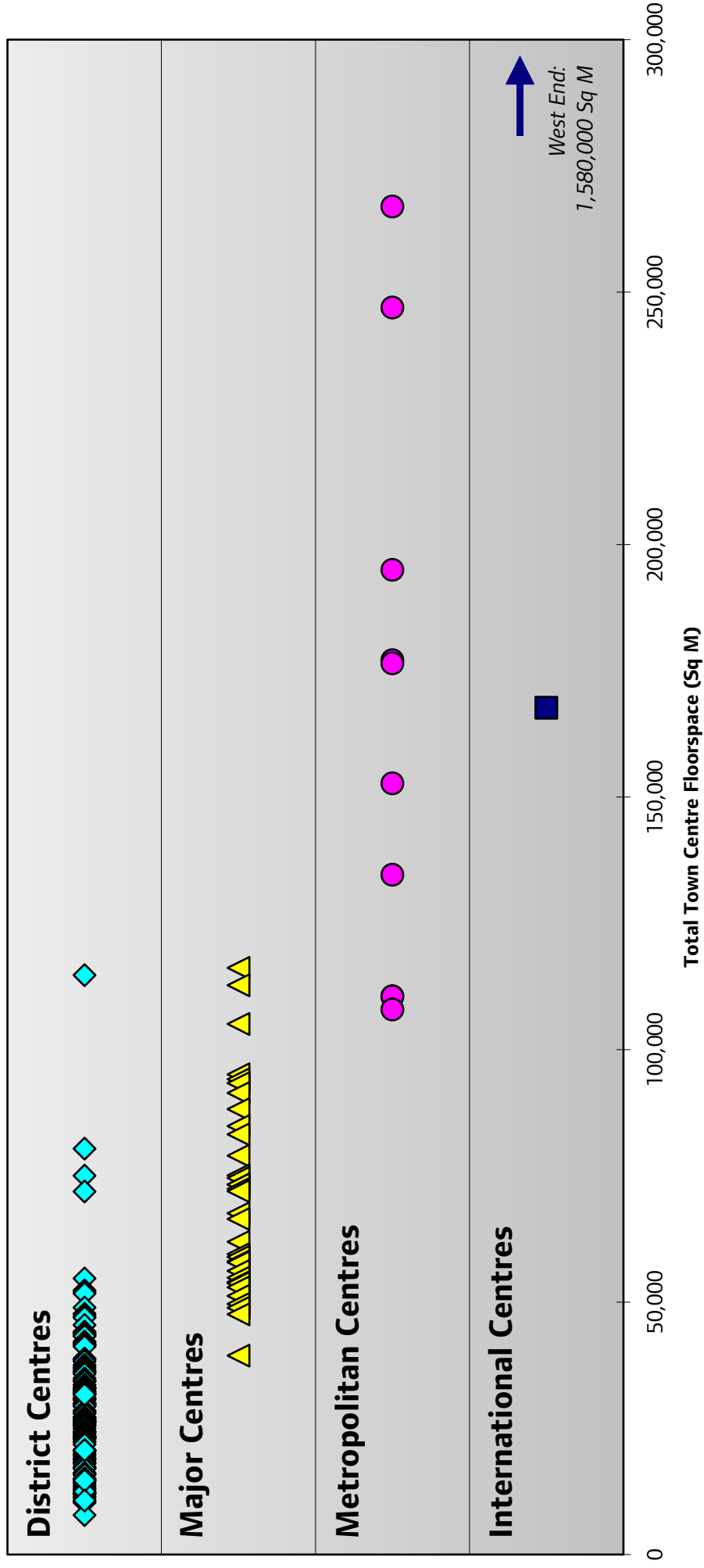
- Survey Form: Questions 1.1 and 1.2 and additional information
- Annex 4, Tables: 1 – Floorspace in the town centre network<sup>25</sup>
  - 2 – Comparison goods floorspace as a % of total retail floorspace
  - 3 – Convenience goods floorspace as a % of total retail floorspace
  - 4 – Retail outlets in town centre network

- 3.1 The classification of centres in the London town centre network is based not just on scale, but also on the function of a centre. Section 1 of the survey therefore provides indications of how town centres relate to each other and the overall network. Further discussion is provided in Section 4 of this report.
- 3.2 The survey form indicated that the data for this question would be provided by GLA/GOAD if boroughs were unable to provide it. A number of boroughs indicated that they would like the GLA to use GOAD data for this question. The differences between GLA/GOAD data and data provided by boroughs is set out in Table 1, Annex 4. This identifies comparable borough retail floorspace and GOAD retail floorspace, as well as total town centre floorspace (GOAD reconciled to ODPM/CASA – see paragraph 2.16-2.19).
- 3.3 Floorspace data (from GLA/GOAD sources) is therefore available for all centres. 64% of Boroughs provided their own data, with the remainder not providing data or indicating a preference to use GLA/GOAD data. Some centres indicate differences between borough estimation of floorspace and GOAD data. Floorspace and outlet analysis below uses GLA/GOAD data in order to allow comparison between centres.
- 3.4 London's town centre floorspace (retail, leisure and vacant floorspace) is over 10,000,000 square metres (Sq M), with approximately 6,300,000 Sq M in retail use (measured across International, Metropolitan, Major and District centres as identified in Annex 1 of the London Plan). The breakdown of floorspace across London's town centre network is shown in Table 1, Annex 4 and summarised for the largest town centres in Table 3.1. Figure 3.1 below shows the range of floorspace between the largest and smallest centres in London, identifying a hierarchy based on size of centre.

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<sup>25</sup> Borough data for this round of health checks and GOAD data, plus data from 1999 health check

Figure 3.1: Total Town Centre Floorspace range in London's District, Major, Metropolitan and International Town Centres



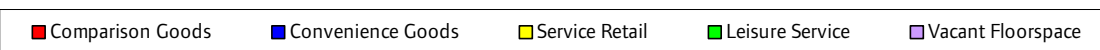
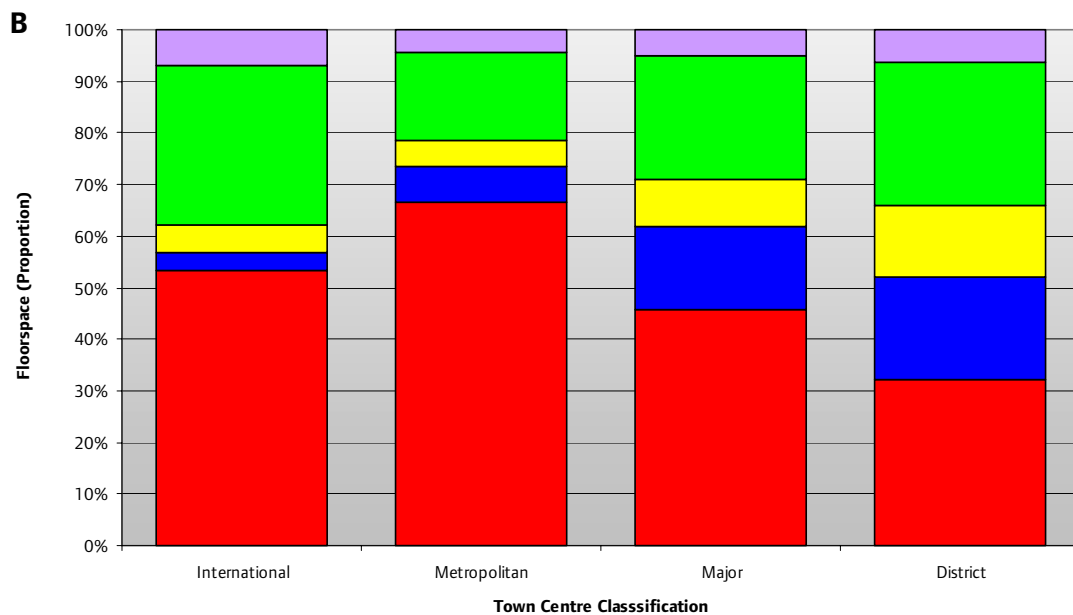
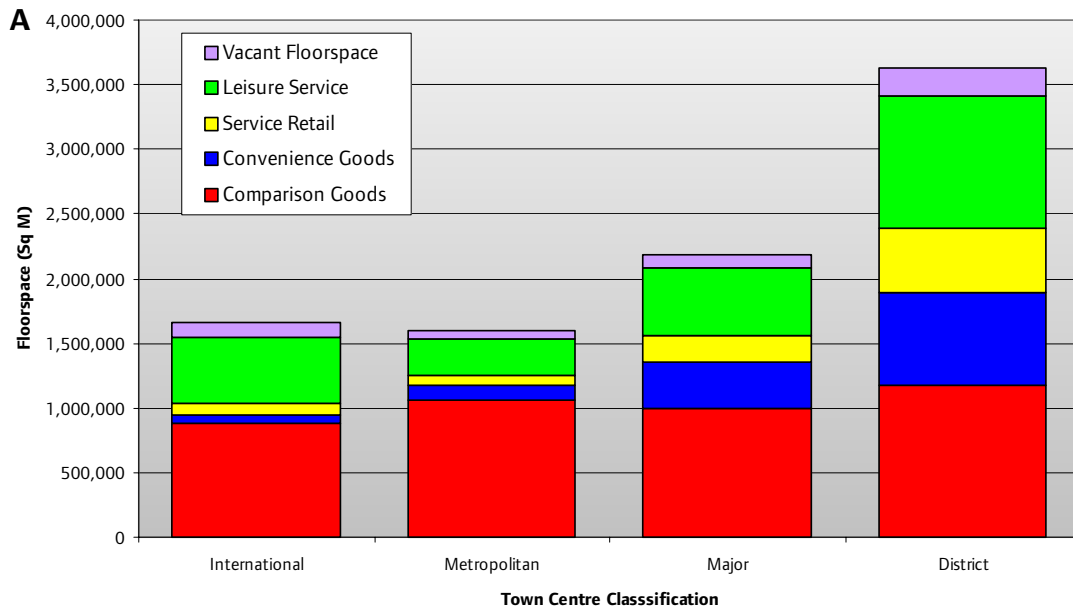
- 3.5 Table 3.1 below shows the floorspace in London's largest town centres, which primarily comprise International and Metropolitan centres. However, the floorspace (retail floorspace in particular) in Uxbridge (116,000 Sq M, 93,000 Sq M retail floorspace) would indicate it is larger than most other Major centres. Angel and Camden Town Major centres also have a large floorspace (113,000 Sq M and 105,000 Sq M respectively), although the relatively low proportion in retail indicates the significant leisure and other functions of these centres. The floorspace of Isle of Dogs/Canary Wharf District centre (115,000 Sq M) also indicates an important role, linked particularly to its employment catchment with both retail and leisure uses.
- 3.6 The smallest Major centres include Wembley (39,000 Sq M) and Stratford (49,000 Sq M) where regeneration and expansion of the centre are planned, and Wandsworth (48,000 Sq M).
- 3.7 The largest District centres (over 70,000 Sq M) are Isle of Dogs (115,000 Sq M), Elephant and Castle/Walworth Rd (combined - 80,000 Sq M – see paragraph 3.8), Swiss Cottage (75,000 Sq M), and Fulham Road West (72,000 Sq M). Cricklewood, Walworth Road and Leytonstone and Shepherd's Bush are all greater than 50,000 Sq M. In Isle of Dogs/Canary Wharf and Shepherds Bush, however, retail comprises less than 48% of overall town centre floorspace. The smallest District centre is around 8,000 Sq M (Rose Hill, Sutton).
- 3.8 The London Plan identifies Elephant and Castle and Walworth Road as two separate District centres. Provision of floorspace data as one centre from LB Southwark has been included in the data. GOAD data floorspace for a combined centre would be above the general threshold for a District centre. However, the health checks have always sought to categorise centres on the basis of their current, rather than future, function and therefore they continue to be categorised separately. Discussions regarding the town centre network will be made through the SRDF process and Further Alterations to the London Plan.
- 3.9 Similarly, London Borough of Ealing have supplied health check data for Ealing (Metropolitan Centre) as a single centre. However there is an issue as to whether this centre functions as one centre, or whether it functions as two distinct centres (Ealing Broadway and West Ealing). This issue will be considered through the West London SRDF and Further Alterations to the London Plan.
- 3.10 Further discussion about these centres and implications of health check findings for the town centre network are included at Chapter 4.
- 3.11 Table 3.1 below shows the floorspace of London's largest town centres, greater than 90,000 Sq M.

**Table 3.1: Floorspace in London's largest town centres**

<b>Borough</b>	<b>London Plan Designation</b>	<b>Town Centre Name (GLA name)</b>	<b>Town Centre Floorspace Sq M *</b>	<b>All Retail Floorspace Sq M</b>
Westminster/ Camden	International	West End	1,581,456	907,616
Croydon	Metropolitan	Croydon	266,981	190,111
Kingston upon Thames	Metropolitan	Kingston	246,969	194,249
Havering	Metropolitan	Romford	195,033	143,313
Redbridge	Metropolitan	Ilford	177,134	135,414
Bromley	Metropolitan	Bromley	176,495	141,695
Westminster/ Kensington And Chelsea	International	Knightsbridge (Sloane Street/ Kensington)	167,742	122,572
Sutton	Metropolitan	Sutton	152,726	115,316
Ealing	Metropolitan	Ealing	134,672	92,422
Hillingdon	Major	Uxbridge	116,186	92,966
Tower Hamlets	District	Isle of Dogs/ Canary Wharf	114,769	55,049
Camden	Major	Camden Town	112,748	62,898
Hounslow	Metropolitan	Hounslow	110,572	86,372
Haringey	Metropolitan	Wood Green	110,547	77,297
Harrow	Metropolitan	Harrow	107,969	78,349
Islington	Major	Angel	105,053	49,883
Waltham Forest	Major	Walthamstow	95,081	66,271
Kensington And Chelsea	Major	Kensington High Street	94,124	69,744
Lewisham	Major	Lewisham	93,364	66,554
Bexley	Major	Bexleyheath	91,398	65,878

\* GOAD reconciled to CASA – see paragraphs 2.16-2.19

**Figure 3.2 (A & B): Town centre floorspace (Convenience, Comparison and Service Retail, Leisure and Vacant) totals in London’s town centre network by total floorspace (A) and proportion (B)**



3.12 Figures 3.2 (A and B) above show the total and proportion of floorspace in town centres in comparison, convenience and service retail use, leisure use and vacant. The average retail floorspace in each of these uses is shown in table 3.2 below.

**Table 3.2: Average floorspace by category for each classification of centre**

	Average retail floorspace (Sq M)				
	Comparison Goods	Convenience Goods	Service Retail	Leisure Services	Vacant Floorspace
<b>International</b>	443,584	27,710	43,800	56,965	258,740
<b>Metropolitan</b>	106,366	11,117	7,971	7,223	27,262
<b>Major</b>	29,342	10,401	5,936	3,150	15,422
<b>District</b>	7,750	4,762	3,320	1,497	6,735

3.13 The proportions of comparison (Table 2, Annex 4) and convenience (Table 3, Annex 4) goods floorspace in London’s town centres are one indication of a centre’s role. However, these proportions can be significantly influenced by the presence of one or more large convenience goods stores (for example in Camden Town with 43% and Catford with 42% convenience floorspace). The figures above and tables in Annex 4 show the significant role of District centres for provision of convenience goods, and the higher proportion of Comparison goods floorspace in Major and particularly Metropolitan and International centres.

3.14 The International and Metropolitan centres provide an important role in providing comparison goods to Londoners and visitors to London. Table 2, Annex 4 also shows how certain centres perform a strategic role in provision of comparison goods, which may be different from similar sized centres. This includes centres such as King’s Road, Kensington High Street and Portobello Road where there is a high proportion of comparison goods retailing.

3.15 The largest floorspace for both multiple and independent retailers in London’s town centre network is primarily in International and Metropolitan centres (see Table 4, Annex 4 and Table 3.3 below). This is because of the overall retail floorspace difference between the different classification of centres.

**Table 3.3: Average floorspace by outlet type for each classification of centre**

	Average retail floorspace (Sq M)					
	Multiples	Independents	Shopping Centres	Jewellers	Banks	Dept Stores
<b>International</b>	353,417	161,678	15,595	7,830	22,925	42,130
<b>Metropolitan</b>	105,811	19,843	50,295	1,107	4,868	24,285
<b>Major</b>	29,160	16,520	11,784	586	2,380	3,992
<b>District</b>	7,438	9,047	1,504	167	1,614	459

- 3.16 Differences between multiple and independent retailers, however, are shown when examining the proportion of floorspace occupied by each type in town centres. The largest proportions of multiples (as a % of total retail floorspace) are generally in Metropolitan centres.
- 3.17 There are a number of District centres which, because of their size have a high proportion of multiple retailers in their retail offer. This may be partially explained by their role (e.g. District centres in the City of London providing for workers in the area, or large-scale retail stores at Canada Water).
- 3.18 As shown by Table 3.4 below, District centres generally have a higher proportion of retail floorspace occupied by independent (55%), rather than multiple (45%), retailers. Combined with the high proportion of convenience goods floorspace in District centres, this shows the important role of District centres to the local economy and their contribution to local distinctiveness and sustainable access to goods and services.
- 3.19 The lowest average proportion of independent occupiers (16%) are in London's Metropolitan centre category.

**Table 3.4: Average proportion of floorspace between Multiple and Independent retailers in London's town centre network**

	Multiple	Independent
International	69%	31%
Metropolitan	84%	16%
Major	64%	36%
District	45%	55%

- 3.20 Enclosed shopping centre floorspace (See Table 3.3 above, and Table 4, Annex 4) is primarily located in Metropolitan centres and the West End. However Uxbridge, Lewisham (Major centres) and Isle of Dogs/Canary Wharf (District centre) have a particularly high level of floorspace in enclosed shopping centres. Similarly, the highest levels of Department Store floorspace are in the International and Metropolitan centres, and in Uxbridge.

### Leisure Floorspace and Leisure Outlets

- Survey form: Question 1.3 and additional information
  - Annex 4, Tables: 5 – Leisure floorspace in town centre network
    - 6 – Leisure in town centre network/night time economy
    - 7 – Leisure outlets in town centre network
- 3.21 Leisure floorspace in centres as measured by GOAD comprises the activities listed in Table 5, Annex 4. A single large leisure facility, or a cluster of leisure/night-time economy uses can have a particular impact on the quantity of leisure floorspace in a town centre. Approximately 2,300,000 Sq M of floorspace across the network (approximately 25% of total floorspace) is leisure uses.

- 3.22 Leisure services can add vitality and viability to a centre and can contribute to London's world city role. Centres, particularly those in and around the Central Activities Zone (and employment concentrations such as the City of London and Isle of Dogs/Canary Wharf) comprise a high proportion of leisure services relative to the quantity of retail and other uses. Some centres indicate particular leisure functions such as Angel (38,000 Sq M, 43% of total floorspace), Camden Town (38,000 Sq M/36%) and Isle of Dogs/Canary Wharf (37,000 Sq M/38%) – see Table 3.5.

**Table 3.5: Town Centres with largest leisure floorspace**

Centre	Classification	Borough	Leisure floorspace Sq M	All Retail Floorspace Sq M	Total floorspace (Sq M) *	Leisure as % of total f'space
West End	International	Westminster	483,580	907,616	149,7286	32%
Croydon	Metropolitan	Croydon	44,790	190,111	252,811	18%
Angel	Major	Islington	39,910	49,883	93,823	43%
Camden Town	Major	Camden	37,760	62,898	104,358	36%
Isle of Dogs/Canary Wharf	District	Tower Hamlets	37,130	55,049	96,489	38%
Knightsbridge (Sloane Street/Kensington)	International	Westminster	33,900	122,572	164,312	21%
Romford	Metropolitan	Havering	33,740	143,313	184,053	18%
Kingston	Metropolitan	Kingston upon Thames	33,160	194,249	242,469	14%
Ealing	Metropolitan	Ealing	27,360	92,422	124,292	22%
Sutton	Metropolitan	Sutton	26,210	115,316	144,866	18%

- 3.23 Despite the relatively large total leisure floorspace, Metropolitan centres contain a generally smaller proportion of leisure relative to the total floorspace (between 14–22%) than International, Major and District centres (see figure 3.2 (B), above).
- 3.24 London's most significant leisure and tourism destination, the West End (484,000 Sq M leisure floorspace), plays a particular strategic function. Some other centres play strategic as well as sub-regional roles, for example through association with cultural facilities, live music, or their sub-regional location (e.g. Metropolitan centres). Data from boroughs (Health Check forms) as shown in Table 3.6 (below) indicate a range of leisure uses across London's Metropolitan centres.

**Table 3.6: Range of leisure uses in London's Metropolitan centres (borough data)**

Centre	Restaurants & Cafes	Take-aways	Pubs & Bars	Nightclubs	Cinema Seats	Theatre seats
Croydon	79	11	32	4	2,500	883
Ealing	72	22	24	4	1,128	464
Romford	69	18	22	4	3,874	0
Ilford	56	14	12	2	2,195	348
Kingston	46	6	19	3	0	350
Sutton	35	18	14		1,690	402
Bromley	40	10	9	2	892	785
Hounslow	16	10	24	0	280	280
Harrow	31	6	9	1	2,632	0
Wood Green	22	14	5	1	3,500	0

- 3.25 Centres in the City of London and Isle of Dogs have significant leisure services floorspace related to the high levels of office employment in these areas (38-78% of total floorspace in leisure services).
- 3.26 Centres in the City (and Isle of Dogs) also generally have higher numbers of bars and pubs compared to other eating/drinking establishments<sup>26</sup> – 33-42%, compared with an average across London’s town centres of 22% (see Table 6, Annex 4).
- 3.27 Those with the highest proportion of restaurants and cafes (compared to other eating/drinking establishments) include Major and International centres, and District and other centres with a specialist dining role. These include Golders Green (74%), South Kensington (73%), Hampstead (70%), Brick Lane (70%) and Crouch End (68%).
- 3.28 The number of leisure outlets (as identified by GOAD: Table 7, Annex 4) in different types of centre varies greatly. The largest number are generally in the West End, a number of District and Other centres in the Central Activities Zone (and Isle of Dogs), some Metropolitan centres, and some centres with a specialist leisure role (such as Camden Town, Angel, Brick Lane and Clapham Junction) as shown in Table 3.7 below. Analysis of the role of leisure services in the town centre network is further explored in the Best Practice Guidance Managing the Night Time Economy<sup>27</sup>.

**Table 3.7: Town centres with largest number of leisure outlets (GOAD data)**

Centre	Classification	Borough	Total No. Rest'n'ts/Cafes	Total No. Take Aways	Total No. Bars/Pubs	Total No. Nightclubs
West End	International	Westminster	1,130	319	537	7
Croydon	Metropolitan	Croydon	99	52	63	1
Camden Town	Major	Camden	82	29	58	0
Victoria Street	Other	Westminster	86	44	37	0
Farringdon	Other	City of London	64	35	64	1
Angel	Major	Islington	78	22	59	0
London Bridge	Other	Southwark	38	32	36	0
Streatham	Major	Lambeth	56	30	17	1
Fullham Road West	District	Kensington And Chelsea	50	23	25	1
Leadenhall Market	District	City of London	30	27	41	0
Queensway/Westbourne Grove	Major	Westminster	76	8	12	0
Fenchurch Street	Other	City of London	35	26	34	0
Liverpool Street	District	City of London	31	33	31	0
Richmond	Major	Richmond upon Thames	58	11	23	0
Kingston	Metropolitan	Kingston upon Thames	45	19	27	1

<sup>26</sup> As proportion of leisure/night time economy uses, i.e. restaurants/cafes; take aways; bars and pubs; nightclubs.

<sup>27</sup> See <http://www.london.gov.uk/mayor/strategies/sds/bpg.jsp>

## Vacant Floorspace

- Annex 4, Tables: 8 – Vacant floorspace in town centre network
- 3.29 Approximately 6% of London’s total town centre floorspace is vacant (523,000 Sq M) according to GOAD data, as show in Table 8, Annex 4. Whitechapel, Wandsworth and New Cross have the highest proportion of floorspace vacant (20–25%). There is a significant amount of vacant floorspace in the West End (over 100,000 Sq M), Croydon and Kingston (15–18,000 Sq M). This is primarily a result of the size of these centres, and their vacancy rates are around six per cent, the London average per centre. Those centres above 9% vacancy levels are indicated in red/bold text in Table 8, Annex 4.
- 3.30 Vacant floorspace is discussed further in Section 3b (Capacity).

## Office Floorspace

- (Questions 1.4)
  - Annex 4, Table: 9
- 3.31 Responses regarding office floorspace in the town centre network were not consistent. Incomplete data was received for 48 centres. A number of centres had no return for this question and those where data was provided used different sources. The GLA has therefore sourced additional data from CASA/ODPM to identify office floorspace in the town centre network.
- 3.32 The CASA/ODPM data (Table 9, Annex 4) shows that the town centres with largest quantity of office floorspace are the West End (3,109,000 Sq M) and Isle of Dogs (715,000 Sq M), followed by a number of District centres in the City of London<sup>28</sup>, Croydon (476,000 Sq M), Hammersmith (328,000 Sq M) and Holborn (326,000 Sq M). District centres (except those in the City of London and the Isle of Dogs/Canary Wharf centre) have the lowest levels of office accommodation. There is clearly a different relationship between office provision and centres within and outside the Central Activities Zone.

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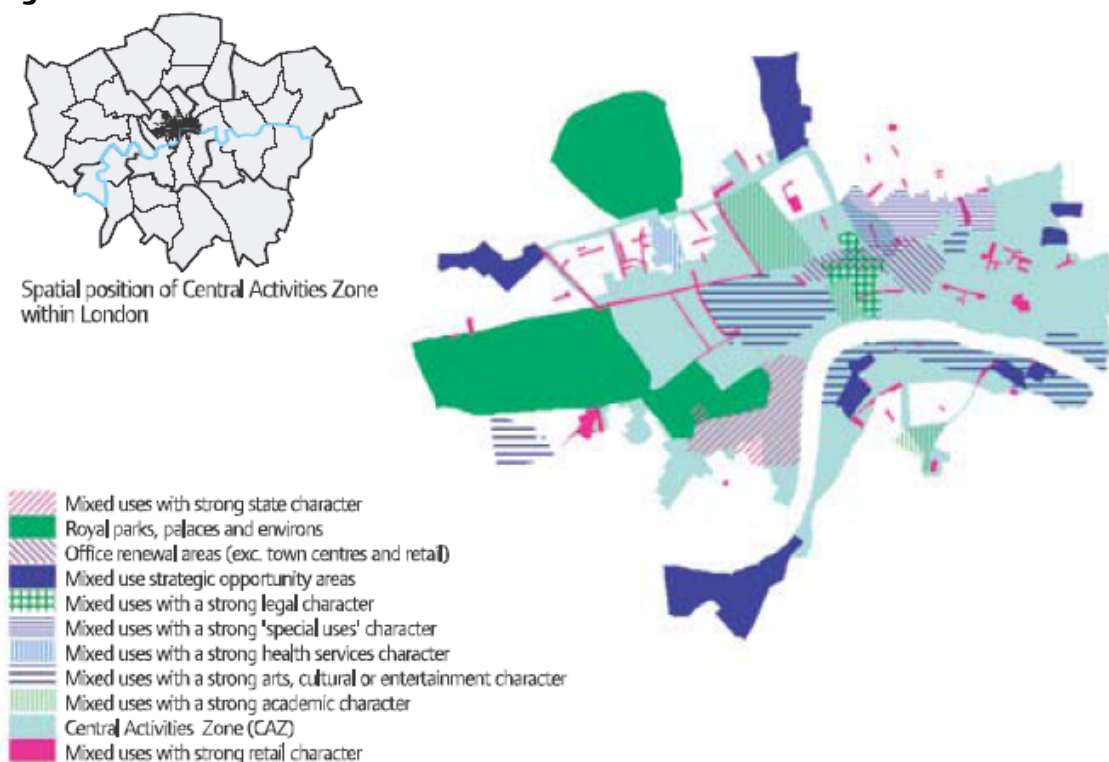
<sup>28</sup> The quantities of office floorspace set out does not reflect the total office floorspace in the City, most of which lies outside of the designated District centres.

**Table 3.8: Office floorspace in London's town centre network – (Outside the Central Activities Zone)**

<b>Centre</b>	<b>Classification</b>	<b>Borough</b>	<b>Office Floorspace (Sq M)</b>
Croydon	Metropolitan	Croydon	475,639
Hammersmith	Major	Hammersmith & Fulham	327,502
Camden Town	Major	Camden	147,663
Kingston	Metropolitan	Kingston upon Thames	131,932
Bromley	Metropolitan	Bromley	110,427
Uxbridge	Major	Hillingdon	107,232
Ealing	Metropolitan	Ealing	100,426
Harrow	Metropolitan	Harrow	99,361
Kensington High Street	Major	Kensington And Chelsea	99,336
Sutton	Metropolitan	Sutton	89,217
Angel	Major	Islington	85,576
Wimbledon	Major	Merton	83,375
Richmond	Major	Richmond upon Thames	78,307

- 3.33 Table 3.8 (above) shows the office floorspace in town centres outside of the Central Activities Zone (CAZ)<sup>29</sup>, see Chapter 5B, London Plan and Figure 3.3 below. Office floorspace is present throughout the Central Activities Zone with particular concentrations in the City of London and the West End. The office floorspace for town centres within CAZ clearly underestimates the total level of office provision which extends beyond the town centre boundaries as identified by CASA/ODPM (See Table 9, Annex 4 for a full list).

<sup>29</sup> As defined in the London Plan published February 2006. Proposed revisions to the Central Activities Zone (published in the draft Further Alterations to the London Plan) are shown in Figure 4.6 of this report.

**Figure 3.3: London's Central Activities Zone**<sup>30</sup>

Source: The London Plan, GLA, 2004

- 3.34 Outside CAZ significant office floorspace exists in the Metropolitan and some Major town centres. Wood Green is the Metropolitan centre with the lowest office floorspace (32,000 Sq M), about half that of Romford (the next lowest Metropolitan centre, 63,000 Sq M). Hammersmith, Camden Town and Uxbridge Major centres have more than 100,000 Sq M of office floorspace.
- 3.35 In assessing the health of town centres, the likelihood of viable office development can help to identify future issues for the centres.
- 3.36 Drawing on the London Office Policy Reviews 2004 and 2006<sup>31</sup>, the SRDFs set out a number of town centres where, from a strategic perspective, speculative office development could be promoted on accessible sites. These are in addition to office provision in CAZ, City fringe areas, at Isle of Dogs/Canary Wharf and Stratford and non-town centre based provision. The town centres are listed in Table 3.9 below.

<sup>30</sup> NB: See also Figure 4.6, Proposed revisions to the Central Activities Zone (published in the draft Further Alterations to the London Plan)

<sup>31</sup> See: <http://www.london.gov.uk/gla/publications/planning.jsp>

**Table 3.9: Locations where speculative office growth could be promoted**

(See paragraphs 3.36 and 3.37)

<b>Borough</b>	<b>Office Location</b>	<b>Location Type</b>
<b>Ealing</b>	Ealing	Town centre based office quarter
<b>Hammersmith &amp; Fulham</b>	Hammersmith	Town centre based office quarter
<b>Hammersmith &amp; Fulham</b>	White City	Town centre based office quarter/Mid-urban business park
<b>Hounslow</b>	Chiswick	Town centre based office quarter/Mid-urban business park
<b>Hounslow</b>	Brentford	Town centre based office quarter
<b>Hillingdon</b>	Uxbridge	Town centre based office quarter
<b>Bromley</b>	Bromley	'Local' or small 'town centre based office quarter'
<b>Croydon</b>	Croydon	Strategic Office Centre
<b>Kingston</b>	Kingston	Town centre based office quarter (possible transport constraints)
<b>Merton</b>	Wimbledon	Town centre based office quarter
<b>Richmond</b>	Richmond	Possible 'town centre based office quarter' but capacity constrained
<b>Richmond</b>	Twickenham	'Local' but possibly serving a wider market
<b>Barnet</b>	Cricklewood/Brent Cross	Potential town centre office quarter. (Currently Opportunity Area). Subject to review.

- 3.37 The SRDFs also set out those town centres where some office provision could be promoted as part of wider residential or residential and retail/leisure mixed use development. This would be likely to entail long-term net loss of overall office stock, partial renewal on the more commercially attractive sites and managed change of use of provision on less attractive sites.

## Education and Health Facilities

- Survey form: Questions 1.5, 1.6
- Annex 4, Tables: 10 – Education Facilities  
11 – Health Facilities

- 3.38 Responses on town centre health and educational facilities were not completed by all boroughs for all centres. The London Plan (Policy 3D.1) encourages the location of health and education in town centres. Such facilities are part of the broader community role played by centres in the network.
- 3.39 Nine of the boroughs who responded to this question indicated twenty-two town centres across London with educational facilities<sup>32</sup>. School provision included six schools in Metropolitan centres (three in Croydon town centre), six in District centres and two in Major centres. The low number of centres indicated as including a school, however, confirm that schools are not necessarily located within town centre boundaries and provision is often made outside of town centres. Other education facilities, particularly in Major and District centres, include colleges, adult education centres and language schools. An analysis of education facilities identified is at Table 10, Annex 4.

<sup>32</sup> Other boroughs indicated zero or did not respond to this question.

- 3.40 Fourteen boroughs indicated centres with health facilities in the town centre network<sup>33</sup> – see Table 11, Annex 4. Two hospitals in larger centres (Southall – Major; Ilford – Metropolitan) are augmented by 40 health clinics and 32 GP practices across Metropolitan, Major and District centres and other local town centres.
- 3.41 In order to more fully assess the role and function of town centres within the London network, improved data regarding health and education facilities within or on the edge of town centres would be useful. Future health checks should therefore seek information in this respect.

### **Civic and Community Facilities**

- Survey form: Question 1.7 (part)
  - Annex 4, Table: 12 – Public toilets
- 3.42 Town centres are clearly identified as the main location for civic facilities and a range of community facilities from community centres, libraries, advice centres and places of worship, to open space and recreational facilities. The range of facilities across the town centre network is varied and would benefit from further analysis using consistent definitions across all boroughs and centres. The varied open question responses received are not suited to analysis across the town centre network. In future health checks consideration should be given to including more quantitative data regarding civic and community facilities as well as a standardised list of facilities which where provision could be compared across centres. The full responses received are listed in the data tables at Annex 5. As with education and health facilities (above), hotel and leisure facilities, civic and community facilities can be found at edge of centre locations. Consideration should be given as to whether such facilities located on the edge of town centres should be included in future health checks.

### **Public Toilets**

- 3.43 Questions regarding public toilet provision in town centres were answered by all but eight boroughs for at least some centres and allow analysis of quantitative data. The 25 borough responses identified 168 public toilet locations across 102 centres in the London town centre network. 58% of these have wheelchair access and 29% have baby-changing facilities. All Metropolitan centres except Ealing and Sutton provided data identifying at least one location. Provision has been identified across a range of size of centre, including 61 District centres. This data is outlined in Table 12, Annex 4.
- 3.44 Policy 3A.15 of the London Plan says that boroughs should assess the need for social and community infrastructure (including public toilets) and policies should seek to ensure appropriate facilities are provided. The GLA are looking to undertake research into public toilet provision in London which will look into current provision and creative ways of managing public toilet facilities.

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<sup>33</sup> Other boroughs indicated zero or did not respond to this question.

## Markets

- Survey form: Question 1.8
  - Annex 4, Table 13
- 3.45 Twenty five boroughs responded to this question. Of these, 58 town centres with markets were identified in the town centre network (Table 13, Annex 4), although there are a number of other market locations not identified in the responses<sup>34</sup>.
- 3.46 These ranged from 450 stalls in Walthamstow to single or small groups of stalls. Centres containing markets span the Metropolitan, Major, District and local centre categories across all parts of London. The larger markets (over 60 stalls) generally operate between five and seven days per week. Markets in London's town centre network provide specific roles for centres and serve local communities.
- 3.47 Markets in town centres are one indication of the role of a centre in the network and improved data would enable a better analysis of these centres within the network. PPS6 highlights the importance of markets, seeking to retain and enhance those existing, and re-introduce or create new ones where appropriate. They help to meet the needs of London's diverse communities and add to the vitality of town centres.

## Employment

- Survey form: Question 1.11
  - Annex 4, Table 14
- 3.48 Data from ODPM/CASA<sup>35</sup> (see paragraph 2.21) has been used to indicate employment in 132 centres where town centre health checks were undertaken. Employment figures are available for convenience, comparison and service retail, restaurants and licensed premises, arts culture and entertainment facilities, commercial office and public services.
- 3.49 Employment in the identified town centres totals 667,000, with 50% in the commercial office sector. The town centres include a large proportion of the CAZ office market and office employment at Canary Wharf. Inclusion of centres within CAZ and at Isle of Dogs/Canary Wharf distorts the employment profile confirming the need in future healthchecks to distinguish between CAZ and the rest of London. After commercial office employment, comparison goods retail employs 18% of town centre workers, followed by restaurants and licensed premises (11%), and public services (7%). These are set out by town centre classification in Table 3.10 and Figure 3.4 below.

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<sup>34</sup> Not all boroughs returned data on this question for all centres. Data may therefore be incomplete.

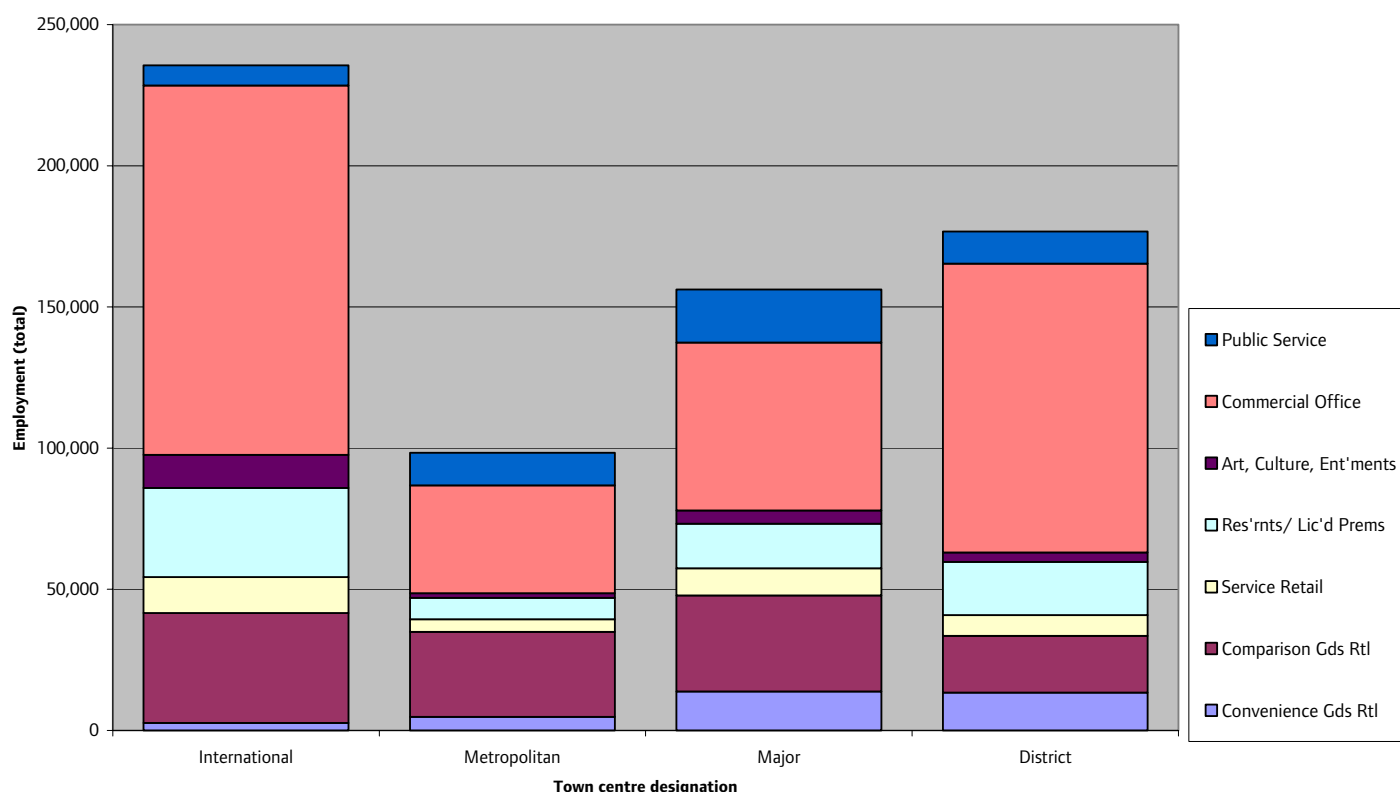
<sup>35</sup> Data from CASA/ODPM study is available at <http://www.casa.ucl.ac.uk/towncentres/cd>

**Table 3.10: Employment by sector and centre classification (1999)**

	EMPLOYMENT (sectors)							TOTAL
	Convenience Gds Retail	Comparison Gds Retail	Service Retail	Res'tnts/Lic'd Prens	Art, Culture, Ent'ments	Commercial Office	Public Service	
<b>International</b>	2,627	38,933	12,693	31,670	11,713	130,807	7,134	235,577
<b>Metropolitan</b>	4,800	30,108	4,467	7,538	1,686	38,230	11,548	98,377
<b>Major</b>	13,808	34,002	9,616	15,790	4,674	59,506	18,794	156,190
<b>District</b>	13,388	20,093	7,327	18,871	3,356	102,335	11,395	176,765

Source: CASA/ODPM – see Table 14, Annex 4

**Figure 3.4: Employment in town centre network, by centre classification (1999)**



3.50 The largest concentrations of employment in town centres identified by the data are those in the Central Activities Zone (CAZ) in particular the West End (218,500 jobs) with extensive floorspace (1,600,000 Sq M) and Victoria Street (34,000 jobs, ranked second after the West End with 88,000 Sq M floorspace, about the equivalent of a Major centre). Commercial office jobs comprise a large proportion of employment in central London centres (those in CAZ) and the Isle of Dogs/Canary Wharf, many of which are classified as District centres in the London Plan. This is a particular factor in the identified high levels of employment in restaurants and licensed premises, and convenience goods, in District centres and distorts the overall picture.

3.51 The town centre network hierarchy can be seen through the employment levels in centres. The employment roles of the different types of centres are

shown in Table 3.10 above. Convenience and public service employment is particularly important in District and Major centres and comparison goods retailing in the Metropolitan and International centres. The two International centres also have distinct roles associated with restaurants, licensed premises, arts, culture and entertainment. Some Major centres with high employment perform specific roles (for example comparison goods retail in Kensington High Street and King Road East) or accommodate high levels of public service employment.

## **3b. Capacity**

### **Capacity Studies and Identified Capacity**

- Survey form: Questions 2.1, 2.2
- Annex 4, Tables: 15 – Identified capacity  
16 – Capacity studies

- 3.52 Identifying capacity in London's town centre network is an essential element of the London-wide town centre health checks. As part of the wider London Town Centre Assessment<sup>36</sup> it is designed to enable reconciliation between the identified floorspace need (comparison and convenience goods studies) and available town centre capacity.
- 3.53 Boroughs undertook specific research to identify development capacity in town centres derived from borough records of planning permissions, from their UDPs/LDFs and through records of vacant sites and premises in town centres. Paragraph 4.4 of PPS6 sets out a requirement for boroughs to regularly collect information on a range of factors including the potential capacity for change or growth. In response to capacity questions on the survey form, data on floorspace capacity was received for only 75 centres in total, with data for 61 of these centres relating to housing units and hotel bedrooms. Full data supplied by boroughs, supplemented by GOAD and LDD data where available, is set out in summary table (Table 15, Annex 4) and in Annex 5.
- 3.54 To supplement the data provided by boroughs, the GLA has sourced additional data from Experian GOAD and the London Development Database (LDD) for vacant floorspace and unimplemented planning permissions respectively. It was not possible, without essential local knowledge, to identify the full range of capacity which could be identified by boroughs (in response to the survey form questions) and this supplementary data should therefore not be taken as identifying the total capacity for additional floorspace that exists in town centres across London. The data should be tested through local assessments of capacity in order to ensure that individual sites are not double counted. Paragraphs 2.24-2.26 set out how this data was sourced.
- 3.55 Capacity identified by GOAD and LDD is set out in Table 3.11 below, and full data (including data provided by boroughs) is identified in Table 15, Annex 4. Table 8, Annex 4 also lists vacant floorspace in London's town centres. Those centres with over 9% vacant floorspace are listed in red.

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<sup>36</sup> See reports at [http://www.london.gov.uk/mayor/strategies/sds/town\\_centre\\_assessment.jsp](http://www.london.gov.uk/mayor/strategies/sds/town_centre_assessment.jsp)

**Table 3.11: Capacity in town centre network, identified by GOAD and LDD**  
(Centres over 3,000 Sq M Vacant floorspace)

Centre	Borough	Identified Capacity				
		GOAD Vacant Floorspace (Sq M)	London Development Database (LDD) - Unimplemented Planning Permissions (2005)			
			Retail (Sq M)	Leisure (Sq M)	Housing (Units)	Hotels (Bedrms)
West End	Westminster	106,090	7,399	1,673	40	79
Croydon	Croydon	17,910	59,956	2,991	349	231
Kingston	K'ston u Thames	15,060	1,200		750	225
Wandsworth	Wandsworth	9,410	12,105	21,465	320	
Dalston	Hackney	7,910			87	
Knightsbridge	Wmin/K&C	7,840	-11		67	118
Ilford	Redbridge	7,680	-4,749		1,152	43
Romford	Havering	7,000	15,187		212	120
Leytonstone	Waltham Forest	6,680				
Streatham	Lambeth	6,590		1,528	208	
Wood Green	Haringey	6,520			87	
Elephant & Castle / Walworth (combined)	Southwark	6,190				
Walthamstow	Waltham Forest	6,030	2,129	1,966	112	
Bakers Arms	Waltham Forest	5,980				
Peckham	Southwark	5,340	-182		100	
Lewisham	Lewisham	5,320	4,950		514	18
Woolwich	Greenwich	5,180		13,000	2,693	
Harrow	Harrow	4,530	2,142		244	
Ealing	Ealing	4,510	2,364	2,750	599	
Kilburn High Road	Camden	4,120			120	79
Kilburn	Brent	4,120				
Angel	Islington	4,030	281		27	
Acton	Ealing	3,970				
Hammersmith	Ha'smith & F'ham	3,950		3,996	13	
Feltham	Hounslow	3,710				
Camden Town	Camden	3,700	2,205		93	
Catford	Lewisham	3,450			34	
Sutton	Sutton	3,340			270	
Brixton	Lambeth	3,330	2,210		199	
Edgware	Barnet	3,280	585		146	
Bromley	Bromley	3,090	1,289	1,220	44	
Praed Street/Paddington	Westminster	3,060				
Enfield Town	Enfield	3,060			9	

3.56 Significant capacity represented by vacant floorspace exists in a number of centres by means of vacant floorspace, particularly in the larger town centres. The West End contains the greatest quantum of vacant floorspace, followed by Croydon and Kingston. Table 3.12 below identifies the centres with the most vacant floorspace, and shows the total floorspace and proportion vacant in these centres.

**Table 3.12: Centres with the most vacant floorspace in London (GOAD data)**

Centre	Classification	Borough	Vacant floorspace Sq M	All Retail Floorspace Sq M	Total floorspace (Sq M)	Vacant as % of total f'space
West End	International	Westminster	106,090	907,616	1,497,286	7%
Croydon	Metropolitan	Croydon	17,910	190,111	252,811	7%
Kingston	Metropolitan	Kingston upon Thames	15,060	194,249	242,469	6%
Wandsworth	Major	Wandsworth	9,410	28,389	45,349	21%
Dalston	Major	Hackney	7,910	38,330	59,600	13%
Knightsbridge (Sloane Street/Kensington)	International	Westminster	7,840	122,572	164,312	5%
Ilford	Metropolitan	Redbridge	7,680	135,414	168,184	5%
Romford	Metropolitan	Havering	7,000	143,313	184,053	4%
Leytonstone	District	Waltham Forest	6,680	32,390	48,440	14%
Streatham	Major	Lambeth	6,590	45,038	77,008	9%

- 3.57 Table 3.13 (parts A and B) below shows totals for the data received from borough responses (for year 2004) (Part A) and LDD data (unimplemented permissions as of August 2005) (Part B) to allow comparison of the different sources. This includes data submitted by boroughs for 75 centres, and the LDD data available only for International, Metropolitan and Major town centres (see paragraph 2.25-2.26).
- 3.58 LDD data (as set out in Table 3.13, Part B) shows unimplemented planning permissions identified in London's Major, Metropolitan and International centres totalling 173,741 Sq M. This comprises unimplemented retail (113,179 Sq M) and leisure (60,562 Sq M) permissions. In addition to this the LDD identifies unimplemented permission for 9,711 housing units and 1,190 hotel bedrooms.
- 3.59 Borough responses (Table 3.13, Part A) for Major, Metropolitan and International centres identified a significantly higher level of potential capacity: 305,544 Sq M of capacity from unimplemented permissions (70,456 retail; 27,188 leisure; 114,646 housing; 27,434 hotel; 65,820 other), 2,155 housing units and 536 hotel bedrooms. Borough responses are able to identify capacity from a wider range of sources than LDD data.
- 3.60 Borough responses (Table 3.13, Part A) for District and Other centres identified a further 1,007,831 Sq M of capacity from unimplemented permissions (225,478 retail; 29,655 leisure; 150,796 housing; 18,124 hotel; 583,778 other), 3,145 housing units and 666 hotel bedrooms.
- 3.61 In addition to unimplemented planning permissions, 6,655 Sq M was identified from undesignated vacant sites, 76,768 Sq M from undesignated vacant premises and 757,626 from UDP designations. This is detailed in Table 3.14 below.

- 3.62 Table 3.13, Part B, shows the importance of collecting a full dataset of available capacity from boroughs for all town centres. It shows how using LDD significantly underestimates the total capacity (as indicated in Part A), as it can only be used for unimplemented permissions. Using comparable data (unimplemented permissions for International, Metropolitan and Major centres), LDD data significantly under-estimates available total capacity from unimplemented permissions, even though borough data is not provided for every centre, because it can only provide floorspace for retail and leisure uses.
- 3.63 However it also shows that for unimplemented retail and leisure permissions, LDD data can identify more capacity than Boroughs have provided through responses to the survey form. As LDD is data input by boroughs into the LDD system differences may have occurred due to town centre definition, dates (borough data 2004, LDD 2005), timescale (e.g. period between implementation of permission and borough identifying this on the LDD system) or boroughs using alternative/incomplete data.
- 3.64 A full dataset of available town centre capacity is required for reconciliation to demand for retail floorspace.

**Table 3.13: (A) Total capacity (from borough data) by sub-region; and (B) Comparison of capacity from unimplemented planning permissions from LDD data and borough data**

		Total Gross Floorspace (Sq M)					Units		
		Retail	Leisure	Housing	Hotels	Other	TOTAL	Housing Units	Hotel Rooms
<b>A</b>	International, Metropolitan, Major, District and Other centres								
	<b>North</b>	5,887	2,657	21,553	12,290	4,729	47,116	613	165
	<b>North East</b>	55,414	17,119	58,397	288	29,769	160,987	620	90
	<b>South East</b>	163,861	18,988	30,800	0	595,865	809,515	7,710	90
	<b>South West</b>	14,525	6,000	11,086	15,860	14,000	61,471	1,646	225
	<b>West</b>	500,058	38,762	350,686	20,120	165,709	1,075,335	3,927	812
	<b>Total (Sq M):</b>	<b>739,745</b>	<b>83,526</b>	<b>472,522</b>	<b>48,558</b>	<b>810,073</b>	<b>2,154,423</b>	<b>14,516</b>	<b>1,382</b>
<b>B</b>	International, Metropolitan & Major centres	70,456	27,188	114,646	27,434	65,820	<b>305,544</b>	2,155	536
	<b>LDD Data</b>	113,179	60,562	No Data	No Data	No Data	<b>173,741</b>	9,711	1,190
	<b>Borough Data</b>	225,478	29,655	150,796	18,124	583,778	<b>1,007,831</b>	3,145	666

\* 'From all sources' indicates that identified capacity is from Unimplemented Planning Permissions, UDP designations, Undesignated Vacant Premises and Undesignated Vacant Sites

**NB** – Sub-regions based on those published in draft Further Alterations to the London (Map 5A.1). See <http://www.london.gov.uk/mayor/strategies/sds/further-alts/docs.jsp>

**Table 3.14: Total capacity in London's centres from Unimplemented Planning Permissions, UDP designations, Undesignated Vacant Premises and Undesignated Vacant Sites**

Unimp'd Permissions	UDP Designations	Undesignated Vacant Sites	Undesignated Vacant Premises	<b>Total</b>
1,313,375	757,626	6,655	76,768	<b>2,154,424</b>

Source: Borough Data

3.65 Table 3.13 (part A) shows that significant capacity exists in west London. This comprises full responses from a number of boroughs and includes a particularly detailed response from the borough of Hounslow outlining the planned regeneration of a number of their town centres. The capacity in west London from unimplemented permissions includes:

- 105,895 Sq M retail<sup>37</sup> at Shepherd's Bush (White City development);
- 25,628 Sq M retail at Uxbridge;
- 21,717 Sq M retail at Hounslow;
- 21,077 Sq M retail at Feltham;
- 57,070 Sq M housing at Feltham;
- 38,050 Sq M housing at Hounslow;
- and 46,555 Sq M housing at Brentford.

3.66 Further guidance and analysis of capacity and reconciliation with retail need will be undertaken through the ongoing SRDF process and supplementary planning guidance.

3.67 The health check survey form also sought to identify whether boroughs have undertaken capacity studies (i.e. capacity to accommodate development, as opposed to demand for development). Boroughs indicated that such capacity studies have not been undertaken in 29 centres. There were a number of centres, however, for which no response was provided. Boroughs indicated that 73 centres have had capacity studies, although little data is provided as to the quantity of capacity identified through these studies.

### **3c. Financial Performance**

#### **Turnover**

- Survey form: Question 3.1
- Annex 4, Table 17 – Turnover in town centre network

3.68 Obtaining robust estimates of turnover in town centres has proven difficult. Such estimates are an important component in assessing town centre health, but also derive reliable information on sales densities. Turnover in London's town centre network according to experimental data from CASA/ODPM is over £23 billion per annum, for the centres in the health check study. Some

<sup>37</sup> This includes comparison goods, convenience goods and service retail

data from the CASA study is disclosive<sup>38</sup> and turnover throughout London and in these centres is likely to be higher (see paragraph 2.23).

**Table 3.15: London town centres with highest levels of turnover**

Centre	Classification	Borough	Turnover (£'000s)					Total
			Convenience	Comparison	Service	Restaurants, Licensed Pirms	Arts, Culture Entertainment	
West End	International	W'minster/Camden	249,682	2,712,499	1,696,534	996,763	983,455	6,638,933
Knightsbridge	International	W'mister/Ken'ton & Chelsea	10,912	580,294	110,073	59,987	5,617	766,883
Victoria Street	Other	W'minster	54,206	285,107	329,849	52,838	18,269	740,269
Kingston	Metropolitan	Kingston u' Thames	59,270	509,798	55,958	36,843	14,348	676,217
Kensington High Street	Major	Ken'ton & Chelsea	27,296	227,248	333,015	26,687	14,363	628,609
Bromley	Metropolitan	Bromley	77,933	422,246		30,159	27,438	557,776
Croydon	Metropolitan	Croydon	89,437	247,640	130,796	56,912	15,123	539,908
Hammersmith	Major	Ham'smith & Fulham	93,448	82,901	234,915	27,730	53,728	492,722
Romford	Metropolitan	Havering	49,764	289,847	32,411	31,348	10,025	413,395
Sutton	Metropolitan	Sutton	81,310	219,573	40,189	25,230	17,739	384,041
King's Road East	Major	Ken'ton & Chelsea	40,471	281,740	37,449	14,106	5,862	379,628
Wood Green	Metropolitan	Haringey	79,825	163,847	14,917	13,693	92,134	364,416
Ilford	Metropolitan	R'bridge	55,847	227,013	31,719	17,839	16,636	349,054
Harrow	Metropolitan	Harrow	6,365	206,370	64,874	20,048	10,984	308,641
Camden Town	Major	Camden	130,336	89,475	Disclosive	40,015	35,399	295,225

Source: ODPM/Casa

- 3.69 The largest turnover is in the two International centres, with over £6 billion in the West End<sup>39</sup> and £767 million in Knightsbridge. Victoria Street has the third-highest turnover in London (see Table 3.15 above).
- 3.70 The turnover of Metropolitan centres is higher than most other centres. Some Major centres in central (in and around the CAZ) and parts of west London also have particularly high turnover – Kensington High Street ( £629 million – high comparison and service retail turnover), Hammersmith (£493 million – high service retail turnover), King's Road East (£380 million – high comparison retail turnover) and Camden Town (£295 million – high convenience turnover, although service retail is disclosive).

<sup>38</sup> In some Areas of Town Centre Activity data is not presented, this is because, despite aggregation, details of individual firms or properties may have been disclosed. See paragraph 2.23.

<sup>39</sup> NB – CASA definition of West End is wider than that would be suggested by the retail core of the Central Activities Zone in the London Plan (see London Plan Chapter 5) or by Westminster City Council, who identify smaller centres within the West End area.

- 3.71 Centres with the lowest levels of turnover as identified have more 'disclosive' data which is unavailable (see paragraph 2.23) and this may therefore not be a true illustration of turnover in these centres.
- 3.72 Total comparison goods turnover is generally higher in Metropolitan than Major centres, which in turn are higher than District centres, although King's Road East, Kensington High Street, Bexleyheath, Richmond, Wimbledon (Major centres) and Victoria Street have a relatively high comparison goods turnover (greater than £125 million, higher than Ealing Metropolitan centre). Convenience goods turnover is highest in the International centres.
- 3.73 The West End, Camden Town and Swiss Cottage/Finchley Road have particularly high turnover of convenience goods (£250 million, £130 million and £103 million respectively), although Swiss Cottage has relatively low turnover for other goods and services (£60 million) compared to Camden (£165 million, excluding service retail which is disclosive).
- 3.74 There appears to be no correlation between convenience goods turnover and the size and role of a centre. Convenience goods turnover is usually dependent on whether there is a large supermarket or similar store in the centre and these are located in a range of centres.
- 3.75 Restaurants and licensed premises turnover is highest in the West End (£997 million) and Knightsbridge (£60 million) followed by other Metropolitan and Major centres (and Victoria Street) with a specialist dining/entertainment role. While Arts, Culture and Entertainment turnover is highest in the West End there are a range of Metropolitan, Major and District centres with relatively high turnover such as Rayner's Lane (£142 million), Wood Green (£92 million) Hammersmith (£54 million), Putney (£53 million) and Camden Town (£35 million).

## Yields

- Survey form: Question 3.2
- 3.76 The level of response to questions regarding yields was particularly low and data appeared unreliable. The responses are therefore not suitable for further analysis. It was also not possible to source other data to supplement this question. It is more appropriate to focus financial analysis on rents, where data is more available and reliable.

## Rents

- Survey form: Question 3.3
  - Annex 4, Tables: 18 – Retail Rents in town centre network 1998-2005
- 3.77 Data from Colliers CRE Retail Rents Map (Table 18, Annex 4) shows that, on average, rental values are significantly higher in London's International centres than Metropolitan centres, which in turn are higher than Major or District centres. This is shown in Figure 3.5 below.
- 3.78 Fluctuations in retail rents over the period 1998-2005 have shown a generally increasing trend over all designations of centre. Retail rents are significantly

higher in London's International centres than in most Metropolitan and Major centres. West End retail rents range from £4,700 per Sq M (Oxford Street) to £3,760 per Sq M (Regent Street) while rents in Knightsbridge are £4,520 per Sq M. The Metropolitan centre with highest rents is Kingston (£3,170 per Sq M). Figure 3.6 shows retail rents in London's International and Metropolitan centres.

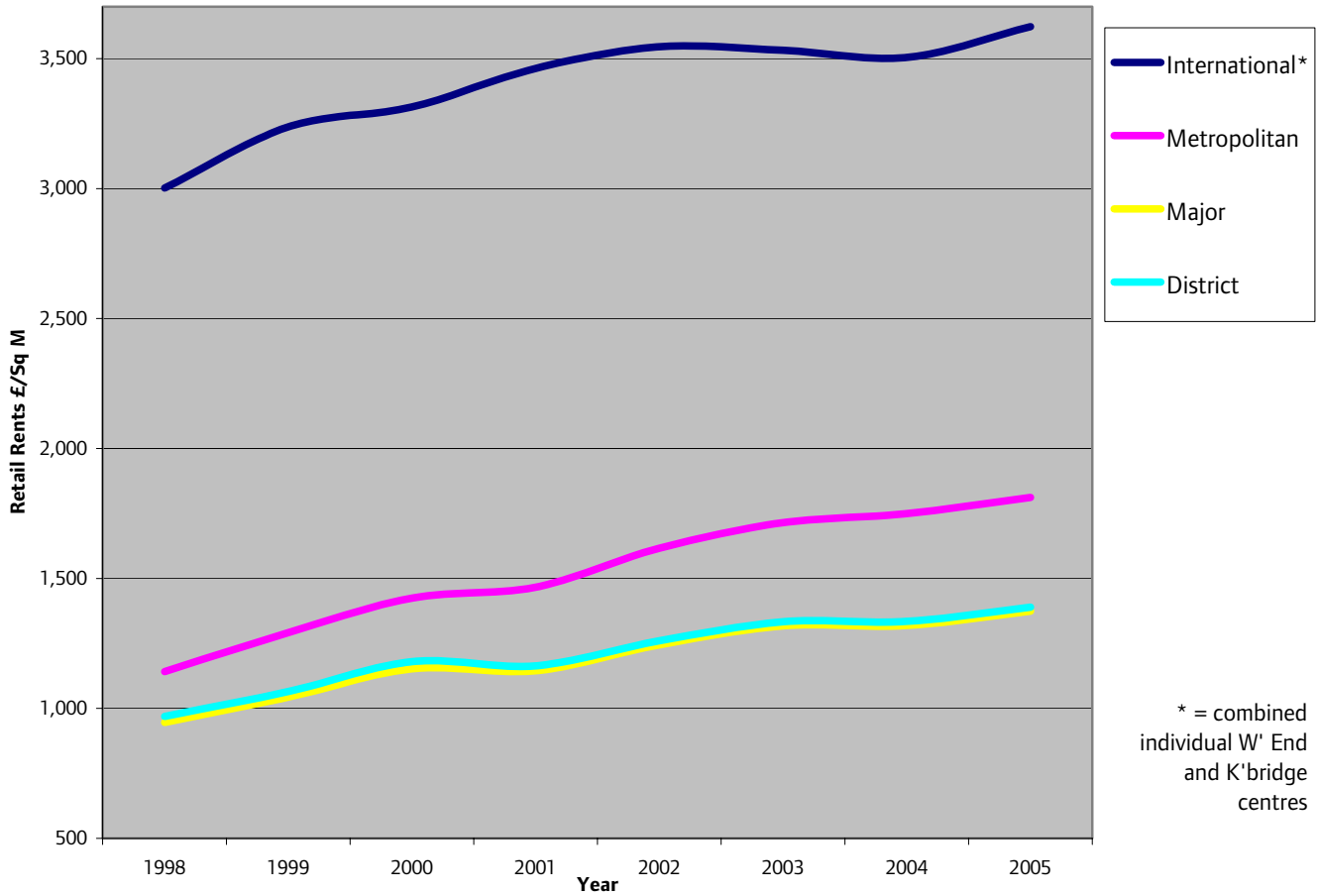
- 3.79 Some Major centres (in particular King's Road East and Kensington High Street) have particularly high rental values (£3,600 and £3,280 per Sq M respectively, compared to an average of £1,370 for Major centres). The District centres King's Road West (£,600/Sq M), New Malden (£3,170/Sq M) and Isle of Dogs/Canary Wharf (£2,800/Sq M), as well as others in and around the central London area also have particularly high rents.
- 3.80 Table 3.16 shows the centres with the highest retail rents in London in 2005.

**Table 3.16: Centres with highest retail rents in London (2005)**

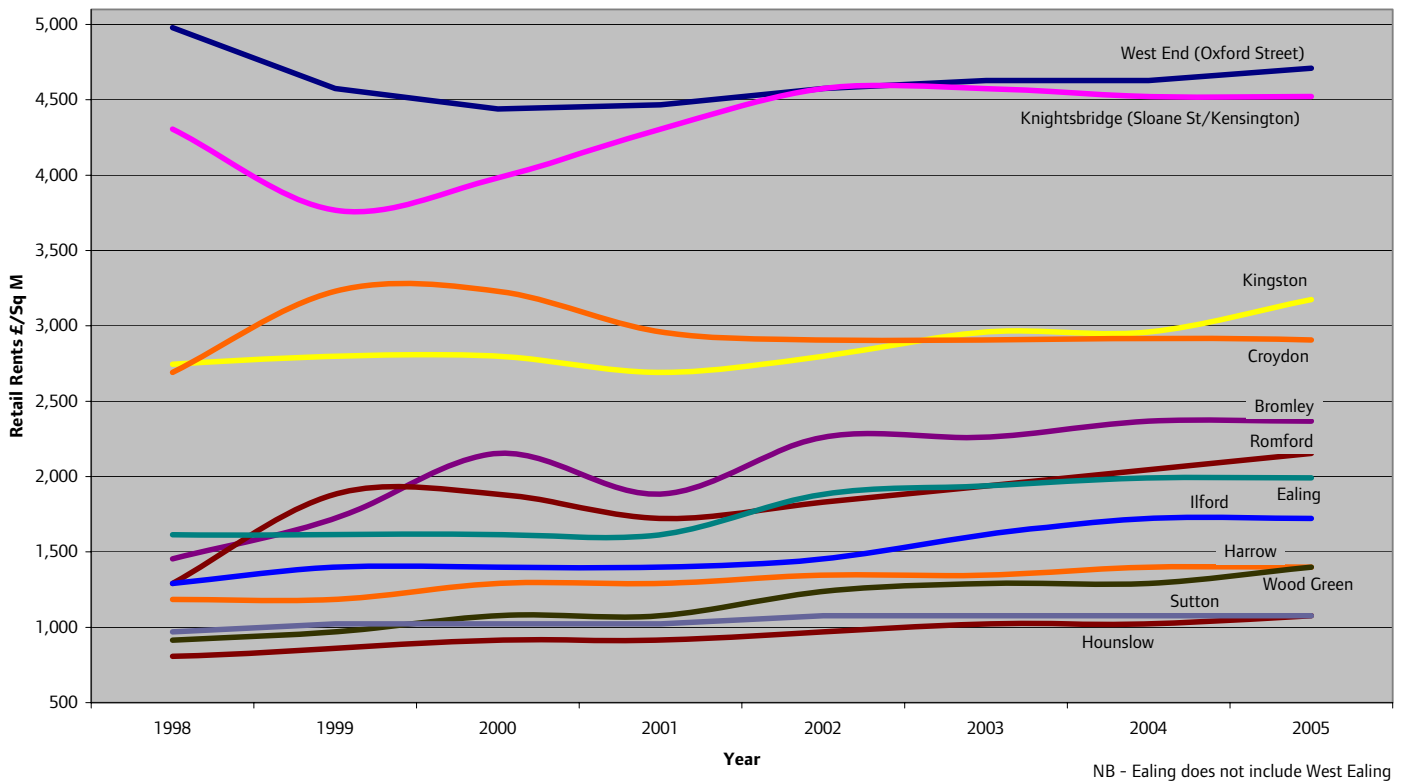
Centre	Designation	Borough	£/Sq M
Oxford Street	International (part of West End)	Westminster	4,709
Bond Street	International (part of West End)	Westminster	4,548
K'bridge (Sloane St/Kens'n)	International	Westminster	4,521
Sloane Street	Other	Ken' & Chelsea	4,521
Covent Garden	Other	W'ster/Camden	3,929
Regent Street	International (part of West End)	Westminster	3,767
Kings Road West	District	Ken' & Chelsea	3,606
Kings Road East	Major	Ken' & Chelsea	3,606
Ken' High Street	Major	Ken' & Chelsea	3,283
New Malden	District	Ken' & Chelsea	3,175
Kingston	Metropolitan	Ken' & Chelsea	3,175
Croydon	Metropolitan	Croydon	2,906
Isle of Dogs/Can' Wharf	District	Tower Hamlets	2,799
Cheapside	District	City of London	2,745
Carnaby Street	International (part of West End)	Westminster	2,745
Bromley	Metropolitan	Bromley	2,368
Moorgate	District	City of London	2,368
Victoria Street	Other	Westminster	2,260
Richmond	Major	Richmond	2,207
Liverpool Street	District	City of London	2,207
Uxbridge	Major	Hillingdon	2,153

Source: Colliers 2005

**Figure 3.5: Average Retail Rents (£/Sq M) in London's International, Metropolitan, Major and District town centres, 1998-2005**

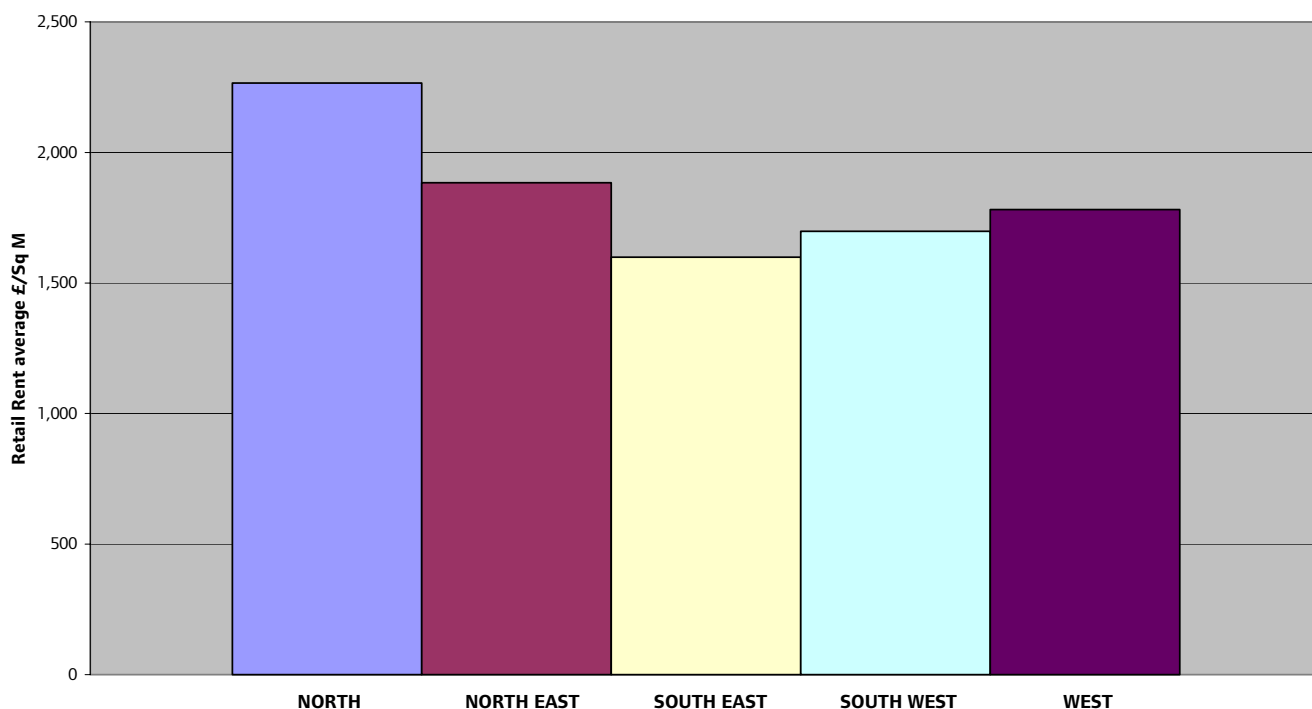


**Figure 3.6: Retail rents in London's International and Metropolitan centres**



3.81 The North London sub-region (see Annex 1) has a higher average of retail rents for all town centres than other sub-regions in London. North London includes Westminster and Camden and therefore the high rents in the West End. South East London has slightly lower average rents. These average rental values relate in particular to the number of Metropolitan and Major centres in the sub-regions, with the lowest average in South East London. The average rental levels are shown in Figure 3.7 below.

**Figure 3.7: Average 2005 retail rents for all town centres, by sub-region <sup>40</sup>**



### 3d. Accessibility

#### Public Transport Accessibility and Car Parking

- Survey form: Questions 4.1, 4.2
- Annex 4, Table 19

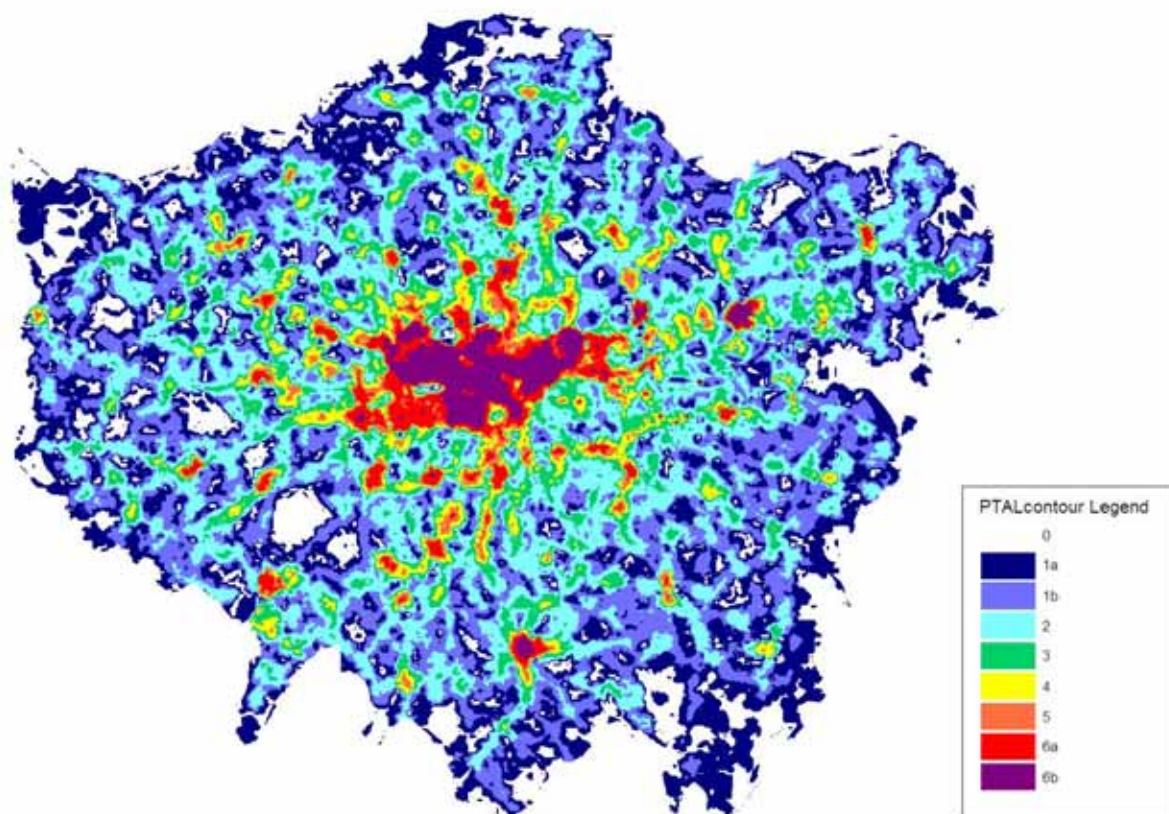
3.82 Town centres in London are key nodes for public transport. Accessibility is measured by Public Transport Accessibility Levels (2001) produced by Transport for London and shown in Figure 3.8 below.

3.83 Accessibility does not necessarily relate to the town centre hierarchy. Centres in and around CAZ generally have higher accessibility levels than those centres outside CAZ. Metropolitan centres have relatively high PTALs, as shown in Table 3.17 below and Table 19, Annex 4. However some Major centres such as Kilburn, Fulham, Orpington (all PTAL 2), Southall and Chiswick (both PTAL 3) have relatively low levels of accessibility.

<sup>40</sup> NB – Sub-regions based on those published in draft Further Alterations to the London (Map 5A.1). See <http://www.london.gov.uk/mayor/strategies/sds/further-alt/sds/docs.jsp>

3.84 The Mayor supports improving access to and within town centres by public transport (Policy 3C.3, London Plan) and seeking to improve public transport capacity and accessibility in areas such as town centres (Policy 3C.1). Public transport accessibility impacts the health of town centres, allowing them perform a wider role and have a larger catchment area. Catchment areas for some centres are identified in the London Town Centre Assessment, Stage 1 (Appendix 13)<sup>41</sup>.

**Figure 3.8: Public Transport Accessibility Levels in London (2001)**



**Table 3.17: PTAL levels in London’s Metropolitan Centres**

Metropolitan Centre	PTAL
Croydon	6B
Wood Green	6A
Ealing	6A
Romford	6A
Kingston	6A
Hounslow	6A
Bromley	6A
Harrow	4
Sutton	4
Ilford	4

<sup>41</sup> Mayor of London. London Town Centre Assessment, Stage 1 – Comparison Goods Floorspace Need (GLA, September 2004)

- 3.85 Research undertaken by Transport for London<sup>42</sup> looked at the contribution made by bus users to the economic health and viability of town centres across London. It discovered that bus was used by just over a third of visitors to town centres (34%), making it the most popular transport mode. Walking (29%) and driving a car (20%) were the next most important modes of access.
- 3.86 Bus customers do not necessarily spend less than those who travel by other modes. Bus customers spend an average of £63 a week in the town centres. Car drivers spend only a little more (£64 on average per week) but those who walk spend considerably more (£91 on average per week). Train and tube travellers spend less with an average of £46 per week and those who use other modes such as taxi or cycle spend £56 a week on average.
- 3.87 The London Plan sets out a parking regime that balances the desirability of reducing car use with the need to provide for attractive, viable development in town centres, while recognising that many people will continue to use their cars for travel. Policy 3C.23 allows for additional parking in town centres, where appropriate, which should take account of a number of factors, including the health of a town centre.

**Table 3.18: Town centres with highest levels of car parking**

Centre	Classification	Borough	Car Parking Spaces			Total (calculated)
			Multi-storey	Surface	On Street	
Kingston	Metropolitan	Kingston	6,124	1,200	314	7,638
Bromley	Metropolitan	Bromley	3,900	306	2,577	6,783
Croydon	Metropolitan	Croydon	5,097	127	360	5,584
Romford	Metropolitan	Havering	3,269	1,426	-	4,695
Ilford	Metropolitan	Redbridge	2,580	1,087	501	4,168
Harrow	Metropolitan	Harrow	1,938	1,052	246	3,236
Hounslow	Metropolitan	Hounslow	665	2,001	97	2,763
Sutton	Metropolitan	Sutton	2,356	-	-	2,356
Bexley'h'th	Major	Bexley	1,649	543	84	2,276
Woolwich	Major	Greenwich	1,200	600	200	2,000
Wood Green	Metropolitan	Haringey	1,799	-	-	1,799
Orpington	Major	Bromley	1,386	0	200	1,586
Ham'smith	Major	Ham' & Fulham	950	300	316	1,566
Wandsworth	Major	Wandsworth	978	468	25	1,471
Ealing	Metropolitan	Ealing	1,350	68	-	1,418
Walth'stow	Major	Waltham Forest	380	612	200	1,192
Pinner	District	Harrow	386	708	17	1,111
Surbiton	District	Kingston	394	600	90	1,084
Hornchurch	District	Havering		1,000	-	1,000
Peckham	Major	Southwark	350	641	-	991

- 3.88 Table 3.18 above and Table 19, Annex 4, show levels of car parking in London's town centre network for those centres where data was returned. The

<sup>42</sup> Town Centres Survey, available at <http://www.tfl.gov.uk/buses/pdfdocs/town-centres-survey.pdf>

Metropolitan centres (except Wood Green and Ealing) have the highest levels of car parking. Bexleyhealth (2,276) and Woolwich (2,000) Major centres also significant car parking. Hammersmith (1,566), Peckham (991), Kensington High Street (970) and Wembley (875) Major centres, and Knightsbridge (859) International centre have relatively high levels of car parking as well as high public transport accessibility (PTALs 6A or 6B).

## Cycling Facilities

- Survey form: Question 4.4
- Annex 4, Table 20

3.89 Cycle parking facilities in town centres are one of a number of potential measures which improve accessibility. London Plan policies 3C.21 and 3D.1 seek to promote access to town centres for cyclists and provision of sufficient secure cycle parking facilities. Inconsistency in numbers provided suggests boroughs interpreted the question and definition of individual parking facilities in different ways. Although boroughs did not answer this question consistently, centres outside the area in and around CAZ (with the exception of some in Kensington and Chelsea) appear to provide more cycle parking facilities than those closer to the CAZ (see Table 3.19 below and Table 20, Annex 4).

**Table 3.19 Centres with more than 100 cycle parking facilities**

Centre	Classification	Borough	Cycle Parking Facilities
Kingston	Metropolitan	Kingston	522
Hammersmith	Major	Ham' & Fulham	150
Kensington High St.	Major	Ken' & Chelsea	138
New Malden	District	Kingston	136
Ealing	Metropolitan	Ealing	125
Ilford	Metropolitan	Redbridge	108
Surbiton	District	Kingston	108

## Shop Mobility

- Survey form: Question 4.3
- Annex 4, Table 21

3.90 Policy 3.225 of the London Plan seeks to create a more accessible and inclusive town centre environment (Policies 3A.14, 3D.1, 4B.5) including provision of shopmobility schemes. Eleven centres across London responded that they had a shopmobility scheme. These are identified in Table 3.20 below. No response was received for a number of centres in London which may have shopmobility schemes.

**Table 3.20: Centres with shopmobility schemes**

Centre	Classification	Borough
Kingston	Metropolitan	Kingston upon Thames
Ilford	Metropolitan	Redbridge
Walthamstow	Major	Waltham Forest
Wandsworth	Major	Wandsworth
Harrow	Metropolitan	Harrow
Orpington	Major	Bromley
Wood Green	Metropolitan	Haringey
Croydon	Metropolitan	Croydon
Lewisham	Major	Lewisham
Bexleyheath	Major	Bexley
Blackheath	District	Lewisham

- 3.91 According to data provided for the town centre health checks, only half of Metropolitan, and five Major, centres appear to have schemes. However, further research (see, for example, [www.justmobility.co.uk](http://www.justmobility.co.uk)) indicates Barking, Camden Town, Hounslow, Romford and Uxbridge also have shopmobility schemes operating.

### **3e. Town Centre Initiatives**

#### **Town Centre Management and Strategies**

- Survey form: Questions 5a-e
  - Annex 4, Table 22
- 3.92 69% of centres for which a response was received employ a town centre manager, 70% have a town centre consultancy group and 66% indicate that they have some form of town centre strategy (see Table 22, Annex 4).
- 3.93 Responses regarding town centre initiatives were not completed by all boroughs for all centres. The responses received suggest that a large number of centres do not have a town centre manager, consultancy group (involving local authority and private sector) and/or a town centre strategy. All Metropolitan centres have a manager, partnership and strategy, except Hounslow which only has a town centre strategy. Approximately ten Major centres, and both International centres appear not to have a manager, partnership or strategy in the conventional sense (although a wide range of other initiatives have been undertaken in the West End International centre).
- 3.94 The London Plan states that boroughs should support and encourage town centre management, partnerships and strategies (see Policies 3D.1, 3D.3 and paragraph 3.232 in the London Plan). Town centre strategies produced in partnership with the private sector, property owners, infrastructure agencies and the community are identified as a tool for effective management and promotion of town centres. Centres in the London network without a town centre strategy should consider whether one should be prepared to complement relevant local development documents.

- 3.95 The health checks identified a range of types of strategy ranging from specific strategies and visions for a town centre to area action plans and UDP policies. Recent government advice in 'How to... Manage Town Centres'<sup>43</sup> identifies tools for managing town centres, with particular regard to the night time economy. This is also addressed in the London Plan Best Practice Guide 'Managing the Night Time Economy'<sup>44</sup>.

### **3f. Environment and Amenity**

#### **Data collection: Accidents and Crime**

- Survey form: Questions 6.1, 6.2
  - Annex 4, Table 23
- 3.96 48% of centres for which a response was received collect data on accidents, and 67% collect data on crime (see Table 23, Annex 4). An evidence base can be important in managing town centres, particularly managing the night time economy.

#### **Attitudinal Surveys**

- Survey form: Question 6.3
  - Annex 4, Table 24
- 3.97 Previous London-wide town centre health checks included a full matrix-based attitudinal survey. In order to ensure that the Londonwide health checks were streamlined, and focussed on strategic issues, the current survey did not request this information as explained in paragraph 2.6. However, the survey form did ask whether such a survey has been recently carried out for the centre.
- 3.98 Half of centres for which a response was received have undertaken an attitudinal survey of their centre in the last five years (see Table 24, Annex 4). Responses were received for 181 town centres regarding crime data and 172 regarding accident data. A number of Metropolitan (Hounslow, Sutton, Romford and Bromley) and Major centres appear not to have undertaken a study.
- 3.99 Detailed responses to this question were not required, given the subjective nature of attitudinal surveys. PPS6 underscores the value of ascertaining the views of users of a town centre in terms of the perceptions of quality, town centre offer, safety, security and environmental quality. Such views can then be used for monitoring and evaluating the effectiveness of town centre improvements and establishing future priorities.

<sup>43</sup> "How to... Manage Town Centres", ODPM publications, 2005. Available from: <http://www.cleanersaferegreener.gov.uk/html/section5/5a.html>

<sup>44</sup> See <http://www.london.gov.uk/mayor/strategies/sds/bpg.jsp>

## **4. Conclusions and Implications for the Town Centre Network**

### **4a. Reviewing the town centre network**

- 4.1 In promoting and enhancing existing town centres, the GLA and boroughs are encouraged by government policy to consider the network of centres and their relationships within the hierarchy (PPS6, paragraph 2.9). The town centre network, as discussed in section 1 of this report and set out in Annex 1 of the London Plan classifies centres as International, Metropolitan, Major, District and Local/Neighbourhood centres.
- 4.2 The town centre network is dynamic and the scale, role and function of centres will change over time. Changes to the status of centres in the network, or identification of new centres is addressed initially through the London Plan (as set out in paragraph 1.6 of PPS6) and SRDFs.
- 4.3 The current role and function of centres is tested using data from the London-wide town centre health checks. Potential changes to the town centre network are set out in Sub Regional Development Frameworks<sup>45</sup> for consideration in the forthcoming review of the London Plan. This chapter sets out the main findings of the health checks and has implications for reviewing the town centre network.

### **4b. Implications of town centre health checks for review**

- 4.4 Town centres are classified according to the current role and function they perform in the wider network of town centres. The characteristics of the different town centre categories (International, Metropolitan, Major, District and Local/Neighbourhood) are set out in Annex 1 (and Annex 1 of the London Plan). The data collated by the health checks tested the various thresholds and characteristics of the five classifications which are set out in Table 4.1 below.

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<sup>45</sup> See <http://www.london.gov.uk/mayor/planning/srdf/index.jsp>

**Table 4.1: Characteristics of the London Plan's town centre classifications**

Classification of Centre	Typical characteristics and indicative thresholds
International	<ul style="list-style-type: none"> <li>• London's main concentrations of a wide range of globally attractive, specialist and high-order comparison shopping.</li> <li>• Catchment areas extend across London and the wider south east region with significant tourism draw.</li> <li>• Unparalleled level of public transport accessibility in and around the Central Activities Zone (PTAL level 6a/b)</li> </ul>
Metropolitan	<ul style="list-style-type: none"> <li>• Serve wide catchments over several boroughs and may extend across sub-regions and into the parts of the wider south east region.</li> <li>• Typically found in suburban locations and take on the role of key sub-regional centres.</li> <li>• At least 100,000 Sq M of total town centre floorspace (over 75,000 Sq M retail floorspace).</li> <li>• Generally a significant proportion of high-order comparison goods relative to convenience goods.</li> <li>• Strong representation of multiple retailers and department stores</li> <li>• Often centres for evening entertainment, culture and leisure.</li> <li>• May also have significant employment, service and civic functions.</li> <li>• Generally have very good accessibility by a range of public transport (PTAL typically 4-6).</li> </ul>
Major	<ul style="list-style-type: none"> <li>• Serve catchments which are typically boroughs-wide and may extend into neighbouring boroughs.</li> <li>• Typically found in inner London locations with some lying in outer suburban centres</li> <li>• Generally contain between 50,000 Sq M up to 100,000 Sq M of retail floorspace.</li> <li>• Generally a relatively higher proportion of comparison goods relative to convenience goods.</li> <li>• Mix of representation between multiple retailers, department stores and independents.</li> <li>• May also have significant employment, leisure, service and civic functions.</li> <li>• Many, though not all, have very good accessibility by a range of public transport (PTAL typically 4-6).</li> </ul>
District	<ul style="list-style-type: none"> <li>• Serve more local catchments within boroughs and distributed more widely than the Metropolitan and Major centres.</li> <li>• Typically contain a relatively high proportion of convenience goods, non-retail services and public facilities relative to comparison goods retail.</li> <li>• Generally contain up to 50,000 Sq M of retail floorspace.</li> <li>• Many districts have developed specialist shopping functions and contain more affordable space relative to prime areas in Metropolitan and Major centres.</li> <li>• Tend to have higher representation among independents.</li> <li>• May also have some smaller scale employment, leisure, service and civic functions.</li> <li>• Generally have reasonable levels accessibility by public transport (PTAL typically 3-6) and attract access by cycling and walking.</li> </ul>
Local/Neighbourhood	<ul style="list-style-type: none"> <li>• Typically include local high street parades and small clusters of shops, mostly convenience goods and other services. May include a small supermarket (less than 2,000 Sq M), sub-post office, pharmacy, laundrette and other useful local services.</li> <li>• Serve a very small and localised catchment.</li> <li>• Often cited as playing a key role in providing local access to affordable food, including fresh fruit and vegetables.</li> <li>• Generally accessible from the local neighbourhood by public transport (mostly bus), by cycling or walking.</li> </ul>

- 4.5 Analysis of the data collected by the town centre health checks, before taking into account any future developments which may occur, have identified a number of town centres where the existing classification may not necessarily represent the role and function these centres are currently playing within the network.
- 4.6 Assessments of the roles of centres within the network, based on information collected through the town centre health checks was made against a number of factors as identified in Table 4.2 below.

**Table 4.2: Key criteria for reviewing the role of centres**

<b>Scale/Size</b>			
1	*	Total town centre floorspace <sup>1</sup> (Sq M)	✓
2	*	Total retail floorspace (Sq M)	✓
3		Comparison goods floorspace (Sq M)	✓
4	*	Extent of the catchment area <sup>2</sup>	–
<b>Role/Function</b>			
5	*	Comparison floorspace as proportion of total (%)	✓
6		Convenience floorspace as proportion of total (%)	✓
7		Department Stores (no.)	✓
8		Number of multiples	✓
9		Independent stores as proportion of total (%)	✓
10	*	Leisure services (Sq M)	✓
11	*	Special role, eg tourism, market, office centre	–
<b>Performance</b>			
12	*	Turnover, annual (£m)	✓
13		Rental level and growth (£/Sq M, %)	✓
<b>Accessibility</b>			
14	*	Public Transport Accessibility Level (PTAL)	–

**Notes:**

**1** – GOAD definition reconciled to ODPM/CASA measure, i.e. total retail floorspace, plus leisure services plus vacant town centre floorspace

**2** – Catchment areas indicate the origin of town centre users and defined according to the extent and degree of penetration – see Appendix 13 of Experian Business Strategies, 2004 op cit, for examples.

\* – Primary indicators

✓ – Summary of town centre ranking included in Tables 4.3 – 4.12 below

Source: Forthcoming SPG on town centre, retail and leisure issues, Mayor of London – see [http://www.london.gov.uk/mayor/strategies/sds/town\\_centre\\_assessment.jsp](http://www.london.gov.uk/mayor/strategies/sds/town_centre_assessment.jsp)

- 4.7 Centres which may be performing a role greater or lesser than the identified indicative range for their classification are set out in Tables 4.3 – 4.12 below, based on these indicators.
- 4.8 Centres were ranked under each of the key criteria set out in Table 4.2. A broad indicative threshold between the five classifications of centre (see Table 4.1) above was identified. This was designed to assist in analysis of the current role and function of centres and to test whether centres display characteristics that would suggest a possible revision to their current designation within the network. However, just because a centre may be above or below the threshold in any one indicator does not necessarily imply that it should be reclassified. In order to assess possible reclassification of centres a wide range of indicators must be considered.

#### **KEY/notes for Tables 4.3 – 4.12**

- **(Number in brackets)** indicates quantity, as identified in threshold column
- **Coloured background** indicates centre where analysis indicates may be performing the role of a different classification in a number of indicators
- ***Italics*** indicates centre where known redevelopment proposals are likely to impact the role and function of a centre
- \* (Star) in title identifies that this is a key indicator (see Table 4.2)

#### **Notes**

All thresholds are indicative. They were derived from the ranks of all centres and selecting thresholds which cut across the general groupings of Metropolitan, Major and District.

Borderline above/below are generally +/- 10% of the threshold.

**Table 4.3: Town centre characteristics: total town centre floorspace<sup>46</sup> (Indicator 1\*)**

Met/Major Threshold	Major centres above threshold	Majors borderline above	Mets borderline below	Met centres below
100,(000) sqm	Uxbridge (116) IoD/Canary Wharf (114) Camden (112)	Farringdon (105) Angel (105)		
<b>Major/District Threshold</b>	<b>District centres above threshold</b>	<b>Borderline above</b>	<b>Majors borderline below</b>	<b>Majors below</b>
50,(000) sqm	Elephant & Castle/Walworth Rd (80) Swiss Cottage/Finchley Rd (75) Fulham Road West (71)	Cricklewood (54) Leytonstone (52) Shepherd's Bush (51)	Eltham (49) Stratford (48) Wandsworth (47) Wembley (39)	

**Table 4.4: Town centre characteristics: total retail floorspace (Indicator 2\*)**

Met/Major Threshold	Major centres above threshold	Majors borderline above	Mets borderline below	Met centres below
75,(000) sqm	Uxbridge (92)			
<b>Major/District Threshold</b>	<b>District centres above threshold</b>	<b>Borderline above</b>	<b>Majors borderline below</b>	<b>Majors below</b>
30-35,(000) sqm	IoD/Canary Wharf (55) Elephant & Castle/Walworth Rd (42)	Swiss Cottage/Finchley Rd (38) Fulham Road West (38) Upton Park (33)	Barking & Dagenham (31) Stratford (31) Hammersmith (31) Wandsworth (28) Wembley (26)	

<sup>46</sup> Total town centre floorspace = GOAD reconciled to CASA. See explanation in Section 2 of this report.

**Table 4.5: Town centre characteristics: total comparison retail floorspace (Indicator 3)**

	Major centres above threshold	Majors borderline above	Mets borderline below	Met centres below
<b>Met/Major Threshold</b> 60,000 sqm	Uxbridge (77)			
<b>Major/District Threshold</b>	<b>District centres above threshold</b>	<b>Borderline above</b>	<b>Majors borderline below</b>	<b>Met centres below</b>
20,000 sqm	Elephant & Castle/Walworth Rd (25) Portobello Road (23) Upton Park (22)	Upminster (21)	Edgware (18) Wembley (18) Wandsworth (17)	Majors below

**Table 4.6: Town centre characteristics: comparison retail floorspace as % of total retail floorspace (Indicator 5\*)**

	Major centres above threshold	Majors borderline above	Mets borderline below	Met centres below
<b>Met/Major Threshold</b> 80%	Uxbridge (83%) Kensington High Street (82%)	Whitechapel (81%)	Harrow (79%) Wood Green (79%)	Ealing (78%)

**Table 4.7: Town centre characteristics: convenience retail floorspace as % of total retail floorspace (Indicator 6)**

	Major & District centres BELOW threshold (less than 11%)	Majors & Districts borderline BELOW threshold	Mets borderline ABOVE (greater than 11%)	Met centres ABOVE (greater than 11%)
<b>Met / Major + District Threshold</b> 11% (Mets usually comprise less than 11% independents)	Whitechapel (9.1%) Fleet Street (8.6%) Kensington High Street (6.0%) Watney Market (5.3%)	Uxbridge (11%)	Harrow (11.4%)	Wood Green (15.5%)

**Table 4.8: Town centre characteristics: number of department stores (Indicator 7)**

	Major centres above threshold	Majors borderline above	Mets borderline below	Met centres below
4-5	Uxbridge (5) Bexleyheath (5)	Lewisham (4) Kings Road East (4) Eitham (4) Tooting (4)		
<b>Major/District Threshold</b>	<b>District centres above threshold</b>	<b>Borderline above</b>	<b>Majors borderline below</b>	<b>Majors below</b>
1-2	Upminster (3)			Dalston (0) Wandsworth (0)

**Table 4.9: Town centre characteristics: number of multiples (Indicator 8a)**

	Major centres above threshold	Majors borderline above	Mets borderline below	Met centres below
120	Kensington High Street (134) Uxbridge (130)			
<b>Major/District Threshold</b>	<b>District centres above threshold</b>	<b>Borderline above</b>	<b>Majors borderline below</b>	<b>Majors below</b>
60	Liverpool Street (73) Chipping Barnet (70) IoD/Canary Wharf (67)	Fulham Road West (66) Chepaside (64)	Elephant & Castle (59) Stretham (59) East Ham 57 Stratford (55)	Peckham (53) Tooting 53 Nags Head (49) Wembley (43) Dalston (43) Brixton (39) Wandsworth (35) Southall (18)

**Table 4.10: Town centre characteristics: independents as % of total number of stores (Indicator 9b)**

<b>Met / Major + District Threshold</b>	<b>Major &amp; District centres BELOW threshold (less than 45%)</b>	<b>Majors &amp; Districts borderline BELOW threshold (45-49%)</b>	<b>Mets borderline ABOVE threshold (51-55%)</b>	<b>Met centres ABOVE threshold (grtr than 55%)</b>
50% (Mets usually comprise less than 50% independents)	<p>IoD/Canary Wharf (43%)</p> <p>Uxbridge (41%)</p> <p>Surrey Quays/Canada Wtr (41%)</p> <p>Enfield Town (35%)</p> <p>Cheapside (36%)</p> <p>Wimbledon (35%)</p> <p>Fleet Street (34%)</p> <p>Moorgate (34%)</p> <p>Hammersmith (34%)</p> <p>Stratford (34%)</p> <p>East Beckton (27%)</p> <p>Tulse Hill (26%)</p>	<p>Liverpool Street (49%)</p> <p>Bexleyheath (49%)</p> <p>Kensington High St (48%)</p> <p>Putney (48%)</p> <p>King's Road East (45%)</p>	Croydon (55%)	

**Table 4.11: Town centre characteristics: leisure services floorspace (Indicator 10)**

<b>Met/Major Threshold</b>	<b>Centres above threshold</b>	<b>Centres borderline above</b>	<b>Mets borderline below</b>	<b>Met centres below</b>
Approx 20,(000) sqm	Angel (40) Camden (38) IoD/Canary Wharf (37) Streatham (25) Elephant & Castle/Walworth Rd (24) Queensway/Westbourne Grove (23) Fulham Road West (23)	Kilburn (22) Shepherd's Bush (21) Hammersmith (20)	Hounslow (18)	Harrow (16)
<b>Major/District Threshold</b>	<b>District centres above threshold</b>	<b>Borderline above</b>	<b>Majors borderline below</b>	<b>Majors below</b>
Approx 12,(000) sqm	Leadenhall Market (19) Swiss Cottage/Finchley Road (18) Cricklewood (17) Praed St/Paddington (17) Clapham High Street (17) Greenwich West (15) Cheapside (15) Liverpool Street (15) Edgware Road South (14)	Acton (13) Surrey Quays (12)	East Ham (11) Peckham (11) Orpington (10)	Edgware (9) Eltham (8) Wandsworth (7) Fulham (7) Wembley (6) Kings Road East (6) Enfield (5)

**Table 4.12: Town centre characteristics: annual turnover (Indicator 12)**

<b>Met/Major Threshold</b>	<b>Major centres above threshold</b>	<b>Majors borderline above</b>	<b>Mets borderline below</b>	<b>Met centres below</b>
£250,000(000)/yr	Kensington High St (628,609) Hammersmith (492,722) Kings Road East (379,628) Camden Town (295,225) Bexleyheath (292,571) Chiswick (284,567) Putney (275,728) Uxbridge (265,197)	Richmond (252,892)	Hounslow (246,650) Ealing (235,298)	
<b>Major/District Threshold</b>	<b>District centres above threshold</b>	<b>Borderline above</b>	<b>Majors borderline below</b>	<b>Majors below</b>
£110,000(000)/yr	Edgware Road (171,003) Rayners Lane (167,931) Swiss Cott'/Finchley Rd (163,029) Wallington (154,706) North Finchley (145,198) Shepherds Bush (137,144)		Dalston (107,704) Brixton (100,046)	Streatham (97,989) Tooting (80,519) Peckham (72,671)

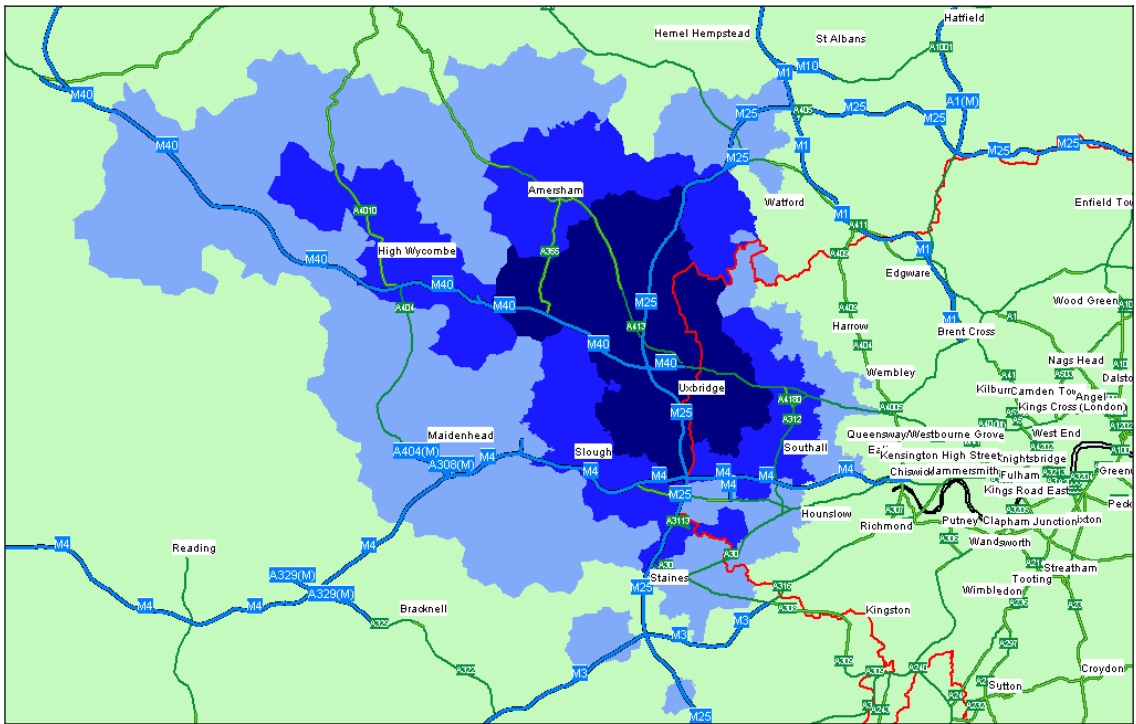
- 4.9 The indicators listed in Table 4.2 and the analysis in Tables 4.3-4.12 show that there are a number of centres which appear to be above, or below, an expected threshold for a particular indicator. Some centres appear to be functioning above or below the level of their current classification according to a number of indicators at present. These are listed in Table 4.13 and discussed in turn below.

**Table 4.13: Centres indicated as performing a role other than their current classification**

Centre	Current Classification	Possible Reclassification
Uxbridge	Major	Metropolitan?
Isle of Dogs/Canary Wharf	District	Major?
Swiss Cottage/Finchley Road	District	Major?
Elephant & Castle/Walworth Rd	District	Major (combined)?
Wandsworth	Major	(Large) District?

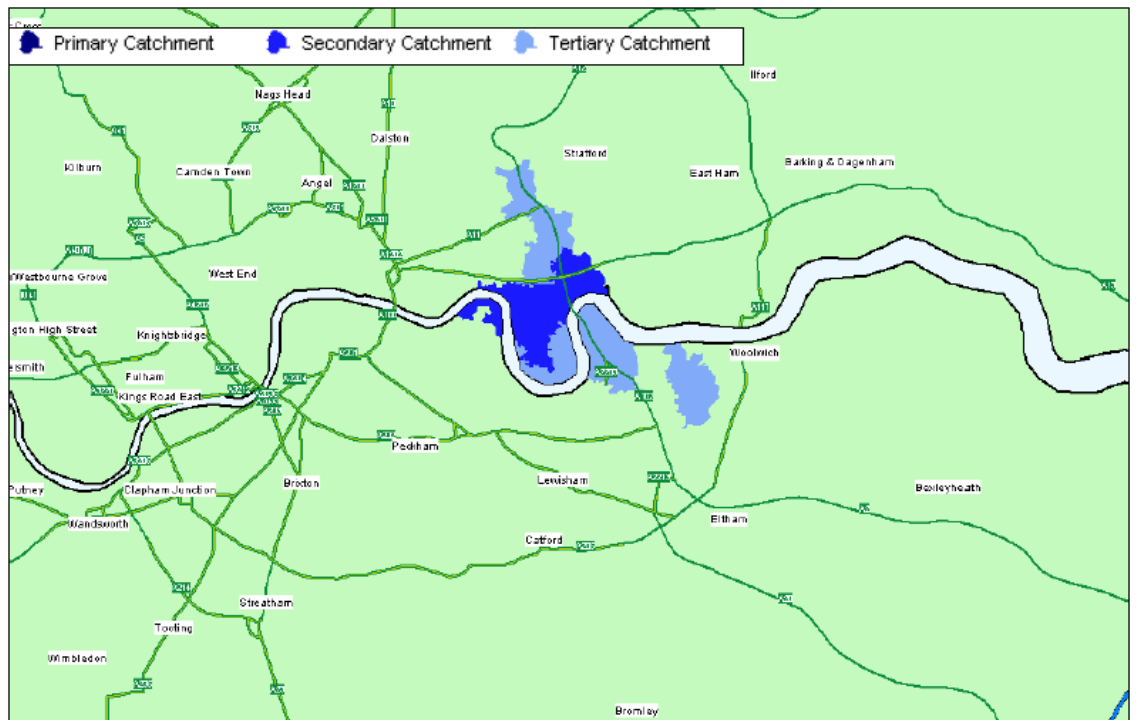
- 4.10 **Uxbridge** is currently classified as a Major town centre in the London Plan, but the indicators suggest that it may be performing the role of a Metropolitan centre. Total town centre floorspace (116,200 Sq M), office floorspace (107,200 Sq M) turnover (£265 million/year) and employment level (7,561) in particular are comparable to most Metropolitan town centres. It has significant comparison retail floorspace (77,000 Sq M, 83% of total retail floorspace), and is above threshold levels identified for number of multiples (130 – threshold 120) and department stores (5 – threshold 4/5). Together with the extent of Uxbridge’s catchment area (see Figure 4.1, below), these factors indicate suggest that it should be considered for designation as a Metropolitan centre in the Further Alterations to the London Plan and in light of SRDF consultation.
- 4.11 **Isle of Dogs/Canary Wharf** is currently identified as a District centre in the London Plan. Data from the health check suggests that it is actually functioning as a Major centre in terms of its size and turnover but not in other town centre functions. The significant retail and leisure floorspace (114,800 Sq M – total town centre floorspace, see section 3A) is comparable to the largest Major centres. Even though it is a District centre, Isle of Dogs/Canary Wharf has 37,000 Sq M of leisure floorspace, primarily relating to its role as an office location – the indicative threshold between Metropolitan and Major centres currently is around 20,000 Sq M. However, a high proportion of retail is in enclosed shopping malls, and the borough’s survey return identified only very limited civic and community facilities. The non-commuter catchment area of Isle of Dogs/Canary Wharf remains relatively small (see Figure 4.2 below) compared to neighbouring centres, with its penetration concentrated in the surrounding Docklands area. On balance however the indicators suggest that this centre might be considered for reclassification as a Major centre.

**Figure 4.1: Uxbridge Catchment Area (2001)**



Source: Experian/Goad

**Figure 4.2: Isle of Dogs/Canary Wharf Catchment Area (2001)**

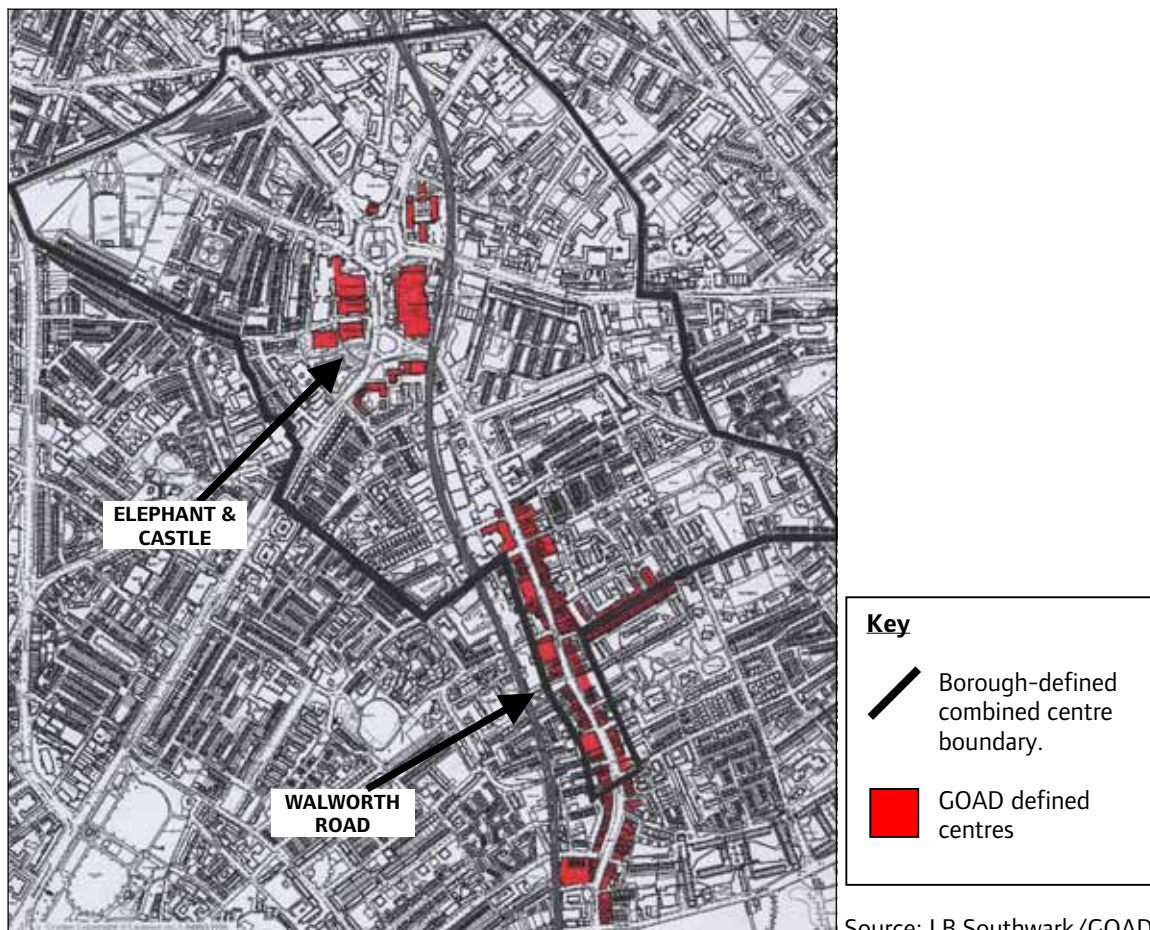


Source: Experian/Goad

4.12 **Swiss Cottage/Finchley Road**, currently classified as a District centre, also comprises significant total town centre floorspace (75,000 Sq M), retail floorspace (38,000 Sq M) as well as almost 18,000 Sq M of leisure floorspace and high turnover (£163 million/year). However the centre has a low proportion of comparison goods retail floorspace (46% of retail floorspace) – lower than all other Major centres except Camden Town (44%) and Peckham (43%) – and a low number of multiples (42) – lower than all other Major centres except Brixton (39) and Wandsworth (35). Therefore, some indicators suggest the centre is functioning at a higher level in the hierarchy, although other indicators suggest it is still functioning as a District centre. The centre will be monitored closely to test the level at which the centre continues to function.

4.13 **Elephant & Castle** and **Walworth Road** are currently two separate District centres in the London Plan. However, with significant regeneration in the Elephant & Castle area, Southwark has suggested they be amalgamated into a single Major centre. Figure 4.3, below, shows the Borough’s boundary for the combined centre (black line) and the extent of the two separate GOAD centres (shaded red buildings).

**Figure 4.3: Elephant & Castle and Walworth Road: Borough and GOAD boundaries**

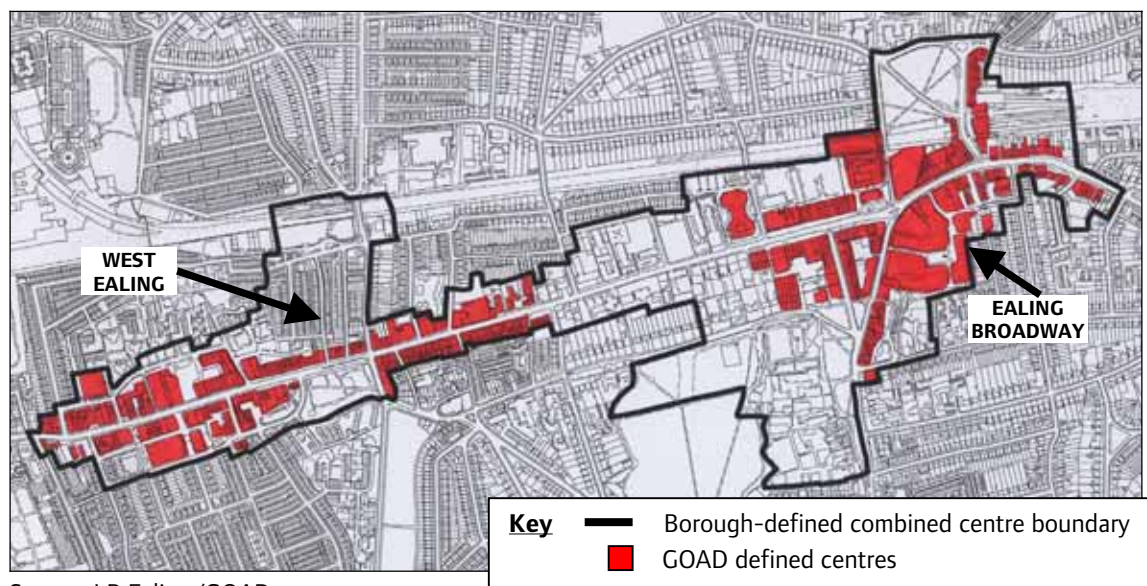


4.14 Figure 4.3 shows that, at present, the Elephant & Castle centre and the Walworth Road centre are separated by an area without significant town centre activity. CASA also identified Walworth Road as separate from Elephant

& Castle. If a combined centre were developed, the indicators above would suggest it would function above the District level. Existing combined total town centre floorspace (80,000 Sq M), retail floorspace (42,000 Sq M), comparison goods (25,000 Sq M) and leisure (24,000 Sq M) are above the District level. The SRDF for Central London states that it is “*anticipated that centre would merge with Walworth Road and become an enlarged integrated centre. Likely that this would be of scale and function of at least a Major centre. This should be tested in light of monitoring before formal re-designation*”<sup>47</sup>.

- 4.15 Similar issues were considered during the SRDF process with regard to **Ealing Metropolitan** centre. The question is whether it is functioning as one centre, or as two separate centres, namely West Ealing and Ealing Broadway. Figure 4.4 below shows the borough’s town centre boundary and the GOAD-defined separate centres. The SRDF for West London states that the “*centre appears to function as two distinct centres: Ealing Broadway and West Ealing. It is critical that the centre develops as an integrated entity for it to be considered as a Metropolitan centre*”<sup>48</sup>.

**Figure 4.4: Ealing Metropolitan Centre: West Ealing and Ealing Broadway**



Source: LB Ealing/GOAD

- 4.16 **Wandsworth** currently appears to be functioning as a large District centre, primarily based on 47,000 Sq M of total floorspace and 28,000 Sq M of total retail floorspace including 17,000 Sq M of comparison goods floorspace, and a number of multiples 35 (the Major/District threshold is 60). Investment in the town centre and riverside is underway, and the potential for intensification/extension is under investigation. The centre will be monitored in future health checks to ensure that it is classified appropriately to the role it plays.

<sup>47</sup> See SRDF Central London: <http://www.london.gov.uk/mayor/planning/srdf/index.jsp>

<sup>48</sup> See SRDF West London <http://www.london.gov.uk/mayor/planning/srdf/index.jsp>

## Other town centres

- 4.17 **Erith** is currently not categorised as a District centre in the London Plan. However with 20,000 Sq M of town centre floorspace (12,500 Sq M retail – more than 27 other District centres), it appears to be functioning as one. The centre has 3,500 Sq M comparison goods floorspace and significant (8,500 Sq M) convenience goods floorspace. Turnover is also of a similar level to other District centres at £22 million/year.
- 4.18 **Leyton**, in Waltham Forest, is also currently not categorised as a District centre in the London Plan. Total retail floorspace (35,500 Sq M) as well as comparison (20,000 Sq M) and convenience (10,000 sq M) goods floorspace indicate that it may be operating at the District level. The recent Layton Yard development has enhanced the role of the centre. This is complemented by the provision of community facilities (municipal offices and education centres).
- 4.19 The role of Erith and Leyton were considered through the SRDF process and recommended for categorisation as District centres in the Further Alterations to the London Plan. The SRDF process also explored whether policies in a number of other centres may lead to their reclassification in the future. This will be monitored through future health checks.
- 4.20 A number of **other centres** are aspiring to developing their role within the town centre network. Centres such as Stratford, Wembley, Shepherd's Bush and Lewisham are subject to specific regeneration proposals. These will be assessed in future health checks.

## Other changes to the network

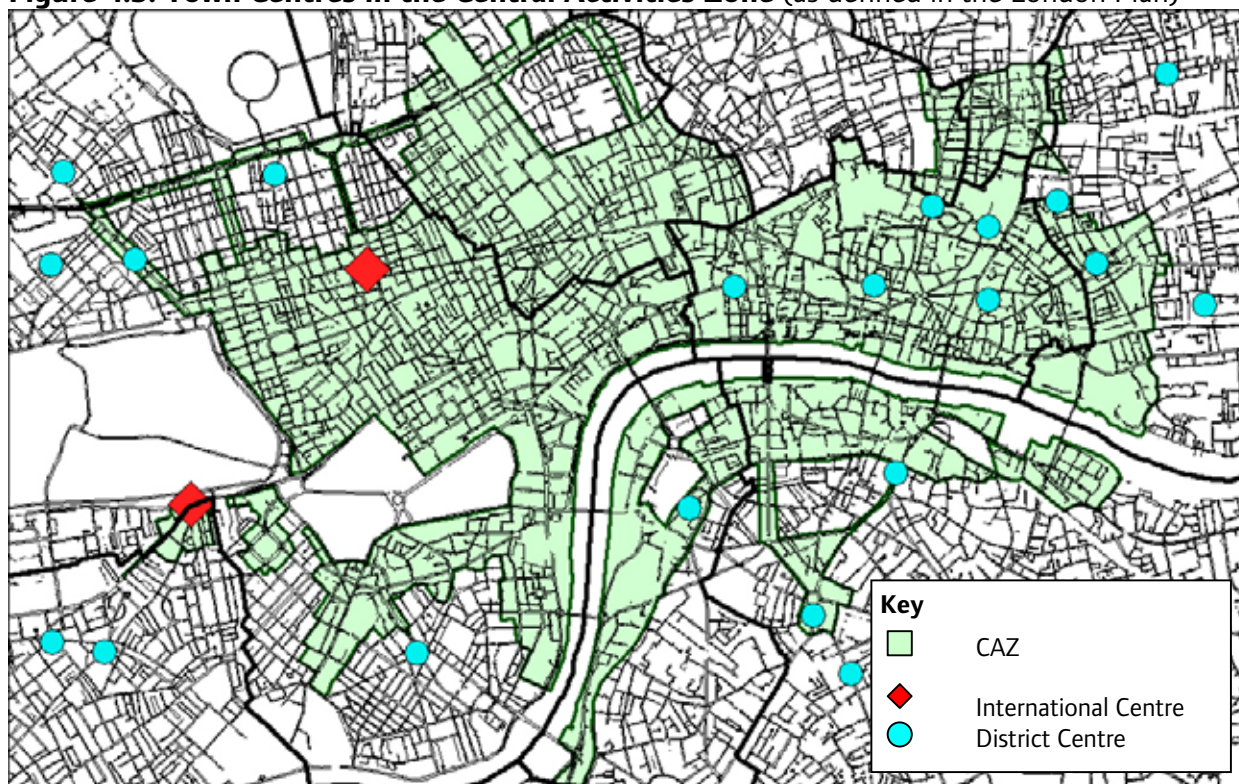
- 4.21 Other changes to the network are proposed Draft Further Alterations to the London Plan<sup>49</sup> and forthcoming Supplementary Planning Guidance<sup>50</sup>. This will include recognising the specialist roles of some of London's town centres, including their roles in accommodating strategically important clusters of night time activities<sup>51</sup>, and consideration of how centres within the Central Activities Zone should be classified. The current centres in the network within CAZ (as set out in the London Plan 2004) are shown in Figure 4.5 below.
- 4.22 In assessing the network of centres as set out in the London Plan, the data gathered for the health checks indicates not all District centres are performing the same type of role as each other. In particular, a number of District centres in the Central Activities Zone (CAZ) are strongly linked to CAZ-related functions of the surrounding area.

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<sup>49</sup> See <http://www.london.gov.uk/mayor/strategies/sds/further-alt/ docs.jsp>

<sup>50</sup> [http://www.london.gov.uk/mayor/strategies/sds/town\\_centre\\_assessment.jsp](http://www.london.gov.uk/mayor/strategies/sds/town_centre_assessment.jsp)

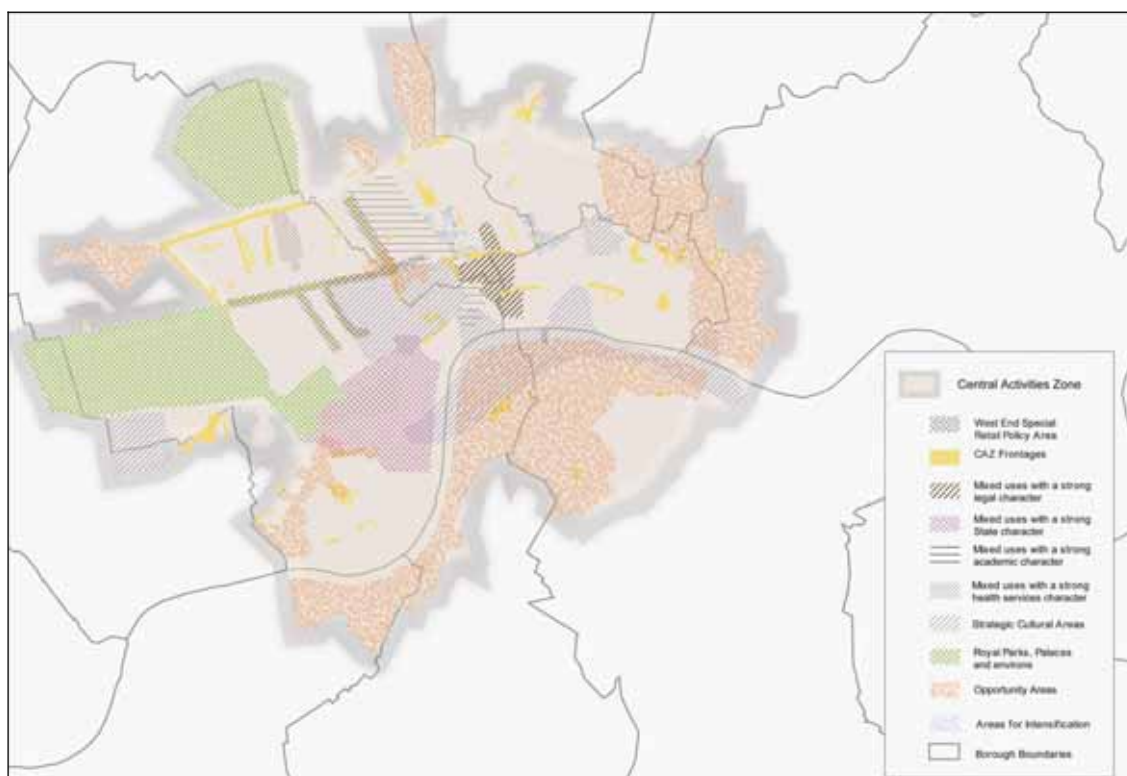
<sup>51</sup> Also see Best Practice Guidance on Managing the Night Time Economy - <http://www.london.gov.uk/mayor/strategies/sds/bpg.jsp>

**Figure 4.5: Town Centres in the Central Activities Zone** (as defined in the London Plan)

- 4.23 Rents indicate that centres in CAZ, particularly in the City of London, are different from other District centres around London. Rents in these centres are higher than most Major and some Metropolitan centres (Cheapside £2,799/Sq M; Liverpool St £2,153/Sq M; Moorgate £2,099/Sq M; Fleet Street £1,507/Sq M; Leadenhall Market £1,507/Sq M).
- 4.24 In terms of overall floorspace, the District centres in the City of London are also relatively large. They generally comprise a higher proportion of Comparison goods floorspace than most District centres ranging from 77% at Fleet Street to 58% at Leadenhall Market (District centre average, 46%). Centres in CAZ also comprise a high proportion of Leisure floorspace compared to the District centre average of 27%: Leadenhall Market 78% (19,440 Sq M); Praed Street/Paddington 61% (17,020 Sq M); Elephant & Castle 57% (15,680 Sq M); Lower Marsh 52% (11,460 Sq M); Cheapside 48% (14,930 Sq M); Liverpool Street 45% (14,700 Sq M); Fleet Street 45% (7,930 Sq M); Moorgate 38% (8,480 Sq M); and Whitechapel 38% (6,650 Sq M).
- 4.25 The District centres in CAZ, and especially in the City of London, serve a different role and catchment to District centres elsewhere in London.
- 4.26 The SRDF and London Plan review processes suggest that in view of this they should be categorised differently to other centres in London. Consultation suggests that the most robust approach would be to categorise them as 'CAZ Frontages' instead of the District centre definition. It would also enable better comparison to be made among District centres outside CAZ – understanding the similarities between centres at this level of the hierarchy which is distorted when those within CAZ are included. Similarly, the unique circumstances of the West End International Centre also require a specific and integrated

approach to support and extend the distinctive offer of London's premiere retail destination. Consultation suggested that identifying a West End Special Retail Policy Area which will be supported by a specific planning framework would provide strategic support for the centre. These changes have been proposed in the draft Further Alterations to the London Plan and the revised Central Activities Zone map (Figure 4.6 below) which shows CAZ frontages in yellow and the West End Special Retail Policy Area in grey.

**Figure 4.6: Proposed revisions to the Central Activities Zone (published in the draft Further Alterations to the London Plan)**



- 4.27 Town centre health checks will continue to be used at the London-wide level to assess the health of centres and CAZ frontages, and their roles within the network of centres.

#### **4c. Considerations for future London-wide town centre health checks**

- 4.28 This report addresses the strategic dimension to the requirement to undertake town centre health checks. It has also provided an opportunity to test the value of the health check process in developing policy and identifying the need for local assessments. The value of the process has been confirmed. Combined with the strategic retail need assessments it has enabled the GLA to address concerns raised at the London Plan EIP<sup>52</sup> to develop more geographically sensitive town centre policy. It has also been a key input to the SRDFs, guiding implementation of existing policy and informing its review through the Further Alterations to the London Plan.

<sup>52</sup> See [http://www.london.gov.uk/mayor/strategies/sds/eip\\_report/index.jsp](http://www.london.gov.uk/mayor/strategies/sds/eip_report/index.jsp)

- 4.29 The series of health checks will continue, at regular intervals, to ensure up to date information is available to inform revisions to the London Plan and Local Development Frameworks. The continuing series will also help boroughs to achieve a regular baseline of information for their own health checks where attitudinal and other information can support that already sought at the London wide level.
- 4.30 The most recent round of health checks have provided lessons to improve the quality and efficiency of the process in the future. In particular it is recognised that collaboration with London Councils (formerly the ALG) and boroughs in the development of the methodology (including forms and guidance notes) assists in deciding information required and availability of information.
- 4.31 The nature of the paper-based forms has led to a lengthy analysis of the data. Manual entry of the data was required for analysis and, together with designing a database into which to input the data, delayed the process. An electronic, possibly internet-based, form to input data, directly linked to the database would significantly improve the speed with which subsequent analysis can be undertaken.
- 4.32 The current health check was also delayed by the length of time taken to provide the data. Information on the likely requirements for health check data should be provided at an early stage and sufficient data-collection time provided for boroughs. Time-scales should be agreed for responses to health checks and partners should keep to the project timetable. Internet-based forms will help the information to be provided to meet the deadline.
- 4.33 Use of additional data sources, as agreed by partners, should help to reduce workload for all stakeholders. Undertaking future health checks electronically will allow greater integration with other data sources including those which provide a consistent London-wide reliable information (e.g. floorspace, rents, PTALs etc). Boroughs should be able to analyse this data and input other data if required. This could include information which requires local knowledge, such as detailed capacity information (e.g. unimplemented permissions from London Development Database) which a borough could verify.
- 4.34 The quality of responses also requires improvement. A number of forms returned did not include data in all fields required to make an effective pan-London analysis. Other data was misunderstood by some respondents (for example some responses to question on the number of cinema seats indicated one seat in the town centre). Electronic input forms and use of the guidance will help ensure data is provided and identify where errors may have occurred.
- 4.35 Future health checks should consider whether additional information is required, and whether this should include edge-of-centre data, and how the information should be defined. While it would be useful to analyse attitudinal data, the in-compatibility of different surveys is likely to prohibit its use at the London-wide level.
- 4.36 Existing 'open' questions could be improved. For example, standardised definitions for qualitative data (e.g. a list of civic facilities which can be

identified as in a town centre or not with a yes/no answer) will facilitate more thorough analysis.

- 4.37 Taking the above suggestions into account, future health checks should continue to be undertaken in a standardised way and as far as possible to allow comparisons to be made with historic health checks.

# Annexes

## **Annex 1: List of London's International, Metropolitan, Major and District centres and Maps of Sub-Regional Boundaries**

### **London's Town Centre Network** (London Plan, 2004)

**International centres**

<b>Borough</b>	<b>Centre</b>
K&C/ W'minster	Knightsbridge
Westminster	West End

**Metropolitan centres**

<b>Borough</b>	<b>Centre</b>
Bromley	Bromley
Croydon	Croydon
Ealing	Ealing
Haringey	Wood Green
Harrow	Harrow
Havering	Romford
Hounslow	Hounslow
Kingston	Kingston
Redbridge	Ilford
Sutton	Sutton

**Major centres**

<b>Borough</b>	<b>Centre</b>
Bking & Dgnhm	Barking
Barnet	Edgware
Bexley	Bexleyheath
Brent	Wembley
Brent/Camden	Kilburn
Bromley	Orpington
Camden	Camden Town
Ealing	Southall
Enfield	Enfield Town
Greenwich	Woolwich Eltham
Hackney	Dalston
H'smith & Fulham	Hammersmith Fulham
Hillingdon	Uxbridge
Hounslow	Chiswick
Islington	Nags Head Angel
Ken. & Chelsea	Kensington High St King's Road East
Lambeth	Streatham Brixton
Lewisham	Lewisham Catford
Merton	Wimbledon
Newham	East Ham Stratford
Richmond	Richmond
Southwark	Peckham
Waltham Forest	Walthamstow
Wandsworth	Clapham Junction Putney Tooting Wandsworth

Westminster Q'way/W'bourne Gr

**District centres**

<b>Borough</b>	<b>Centre</b>
B'king & Dag'ham	Dagenham & Heathway Chadwell Heath
Barnet	North Finchley Chipping Barnet Church End, Finchley East Finchley Temple Fortune Golders Green Whetstone Hendon central New Barnet Brent Street Mill Hill
Barnet/Brent	Cricklewood Colindale/The Hyde
Barn't/Brent/ Harr'w	Burnt Oak
Bexley	Welling Sidcup Crayford
Brent	Harlesden Willesden Green Wembley Park Preston Road Neasden Ealing Road
Brent/Harrow Bromley	Kingsbury West Wickham Beckenham Petts Wood Penge
Brmly/Crydn/Lmbth Camden	Crystal Palace Swiss Cottage/ Finchley Rd Kentish Town Hampstead West Hampstead
City of London	Fleet Street Cheapside Leadenhall Market Moorgate Liverpool Street
Croydon	Purley Thornton Heath Upper Norwood Norbury South Norwood Coulsdon Addiscombe
Ealing	Acton

	Greenford Hanwell		West Norwood Stockwell
Enfield	Angel Edmonton Edmonton Green Palmers Green Southgate		Lower Marsh Tulse Hill
Greenwich	Greenwich West Thamesmead Plumstead	Lewisham	Deptford Sydenham Forest Hill New Cross Lee Green Downham Blackheath
Hackney	Mare Street Stoke Newington	Merton	Morden Mitcham
Hkny/Hrngy/IsIngtn	Finsbury Park	Newham	Upton Park Forest Gate East Beckton Canning Town
H'smith & Fulham	Shepherds Bush	Redbridge	Barkingside South Woodford Gants Hill Wanstead
Haringey	Muswell Hill Crouch End Tottenham Green Lanes West Green Road	Richmond	East Sheen Teddington Whitton Twickenham
Harrow	Pinner Wealdstone Rayners Lane South Harrow Stanmore North Harrow	Southwark	Walworth Road Surrey Qys/Canada Wtr Dulwich – Lordship Lane Borough High Street Elephant & Castle
Harrow/Brent	Kenton	S'thwark/Lambeth	Camberwell
Havering	Hornchurch Upminster Collier Row Elm Park Harold Hill Rainham	Sutton	Wallington Worcester Park North Cheam Cheam Rosehill
Hillingdon	Yiewsley/West Drayton Ruislip Hayes Eastcote Northwood Ickenham	Tower Hamlets	Bethnal Green Crisp Street Poplar Whitechapel Roman Road (east) Watney Market Isle of Dogs/ Canary Whf
Hounslow	Feltham High Street Brentford	Waltham Forest	Bakers Arms Leytonstone South Chingford Wood Street North Chingford
Islington	Archway	Wandsworth	Balham
Ken. & Chelsea	Portobello Road Notting Hill Gate Fulham Road (east) South Kensington Earls Court Road King's Road (west) Fulham Road (west)	Westminster	Edgware Road
Kingston	New Malden Surbiton Tolworth		
Lambeth	Clapham High Street		

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South  
Marylebone High  
Street  
Edgware  
Rd/Church St  
Praed  
St/Paddington  
Warwick  
Wy/Tachbrook  
St  
Harrow Road  
St John's Wood

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**Source: London Plan, 2004**

<http://www.london.gov.uk/londonissues/planninganddevelopment.jsp>

## **London's Sub-Regional Boundaries**

Draft Further Alterations to the London Plan, 2006



*These boundaries are referred to in the main report.*

## London's Sub-Regional Boundaries

London Plan, 2004



*These boundaries are in the London Plan published 2004. The text of the main report refers to the boundaries proposed in the draft Further Alterations to the London Plan published in 2006.*

## Annex 2: Survey form and guidance notes

The following pages are copies of the Survey Form questions and Guidance Notes sent by post and email to borough representatives for completion.

### Survey Form: Annex 2 (a)

#### HEALTH CHECK SURVEY FORM

Before completing this proforma, you are advised to consult the accompanying guidance notes which give advice on information requirements and definitions.

Please provide as much of the requested information as possible for the calendar year 2003. If this data is unavailable or incomplete, please provide the most recent information, and specify the year to which it relates.

Please attach a map with the town centre site boundary marked clearly on it. A digitised version would be ideal. If this is not available, then a paper copy will be sufficient.

You can expand all responses on a separate sheet if you wish.

#### 1 SCALE AND FUNCTION

##### RETAIL FLOORSPACE

NOTE! This data will be provided by the GLA/Experian Business Strategies, sourced from GOAD if Boroughs are unable to supply it.

YEAR	
SOURCE	

TYPE OF RETAIL FLOORSPACE	TOTAL NO. UNITS	TOTAL GROSS FLOORSPACE (sq.m)
Comparison Retail		
Convenience Retail		
Service Retail		
All Retail		

##### RETAIL OUTLETS

NOTE! This data will be provided by the GLA/Experian Business Strategies, sourced from GOAD if Boroughs are unable to supply it.

YEAR	
SOURCE	

TYPE OF RETAIL OUTLET	TOTAL NO. UNITS	TOTAL GROSS FLOORSPACE (sq.m)
Multiple Retailers		
Enclosed Shopping Centres		
Department Stores		
Independent Stores		
Jewellers		
Banks and Building Societies		

**1.3 LEISURE, CULTURE & ARTS FACILITIES**

YEAR	
SOURCE	

Please complete the following table in relation to cinemas and theatres in the town centre.

	TOTAL NO. SEATS	TOTAL EMPLOYMENT
Cinemas		
Theatres		

Please indicate the number of restaurants and cafes in the town centre.

Please indicate the number of takeaways in the town centre.

Please indicate the number of pubs and bars in the town centre.

e) Please indicate the number of nightclubs in the town centre.

f) Please indicate the number of public libraries in the town centre.

g) Please indicate the number of sports / leisure facilities in the town centre.

Local Authority

Please indicate type of facilities .....

.....

.....

Private

Please indicate type of facilities .....

.....

.....

h) Please indicate,

The total number of hotel bedrooms in the town centre.

The total number of hotels in the town centre.

i) Please describe any other arts / culture / entertainment attractions in the town centre not covered above.

.....

.....

.....

.....

**1.4 OFFICE FLOORSPACE**

YEAR:	TOTAL GROSS FLOORSPACE (sq.m)
SOURCE:	
Office Floorspace	

**1.5 EDUCATION**

YEAR	
SOURCE	

Please indicate the total number of schools in the town centre, if any.

Please describe the nature of any other major education facilities in the town centre, if any.  
 .....  
 .....  
 .....

**1.6 HEALTH FACILITIES**

YEAR	
SOURCE	

TYPE OF FACILITY	NUMBER OF FACILITIES
Hospital	
Health Clinic	
GP Practices	

**1.7 CIVIC AND COMMUNITY FACILITIES**

YEAR	
SOURCE	

Please describe any civic facilities in the town centre.  
 .....  
 .....  
 .....

Please indicate the number of places of worship in the town centre.

Please summarise any other important community facilities, not referred to above.  
 .....  
 .....  
 .....

Please indicate

The number of public toilet facilities in the town centre.

The number of these public toilets that are wheelchair accessible.

The number of these public toilets with baby changing facilities.

**1.8 MARKETS**

YEAR	
SOURCE	

a) Is there a market in the town centre? YES / NO

*If so, please indicate the following:*

b) Are there different markets on different days? YES / NO

On what days does it / do they operate?

.....  
 .....  
 .....

d) How many stalls are there?

--

**1.9 EVENING SHOPPING**

YEAR	
SOURCE	

a) Is there evening shopping (i.e. after 6pm)? YES / NO

b) If yes, does this apply to (Please tick as appropriate):

- All retail outlets
- Most retail outlets
- Some retail outlets
- Enclosed shopping centres only

c) If yes, please indicate which nights and at what times of year.

.....  
 .....

**1.10 SUNDAY SHOPPING**

YEAR	
SOURCE	

a) Is there Sunday shopping? YES / NO

b) If yes, does this apply to (please tick as appropriate):

- All retail outlets
- Most retail outlets
- Some retail outlets
- Enclosed shopping centres only

**1.11 EMPLOYMENT – OFFICE, RETAIL AND LEISURE**

This will be provided by the GLA. For ODPM defined centres only.

**2 CAPACITY**

**2.1 SOURCE OF CAPACITY**

YEAR	
SOURCE	

SOURCE OF CAPACITY		NUMBER OF SITES/ PREMISES	TOTAL GROSS FLOOR-SPACE (sq.m)	TOTAL AREA (ha)	OTHER MEASURES	
					HOUSING (No. of dwellings)	HOTELS (No. of bedrooms)
Unimplemented Permissions	Retail					
	Leisure					
	Housing					
	Hotels					
	Other					
UDP Proposals Map Allocations (excluding those included above)	Retail					
	Leisure					
	Housing					
	Hotels					
	Other					
Undesignated Vacant Premises with Development Potential (excluding those included above)	Retail					
	Leisure					
	Other					
Undesignated Vacant Sites with Development Potential (excluding those included above)	Retail					
	Leisure					
	Other					

**2.2 CAPACITY STUDY**

a) Has a retail capacity study been undertaken in the last 5 years? YES / NO

b) If so, please indicate the capacity for additional Gross floorspace/site area identified.

	sq.m	ha
Food		
Non-Food		
Total		

### 3 FINANCIAL PERFORMANCE

#### 3.1 TURNOVER – RETAIL AND LEISURE

This will be provided by the GLA. For ODPM defined town centres only.

#### 3.2 SHOPPING YIELDS

Please complete the following table in relation to initial yields currently being applied in the town centre

YEAR	
SOURCE	

DEVELOPMENT SECTOR	INITIAL YIELD (%)
Retail	
Office	
Industrial	
Leisure	

#### 3.3 SHOPPING RENTS

Please complete the following table in relation to trends in the retail performance of the town centre

YEAR	
SOURCE	

DEVELOPMENT SECTOR	RENTAL LEVELS PER (sq.m)
Retail	
Office	
Industrial	
Leisure	

### 4 ACCESSIBILITY

#### 4.1 PUBLIC TRANSPORT ACCESSIBILITY

PTALs will be supplied by the GLA. TfL sent a letter and information about PTALs, including a borough map, to all the boroughs in the summer of 2003. If boroughs require more detailed information about PTALs for their borough, please contact Simon Cooper at TfL, tel 0207 941 2849.

Analysis of public transport and crowding will be investigated with TfL as part of SRDFs.

Analysis of modal split in town centres is being investigated with TfL.

**4.2 CAR PARKING**

Please complete the following in relation to car parking spaces in the town centre.

YEAR	
SOURCE	

TYPE OF CAR PARKING PROVISION	NUMBER OF SPACES
Multi-storey car parks	
Surface car parks	
Short term charging car parks	
Long term charging car parks	
On-Street car parking	
Disabled car parking spaces*	

\* if applicable, please describe their location in relation to the major centre attractions

.....  
 .....

**4.3 SHOP MOBILITY SCHEME**

a) Is there a shop mobility scheme? YES / NO

b) If yes, please describe

.....  
 .....

**4.4 FACILITIES FOR CYCLISTS**

Please indicate the number of bicycle parking facilities in the town centre, if any

**4.5 PEDESTRIAN FLOWS**

a) Do you collect data on Pedestrian Flows? YES / NO

b) If so, please indicate 'peak' flows giving the appropriate units, year and source of the information

FLOW	
YEAR	
SOURCE	

**5 TOWN CENTRE INITIATIVES**

a) Is there a Town Centre Manager? YES / NO

b) Is there a Town Centre Consultancy Group involving the local authority and private sector? YES / NO

c) Is there a Town Centre Strategy? YES / NO

If yes, please describe the nature of the strategy .....

.....  
 .....

d) Are there any other special initiatives which the council are promoting in the town centre (e.g. environmental improvements, CCTV, new development, changes to car parks)? Please specify.

.....  
 .....

e) Are there any particular features of the town centre which attract visitors (e.g. specialist shopping facilities, green space)? Please describe.

.....  
 .....

**6 ENVIRONMENT AND AMENITY**

**6.1 ACCIDENTS**

a) Do you collect information on the number of pedestrian accidents in the town centre?  
 YES / NO

b) If YES, please give details of what information you collect

.....  
 .....

c) If YES, please indicate the total number of pedestrian accidents in the town centre for the most recent year that records are available

Number	
Year	
Source	

**6.2 CRIME**

a) Do you collect information on recorded crime? YES / NO

b) If YES, please give details of what information you collect

.....  
 .....

c) If YES, please indicate the total number of offences in the town centre for the most recent year for which records are available

Number	
Year	
Source	

**6.3 ATTITUDINAL SECTION**

Have you done a health check on the town centre in the last 5 years that involved questions on it's quality?  
 YES / NO

## **Guidance Notes: Annex 2 (b)**

### **EXPLANATORY NOTES TO BOROUGHs UNDERTAKING THE HEALTH CHECKS**

These guidance notes are provided to assist boroughs in the completion of the 2003 Town Centre Health Check Survey Form. The methodology for the 2003 round of health checks builds upon that developed by Urbed and Donaldsons for LPAC which was implemented for LPAC's 'High Accessibility and Town Centres in London' in August 1994 and updated for the 1999 health check survey.

Boroughs may also wish to refer to 'PPG6: Town Centres and Retail Development' that provides further context for this work and an explanation of approaches to measure the vitality and viability of Town Centres.

### **DATA AVAILABILITY AND INTERPRETATION**

The main aim of the exercise is to provide a profile of centres identified on as consistent and comparable basis as possible, which allows comparisons of similar centres to establish their relative performance and overall health. Ideally the data should also be likely to be available in the same form in the future and must allow comparisons to be made between centres. However, this level of consistency and continuity is actually hard to achieve in practice across London, particularly for the district centres where data are in some cases limited to local sources. Therefore in completing the health check proformas, these notes provide guidance on the preferred source of information and of potential local alternatives.

The data collected in this survey will as far as possible be interpreted as a whole for an individual centre and be compared with other centres as completed profiles. This is because no single data variable alone is capable of indicating the apparent 'health' or otherwise of a centre. In addition a centre's attractiveness derives from a range of factors in combination.

### **DEFINITION OF TOWN CENTRES**

*All questions relate to activities within the boundaries of the town centre.*

Boroughs are requested to complete a Survey Form for each of their town centres identified in the draft London Plan (including international, metropolitan, major and district centres) and any other local or neighbourhood centres, which the borough considers, ought to be included. Where town centres straddle more than one borough, we ask that the relevant boroughs decide between themselves how best to complete the town centre health check. Either by one borough doing a health check for the entire town centre, or each borough submitting a health check for the part of the town centre that falls within its boundaries. Please indicate with the health check return the option that was chosen.

Boroughs are requested to include a map with their return indicating clearly the boundaries of the relevant town centre taken from UDPs. A digitised GIS version (in MID/MIF format) is requested but if this is not available, then a paper copy will be sufficient.

Data in respect of retail floorspace and retail outlets (see sections 1.1 and 1.2 below) will be supplied by the GLA and consultants Experian Business Strategies sourced from Goad. Where borough Officers are of the opinion that this source severely misrepresents the particular town centre in a London-wide context then boroughs are advised to provide information from their own

sources, which should be in a similar format to the Survey Form. This data should be clearly cross-referenced where appropriate and the source clearly indicated on the Survey Form.

## SECTIONS OF THE FORM REQUIRING FURTHER CLARIFICATION

### 1 SCALE AND FUNCTION

#### 1.1: Retail Floorspace

Information here will be provided by the GLA working with Experian Business Strategies sourced from GOAD which provides information on comparison, convenience and total floorspace in each centre as well as information on vacancies. Data will be provided for international, metropolitan, major and district town centres in the draft London Plan.

Note: GOAD only records the ground floorspace of each retail premises and the total may appear lower than the floorspace data obtained from other sources. The advantage of GOAD however is that it is comparable between centres, regularly updated and available on a consistent basis for previous years. Hence it is generally the best to use for a health check to be employed in a strategic context.

For centres where GOAD data is not available, Boroughs should use local sources as available indicating the source on the proforma. Where trend information is not available in a directly comparable format to the proforma, Boroughs may provide information at other survey base dates (post 1991), indicating the dates of any survey sources in the space provided on the proforma. Boroughs may also choose to submit other sources in addition to the GOAD data to be supplied as noted under the definition of town centres above. Floorspace figures should be expressed as Gross floorspace.

#### 1.2: Retail Outlets

Information here can be provided by the GLA working with Experian Business Strategies sourced from GOAD. Data will be provided for international, metropolitan, major and district town centres in the draft London Plan.

For centres where GOAD data is not available, Boroughs should use local sources as available indicating the source on the proforma. Where trend information is not available in a directly comparable format to the proforma, Boroughs may provide information at other survey base dates (post 1991), indicating the dates of any survey sources in the space provided on the proforma. Boroughs may also choose to submit other sources in addition to the GOAD data to be supplied as noted under the definition of town centres above. Floorspace figures should be expressed as Gross floorspace.

#### 1.3: Leisure, Culture & Arts Facilities

a) Information on numbers of seats should be identified by direct (telephone) enquiry. Information on employment can be obtained from the Yellow Pages Business Database or direct enquiry.

b) – i) please use local sources as appropriate

h) The definition of hotel means ‘tourist hotel accommodation’ and not ‘hostel type accommodation’.

#### 1.4 Office; 1.5 Education; 1.6 Health Facilities:

please use local sources as appropriate

#### 1.7: Civic and Community Facilities

Civic facilities refer to Local Borough facilities (e.g. town halls), as well as those managed by other authorities (e.g. Magistrates Courts, Police Stations).

#### 1.8 Markets; 1.9 Evening Shopping; 1.10 Sunday Shopping

please use local sources as appropriate

#### 1.11 Employment – Office, Retail and Leisure

Data will be supplied by the GLA sourced from the ODPM. This will cover the 147 Areas of Town Centre Activity and 21 Retail Cores identified in the ODPM/CASA research.

## **2 CAPACITY**

It is expected that the planning authority has undertaken this specific research. This information should be derived from Borough planning records on permissions, from the UDP and through records of vacant sites and premises in town centres.

Please indicate clearly the sources and year of information in each case

Please indicate the number of sites and premises, the total floorspace in square metres and the total area in hectares

Floorspace figures should be expressed as Gross floorspace.

Sources of capacity for housing and hotels are only requested in respect of unimplemented permissions and UDP Proposal Map allocations. Please indicate the number of sites, the total site area and the total number of housing dwellings and the total number of hotel bedrooms in the spaces provided.

'Other' refers to any other significant town centre uses, which you consider to have a bearing on the health of the town centre.

## **3 FINANCIAL PERFORMANCE**

### **3.1 Turnover – Retail and Leisure**

Data will be supplied by the GLA sourced from the ODPM. This will cover the 147 Areas of Town Centre Activity and 21 Retail Cores identified in the ODPM/CASA research.

### **3.2 & 3.3: Shopping Yields & Shopping Rents**

Yield is the percentage annual return required by investors of property. PPG 6 identifies yield as one of the main indicators of the vitality and viability of town centres (PPG 6 - Figure 1)

Rent is the rent paid per square foot for the front section of a shop.

Both yield and rental levels should preferably be measured by reference to unit-type shops located in the prime retail area.

Borough Officers are advised to contact their Valuers who may in turn wish to contact local property agents for this information.

The GLA can provide retail rents for some London town centres. This will be supplied to boroughs in due course.

## **4 ACCESSIBILITY**

### **4.1 Public Transport Accessibility**

PTALs (Public Transport Accessibility Level) will be used by the GLA for 4.1. TfL sent a letter and information about PTALs, including a borough map, to all the boroughs in the summer of 2003. If boroughs require more detailed information about PTALs for their borough, please contact Simon Cooper at TfL, tel 0207 941 2849.

Analysis of public transport and crowding will be with TfL as part of SRDFs.

Analysis of modal split is being investigated with TfL.

### **4.2: Car Parking**

A short term charging car park is one, which only permits stays of less than 2 hours under normal (non-penalty) charging arrangements.

On-street car parking should include both charged and non-charged parking spaces.

### **4.3 Shop Mobility Scheme**

Some examples of a shop mobility scheme are allowing older and disabled people to borrow a scooter or powered wheelchair to access the parts of the shopping centre previously too far to walk, and escorts to assist blind and partially sighted people do their shopping.

please use local sources as appropriate

#### **4.4 Facilities for cyclists**

please specify the number of dedicated bicycle parking facilities using local sources as appropriate

#### **4.5 Pedestrian Flows**

please use local sources as appropriate

### **5 TOWN CENTRE INITIATIVES**

please use local sources as appropriate

### **6 ENVIRONMENT AND AMENITY**

#### **6.1 Accidents**

please identify whether the borough collects data on pedestrian accidents in the town centre  
If so, please provide details, for example if data is recorded by type of accident, and how often it is collected

#### **6.2: Crime**

please identify whether the borough collects data on recorded crime in the town centre  
If so, please provide details, for example if data is recorded by type of crime, location of crime and how often it is collected  
Please expand on your response on a separate sheet if you wish

#### **6.3 Attitudinal Section**

For the 2003 health check survey, we are only requesting information on whether attitudinal / qualitative surveys have been carried out or not in the last 5 years

## **Annex 3: Additional Information on Data Sources**

Data for the following centres (GOAD centre name) has been estimated (see paragraph 2.22):

**Centres where GOAD data has been estimated (see paragraph 2.22)**

Mayor of London

London-wide Town Centre Health Checks (2006 Analysis)

Addington Road, Selsdon  
Aldersgate Street, Barbican  
Bath Road and Vicarage Farm Road,  
Heston Hounslow  
Beddington Farm Road, Croydon  
Bickley Road, Widmore  
Bromley Road, Lewisham  
Church Road, Ealing  
City Road, Old Street  
Coombe Lane, Merton  
Dorset Road, Lambeth  
Enfield Wash  
Fulham Palace Road, Hammersmith  
and Fulham  
Gidea Park, Romford  
Hammersmith and Fulham  
Hammond Road, Enfield  
Hampton High Street  
Haverstock Hill, Camden  
Hawks Road, Kingston upon Thames

New Kings Road, Hammersmith and  
Fulham  
Pinner Road, Harrow on the Hill  
Replingham Road, Wandsworth  
Rockware Avenue, Greenford  
Sipson, Hounslow  
St. James's Road and Southwark  
Bridge Road, Southwark  
Station Approach, Hayes  
The Broadway, Woodford  
Tulse Hill  
Vanbrugh Park, Greenwich  
Waddon Way, Beddington

Highams Park  
Highgate  
Holland Park Avenue, Kensington and  
Chelsea  
Kew  
Knights Hill, Lambeth  
Lambeth  
London Road and Great West Road,  
Osterley ,Isleworth  
London Road, Selhurst  
Merton High Street, Merton  
Meyrick Road, Wandsworth  
Mile End Road Prescott Street and  
Whitechapel Road, Tower Hamlets  
Moreton Street, Pimlico.  
Munster Road, Hammersmith and  
Fulham

## **Annex 4: Summary Tables of Responses**

Separate document, available electronically.

See [http://www.london.gov.uk/mayor/strategies/sds/town\\_centre\\_assessment.jsp](http://www.london.gov.uk/mayor/strategies/sds/town_centre_assessment.jsp)

## **Annex 5: Full Data Tables**

Separate document, available electronically.

See [http://www.london.gov.uk/mayor/strategies/sds/town\\_centre\\_assessment.jsp](http://www.london.gov.uk/mayor/strategies/sds/town_centre_assessment.jsp)

These are tables of full responses from the database holding responses from boroughs and additional information in answer to questions set out on the survey form in Annex 2. Available electronically in Excel format for analysis purposes. Call the London Plan Team on 020 7983 4000 for further information.





## Other formats and languages

For a large print, Braille, disc, sign language video or audio-tape version of this document, please contact us at the address below:

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You will need to supply your name, your postal address and state the format and title of the publication you require.

If you would like a summary of this document in your language, please phone the number or contact us at the address above.

### Chinese

如果需要您母語版本的此文件，  
請致電以下號碼或與下列地址聯絡

### Vietnamese

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

### Greek

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

### Turkish

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

### Punjabi

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

### Hindi

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

### Bengali

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

### Urdu

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

### Arabic

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

### Gujarati

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

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The Queen's Walk  
London SE1 2AA

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