2013 London Town Centre Health Check Analysis Report

March 2014

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The 2013 Town Centre Health Check has created a comprehensive database of indices showing the vitality and viability of town centres in London. The GLA would like to take this opportunity to thank everyone who was involved in the project, including colleagues from London Boroughs, Transport for London and various departments within the GLA.
In particular thank you to colleagues from Barking & Dagenham, Croydon, Ealing, Greenwich, Hammersmith & Fulham, Kensington and Chelsea, Lewisham, Merton, Redbridge, Waltham Forest, Wandsworth for their great support in the health check.

Contents

Report Annexes – see separate volume

Technical Annexes (Excel format) – available from the GLA London Datastore:
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Executive Summary

The 2013 London Town Centre Health Check (TCHC) is the latest in the ongoing series of strategic London-wide health checks undertaken by the Greater London Authority (GLA) with support from the London boroughs. It provides a 'snapshot' of the health of over 200 of London's town centres using a selection of strategic health check indicators and illustrates how these have changed over time. This strategic town centre health check informed the preparation of the Further Alterations to the London Plan (FALP) and Supplementary Planning Guidance (SPG) and contributes to the evidence base for local development plan policies, development proposals and implementation of town centre and local strategies in accordance with London Plan policy 2.15 and 4.7 and the National Planning Policy Framework (NPPF) and practice guidance.

This London-wide strategic town centre health check spans a period which experienced a tough economic climate and the emergence of longer-term structural challenges arising from reduced levels of growth in consumer expenditure and the expansion of internet/multi-channel retailing. The evidence in this health check suggests that despite rising levels of vacancy 2007-2012, its town centres are beginning to adapt to these challenges with a pronounced shift towards more-leisure oriented functions, particularly cafes and restaurants, alongside retailing, offices, housing and civic and community functions. The challenge going forward will be to facilitate their evolution, diversification and intensification (including for higher density housing), reduce vacancy rates, improve quality and accessibility, and realise their potential as thriving, liveable centres at the hub of their communities.

Main Survey Findings

1. London's **total town centre floorspace** was approximately 10.9 million sq.m in 2012[1], an increase of over 540,000 sq.m since 2007 (see Figure 0.1).

2. Occupied **retail floorspace** in London's town centres was approximately 7.1 million sq.m in 2012, an increase of 140,000 sq.m since 2007. Strong growth in convenience retail floorspace (+175,000 sq.m, +14%) was counterbalanced by a modest reduction in comparison retail floorspace (-13,000 sq.m) and service retail floorspace (-22,000 sqm).

[1] Based on Experian GOAD centre data

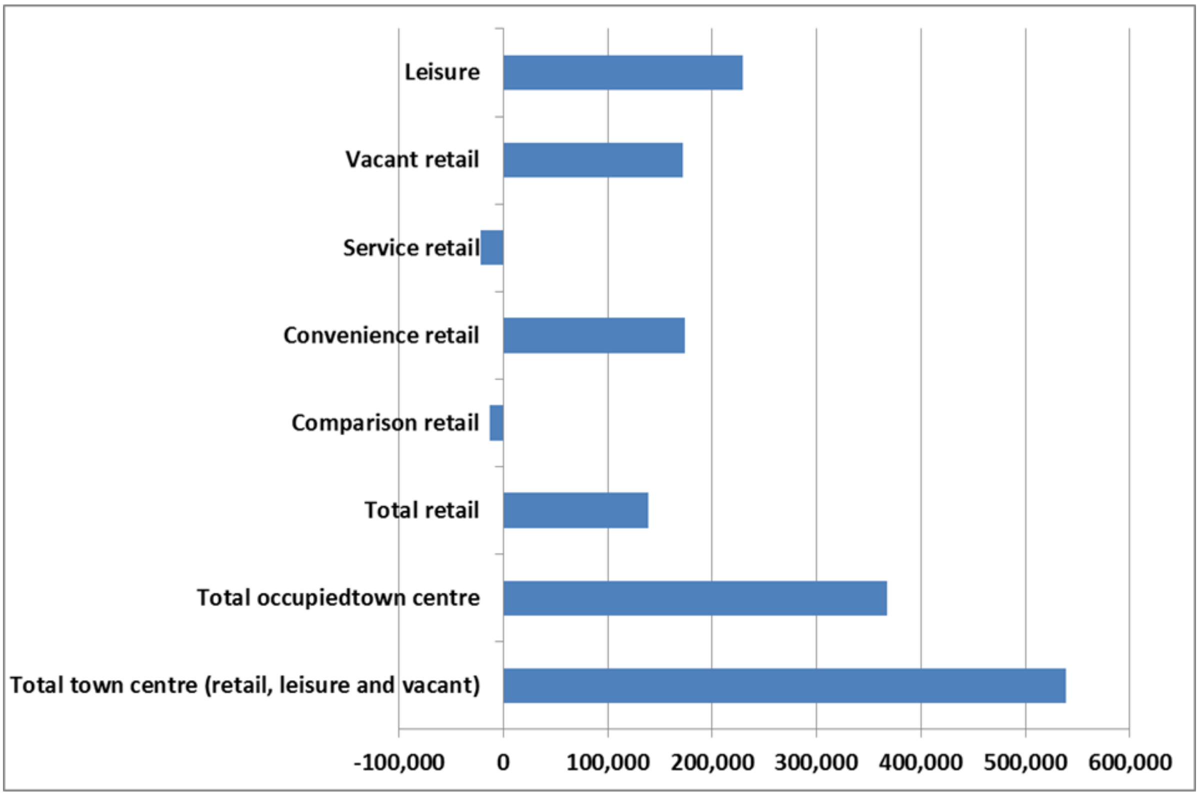
3. Over the five year period from 1 April 2008 to 31 March 2013, the percentage of net gains to retail floorspace in **town centre**, **edge-of-centre** and **out-of-centre** locations was 26%, 59% and 14% respectively.

4. The proportion of retail floorpsace occupied by **multiples** in town centres increased from 62% to 64% over the period 2007 to 2012. Multiples grew strongly relative to independents in particular in the Central Activities Zone.

5. **Leisure floorspace** in London's town centres was approximately 2.9 million sq.m in 2012, an increase of 230,000 sq.m (+9%) since 2007. In the leisure category, growth was particularly strong in restaurants and cafes uses (outlets up by 21% since 2007). Hot food takeaway and betting shop uses in town centres grew strongly over the 2007 to 2012 period (+8% and +23% outlets respectively) whilst public houses in town centres declined by 9%.

6. **Vacant floorspace** in London's town centres was approximately 960,000 million sq.m in 2012 (an increase of 170,000 sq.m since 2007). The overall town centre vacancy rate in 2012 was 8.8%, compared to 7.4% recorded in 2007. The national average retail vacancy rate in October 2012 was 13.2%.

Figure 0.1 Town Centre Floorspace 2007 - 2012 (sq.m)



Source: Experian GOAD/GLA (based on analysis of 185 centres)

7. Nineteen centres recorded net increases in **office floorspace** completions 2008-2012, together comprising just over 92,000 sq.m, whereas 35 centres recorded net decreases in office floorspace with a net loss of 108,000 sq.m. The overall net loss of office floorspace in town centres was 16,000 sq.m.

8. Emerging results from **office to residential permitted development** prior approval monitoring suggest that since commencement in 2013 there have been 1,168 applications affecting at least 400,000 sqm B1a office floorspace (based on 571 applications) potentially yielding at least 8,254 residential units (based on 871 applications). Where data is available, around 60% of the B1a floorspace affected and residential units gained are in town centres and a further 16% in edge of centre locations. Of the 419 prior approval applications where the occupancy status is known, two-fifths are currently occupied and a further one-fifth part occupied.

9. Over the five year period from 1 April 2008 to 31 March 2013 there were 40,407 net **housing completions** within or on the edges of London's town centres, or just over 8,100 per annum. Of this total 15,366 net housing units were completed within London's town centres, about 3,080 per annum, and 25,041 units were completed on the edges of London's town centres, or just over 5,000 per annum. The highest combined town centre and edge of centre housing completions over this period were recorded in Canary Wharf (1,833 units), Elephant and Castle (1,357 units) and Dalston (1,156 units).

10. There were 16,843 net additional **housing units** under construction within London's town centres at the end of March 2013 and a further 21,585 net additional units had planning permission but had 'not started'. Developments under construction or with permission and not started in edge of centre locations could yield a further 37,200 units. Housing capacity in town centres in identified allocations and 'potential' sites could yield capacity for more than 55,000 units over the period 2015/16 to 2024/25 and if edge of town centre locations are included the capacity increases to more than 97,000 units.

11. At the end of March 2013 there was approximately 830,000 sq.m of net additional **non-residential floorspace** under construction within London's town centres (although a significant part of this is B1a office use at Canary Wharf). In addition there were 249,000 sq.m of non-residential floorspace with unimplemented ('not-started') planning permissions in town centres at the end of March 2013 including 50,000 sq.m net additional A1 retail floorspace at Shepherds Bush and 163,000 sq.m B1a office floorspace in Croydon. There are

notable potential gains in town centre permissions not started in cafes and restaurants, hot food takeaways and non-residential institutions, with declines in pubs/bars and industrial uses.

12. Over the period from 2009 to 2012, **retail rents** in the International centres (West End and Knightsbridge) showed strong average growth (8.6%) driven in particular by the West End. There has been modest recovery in average rents in the CAZ Frontages (3.3%), Metropolitan centres (2.8%), Major (2.8%) and District centres (2.5%). However retail rents in some Metropolitan and Major centres and CAZ frontages have either declined or shown little growth, including Tottenham Court Road, Victoria Street, Fleet Street, Baker Street, Kensington High Street, Croydon, Harrow, Ealing, Romford, Ilford and Hounslow. Retail rents at Shepherds Bush increased by 8% between 2011 and 2012.

<u>Reviewing the London Plan Town Centre Network</u> (see Figure 0.2)

The review of the strategic Town Centre Network for the draft Further Alterations to the London Plan (FALP) produced the following key findings:

- Stratford, identified as a new Metropolitan centre
- King's Cross / St Pancras is identified as a new CAZ Frontage
- Three town centres (Highams Park, Lavender Hill/Queenstown Road and Earlsfield) are identified as having potential for promotion to the 'District centre' status
- Three town centres (Plumstead, Elm Park, Lee Green) are identified for de-designation due to several of the indicators falling significantly below the thresholds for a District centre
- Wembley Park is now confirmed as District centre - no longer 'subject to monitoring'
- Three town centres (North Harrow, Harold Hill and Downham) are identified as being borderline cases, where several indicators are marginally below the relevant thresholds. These centres are still identified as District centres but should be classified as 'subject to ongoing monitoring'
- Croydon is identified as a centre for regeneration

- Gants Hill in Redbridge is recommended for classification as a night time economy cluster of 'more than local importance'

- Office guidelines for a number of centres including Bromley and Kingston have been updated taking into account recent research in the London Office Policy Review 2012. Ealing is recommended to be appropriate for a mix of speculative and mixed use office development potential.

Potential future changes to the network over the Plan period (see Figure 0.3)

- Stratford and Shepherd's Bush are considered to have future potential to attain International centre status in the London Plan town centre network in recognition of their global renown and wide range of high quality and high order comparison goods retailing and specialist offers

- Colliers Wood in Merton is recognised as having future potential to become a District centre subject to the genuine integration of a number of edge of centre sites to form a coherent centre.

Figure 0.2 Review of the town centre network classifications

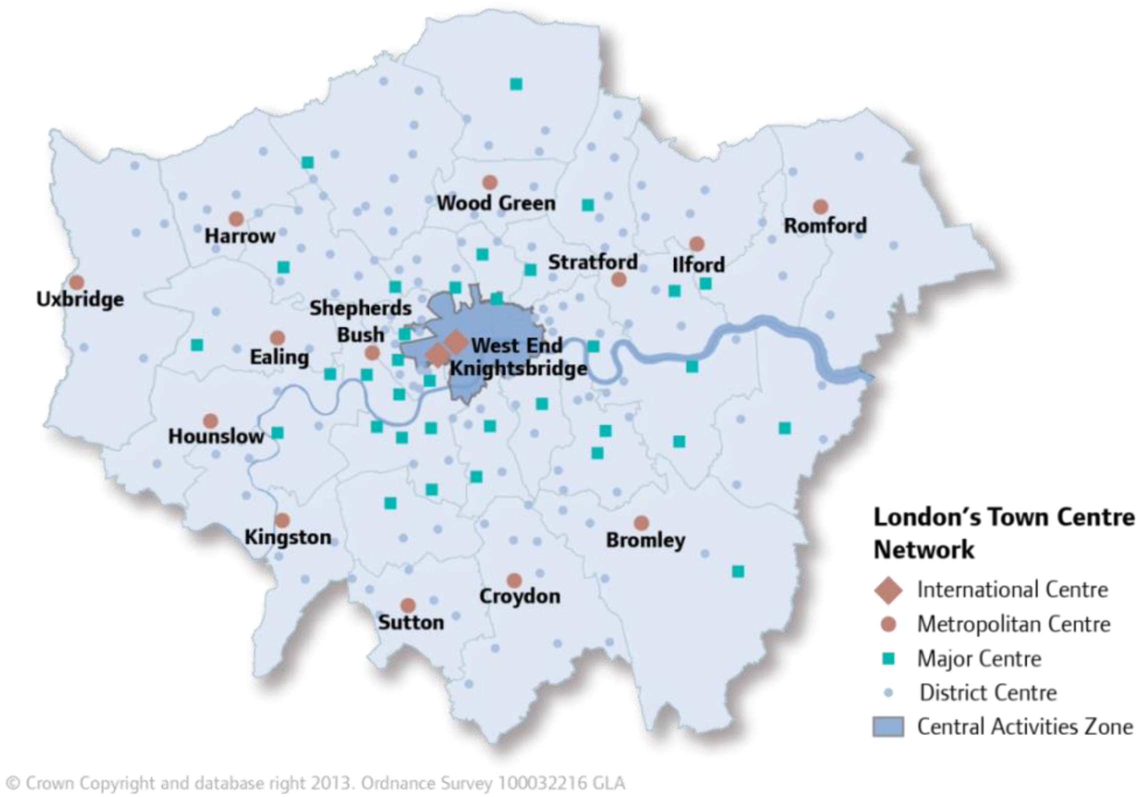
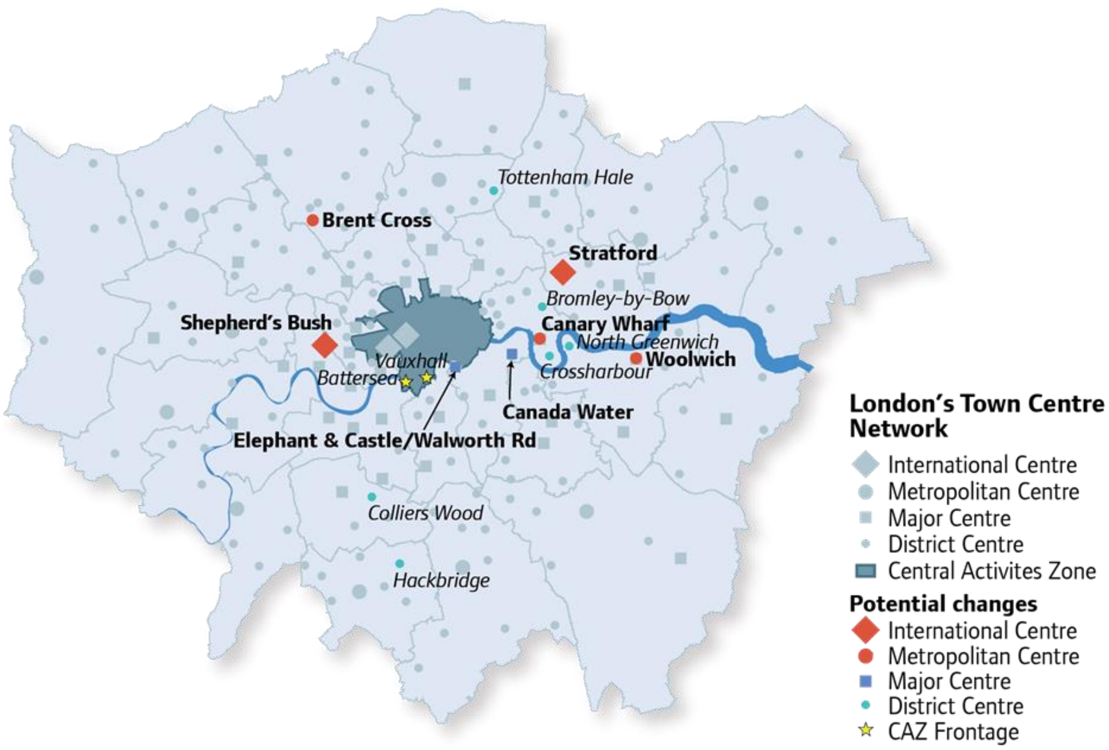


Figure 0.3 Recommended potential future changes to the town centre network



1. Introduction

A strategic health check of London's town centres was first undertaken in 1994 by the London Planning Advisory Committee (LPAC) and subsequently they have taken place approximately every four years alongside reviews/alterations to the London Plan. The LPAC and GLA have published a series of town centre health check reports in the years of 1994, 1999, 2002, 2006 and 2009.

The 2013 London Town Centre Health Check (TCHC) is the latest in this ongoing series undertaken by the Greater London Authority (GLA) with support from the London boroughs. It provides a 'snapshot' of the health of over 200 of London's town centres using a selection of strategic health check indicators and illustrates how these have changed over time. This strategic town centre health check informs the preparation of the Further Alterations to the London Plan (FALP) and Supplementary Planning Guidance (SPG) and contributes to the evidence base for local development plan policies, development proposals and implementation of town centre and local strategies in accordance with London Plan policy 2.15 and 4.7 and the National Planning Policy Framework (NPPF) (see Section 1.1).

The **objectives** of the London Town Centre Health Check are to:

The GLA's approach to the TCHC is devised for cooperative working with boroughs and partner organisation to create a comprehensive information database for the vitality and viability of town centres in London. The objectives of the health check are:

1) To co-ordinate across all London Boroughs and other relevant agencies the collection of consistent data on indicators of town centre vitality and viability and the identification of capacity of different centres within the network to meet likely future needs in accordance with Government policy in NPPF and London Plan policies 2.15 and 4.7;

2) To provide thresholds for selected indicators against which the performance of centres can be assessed, identifying their scale, role and function in the network, their roles in the regeneration process and strategic clusters of night time economic activities (London Plan Annex 2);

3) To inform change and development in the London town centre network including potential future changes in the classification of centres;

4) To monitor the implementation of the London town centre network and inform the FALP and its Examination in Public, and associated Supplementary Planning Guidance (SPG);

5) To support the preparation and implementation of local Development Plan Documents (DPDs) including town centre policies and proposals and town centre management strategies;

6) To 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;

7) To streamline the data collection process, deliver cost effectiveness and add value through strategic working;

8) To inform and support the work of 'Town Teams' proposed by Mary Portas in her report.

1.1 Policy Context

<u>National Planning Policy</u>

The National Planning Policy Framework (NPPF)[2] sets out the Government's planning policies for England. At the heart of the NPPF is a presumption in favour of sustainable development. It recognises that planning policies should be positive, promote competitive town centre environments and manage growth of centre over the plan period. In drawing up Local Plans, local planning authorities should define a network and hierarchy of centres that is resilient to anticipated future economic growth. The NPPF requires that local planning authority use adequate, up-to-date and relevant evidence to assess the role and function of town centres and the relationship between them including trends in the performance of centres. National planning practice guidance was published in March 2014. This health check takes into account national guidance on which indicators should be used to determine the health of town centres and focuses on those indicators which are considered to be appropriate for a strategic London-wide study (see Chapter 2 on methodology).

[2] Communities and Local Government, National Planning Policy Framework, March 2012

The Portas Review

The Mary Portas Review sets out a bold vision for the future of high streets and details a 28-point plan that can help the high street become the vibrant hub of the community. In March 2012, the Government published its responses to the review[3] and supported a number of the Portas recommendations by a new package of measures including the support of 'Town Teams' and running high street pilots to test the concept.

London Plan

The London Plan (2011)[4] identifies London's town centres as a key spatial priority (Policy 2.15) providing access to a range of services and enabling all parts of London to make a greater contribution to London's economic success. Its supporting text states that:

'The current role of town centres should be tested through regular town centre 'health checks'. This process should ensure that the network is sufficiently flexible to accommodate change in the role of centres and their relationships to one another. Centres can be reclassified and, where appropriate, new centres designated, in the light of these through subsequent reviews or alterations to this plan and DPDs. Changes to the upper tiers in the network (Major and above) should be co-ordinated first through this Plan. (London Plan paragraph 2.74)

Policy 4.7, part A affirms the importance of a collaborative approach to assessing need for development across the town centre network and monitoring the health of centres within it:
"The Mayor supports a strong, partnership approach to assessing need and bringing forward capacity for retail, commercial, culture and leisure development in town centres"

It also encourages boroughs through their local plans to:

"identify future levels of retail and other commercial floorspace need in light of integrated strategic and local assessments [and] undertake regular town centre health checks to inform strategic and local policy and implementation." (Policy 4.7, part C)

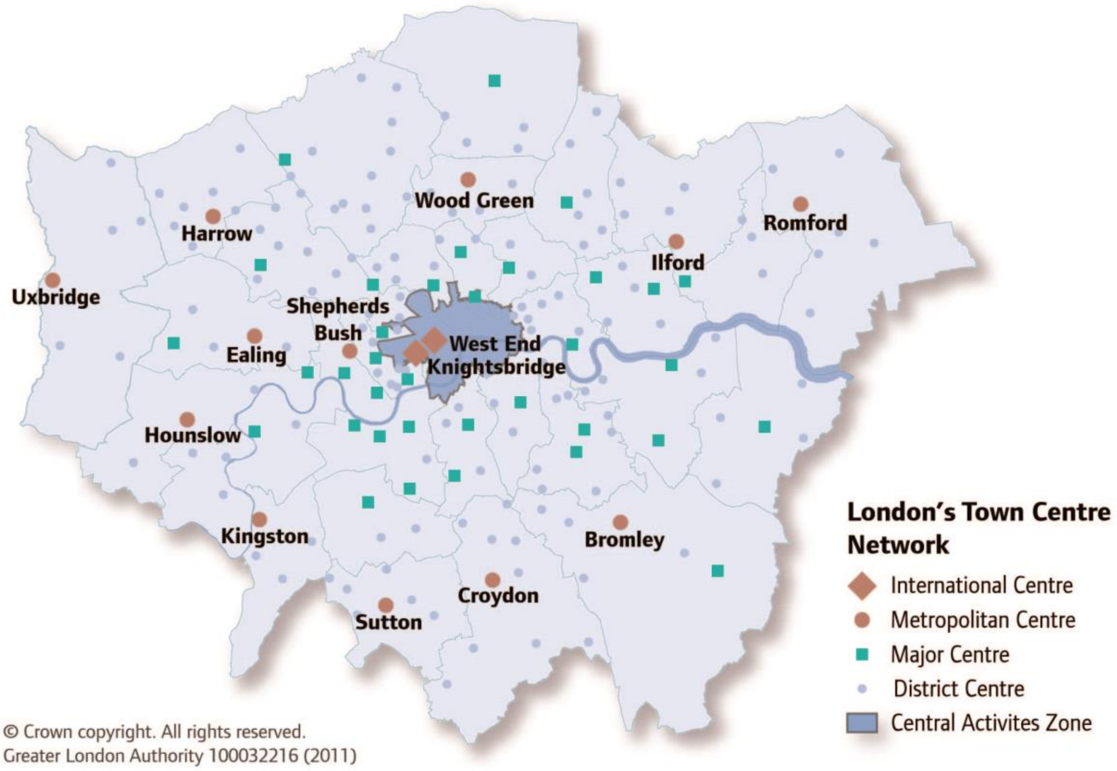
[3] Communities and Local Government, High streets at the heart of our communities: the government's response to the Mary Portas review, March 2012

[4] Mayor of London, The London Plan: spatial development strategy for Greater London, GLA July 2011

London’s Strategic Town centre Network

London has a complex pattern of town centres. While each town centre performs a different function according to the community and area it serves, the London Plan identifies five broad types of town centre within London: International, Metropolitan, Major, District, Neighbourhood/Local centres and, within the Central Activities Zone, a supplementary classification, the CAZ Frontages (see Annex 1 for definitions). The London Plan (2011) network is illustrated in Map 1.1.

Map 1.1: London Town Centre Network (London Plan, 2011)



Annex 2 of the London Plan provides strategic guidance on policy directions for individual town centres including their potential for growth, together with potential future changes to the categorisations of centres within the network (subject to implementation and planning approvals).

Draft Further Alterations to the London Plan (FALP) were published in January 2014. The 2013 Town Centre Health Check, together with work by the Outer London

Commission and other GLA research[5], forms a key part of the evidence base for proposed amendments to the town centre network and associated policy in FALP. Further details are provided in Section 3 and 4 of this report.

1.2 Report Structure

This report summarises the main conclusions of the 2013 London Town Centre Health Check. It includes data sourced by the GLA as well as additional data provided during a health check survey by the boroughs. Chapter 2 describes the methodology of the health check. Chapter 3 sets out the main findings. Chapter 4 outlines how the findings for London's Town Centre Network inform the preparation of the FALP. Conclusions and recommendations are set out in Chapter 5.

The Annexes comprise further details on town centre definitions, the health check indicators, and a range of summary data tables including the review of the town centre network.

A supplementary 'Technical Annex' containing data tables in Excel spreadsheet format is available separately on the London Datastore. Please contact the Greater London Authority, publications, for further details.

[5] Outer London Commission – third report (GLA, forthcoming); Ramidus Consulting, 2012 London Office Policy Review. GLA, 2012; Experian Business Strategies. Consumer expenditure and comparison goods retail floorspace need in London. GLA, 2013

2 Methodology

Over the years, the methodology of the strategic health check has been updated and the quality and efficiency of the data collection process has been improved significantly. The interactive approach with all London boroughs has proven successful in enhancing co-ordination and data sharing. The 2013 health check methodology included some minor changes to that adopted in the 2009 TCHC and these are explained in the sub-sections that follow.

2.1 Scope

The objectives of the 2013 London TCHC are set out in Chapter 1. It aims to measure the performance of centres within the town centre network classified in the London Plan, using key indicators of town centre vitality and viability, to inform the review of the town centre network in the London Plan (2011) and provide a strategic context for both local and strategic stakeholders.

The scope of the project is focused on International, Metropolitan, Major and District centres, as well as the CAZ frontages in the Central Activities Zone (see Annex 1 for definitions). Other locations including neighbourhood and more local centres are only examined in this strategic health check where their characteristics suggest that they may be fulfilling an elevated role and function in the network and could therefore merit explicit recognition in the FALP (see Table 2.1).

Table 2.1: Additional centres/locations examined in the health check

Name	Borough	London Plan 2011 classification
Brent Cross	Barnet	Regional Shopping Centre
Kings Cross	Camden	Unclassified
North Greenwich	Greenwich	Unclassified
Tottenham Hale	Haringey	Unclassified
South Ruislip	Hillingdon	Unclassified
Herne Hill	Lambeth/Southwark	Unclassified
Clapham South	Lambeth/Wandsworth	Unclassified
Lavender Hill/Queenstown Road	Lambeth/Wandsworth	Unclassified
New Cross Gate	Lewisham	Unclassified
Hackbridge	Sutton	Unclassified
Bromley–by–Bow	Tower Hamlets	Unclassified
Crossharbour	Tower Hamlets	Unclassified
Highams Park	Waltham Forest	Unclassified
Battersea	Wandsworth	Unclassified
Vauxhall	Wandsworth	Unclassified
Southfield	Wandsworth	Unclassified
Earlsfield	Wandsworth	Unclassified

2.2 Key stages of the health check

The principal stages in the methodology are:

Stage 1: Preparation

Stage 1a: Consult on draft methodology

The first step involved a review of the 2009 TCHC indicators of town centre vitality and viability, ensuring that they remained useful and relevant for statutory planning functions and the formulation and implementation of town centre management strategies. The final methodology took into account the comments received during the borough consultation.

The indicators for this health check are categorised in the following sub-headings:

- Scale and Function
- Capacity
- Financial Performance
- Accessibility
- Town centre Initiatives
- Accidents and Security
- Environment

Further details of the health check indicators including data sources can be found in Annex 2. The indicators selected within each category strike a balance between the desirability of having particular information and the availability of data with a focus on matters of strategic importance. Key changes in the 2013 health check include the addition of new indicators such as key retail attractors, percentage of businesses at risk of closure, delphi scores and development capacity at edge of centre locations (see Annex 6 for definitions).

Stage 1b: Define town centre boundaries

Town centre boundary issues

Consistency and comparability among the data sets for the TCHC are key priorities to enable robust comparisons to be made between centres across London and over time. For the London-wide health check, data recorded has been based upon the same definition of the extent of the town centre as far as practically possible. However, in practice there are different geographical definitions of town centres including:

- Development Plan Document (DPD) town centre boundaries;
- GLA town centre boundary proxies ('TCHC polygon');
- GOAD centre boundaries.

DPD town centre boundaries were sourced from boroughs' Local Development Plans. However, there are local variations in the way in which town centre boundaries are indicated on DPD proposals maps, with some boroughs identifying a town centre boundary polygon along with primary and/or secondary retail frontages, whilst others use only the frontages with no town centre boundary polygon. To overcome this variation and to adopt a consistent approach to town centre definitions, the GLA developed a town centre health check boundary or 'TCHC polygon' for the purposes of data collection. For example, where a development plan identified a town centre boundary, this boundary was used as the basis for the analysis. However, if town centre/retail frontages were used instead of a town centre boundary, the frontages plus the plot of land immediately behind the frontages, were used as a proxy for developing a boundary 'polygon' which could then be used to analyse geo-coded data.

The GLA called for boroughs' town centre map data, alongside the consultation on the draft 2013 TCHC methodology, which included:

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

These boundaries were used to define the town centre areas (called 'TCHC polygons' or 'GLA centre boundaries') and formed the basis for data collection for several of the health check indicators.

For some indicators (such as retail, leisure and service floorspace) it has been necessary to use GOAD centre boundaries[6] to facilitate time series analysis and comparisons with previous health checks. It is important to note however that GOAD centre boundaries do not always reflect the defined boundaries of the town centre contained in boroughs' DPD proposals maps (used as a basis for the 'TCHC polygons' or 'GLA centre boundaries' – see above). In general, the area covered by the GOAD centre boundary is usually wider than the town centre boundaries in boroughs' DPDs.

<u>Cross boundary centres</u>

A number of town centres in London cross one or more borough boundaries and these are referred to as 'cross boundary centres'. Data sourced by the GLA for these centres,

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[6] Details of Experian GOAD centre data can be found at: http://www.experian.co.uk/goad/goad.html

relate to the whole centre for the purposes of this strategic health check. However, data provided by the boroughs for the cross boundary centres tend to apply only to that part of the centre lying within the borough in question. In these cases it is necessary to amalgamate data from the relevant boroughs to provide a total for the entire centre, subject to consistency in the data including source, method and year of collection. Where data for cross boundary centres was missing from one of the relevant boroughs, then data sourced by the GLA were used as the default where available.

Analysis of the GIS data showed that parts of the CAZ Frontage boundaries of Charing Cross Road and Covent Garden/Strand are currently overlapping with the 'West End' International centre boundary (see Map 2.1). To avoid double counting of the TCHC data, the relevant CAZ frontages have been split into several portions and information provided separately. Collaboration between the GLA and boroughs to redefine boundaries of these overlapping centres (West End, Charing Cross Road, Covent Garden and The Strand) is needed in the future.

Map 2.1 Illustrative diagram of West End and selected CAZ frontage 'polygons'

Stage 2: Data collection
Stage 2a: GLA data collection

The evaluation of the health of town centres is dependent on data collected from a number of sources (see Annex 2). The 2013 TCHC continued to adopt an interactive approach to share and collect data with boroughs with an improvement in the design of the survey form. Instead of creating a form for each centre, the 2013 survey form provided cells for all centres within a borough's administrative boundary. This made the borough data entry more efficient compared to the 2009 TCHC. The GLA sourced as much of the data for the health check as possible. This brought a number of advantages: firstly, it reduced the burden on the London boroughs with regard to data collection and secondly, it helped to ensure that as far as possible, that data is collected across London's town centres on a comprehensive, consistent and comparable basis. The GLA data was made available to boroughs during the survey.

Similar to previous health checks, the floorspace analysis in this report uses the data sourced by the GLA mainly from Experian GOAD (see Annex 6 for definitions). This dataset adopts a consistent methodology for data capture and allows comparison between centres. Borough datasets, particularly for floorspace, use various methods for data capture and although these may well be very robust in each instance do not always allow for consistent comparisons between centres across London.

Experian GOAD data

The Experian GOAD database is updated annually by a team of professional surveyors. The date of the GOAD survey varies for each centre. The GOAD floorspace figures are based on Ordnance Survey gross surface area calculations limited to ground floors rather than net trading areas. To generate a realistic estimate of the total retail floorspace within a building, an allowance has been made for the upper floors and basements. For example, upper floors (in department stores, shopping centres etc.) have been included by adding 70 per centre of the ground floorspace for each additional floor. Extreme examples (largest department stores) have been adjusted to actual amounts where known.

In the 2013 health check, the Experian GOAD data are available for the 'GOAD centre boundaries' and the 'GLA TCHC polygons' (called 'Experian GOAD centre data' and 'Experian GLA centre data' respectively in this report).

The 2013 health check uses the Experian GOAD centre data and Experian GLA centre data to measure the performance of town centres. Experian GOAD centre data are only used for time series analyses and in particular comparison with 2007 data. There are some centres recorded by Experian GOAD where the GOAD boundary does not match well with the actual town centre boundary in question. In the case of a few town centres[7] where there were clear anomalies in the Experian GOAD data or significant discrepancies between the GOAD boundary and the borough's own Local Plan boundary, the Experian GOAD data was replaced by either the Experian GLA centre data or the borough data for that centre in the analysis. In this health check, combined datasets sourced from Experian GOAD and/or boroughs have been used for some centres, including Ealing (Ealing Broadway and West Ealing), Shepherds' Bush (incorporating Westfield shopping centre) and Stratford (incorporating Westfield Stratford City shopping centre).

Stage 2b: Borough Survey Form for data collection

The 2013 TCHC borough survey forms were sent out to the 33 boroughs via email in July 2013. Each borough received a form specifically assigned to them, containing all centres in need of assessment in the borough. The revised form allowed boroughs to enter data for all centres at the same time and simplify the data entry process. In the electronic survey form, a significant amount of data had already been provided by the GLA. This allowed boroughs to view a number of GLA datasets that could contribute to their own evidence base on town centres. It also gave boroughs an opportunity to verify the GLA data and put forward alternative data where appropriate. For those indicators where data had been collected by the GLA, boroughs were not obliged to fill in the borough data entry sections – but they were there if boroughs wished to put forward alternative data that they had accessed. However, particular attention had to be given to data that could not be accessed by the GLA and these indicators were highlighted in the 'contents' page of the electronic form.

Stage 3: Data analyses and interpretation

Following collection of the borough data through the survey forms, the GLA analysed the data and presented them in this report. It examines the current state of health (vitality and viability) of London's town centres, in particular to monitor the implementation of London's Town Centre Network (Annex 2, London Plan). The 2013

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[7] In this health check, combined datasets sourced from Experian GOAD and/or boroughs have been used for some centres, including Angel Edmonton, Baker Street (part), Borough High Street, Charing Cross Road, Church End, Finchley, Covent Garden/The Strand, Crossharbour, East Greenwich, Edgware Road South, Edgware Road/Church Street, Edmonton Green, Fulham Road (east), Hackbridge, Highams Park, Kings Road (west), Leyton, Marylebone High Street, Marylebone Road, New Addington, North Finchley, Roman Road (east), Rosehill, Wentworth Street and Worcester Park.

TCHC report also further enhances the value of data collected by including time-series analyses, where feasible, to show significant trends and distinguish apparent short-term risk and long-term health of London's town centres.

The roles and function of centres were assessed against a set of core indicators and broad thresholds. The core indicators include:

- Total town centre floorspace (retail, service and leisure) (sq.m)
- Total retail floorsapce (sq.m)
- Total comparison goods retail floorspace (sq.m)
- Comparison goods retail as a percentage of total retail floorspace
- Convenience goods retail as a percentage of total retail floorspace
- Leisure services (sq.m)
- Office floorspace (sq.m)
- Zone A Rental levels 2012 (£/sq.m)
- Public Transport Accessibility Level (PTAL) – at centroid point

Stage 4: Draw out implications for the London Town Centre Network and its associated policy review

The analysis and interpretation of health check data and trends in Stage 3 can be used for many different purposes. Firstly, it helped to inform town centre policy and the review of the town centre network for the FALP. The analysis will also inform the preparation of associated Supplementary Planning Guidance (SPG) for Town Centres and the Central Activities Zone. Secondly, information gathered from the health check can be used by boroughs to form the basis for their own town centre health checks (supplemented by more local, qualitative indicators, as appropriate) to inform the preparation of Local Plan and neighbourhood plan documents and town centre management strategies. Thirdly, findings of the health check can be used for development management purposes, providing baseline information to help evaluate and comment upon development proposals within London and its surrounding areas.

2.3 Survey Responses

Out of the total of 33 boroughs, 32 responded[8] to the 2013 health check survey. This survey has streamlined the data collection process and boroughs could focus on the indicators where there were data gaps. The level and quality of responses to the survey questions varied from borough to borough. Data gaps persist in the areas of capacity, employment and financial performance.

[8] London borough of Haringey did not participate in the 2013 TCHC borough survey.

3 Main Survey Findings

3.1 Scale and Function

Scale and function are important factors in assessing the health of town centres and their classification in the London town centre network (see Chapter 4). Scale is typically measured by assessing the quantity of floorspace and number of outlets in various town centre uses and assessments of function take into account quantitative and qualitative considerations including the types and diversity of uses for example in retail, leisure, offices and other town centre functions.

The floorspace and outlet analysis in this report uses the data sourced by the GLA mainly from Experian GOAD (see Section 2.2 for details). This dataset adopts a consistent methodology for data capture and allows comparison between centres. Experian GOAD data applied to 'Experian GOAD centres' is used in the time series comparisons for the period 2007 to 2012.

The 2013 health check also provides Experian GOAD data for the 'GLA centre' boundaries based upon town centre boundaries in borough DPDs. This data is only available for 2012 and so cannot be used for time series analysis.

3.1.1 Total town centre floorspace

- **Technical Annex:** Tab 1.1: Total town centre floorspace
- **Data source:** Experian GOAD supplemented by borough data.

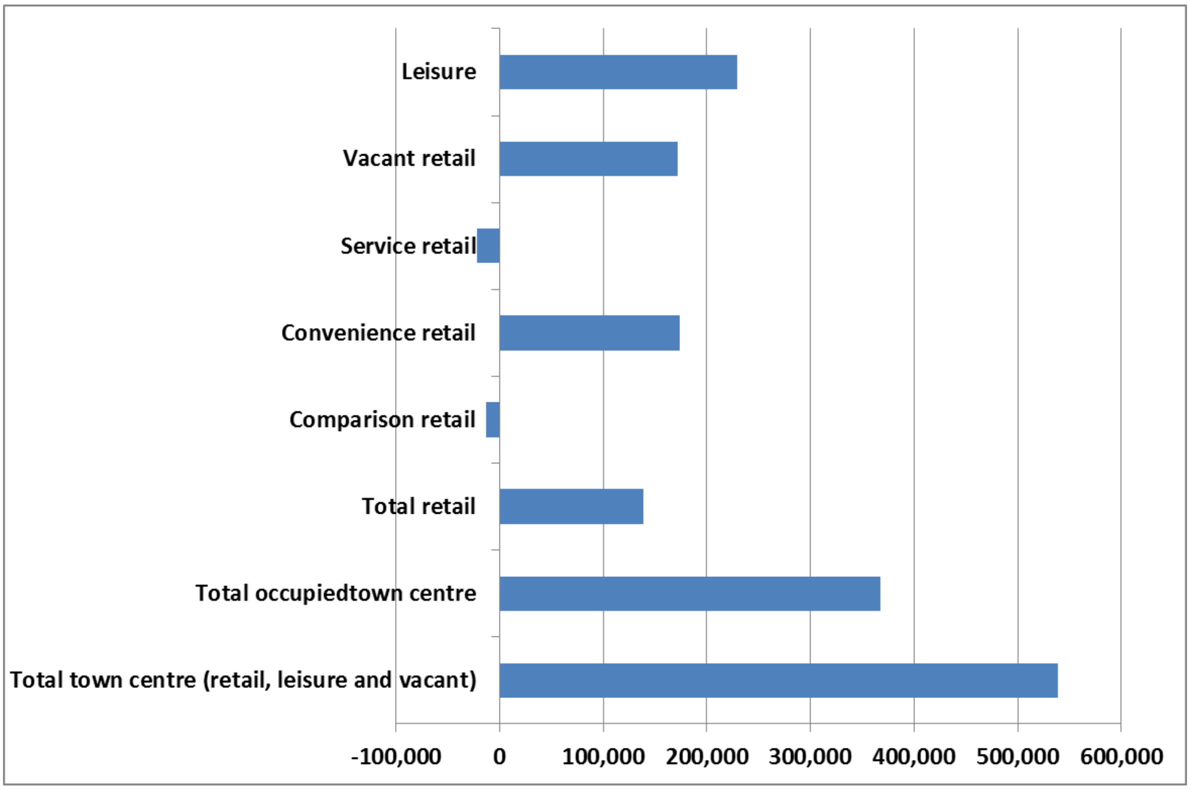
Town centres are key locations for a diverse range of activities, including retail, leisure and office space as well as housing, social infrastructure and public open space. For the health check, total town centre floorspace is defined as the sum of floorspace of comparison retail, convenience retail, service retail, vacant retail and leisure uses. Robust data on office, social infrastructure and other civic and community floorspace is not available for all centres and these categories are excluded from the total town centre floorspace calculation.

According to the Experian 'GOAD centre' data, London's total town centre floorspace was approximately 10.9 million sq.m in 2012. According to the Experian 'GLA centre' data (which overall cover a more tightly defined area than the GOAD centre boundaries), London's total town centre floorspace was approximately 8.9 million square metres (sq.m) in 2012. Further details at centre level are provided in the Report Annex 3, Table A3.1 and in the Technical Annex Tab 1.1.

Time series analysis of total town centre floorspace in London (2007-2012) is based on analysis of 185 out of 217 centres identified in the Annex 2 of the London Plan (2011) which have Experian GOAD centre data for 2007 and 2012. On this basis, the overall quantum of London's town centre floorspace (retail, leisure and vacant floorpsace) has increased by 540,000 sq.m (+6%) over the period 2007 to 2012. The growth of the overall town centre floorspace is driven primarily by growth in convenience retail, leisure floorspace and vacant retail (See Figure 3.1).

Over the period between 2007 and 2012, the total amount of 'occupied' town centre floorspace increased by 370,000 sq.m (+4%). The composition of occupied floorspace however has changed markedly over the period (see Figure 3.1). Total retail floorspace in the 185 town centres analysed, increased by 140,000 sq.m (+2%) and leisure floorspace by 230,000 sqm (+10%). Strong growth in convenience retail floorspace (+175,000 sq.m, +14%) was counterbalanced by a modest reduction in comparison retail floorspace (-13,000 sq.m) and service retail floorspace (-22,000 sqm)[9]. Total vacant retail floorspace increased significantly over the period by 170,000 sq.m (24%).

Figure 3.1 Town Centre Floorspace 2007 - 2012 (sq.m)



Source: Experian GOAD/GLA (based on analysis of 185 centres)

[9] See Report Annex 6 for general definitions and Annex 5 for detailed category definitions.

Table 3.1 lists the 20 largest town centres in London based on their total town centre floorspace. Stratford and Shepherd's Bush have risen up the rankings as a result of the opening of Westfield Stratford City and Westfield London. The West End remains the largest centre in London. According to the Experian GOAD centre data, Knightsbridge appears to have experienced a significant reduction in town centre floorspace. Ilford and Harrow also experienced declines in town centre floorspace and are ranked 10th and 17th, down from 6th and 12th respectively in 2007. In contrast, Croydon, Kingston, Romford, Canary Wharf, Camden Town, Kings Road East and Angel showed strong growth in total town centre floorspace over the 2007-2012 period.

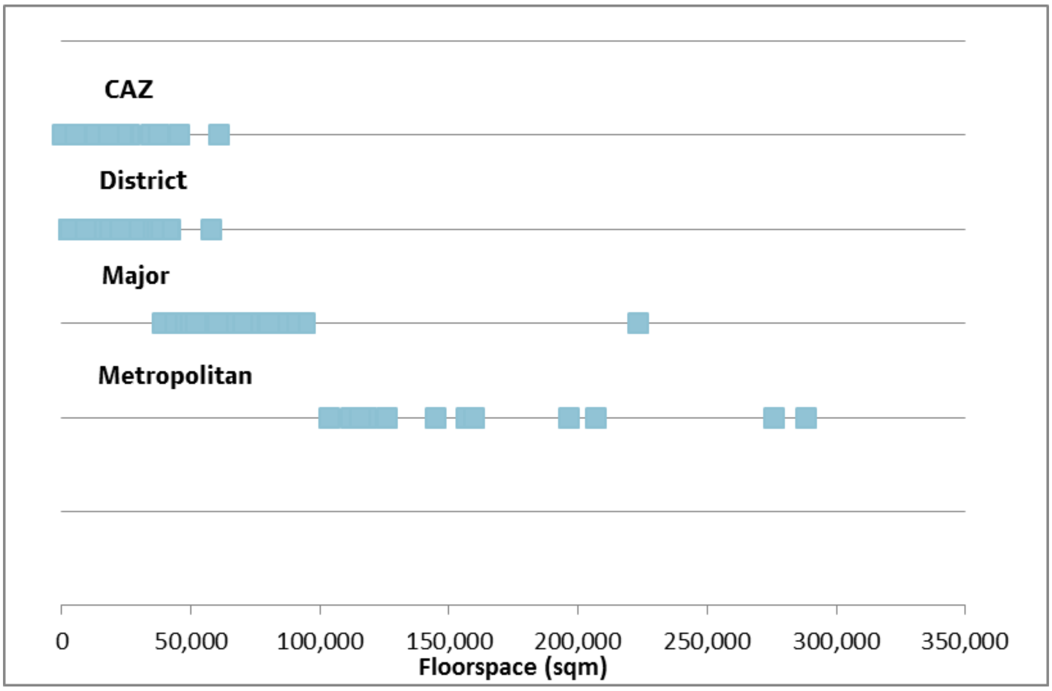
Table 3.1 Total town centre floorspace and change in rankings of London's largest town centres 2007 - 2012

Centre	Classification (LP2011)	2012 Total town centre floorspace (sq.m)	2007 Total town centre floorspace (sq.m)	% change 2007 - 2012	2012 rank	Change in rank 2007 - 2012
West End	International	1,675,389	1,639,673	2%	1	0
Croydon	Metropolitan	320,991	288,224	11%	2	0
Kingston	Metropolitan	276,438	235,976	17%	3	1
Stratford	Major	228,150	54,818	316%	4	38
Romford	Metropolitan	207,025	179,746	15%	5	0
Shepherds Bush	Metropolitan	197,232	49,011	302%	6	45
Knightsbridge	International	196,341	241,768	-19%	7	-4
Sutton	Metropolitan	159,635	154,758	3%	8	0
Bromley	Metropolitan	156,712	156,311	0%	9	-2
Ilford	Metropolitan	145,860	177,234	-18%	10	-4
Ealing	Metropolitan	126,861	128,761	-1%	11	-2
Hounslow	Metropolitan	124,145	116,858	6%	12	-1
Wood Green	Metropolitan	120,757	124,722	-3%	13	-3
Canary Wharf	Major	119,708	97,359	23%	14	0
Uxbridge	Metropolitan	112,175	111,509	1%	15	-2
Camden Town	Major	106,059	93,563	13%	16	-1
Harrow	Metropolitan	104,799	115,858	-10%	17	-5
Kings Road East	Major	102,243	93,355	10%	18	-1
Angel	Major	102,181	91,394	12%	19	0
Bexleyheath	Major	91,280	93,504	-2%	20	-4

(Source: Experian GOAD centre data)

According to the Experian GOAD centre data, growth in total town centre floorspace occurred in 8 of the 12 Metropolitan town centres and in all the CAZ Frontages for which data was available. A total of 21 of the 35 Major centres (60%) experienced contraction in total floorspace. Of the 131 District centres for which data was available, 89 experienced a contraction in total floorspace (68%). Changes in District centres varied greatly, from significant growth of more than 25,000 sqm in Leyton, Fulham Road (west) and Brick Lane, to significant reductions of more than 10,000 sqm in Kings Road (west) and Roman Road (east).

Figure 3.2 Total town centre floorspace in London Plan Town Centre classifications



(Source: Experian GLA Centre data, 2012)

Figure 3.2 shows the range of total town centre floorspace in London Plan (2011) town centre classifications. Figure 3.2 illustrates that Metropolitan town centres typically contain at least 100,000 sqm of retail, service and leisure floorspace combined. Major centres typically contain between 50,000 sqm and 100,000 sqm of retail, service and leisure floorspace and District centres up to 50,000 sqm. Stratford, classified as a Major centre in the 2011 London Plan, is the notable outlier in Figure 3.2. It is proposed for reclassification to a Metropolitan town centre in draft Further Alterations to the London Plan published in January 2014.

Tables 3.2a-c below shows the average floorspace in London's town centre classifications (based on those centres with data for both 2007 and 2012)[10] in comparison, convenience and service retail, vacant retail and leisure uses.

[10] Includes 185 centres in total. Knightsbridge and Ilford are excluded from the analysis as the Experian GOAD time series data between 2007 and 2012 for these centres is considered to be unreliable.

Table 3.2a Average floorspace by type of town centre use in London's town centre network, 2007

2007	Comparison goods retail (sqm)	Convenience goods retail (sqm)	Service retail (sqm)	Vacant retail (sqm)	Leisure (sqm)
Int - West End	865,705	53,617	76,070	121,555	522,726
Metropolitan	93,593	12,820	7,565	9,121	27,969
Major	29,909	10,984	6,798	4,879	17,361
District	8,805	5,256	3,609	2,161	6,615
CAZ Frontage	7,376	2,396	2,230	5,066	13,216

(Source: Experian GOAD centre data, 2007)

Table 3.2b Average floorspace by type of town centre use in London's town centre network, 2012

2012	Comparison goods retail (sqm)	Convenience goods retail (sqm)	Service retail (sqm)	Vacant retail (sqm)	Leisure (sqm)
Int - West End	842,232	68,187	76,165	100,174	588,631
Metropolitan	103,849	14,763	8,017	15,751	30,963
Major	30,756	12,537	6,591	6,412	18,578
District	7,518	5,829	3,375	2,735	6,803
CAZ Frontage	12,577	3,581	3,771	3,824	22,239

(Source: Experian GOAD centre data, 2012)

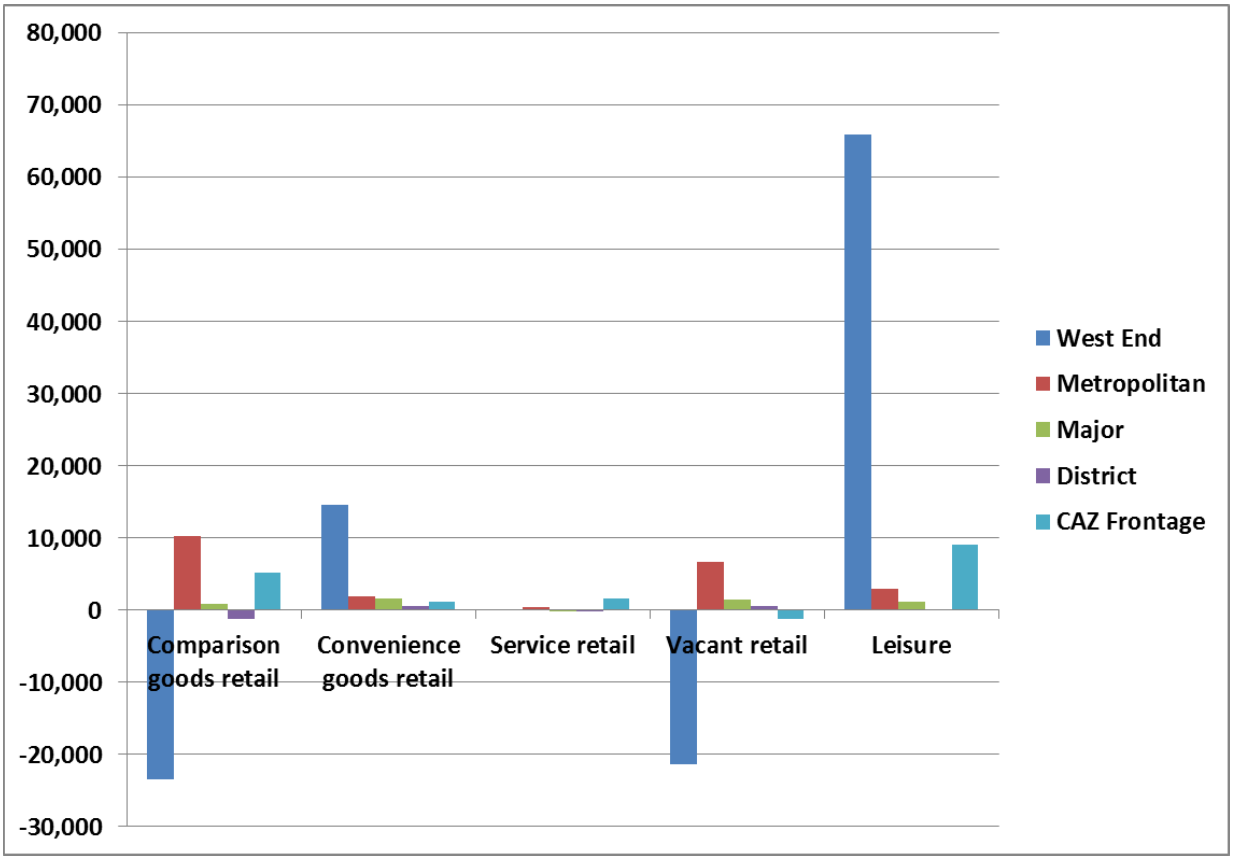
Table 3.2c Average floorspace by type of town centre use in London's town centre network, 2007-2012

2007-2012	Comparison goods retail (sqm)	Convenience goods retail (sqm)	Service retail (sqm)	Vacant retail (sqm)	Leisure (sqm)
Int - West End	-23,473	14,570	95	-21,381	65,905
Metropolitan	10,256	1,943	452	6,630	2,994
Major	846	1,553	-207	1,533	1,217
District	-1,287	573	-234	574	188
CAZ Frontage	5,201	1,185	1,541	-1,242	9,023

(Source: Experian GOAD centre data)

Tables 3.2a-c above and Figure 3.3 below show that average comparison goods floorspace increased in Metropolitan centres, Major centres and CAZ Frontages over the period 2007 to 2012, but decreased in the International and District centres. The marginal increase in average comparison goods floorspace in Major centres is attributed mainly to a substantial increase at Stratford (classified as a Major centre in the 2011 London Plan). Average convenience floorspace increased across all classifications. Average vacant floorspace declined in Central London (International centres and CAZ Frontages) and increased most significantly for Metropolitan centres. Average leisure floorspace increased across all classifications but most strongly in the International centres and CAZ Frontages.

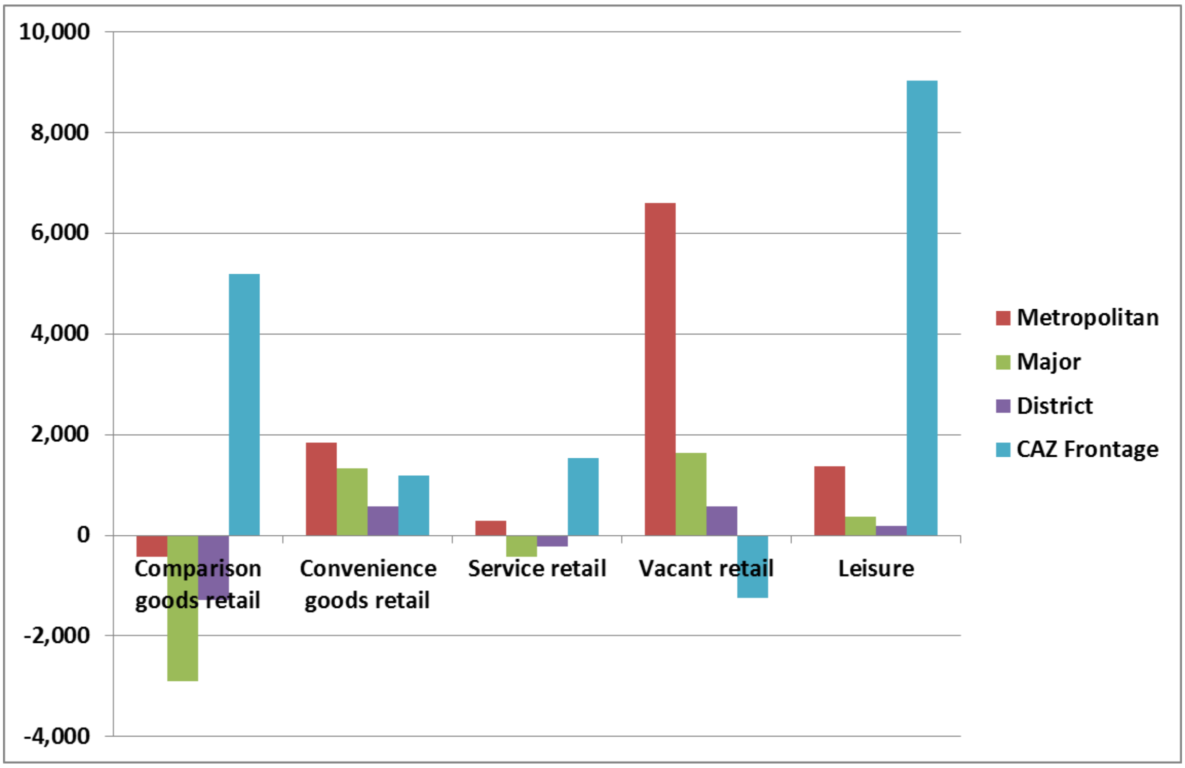
Figure 3.3 Changes of 'average floorspace' (sq.m) by type of town centre uses 2007 and 2012



(Source: Experian GOAD centre data)

To illustrate changes across the wider network Figure 3.4 below reproduces the analysis in Figure 3.3 but <u>excludes</u> the International centres, Shepherds Bush and Stratford (the latter two as special cases given their substantial level of growth). When these centres are excluded from the analysis, it shows that average comparison goods floorspace declined across all town centre classifications except the CAZ Frontages. The most significant average declines were in the Major and District centres. Average convenience floorspace increased across all classifications and by marginally less than the reductions in average comparison retail floorspace in Major and District centres. Average vacant floorspace increased most significantly in the Metropolitan centre classification. Average leisure floorspace increased across all classifications but most strongly in the CAZ Frontages. These average figures mask significant variations for individual centres within the different categorisations. Further details for individual centres can be found in the Technical Annex.

Figure 3.4 Change of 'average floorspace' (sq.m) by type of town centres uses 2007-2012 (excluding the International centres, Shepherds Bush and Stratford)



(Source: Experian GOAD centre data)

3.1.2 Retail floorspace and vacant floorspace

- **Technical Annex:**
    - Tab 1.2a Retail floorspace and retail unit (Experian data, GLA centres)
    - Tab 1.2b Retail floorspace and retail unit (Experian data, GOAD centres)
    - Tab 1.2c Retail floorspace and retail unit (LDC data)
    - Tab 1.2d Retail floorspace and retail unit (borough data)

- **Data source:** Analysis based on Experian GOAD data supplemented by borough data. Local Data Company data supplemented the retail outlet analysis.

Retailing is one of the key drivers of economic success, vitality and viability of town centres, providing jobs and convenient access to goods and services for customers. The term 'retail floorspace' in this report is composed of comparison retail, convenience retail and service retail (see Annex 6 for definitions).

Total Retail Floorspace

According to the Experian GLA centre data (based on town centre boundaries in borough DPDs), there is approximately six million sq.m of occupied retail floorspace in London's town centre network (217 centres identified in Annex 2 of the London Plan 2011) in 2012. According to the wider GOAD centre definition of town centre boundaries, total occupied retail floorspace in London's town centres is recorded at just over seven million sq.m in 2012. Further details at centre level including the breakdown of retail floorspace into its three components (comparison goods, convenience goods and service retail) are provided in the Report Annex 3, Table A3.1 and in the Technical Annex Tabs 1.2a and 1.2b. Time series analysis of total occupied retail floorspace (2007-2012) is based on 185 out of 217 centres in the London Plan, which have Experian GOAD centre data for 2007 and 2012. According to the time series analysis of these centres, occupied retail floorspace in London's town centres increased by around 140,000 sqm or just over 2% between 2007 and 2012.

The proportions of comparison goods, convenience goods and service retail floorspace in London's town centres[11] (see Figure 3.5 below) provide an indication of a centre's role and function. Figure 3.5 illustrates the key role that District centres play in the provision of convenience goods and services, and the higher proportion of comparison goods floorspace in the International and Metropolitan and the CAZ Frontages and to a lesser degree in the Major centres. However, in Major and District centres in particular, these proportions can be influenced significantly by the presence of one or more large convenience goods stores (for example Canary Wharf contains 45% convenience floorspace, Fulham 45%, Camden Town 44%, Peckham 39% and Catford 38%). It is important to note that a variable proportion of this 'convenience goods' floorspace in supermarkets may in reality be devoted in part to the sale of comparison goods, but this is not picked up in the data.

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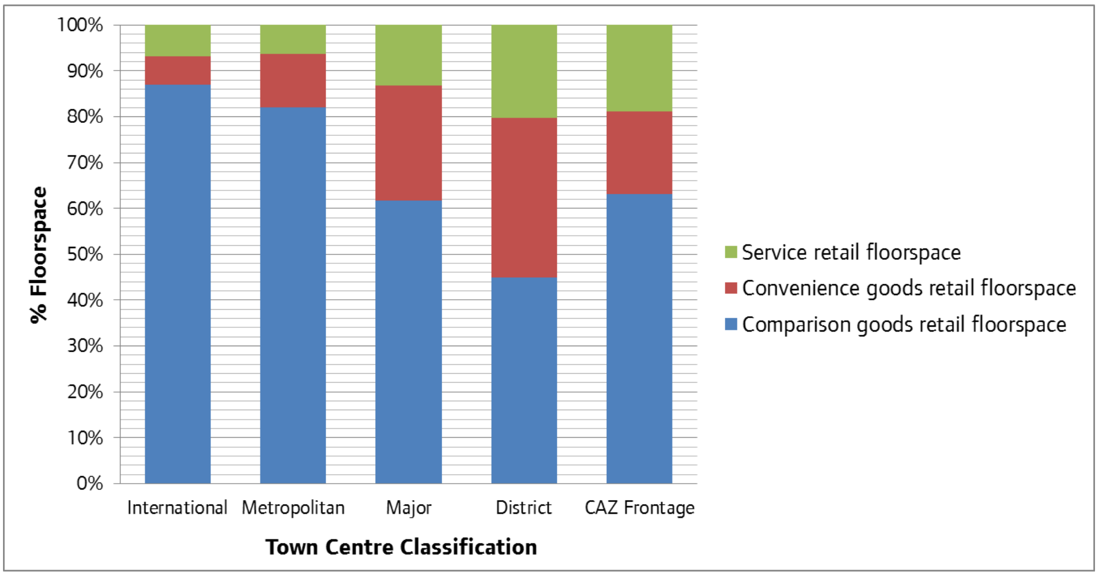
[11] See Annex 6 Glossary for brief definitions of comparison, convenience and service floorspace, and Annex 5 for detailed GOAD category definitions.

Figure 3.5 Proportion of town centre floorspace by type of use in London's town centre network

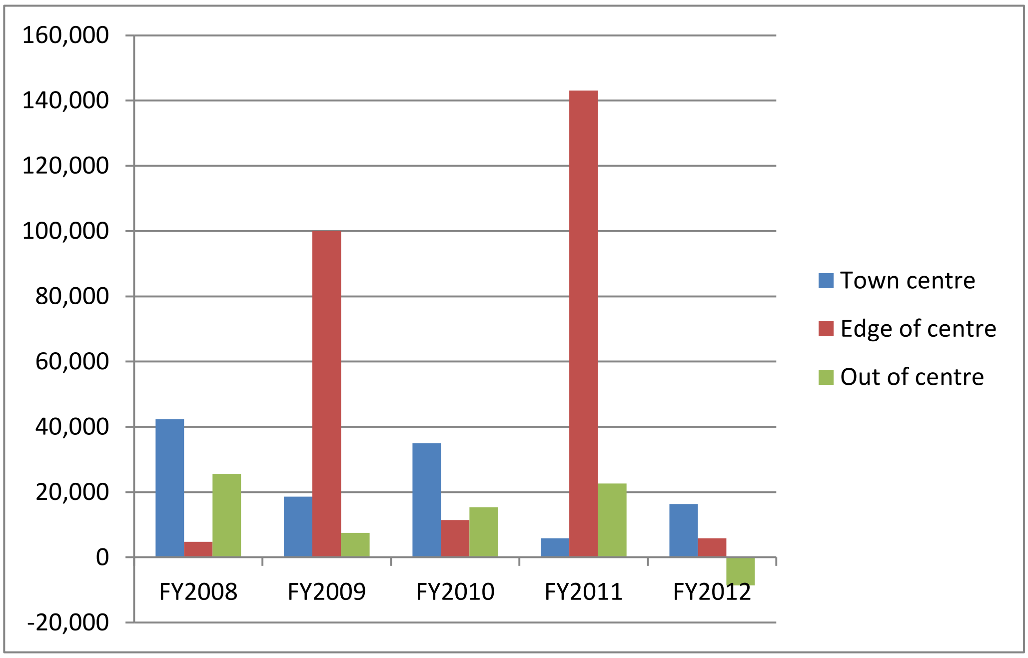


(Source: Experian GOAD centre data, 2012)

Over the five year period FY2008 to FY2012, the percentage of net gains to retail floorspace in schemes over 1,000 sq.m in town centre, edge-of-centre and out-of-centre locations was 26%, 59% and 14% respectively[12]. In absolute terms net gains to retail floorspace completed in town centres over this period totalled 118,017 sqm. Figure 3.6 shows the breakdown for each financial year. Substantial retail completions at Shepherd's Bush (Westfield London) and Stratford City account for the significant gains in edge of centre locations in FY2009 and FY2011. Since implementation, Westfield London has been integrated with Shepherds Bush and now lies within the town centre boundary. In FY2012, total net gains to retail floorspace in town centre and edge-of-centre locations combined were at their lowest compared to the four previous years.

[12] FY = Financial year. FY2008 to FY2012 covers the five year period from 1 April 2008 to 31 March 2013. 'Edge of centre' is defined here as a location within a 300 metre buffer zone of the town centre boundary used for data collection purposes (the TCHC polygon).

Figure 3.6 Net gains to retail floorspace in schemes over 1,000 sq.m in town centre, edge-of-centre and out-of-centre locations FY2008 to FY2012



Source: GLA/London Development Database

Comparison Retail Floorspace

Total comparison retail floorspace in London's town centres stood at just over 4 million sq.m in 2012 accounting for 65% of total retail floorspace. The International, Metropolitan centres and CAZ frontages provide an important role in providing comparison goods to Londoners and visitors to London (Table 3.3 below). Tab 1.2a/b in the Technical Annex also shows how certain centres perform a strategic role in the provision of comparison goods, which may be different from similar sized centres. This includes centres such as Kings Road East, Fulham Road (west) and Portobello Road, where there are high proportions of comparison goods retailing. Over the period 2007-2012 net comparison retail floorspace in town centres decreased marginally by around 13,000 sq.m (based on analysis of 185 centres for which Experian GOAD data was available). Note however that Experian GOAD data may not always capture comparison goods retail floorspace in supermarkets. With this caveat in mind, the data indicates that comparison retail floorspace increased in only 35 of the 185 centres. The largest gains were at Shepherd's Bush, Stratford, Kingston, Leyton, Fulham Road (west) and Cheapside. According to the Experian GOAD data, 150 of the 185 centres (81%) recorded losses of comparison goods retail floorspace over the period 2007-2012 including the West End, Harrow, Kings Road East and Wood Green.

Table 3.3 Town Centre comparison goods retail floorspace, ranked 2012

Centre	Borough	Classification (LP2011)	Comparison goods retail floorspace (sqm)	Comparison goods retail as % of total retail floorspace
West End	Westminster/Camden	International	842,232	85%
Kingston	Kingston upon Thames	Metropolitan	206,480	94%
Croydon	Croydon	Metropolitan	176,361	85%
Knightsbridge	Kensington and Chelsea/Westminster	International	162,612	96%
Stratford	Newham	Major	151,021	85%
Shepherds Bush	Hammersmith and Fulham	Metropolitan	130,027	89%
Romford	Havering	Metropolitan	110,776	75%
Bromley	Bromley	Metropolitan	104,913	88%
Sutton	Sutton	Metropolitan	93,225	78%
Ilford	Redbridge	Metropolitan	80,771	81%
Uxbridge	Hillingdon	Metropolitan	71,863	81%
Wood Green	Haringey	Metropolitan	68,702	76%
Kings Road East	Kensington and Chelsea	Major	68,176	86%
Hounslow	Hounslow	Metropolitan	65,629	74%
Harrow	Harrow	Metropolitan	58,732	78%
Ealing	Ealing	Metropolitan	55,628	64%
Lewisham	Lewisham	Major	48,107	72%
Kensington High Street	Kensington and Chelsea	Major	45,258	70%
Wimbledon	Merton	Major	40,870	66%
Bexleyheath	Bexley	Major	40,756	68%

(Source: Experian GOAD centre data, 2012)

Convenience Retail Floorspace

There was approximately 1.4 million sq.m of convenience retail floorspace in London's town centres in 2012, about 65% of total retail floorspace. Over the period 2007-2012 net convenience retail floorspace in town centres increased by around 175,000 sq.m[13]

[13] Caveat: note that some floorspace in supermarkets devoted to comparison goods may be included in this figure.

(based on analysis of 185 centres for which data was available). Convenience floorspace increased in 111 (60%) of these centres. The largest gains were in the West End, Leyton, Canary Wharf and Orpington which all increased by over 10,000 sq.m. According to the Experian GOAD data, 74 of the 185 centres (40%) recorded losses of convenience goods retail floorspace over the period 2007-2012. The largest losses were recorded in Kings Road (west), Woolwich and Southall. Table 3.4 below identifies those centres with the largest levels of convenience floorspace in London's town centre network (further details are provided in the Technical Annex Tab 1.2a/b).

Table 3.4 Town Centre convenience goods retail floorspace, ranked 2012

Centre	Borough	Classification (LP2011)	Convenience goods retail floorspace (sqm)	Convenience goods retail as % of total retail floorspace
West End	Westminster/Camden	International	68,187	7%
Canary Wharf	Tower Hamlets	Major	40,192	58%
Camden Town	Camden	Major	24,487	41%
Romford	Havering	Metropolitan	23,381	16%
Peckham	Southwark	Major	21,254	39%
Walthamstow	Waltham Forest	Major	19,651	32%
Sutton	Sutton	Metropolitan	19,509	16%
Ealing	Ealing	Metropolitan	18,971	22%
Hounslow	Hounslow	Metropolitan	18,124	21%
Stratford	Newham	Major	17,535	10%
Croydon	Croydon	Metropolitan	17,439	8%
Tooting	Wandsworth	Major	16,507	35%
Orpington	Bromley	Major	16,233	35%
Wood Green	Haringey	Metropolitan	15,559	17%
Thornton Heath	Croydon	District	15,039	54%
Edmonton Green	Enfield	District	14,707	49%
Swiss Cottage/ Finchley Road	Camden	District	14,131	38%
Fulham	Hammersmith and Fulham	Major	13,962	41%
Feltham High Street	Hounslow	District	13,945	40%
Purley	Croydon	District	13,520	65%

(Source: Experian GOAD centre data, 2012)

Service Retail Floorspace

There was approximately 725,000 sq.m of service retail floorspace in London's town centres in 2012, about 13% of total retail floorspace. Service retail includes the sale of a diverse range of services such as dry cleaning, electrical repairs, clothing alterations, hairdressing, launderettes, opticians, travel agents and Post Offices. A full list of service retail uses is available in Annex 5. Table 3.5 lists the town centres with the highest level of service retail floorspace. The highest proportion of service retail floorspace is primarily found in District centres, meeting the day-to-day needs for those communities they serve. The West End tops the list despite service retail only accounting for 8% of total retail floorspace. (Technical Annex Tab1.2a/b provides further details).

Table 3.5 Town centre service retail floorspace, ranked 2012

Centre	Borough	Classification (LP2011)	Service retail floorspace (sqm)	Service retail as a percentage of total retail floorspace
West End	Westminster/Camden	International	76,165	8%
Croydon	Croydon	Metropolitan	13,841	7%
Romford	Havering	Metropolitan	13,624	9%
Ealing	Ealing	Metropolitan	12,978	15%
Streatham	Lambeth	Major	10,387	26%
Swiss Cottage/ Finchley Road	Camden	District	10,346	28%
Liverpool Street	City of London	CAZ Frontage	10,207	25%
Canary Wharf	Tower Hamlets	Major	10,061	15%
Wimbledon	Merton	Major	9,902	16%
Angel	Islington	Major	9,624	18%
Stratford	Newham	Major	9,114	5%
Camden Town	Camden	Major	9,016	15%
Orpington	Bromley	Major	8,531	18%
Leyton	Waltham Forest	District	8,433	19%
Cricklewood	Barnet/Brent/Camden	District	8,405	18%
Woolwich	Greenwich	Major	8,385	18%
Kensington High Street	Kensington and Chelsea	Major	8,203	13%
Peckham	Southwark	Major	7,848	14%
Walthamstow	Waltham Forest	Major	7,740	12%
Clapham High Street	Lambeth	District	7,728	28%

(Source: Experian GOAD centre data, 2012)

Service retail floorspace in town centres declined by 22,000 sq.m over the period 2007-2012 based on analysis of the 185 town centres with Experian GOAD data for both 2007 and 2012. Service floorspace decreased in 81 (44%) of the 185 centres for which data was available. The largest losses were in the Wembley, North Finchley and Fulham. According to the Experian GOAD data, 104 of the 185 centres (56%) recorded gains of service retail floorspace over the period 2007-2012. The largest gains were recorded in Stratford, Liverpool Street and Leyton.

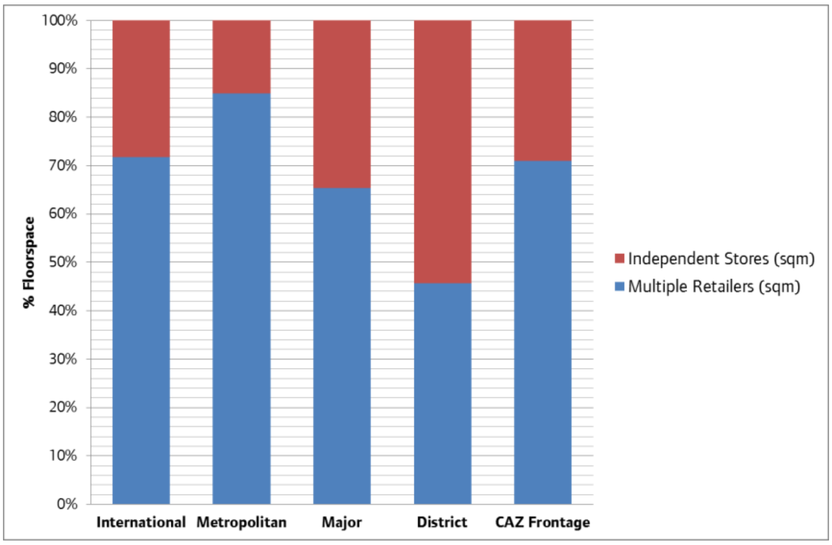
Financial and professional services

According to data from Experian, bank and building societies occupied over 300,000 sq.m of floorspace in London's town centres in 2012 and approximately 1,200 outlets. Estate agents and letting agents occupied a further 1,700 outlets according to data from the Local Data Company. A total of 266 pawnbrokers were identified in 107 centres, over half of these in the Metropolitan and Major centres. At the time of publication data is not available on pay day loan shops. Further research would be required to ascertain the extent and distribution of these uses.

Multiples and Independents

The proportion of retail floorspace occupied by multiples and independents in London's town centre network is summarised in Figure 3.7 below. Experian defines multiple retailers as those with ten or more outlets that share a common trading fascia and/ or holding company (and defines independents as those with less than 10 outlets).

Figure 3.7 Average proportion of multiple and independent floorspace in London's town centre network, 2012



(Source: Experian GOAD centre data, 2012)

According to the Experian GOAD centre data (based on 217 centres in the London Plan 2011), District centres generally have a higher proportion of retail floorspace occupied by independent (54%), rather than multiple (46%) 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 access to goods and services by sustainable modes such as walking, cycling and public transport. The highest average proportions of multiple occupier floorspace can be found in London's Metropolitan centres (85%), International centres (72%) and the CAZ Frontages (73%). A detailed town centre breakdown is provided in the Technical Annex, Tab1.2a and Tab1.2b.

There are a number of District centres which, due to their size, have a high proportion of multiple retailer floorspace in their retail offer. This may be partially explained by the presence of one or more supermarkets, for example in Feltham High Street (5 supermarkets), Leyton (5 units), and Erith (3 units). Further details are provided in Tab1.2c, Technical Annex.

A time series comparison of floorspace occupied by multiples and independents (2007 to 2012) is based on analysis of 201 centres (out of 217 centres identified in the Annex 2 of the 2011 London Plan), which have Experian GOAD centre data for 2007 and 2012. The proportion of floorpsace occupied by multiples in town centres increased from 62% to 64% over this period. Multiples grew strongly relative to independents in the CAZ Frontages (see Table 3.6).

Table 3.6 Average proportion of multiple and independent retailers in London's town centre classifications

	2007		**2012**		**Change in % share 2007-2012**	
	Multiples	Independents	Multiples	Independents	Multiples	Independents
International	69.7%	30.3%	71.8%	28.2%	2.1%	-2.1%
Metropolitan	85.2%	14.8%	85.0%	15.0%	-0.2%	0.2%
Major	62.7%	37.3%	64.7%	35.3%	2.0%	-2.0%
District	44.9%	55.1%	45.7%	54.3%	0.8%	-0.8%
CAZ Front.	61.6%	38.4%	73.1%	26.9%	11.5%	-11.5%
All centres	**61.9%**	**38.1%**	**64.4%**	**35.6%**	**2.5%**	**-2.5%**

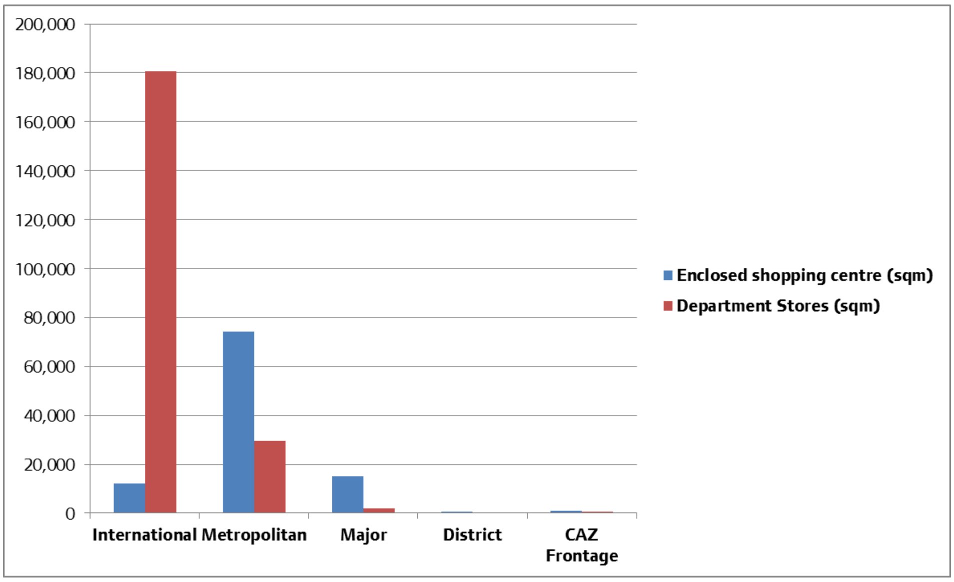
(Source: Experian GOAD centre data, 2012)

Enclosed shopping centre and department stores

Analysis of enclosed shopping centres and department stores in the 2013 health check is focused on the 2012 Experian GLA centre data based on 217 centres identified in the Annex 2 of the London Plan (2011). The health check data for department stores and data for enclosed shopping centres (some of which may include one or more department stores) are provided separately.

The average quantity of floorspace in enclosed shopping centres and department stores in London's town centre classifications is illustrated in Figure 3.8. Enclosed shopping centre floorspace is located primarily in Metropolitan centres and the West End (no provision in Knightsbridge). However, some Major centres (Canary Wharf, Enfield Town, Lewisham and Bexleyheath) also have a high level of floorspace in enclosed shopping centres. According to the Experian GLA centre data, only 9 District centres have an enclosed shopping centre including Feltham High Street, Canada Water, Edmonton Green, Swiss Cottage/Finchley Road, East Beckton, Acton, Elephant & Castle, Chipping Barnet and Dagenham & Heathway. On average, Metropolitan town centres have a higher proportion of total retail floorspace located within enclosed shopping centres relative to other centres in the network (see Table 3.7). International centres contain the highest proportions of total retail floorspace in department stores. The highest levels of department store floorspace are found in the International and Metropolitan centres and in Kings Road East, Wimbledon and Victoria Street. Details are set out in the Technical Annex, Tab1.2a.

Figure 3.8 Average floorspace by enclosed shopping centres and department stores in London's town centre classifications.



(Source: Experian GLA centre data, 2012)

Table 3.7 Average floorspace of enclosed shopping centres and department stores in London's town centre network, 2012

Classification (LP2011)	Enclosed shopping centre (sqm)	Department Stores (sqm)	Total Retail Floorspace (sqm)	Proportion of enclosed shopping centres floorspace as total retail floorspace (%)	Proportion of department stores floorspace as total retail floorspace (%)
International	12,208	180,664	388,691	3%	46%
Metropolitan	74,340	29,655	122,721	61%	24%
Major	15,205	2,108	45,677	33%	5%
District	700	68	13,608	5%	0%
CAZ Frontage	1,057	570	11,971	9%	5%

(Source: Experian GLA centre data, 2012)

Vacant floorspace

Data on vacant retail floorspace has been sourced from Experian Business Strategies for 2012. The Experian datasets reveal that London's town centres had over 960,000 sq.m of vacant retail floorspace (measured by the Experian GOAD centre data) of which over 770,000 sq.m was recorded within the narrower Experian GLA centre definition based upon borough DPD boundaries (see Technical Annex Tabs 1.3a and 1.3b).

According to the Experian GOAD centre data (2012), vacant floorspace in town centres increased by approximately 170,000 sq.m over the period 2007 to 2012. The estimated vacancy rate for retail floorspace (as a percentage of total town centre floorspace) in London was 8.8% (up from 7.4% in 2007). The national average retail vacancy rate in October 2012 was 13.2%[14]. Vacancy rates vary widely across London's town centres (see Map 3.1). Fourteen town centres recorded vacancy rates in 2012 in excess of 20% including Croydon, Streatham, Wandsworth and Woolwich. In contrast, 16 centres recorded vacancy rates of less than 3% including Greenwich West, Knightsbridge and Covent Garden/The Strand.

The Experian data allows some comparisons of retail vacancy rates between mid-2007 (just prior to the economic downturn) and November 2012 (see Annex 3, Table A3.2). It illustrates how different centres may have been affected by the economic climate, the growth in multi-channel retailing and competition from out of centre development. The level of vacant floorspace increased in 133 out of the 197 town centres with data for both 2007 and 2012 with notable increases in Croydon and Ilford.

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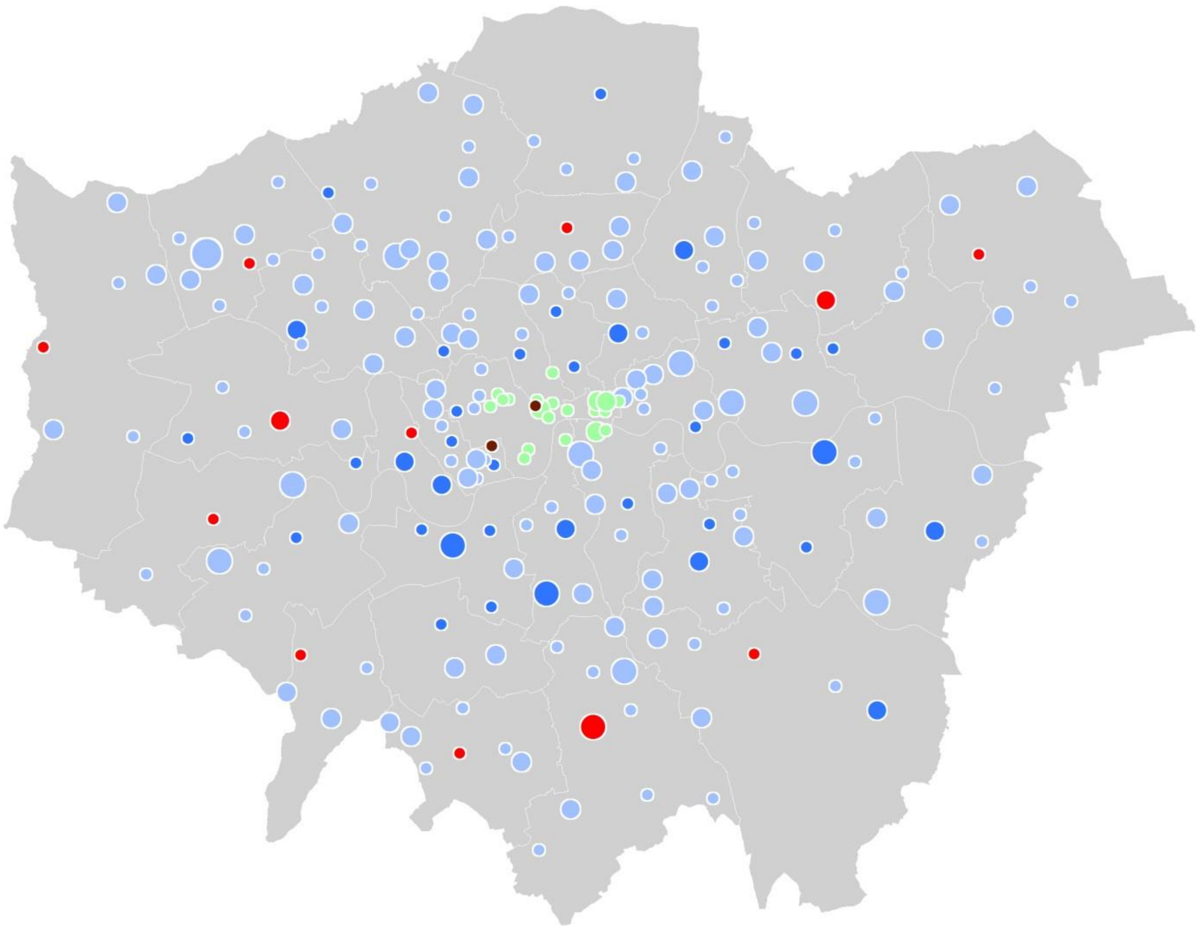
[14] Colliers International, National Retail Barometer, winter 2013

Map 3.1 London Plan town centre retail floorspace vacancy rates, 2012



Vacant retail floorspace as a % of total town centre floorspace
Data from November 2012
Source: Experian Goad

The data from Experian can be considered alongside trends highlighted by Colliers CRE in their Central London Retail Health Check (Winter 2013)[15], which indicates that in central London the number of retail voids as a proportion of total retail units stood at 2.4% in January 2013, down from 6.0% in January 2009, 7.8% in July 2008 and 8.4% in 2007. The report also highlights that the amount of void floorspace as a proportion of total retail floorspace fell from 3.9% in January 2009 to 1.3% in January 2013, compared to 4.7% in July 2008 and 6.6% in January 2007.

The Colliers work on Central London also provides detail on the average size of void units, which fell 10.4% to 163 sq.m in January 2013 (182 sq.m in January 2009). Over the period from July 2012 to January 2013, long term vacancies (vacant units that have been empty for over a year) dropped from 10.5% to 4% and the proportion of vacant units that have been empty for less than six months has risen from 60.5% to 76%. This suggests that the majority of vacancies are short term and that many of the long term vacancies have now been let or under construction to create new modern retail space or changed to alternative uses.

3.1.3 Leisure floorspace and leisure outlets

- **Technical Annex:**
  Tab 1.4a Leisure floorspace and leisure outlets (Experian data, GLA centres)
  Tab 1.4b Leisure floorspace and leisure outlets (Experian data, GOAD centres)
  Tab 1.4c Leisure outlets (Local Data Company data)
  Tab 1.4d Leisure floorspace and leisure outlets (borough data)
- **Data source:** Analysis is mainly based on Experian GOAD data supplemented by borough data and Local Data Company data.

Leisure floorspace in centres as measured by GOAD comprises a range of activities including cinemas, theatres, concert halls, cafes, takeaways, pubs, bars, night clubs and a range of other leisure facilities (see Annex 5 for definitions). Leisure services can add vitality and viability to a centre and ensure it remains lively after the shops close. A significant quantum and range of leisure facilities, or a cluster of leisure/night-time economy uses, can be an important component of a town centre's role and function.

According to the Experian GOAD centre data (2012), leisure uses comprise of a total of approximately 2.9 million sq.m of floorspace across the network with a particular concentration of these activities in central London. The more narrowly defined Experian GLA centre data based on town centre boundaries in borough DPDs suggests that leisure uses comprise of a total of approximately 2 million sq.m of floorspace across the

[15] Colliers International, Central London Retail Health Check, winter 2013)

network. Analysis of the Experian GOAD centre data indicates that total leisure floorspace in London's town centres has risen by over 230,000 sqm (9%) between 2007 and 2012, increasing its share of total town centre floorspace from 25% to 26% over this period.

Table 3.8 Town centre leisure floorspace, ranked and change 2007-2012

Centre	Classification (LP2011)	2012 Total leisure floorspace (sqm)	2007 Total leisure floorspace (sq m)	% change 2007 - 2012	2012 Leisure floorspace as a % of total town centre floorspace
West End	International	588,631	522,726	13%	35%
Stratford	Major	46,395	16,218	186%	20%
Kingston	Metropolitan	46,102	41,443	11%	17%
Croydon	Metropolitan	44,779	47,066	-5%	14%
Romford	Metropolitan	41,423	35,254	17%	20%
Shepherds Bush	Metropolitan	40,672	21,378	90%	21%
Angel	Major	40,666	39,011	4%	40%
Camden Town	Major	40,172	31,986	26%	38%
Canary Wharf	Major	39,487	35,771	10%	33%
Victoria Street	CAZ Frontage	36,529	no data	no data	41%
Liverpool Street	CAZ Frontage	33,083	9,817	237%	40%
Moorgate	CAZ Frontage	30,822	17,017	81%	60%
Queensway/ Westbourne Grove	Major	30,756	23,735	30%	41%
Sutton	Metropolitan	28,295	27,834	2%	18%
Bromley	Metropolitan	26,446	26,072	1%	17%
Hounslow	Metropolitan	25,699	18,542	39%	21%
Wood Green	Metropolitan	25,471	26,848	-5%	21%
Ealing	Metropolitan	24,027	27,263	-12%	19%
Leadenhall Market	CAZ Frontage	23,509	20,669	14%	48%
Knightsbridge	International	23,287	23,305	0%	12%

(Source: Experian GOAD centre data, 2007-2012)

London's most significant leisure and tourism destination, the West End (588,631 sq.m leisure floorspace), has a unique strategic function and its competitive position was consolidated over the last few years with an increase of 13% in leisure floorspace - see Table 3.8. Metropolitan town centres (particularly Kingston, Croydon, Romford and Shepherds Bush) play strategic as well as sub regional roles. Stratford has emerged as a significant leisure destination following the implementation of the Stratford City development. A number of Major centres have also developed specialist roles in leisure, including Angel, Camden Town, Canary Wharf, Queensway/Westbourne Grove, Kilburn, and Brixton. CAZ frontages typically have a high proportion of leisure services relative to the quantity of retail and other uses. Further details at centre level including the breakdown of leisure floorspace into its constituent components are provided in the Report Annex 3, Table A3.3 and in the Technical Annex Tabs 1.4a and 1.4b.

In comparison to the 2009 health check, significant increases of leisure floorspace took place in the West End, Stratford and several CAZ frontages, notably Liverpool Street, Moorgate and London Bridge. Several Metropolitan and Major centres also recorded strong growth in leisure uses including Hounslow, Romford, Shepherds Bush, Kingston, Kings Road East, Camden and Queensway/Westbourne Grove. Despite relatively large absolute levels of leisure floorspace, Metropolitan centres contain a generally smaller proportion of leisure (12%-20%) relative to total town centre floorspace than CAZ Frontages, District and Major centres.

Restaurants and cafes

Table 3.9 below outlines the changes in leisure floorspace (A3, A4 and A5) in London's town centre network between 2007 and 2012. According to the data, restaurant and cafe floorspace (A3 Use Class) across London's town centres increased from 757,000 sq.m in 2007, to 967,000 sq.m in 2012, an increase of almost 210,000 sq.m (28%). This result is based on analysis of 199 centres with data for both 2007 and 2012. The largest increases were found in the West End and CAZ frontages, Canary Wharf and Camden Town. With the exception of Wood Green and Ilford, the majority of Metropolitan centres recorded increases in restaurant and café floorspace (including Romford with an increase of 64%). Experian data recorded an increase in the number of A3 restaurant and cafe outlets across London's town centres from 5,389 in 2007, to 6,512 in 2012, an increase of 1,123 (21%). The largest increases in the number of these outlets were found in the West End, Liverpool Street and Shepherds Bush.

Pubs, wine bars and other drinking establishments

According to data from Experian, floorspace in town centres in the A4 Use Class (pubs, wine bars and other drinking establishments) declined from 496,000 sqm in 2007 to 442,000 sq.m in 2012, a reduction of around 54,000 sqm or 11%. This result is based on analysis of 141 centres with floorspace data for both 2007 and 2012. Pub floorspace declined in 97 of the 141 centres including all of the Metropolitan centres. The most significant losses were in the West End, Croydon, Canary Wharf, Angel, Ealing and Kingston. Growth in pub floorspace occurred in 43 of the 141 centres and almost 75% of this growth was concentrated in just eight centres mostly in central and inner London namely Victoria Street, Liverpool Street, Moorgate, London Bridge, Lower Marsh/The Cut, High Holborn/Kingsway and Clapham High Street.

Table 3.9 Leisure outlets and floorspace (A3, A4 and A5 use classes) in London's town centre network 2007 – 2012

	A3 Restaurants and cafes	A4 Pubs, bars and other drinking establishments	A5 Hot food takeaways
Floorspace sqm 2012	967,216	442,319	307,449
Floorspace sqm 2007	757,320	496,138	258,771
Change sqm 2007-2012	209,896 (28%)	-53,819 (-11%)	48,678 (19%)
Centres with data for 2007 and 2012	199	141	166
Outlets 2012	6,512	2,042	3,208
Outlets 2007	5,389	2,251	2,964
Change 2007 -2012	1,123 (21%)	-209 (-9%)	244 (8%)
Centres with data for 2007 and 2012	187	196	207

Source: Experian GOAD

In terms of outlets, Experian data recorded an overall net decrease in the number of pubs and bars across London's town centres from 2,251 in 2007, to 2,042 in 2012, a reduction of 209 (-9%). Public houses account for 71% of the net reduction. This result is based on analysis of 196 centres with outlet data for both 2007 and 2012. Exactly 100 centres recorded decreases in pubs and bars (a total reduction of 352 outlets) whilst 41 centres recorded increases in pubs and wine bars (with 143 additional outlets). Liverpool Street, Kilburn and Fulham recorded the largest increases. The largest decreases in the number of these facilities were recorded in the West End, Brick Lane, Wembley and Croydon.

Hot food takeaways

According to data from Experian, floorspace in town centres in the A5 Use Class (hot food takeaways) increased from 259,000 sqm in 2007 to 307,000 sq.m in 2012, an increase of almost 50,000 sqm or 19%. This result is based on analysis of 166 centres with floorspace data for both 2007 and 2012. Hot food takeaway floorspace increased in 104 of the 166 centres. The largest increases were recorded in the West End, Liverpool Street, Victoria Street, Stratford, High Holborn, Chrisp Street, Camden Town and Wembley.

In terms of outlets, Experian data recorded an overall net increase in the number of hot food takeaways in London's town centres from 2,964 in 2007, to 3,208 in 2012, an increase of 244 (8%). This result is based on analysis of 207 centres with outlet data for both 2007 and 2012. Over 105 centres recorded increases in hot food takeaways (with a total increase of 519 outlets). About one third of these centres recorded 5 or more additional takeaways over the period. Meanwhile, 78 centres recorded decreases in hot food takeaway outlets (together accounting for a loss of 275 outlets). According to Experian, the largest increases were found in Liverpool Street, Victoria Street, Fulham, High Holborn/Kingsway, Harrow Road and West Green Road/Seven Sisters.

Betting shops

Experian GOAD data recorded an overall net increase in the number of bookmakers/casinos in London's town centres from 790 in 2007 to 974 in 2012, an increase of 184 (23%). This result is based on analysis of 205 centres with outlet data for both 2007 and 2012. Outside the West End and central London, the highest concentrations of bookmakers/casinos in 2012 were recorded in Croydon and Greenwich West. Table 3.10 below ranks London's town centres by number of bookmakers/casinos in 2012 showing change in the number of outlets relative to 2007. According to the Experian GOAD data, about 75% of London's town centres had 3 or more bookmakers/casinos in 2012 (compared with 67% in 2007).

Table 3.10 Town centres with bookmakers/casinos, rank and change 2007-12

Centre	Borough	Classification (LP2011)	2012	2007	2007-2012
West End	Westminster/Camden	International	86	71	+15
Croydon	Croydon	Metropolitan	17	11	+6
Liverpool Street	City of London	CAZ Frontage	13	3	+10
Greenwich West	Greenwich	District	13	5	+8
Victoria Street	Westminster	CAZ Frontage	10	1	+9
Southall	Ealing	Major	10	5	+5
East Ham	Newham	Major	10	6	+4
Hounslow	Hounslow	Metropolitan	10	7	+3
Romford	Havering	Metropolitan	10	8	+2
Walthamstow	Waltham Forest	Major	10	8	+2
Wood Green	Haringey	Metropolitan	10	8	+2
Camden Town	Camden	Major	10	9	+1
Ealing	Ealing	Metropolitan	10	10	0
Ilford	Redbridge	Metropolitan	9	6	+3
Nags Head	Islington	Major	9	7	+2

(Source: Experian GOAD centre data, 2012)

3.1.4 Office and Other Employment floorspace

- **Technical Annex:**
  - Tab 1.5a Office and other employment floorspace (GLA data)
  - Tab 1.5b Office and other employment floorspace (borough data)
- **Data source:**
  - The office floorspace data is sourced from the 2009 health check, supplemented by data from the London Development Database and London Boroughs.
  - The commercial floorspace data is sourced from Experian GOAD based on the 2013 TCHC polygons.

Beyond the Central Activities Zone, town centres are an important focus for commercial development, and alongside retail and leisure development, office development in viable locations has a role to play in ensuring the vitality of town centres. The scale, role and function of town centres in the network are influenced by the scale and nature of commercial enterprise and other public, private and voluntary organisations operating (in particular, though not exclusively) from offices.

Using the 2009 town centre health check data as a base, the GLA updated these figures using completions and change of use data from the London Development Database to 31 March 2012. Some boroughs have been able to supply more detailed local data on office floorspace and where appropriate this data has been adopted in the 2013 health check. It should be stressed that the figures in Table 3.11 below (and those for other centres in the report Annex 3, Table A3.3 and the Technical Annex, Tab 1.5a and 1.5b) are estimates only, and should be treated with some caution. According to the data, Canary Wharf, the Metropolitan centres and several Major centres contain the largest levels of office floorspace in the town centre network.

Over the period between April 2008 and March 2012, a total of 19 centres recorded net increases in office floorspace completions, together comprising just over 92,000 sq.m. Cheapside had the largest volume of completed office development, with an additional 14,366 sq.m of office floorspace, and followed by Angel (9,615 sqm) and Ealing (9,154 sqm). Over the same period, 35 centres recorded net decreases in office floorspace arising from the completion of permitted schemes, with an overall net loss of 108,000 sq.m. The largest net losses were in Uxbridge (-16,275 sq.m), Nags Head (-7,447 sq.m), Wallington (-7,330 sq.m) and Gants Hill (-7,200 sq.m). Net losses were also recorded in Croydon (-6,351 sq.m) and Kingston (-6,271 sq.m).

Table 3.11 Estimated town centre office floorspace stock 2012 (ranked by centre) and net office floorspace gains/losses in completed developments 2008-2012

Centre Name (LP2011)	Borough	Classification (LP2011)	Estimated Office Floorspace (sq.m) (31/3/2012)	Net office floorspace gains/losses in completed developments (sq.m) 1/4/2008-31/3/2012
Canary Wharf	Tower Hamlets	Major	1,790,569	0
Croydon	Croydon	Metropolitan	629,010	-6351
Hammersmith	Hammersmith and Fulham	Major	327,305	0
Camden Town	Camden	Major	239,324	524
Ealing	Ealing	Metropolitan	173,020	9154
Bromley	Bromley	Metropolitan	162,193	0
Fleet Street	City of London	CAZ Frontage	150,430	0
Sutton	Sutton	Metropolitan	137,648	-2610
Uxbridge	Hillingdon	Metropolitan	135,625	-16275
Kensington High Street	Kensington and Chelsea	Major	133,054	-1141
Wembley	Brent	Major	117,880	-3220
Harrow	Harrow	Metropolitan	108,844	-1358
Wimbledon	Merton	Major	100,000	-374
Kingston	Kingston upon Thames	Metropolitan	99,932	-6271
Richmond	Richmond upon Thames	Major	94,139	-61

Source: VOA, boroughs, London Development Database

Permitted development rights for changes of use from offices to residential

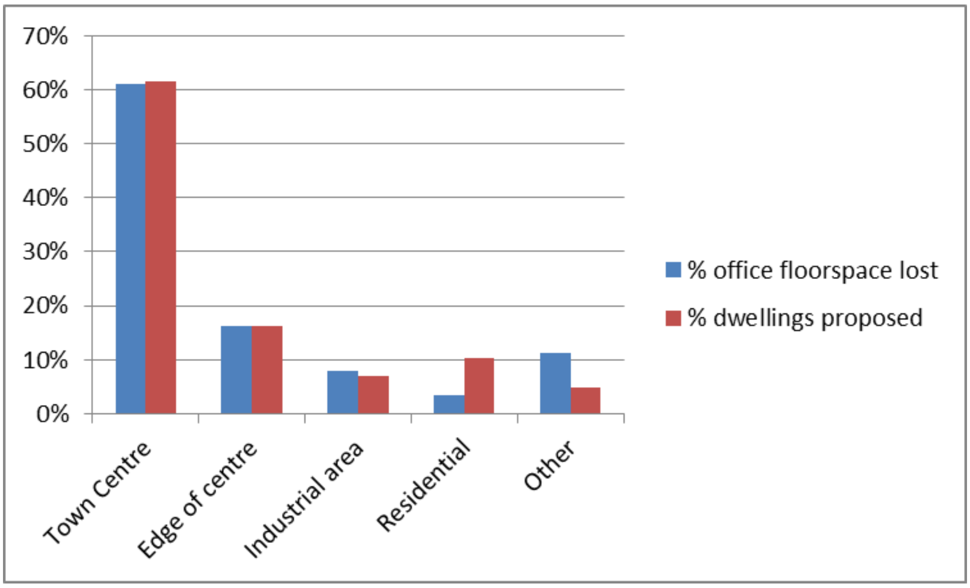
In 2013 the government liberalised permitted development rights for changes of use from offices to residential but granted exemptions for parts of London including the Central Activities Zone, the north of the Isle of Dogs, Tech City (City Fringe), Kensington and Chelsea and the Royal Docks Enterprise Zone. The impact of the liberalisation of permitted development rights on town centres beyond these areas is being monitored by the GLA in collaboration with the boroughs.

Emerging results from this monitoring suggest that there have been over 1,168 prior approval applications[16] across London. The majority of these are in Richmond (27%), Barnet (8%), Camden (8%), Merton (7%), Lambeth (6%) and Islington (6%).

Data on B1a office floorspace potentially being lost is only available for 571 of the 1,168 applications and affects a sum total of at least 400,000 sq.m (an average of about 700 sq.m per application). A total of 8,254 residential units are recorded as potentially gained in the data available for 871 of the 1,168 applications (an average of 9.5 units per application). Based on those applications where data is available, around 60% of the B1a floorspace potentially lost and residential units gained is in town centre and a further 16% in edge of centre locations (see Figure 3.9).

The current occupancy status of buildings subject to prior approval applications is available for only 36% of the applications notified to the GLA (see Figure 3.10). Of the 419 prior approval applications where the occupancy status is known, about two-fifths are currently occupied and one fifth part occupied/part vacant with two-fifths 'wholly vacant'.

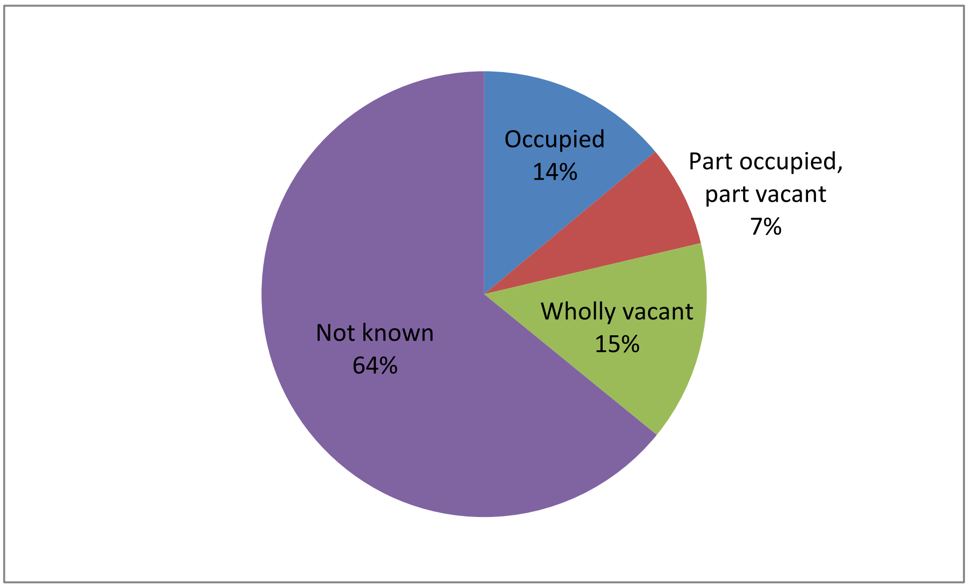
Figure 3.9 Proportion of B1a office floorspace lost and residential units gained in prior approval applications reported to the GLA at 14th March 2014



Source: GLA/Boroughs

[16] Note that the statistics presented here are from those prior approval applications that London boroughs had notified the GLA at 14th March 2014. The outcome of each application is subject to the prior approval process. Future research will look at the impact of the decisions made in permitted development rights prior approval applications based upon borough submission data.

Figure 3.10 Occupancy status of buildings in prior approval applications reported to the GLA at 14th March 2014



Source: GLA/Boroughs

3.1.5 Education and Health facilities

<u>Education facilities</u>

- **Technical Annex:**
  - Tab 1.6a Education facilities (GLA data)
  - Tab 1.6b Education facilities (borough data)
- **Data source:** Edubase

Town centre data on education facilities was sourced from Edubase, a register of all educational facilities in England and Wales, maintained by the Department for Education.

Only a few schools are located in town centres as defined in the GLA centre boundaries. These largely are maintained primary schools and other independent schools. Two free schools are located in town centres (Feltham High Street and Peckham). Five centres in central London have a higher education establishment. Seven further education facilities are located in Kingston, Croydon, Nags Head, Richmond, Wandsworth, Chipping Barnet and Upper Norwood/Crystal Palace. Table 3.12 shows the centres with the largest number of education facilities.

Table 3.12 Education facilities in town centres by type, ranked by total number.

Centre	Classification (LP2011)	Free Schools	Academies	Maintained schools	Pre-Schools	Other Independent Schools	Higher Education	Further Education	Total No. Education Facilities
Elephant and Castle	District	0	0	4	0	0	1	0	5
Ealing	Metropolitan	0	0	1	0	3	0	0	4
Ilford	Metropolitan	0	1	1	0	2	0	0	4
Edgware	Major	0	0	2	0	2	0	0	4
Feltham High Street	District	1	0	3	0	0	0	0	4
West End	International	0	0	2	0	1	0	0	3
Croydon	Metropolitan	0	0	0	0	2	0	1	3
Hounslow	Metropolitan	0	0	1	0	2	0	0	3
Southall	Major	0	0	1	0	2	0	0	3
Greenford	District	0	0	3	0	0	0	0	3

(Source: Edubase)

3.1.6 Health facilities

- **Technical Annex:**
    - Tab 1.7a Health facilities (GLA data)
    - Tab 1.7b Health facilities (borough data)
- **Data source:** Local Data Company and NHS

Data for hospitals, GP surgeries and ambulance stations are obtained from the National Health Service (NHS). Other health facilities data, including that for dentists has been sourced from the Local Data Company. Most town centres have some form of health facility, ranging from hospitals and GP practices to herbalists, and provide convenient access for the communities they serve. Table 3.13 below illustrates the range of health facilities in London's International and Metropolitan town centres. Details for other London Plan town centres are contained in the Technical Annex, Tab1.7a.

Table 3.13 Health facilities in London's International and Metropolitan town centres.

Ref	Centre	Classification (LP2011)	Dentist	GP - Main	GP - Branch	Health Clinic	Hospital
1	West End	International	7	8	1	1	1
2	Knightsbridge	International	1	0	0	0	0
3	Bromley	Metropolitan	4	3	0	0	0
4	Croydon	Metropolitan	3	8	0	0	1
5	Ealing	Metropolitan	5	2	0	1	0
6	Shepherds Bush	Metropolitan	1	2	0	1	0
7	Wood Green	Metropolitan	4	0	0	0	0
8	Harrow	Metropolitan	0	10	0	0	0
9	Romford	Metropolitan	4	2	0	0	0
10	Uxbridge	Metropolitan	1	2	0	1	0
11	Hounslow	Metropolitan	5	6	0	0	0
12	Kingston	Metropolitan	3	1	1	1	0
13	Ilford	Metropolitan	3	12	0	0	0
14	Sutton	Metropolitan	1	4	0	0	0

Source: NHS/Local Data Company

Dentists (311 units) have the highest level of representation in the London town centre network (see Table 3.14 below) followed by GPs (308 units), Health Clinics (64 units) and Herbalists (41 units). Of the 217 centres identified in the 2011 London Plan, 78% have at least one dentist, 48% at least one GP and 24% at least one health clinic. Note however that the figures in Table 3.14 below do not take into account health facilities that may be located in edge of centre sites.

Table 3.14 Health facilities in town centres and proportion with at least one of each facility

	Dentists	GP surgeries	Health clinics	Herbalists
Total no. of facilities in town centres	311	308	64	41
No. of centres with at least one facility	169	104	53	25
% of centres with at least one facility	78%	48%	24%	12%

Source: NHS/Local Data Company/GLA

3.1.7 Civic and community facilities

- **Technical Annex:**
  - Tab 1.8 Public toilets (borough data)
  - Tab 1.9a Civic and community facilities (LDC data)
  - Tab 1.9b Civic and community facilities (borough data)
- **Data sources:** Local Data Company / boroughs

The analysis of civic and community facilities in town centres is constrained by the reliability of data, which was primarily sourced by the GLA from the Local Data Company and supplemented by limited borough data.

Civic and community facilities, including community centres, places of worship and libraries are a vital part of town centres. According to the health check data, post offices are distributed widely across the London Town Centre Network. Of the 136 centres for which data was supplied, 115 centres had at least one Post Office (85% of centres). In some centres there is more than 1 post office, e.g. Ilford (3), Croydon (2), Ealing (2), Sutton (2), Hammersmith (2), Wimbledon (2), Peckham (2), Chadwell Heath (2), Yiewsley/West Drayton (2), Elephant and Castle (2), Leyton (2) and Borough High Street (2). Places of worship can be found in many town centres with a particular concentration in the West End, Metropolitan and some Major centres, including Brixton (33 units), Southall (30), Streatham (23), Lower Marsh/The Cut (21), West Norwood/Tulse Hill (15), West End (12), and Elephant and Castle (10). Approximately half (53%) of the centres for which data was available had a library and 39% had at least one community centre.

Public toilets are regarded an essential facility and important to the functioning of a town centre. The provision of public toilets encourages local people and visitors to utilise public areas for longer periods of time. Public toilets can also support local business by allowing potential customers to spend a longer period in the centre. They are especially important for particular groups such as children, older people, disabled people, women and visitors to the town centre. However, across London there is a lack of information on the location of public and community toilets. Town centre data on public toilets was sourced from the boroughs.

Of the 198 centres for which data is available 113 have at least one public toilet (57%). Wheelchair accessible toilets are available in only 48% of centres (61 centres out of 128 for which data was available) and toilets with baby changing facilities are available in

27% of centres. Seven centres provide Changing Places[17] toilets, namely Uxbridge, Woolwich, Wimbledon, Eltham, Mitcham, Hayes and East Ham. The provision of public toilets has been supplemented by Community Toilet Schemes such as the Mayor's Open London toilet scheme. These schemes involve the opening of existing toilet facilities in commercial premises such as retail outlets or public buildings to the public, free of charge. There are 31 centres currently operating Community Toilet Schemes in London's Town Centre Network.

3.1.8 Markets

- **Technical Annex:** Tab 1.10 Markets
- **Data source:** 2009 London wide Town Centre Health Check updated by 2013 borough survey returns

Table 3.15 Town Centres in London with the largest number of markets

Centre	Classification (LP2011)	Total no. of markets (unit) (2009)	Total no. of markets (unit) (2013)	Street markets (unit)	Covered markets (unit)	Specialist markets (unit)	Farmers' markets (unit)
Southall	Major	2	7	6	1	0	0
Brixton	Major	6	7	6	1	0	0
Camden Town	Major	6	6	4	0	2	0
Romford	Metropolitan	1	5	1	0	4	0
Greenwich West	District	3	5	1	1	3	0
Bromley	Metropolitan	3	4	1	0	1	2
Ilford	Metropolitan	5	4	1	0	3	0
Beckenham	District	0	4	0	0	1	3
Penge	District	1	4	3	0	0	1
West End	International	3	3	2	0	1	0
Ealing	Metropolitan	1	3	0	0	2	1
Wood Green	Metropolitan	3	3	1	1	1	0
Sutton	Metropolitan	4	3	1	0	1	1
Orpington	Major	2	3	3	0	0	0
Catford	Major	1	3	2	1	0	0
Bakers Arms	District	0	3	3	0	0	0

Source: GLA/boroughs

[17] A toilet which has enough space and the right equipment to enable use by people with profound and multiple disabilities and their carers who cannot use standard disabled persons toilets. See http://www.changing-places.org

Street markets, specialist markets and farmers markets can contribute to town centre's vitality and viability as well extending competitive choice and access to a range of goods and products. They can also make valuable contributions to meeting London's varied dietary requirements. Town centre data on markets is originally sourced by the GLA from the London Assembly Report on Street Market (2007), with an update by boroughs in the 2009 Town Centre Health Check. The market data contains information on the location and types of markets in London and the associated number of pitches at each and its opening hours. The GLA updated the market data with the latest borough data collected in the 2013 health check. Table 3.15 lists the top 20 town centres with the largest number of markets and comparison with the 2009 health check data. Further details are provided in the Technical Annex, Tab 1.10.

3.1.9 Evening and Sunday shopping

- **Technical Annex:**
- Tab 1.11 Evening shopping
- Tab 1.12 Sunday shopping
- **Data source:** 2013 TCHC borough survey returns

The health check relied on boroughs' local knowledge on evening and Sunday shopping. Responses were not comprehensive across all boroughs for all centres and the health check analysis is limited to those centres with valid information (see Technical Annex Tab 1.11 and 1.12).

According to the 2013 survey results, almost 90% of the 153 centres for which data was available have supermarkets open in the evening, compared to a figure of 92% in the 2009 survey (note that the latter excluded the CAZ frontages in the City of London). Almost 70% of centres have retailers (excluding supermarkets) open for evening shopping – a figure broadly comparable with the 2009 survey.

With regards to Sunday trading, of the 63 town centres for which data was supplied, 94% have supermarkets open on Sundays in the 2013 survey (the same percentage was recorded in 2009). In the 2013 survey, the majority of retailers (more than 50%) opened on Sunday in every centre (100%) for which data was supplied compared to only 55% of centres recorded in the 2009 survey.

3.1.10 Employment in centres

- **Technical Annex:**
    - Tab 1.13 Employment in centres
- **Data source:**
    - ONS BRES survey (2011) at Middle Layer Super Output Areas (2004);
    - Cities Revealed Land Use Polygons (2007)
    - 2013 TCHC Polygons

There is no official employment data for town centres. The very low borough response rate to this employment question also reflects the difficulties in accessing reliable employment figures for town centres.

Therefore, the GLA applied GIS techniques to estimate employee numbers in town centres, based on the existing available data – BRES Employment data at Middle Layer Super Output Areas (MSOAs), Cities Revealed Land use Polygons, and 2013 TCHC Polygons. The GLA estimates for town centre employment are indicative only and subject to a number of caveats e.g. BRES data is unreliable for MSOAs with 6000 or fewer jobs and the estimates use plot ratios and employment densities and assume that there are no vacant properties within the land use types.

Given the limitations of the employment estimates, it is very difficult to draw meaningful conclusions on employment in centres. However, the analysis indicates that the West End, Canary Wharf, the Metropolitan centres and the CAZ frontages contain the highest number of employees across the town centre network.

3.1.11 Population in centres

- **Technical Annex:**
    - Tab 1.14 Population in centres
- **Data source:** 2011 Census (ONS)

The Office for National Statistics estimates the number of usual residents[18] and the number of households with at least one usual resident based on unit postcode. Usual residence postcode grid references were attached to unit postcodes using the ONS Postcode Directory file. A 25 metre buffer was applied to each 2013 TCHC polygon to ensure a more accurate population estimate was calculated from the unit postcode data. Table 3.16 shows the town centres with the largest number of households. The average size of population and households appears to correlates well with the scale of town

[18] Usual residence refers to the housing unit or collective living quarters at which a person usually lives.

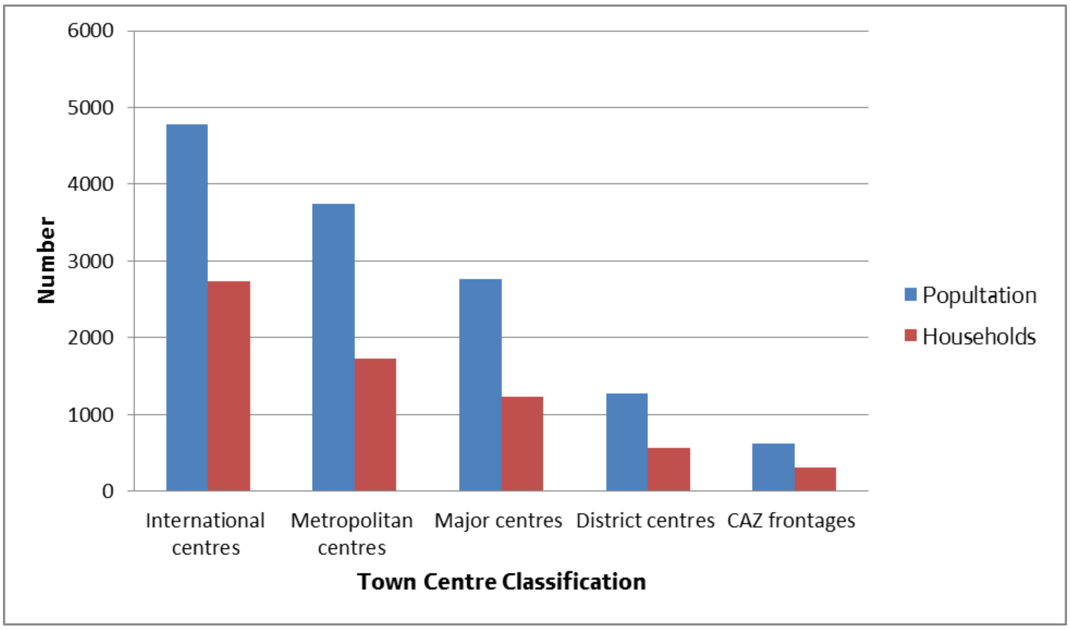
centres in the London's town centre network (see Figure 3.11). There are of course notable exceptions, such as the Elephant & Castle, Acton and Greenwich which feature in the highest ten centres ranked by number of households.

Table 3.16 Town centres with largest number of households

		Unit Postcodes within 25m of Town Centre boundaries:	
Centre	**Classification (LP 2011)**	**Total number of residents**	**Total number of occupied Households**
Elephant and Castle	District	12,094	5,197
West End	International	7,803	4,404
Woolwich	Major	5,994	2,978
Ealing	Metropolitan	6,047	2,835
Croydon	Metropolitan	5,481	2,559
Peckham	Major	6,158	2,528
Kingston	Metropolitan	5,098	2,367
Acton	District	5,222	2,335
Angel	Major	4,542	2,315
Greenwich West	District	5,073	2,191
Kilburn	Major	4,377	2,186
Streatham	Major	4,724	2,175
Shepherds Bush	Metropolitan	4,269	2,088
Ilford	Metropolitan	4,963	2,018
Finsbury Park	District	4,156	1,979
Romford	Metropolitan	3,571	1,915
Brixton	Major	3,824	1,851
Feltham	District	4,152	1,731
Camden Town	Major	3,870	1,723
Wembley	Major	4,452	1,667

Source: 2011 Census (ONS)/GLA

Figure 3.11 Average population and households in London's town centre network



Source: 2011 Census (ONS)/GLA

3.1.12 Housing completions

- **Technical Annex:**
    - Tab 1.15 Housing Completions in centres/edge of centre
- **Data source:** London Development Database (LDD)

The GLA derives town centre data on housing completions from its London Development Database (LDD). The housing completion data includes residential units obtained from new build or gained through change of use or conversion of existing dwellings.

Housing completions within town centres

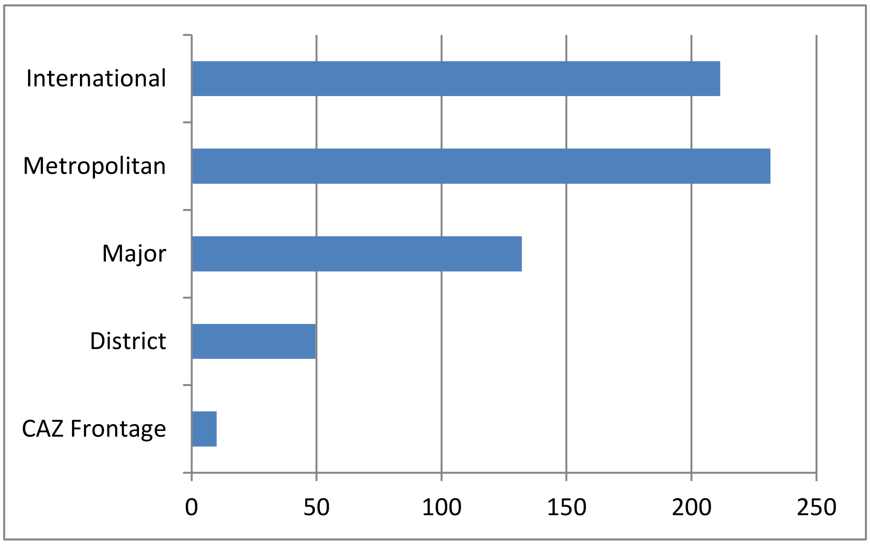
Over the period FY2008 to FY2012[19] there were 15,366 net housing completions within London's town centres, about 3,080 per annum. Table 3.17 lists the top 20 town centres with the largest housing completions in centres over the period. Wembley town centre tops the list with 946 net additional units, followed by Elephant & Castle, Croydon and Woolwich.

[19] FY = Financial year. FY2008 to FY2012 covers the five year period from 1 April 2008 to 31 March 2013

Table 3.17 Town centres with largest housing completions (FY2008 – FY2012)

Centre	Borough	Classification (LP2011)	Net housing (C3) completions within town centre
Wembley	Brent	Major	946
Elephant and Castle	Southwark	District	738
Croydon	Croydon	Metropolitan	650
Woolwich	Greenwich	Major	603
Dalston	Hackney	Major	600
Ilford	Redbridge	Metropolitan	584
Hayes	Hillingdon	District	568
Gants Hill	Redbridge	District	475
West End	Westminster/Camden	International	402
Romford	Havering	Metropolitan	380
Clapham High Street	Lambeth	District	375
Greenwich West	Greenwich	District	347
Wandsworth	Wandsworth	Major	338
Canada Water	Southwark	District	233
Kingston	Kingston upon Thames	Metropolitan	227
Wallington	Sutton	District	223
Walthamstow	Waltham Forest	Major	201
Harrow	Harrow	Metropolitan	186
Acton	Ealing	District	180
Kilburn	Brent/Camden	Major	177

Figure 3.12 Average housing completions in centres across the London's town centre network (FY2008 – FY2012)



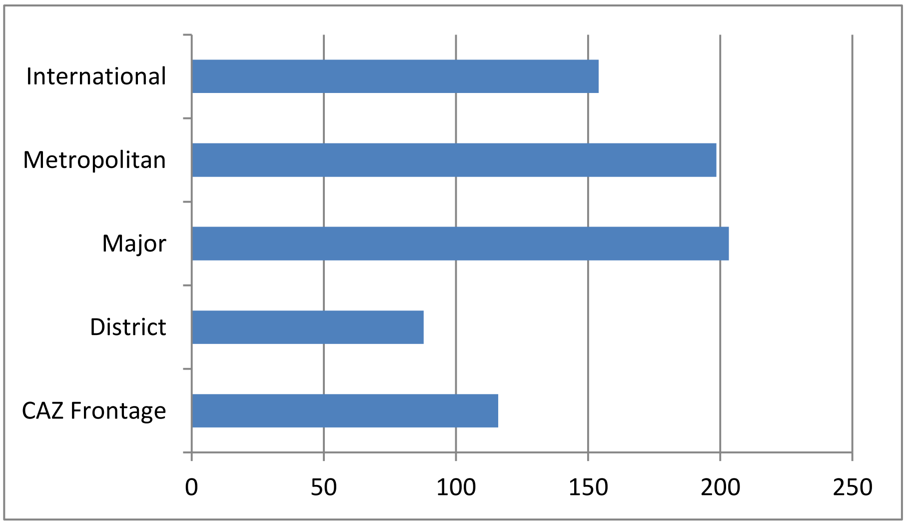
Source: London Development Database

Generally housing completions in centres tend to have a positive correlation with the scale of the town centre (Figure 3.12). Over the period FY2008 to FY2012, the Metropolitan centres yielded an average of around 230 units, the Major centres 130 units and District centres each averaged 50 units. Some District centres however recorded high levels of residential unit completions over the period, for example in Elephant and Castle (730 units), Hayes (568) and Gants Hill (475).

Housing completions on the edge of centres[20]

Over the period FY2008 to FY2012[21] there were 25,041 net housing unit completions on the edges of London's town centres, or just over 5,000 per annum. The highest levels of edge of centre housing completions over the period occurred in Canary Wharf, Elephant and Castle, Dalston and South Woodford, each with more than 500 net units (see Table 3.18). Figure 3.13 illustrates that over the period FY2008 to FY2012, the Metropolitan and Major centres yielded an average of around 200 units in edge of centre locations and District centres averaged about 90 units. The combined total for town centre and edge of town centre housing completions was 40,407 over the period, almost 8,100 per annum. The highest combined town centre and edge of centre housing completions were recorded in Canary Wharf (1,833 units), Elephant and Castle (1,357 units) and Dalston (1,156 units).

Figure 3.13 Average housing completions on the edge of centres by town centre classification (FY2008 – FY2012)



Source: London Development Database

[20] The term 'edge of centre' is defined in this health check as a location within a 300 metre buffer zone of the town centre boundary used for data collection purposes (the TCHC polygon).

[21] FY = Financial year. FY2008 to FY2012 covers the five year period from 1 April 2008 to 31 March 2013

Table 3.18 Town centres with largest housing completions on the edge of centres (FY2008 – FY2012)

Centre	Borough	Classification (LP2011)	Net housing (C3) completions on edge of town centre
Canary Wharf	Tower Hamlets	Major	1833
Elephant and Castle	Southwark	District	619
Dalston	Hackney	Major	556
South Woodford	Redbridge	District	549
Lewisham	Lewisham	Major	465
Nags Head	Islington	Major	464
Greenwich West	Greenwich	District	448
Mare Street	Hackney	District	440
South Harrow	Harrow	District	414
Stratford	Newham	Major	408
Deptford	Lewisham	District	405
Croydon	Croydon	Metropolitan	376
Romford	Havering	Metropolitan	364
Stockwell	Lambeth	District	364
Ealing	Ealing	Metropolitan	363
Marylebone Road	Westminster	CAZ Frontage	325
Finsbury Park	Islington/Hackney/Haringey	District	323
Angel	Islington	Major	317
Hounslow	Hounslow	Metropolitan	311
Camden Town	Camden	Major	302

Source: London Development Database

3.2 Capacity

The GLA appointed Experian to assess the scale and nature of consumer expenditure across London for comparison retail goods, convenience retail goods and other expenditure including leisure over the period 2013 to 2036[22]. For comparison retail goods, the report provides an indication of the scale and distribution of current and future floorspace needs for London, including town centres for five year periods to 2036. Whilst, the consumer expenditure study provides a demand-side view on retail and leisure uses, the town centre health check aims to provide insights into the capacity the town centre network to accommodate the projected growth, including for housing development.

[22] Experian Business Strategies. Consumer Expenditure and Comparison Goods Retail Floorspace Need in London. GLA, 2013

3.2.1 Planning permissions – under construction and not started

- **Technical Annex:**
  - Tab 2.1a Planning Permissions in centres (a) under construction
  - Tab 2.1b Planning Permissions in centres (b) not started
  - Tab 2.5a Planning Permissions at the edge of centres (a) under construction
  - Tab 2.5b Planning Permissions at the edge of centres (b) not started
- **Data source:** London Development Database (LDD)/boroughs

The GLA sourced data from the London Development Database (LDD) [23] for developments under construction and those with planning permission but not started. The data is available for all centres (and edge of centre locations) across the London town centre network.

Town centre locations (non-residential floorspace)

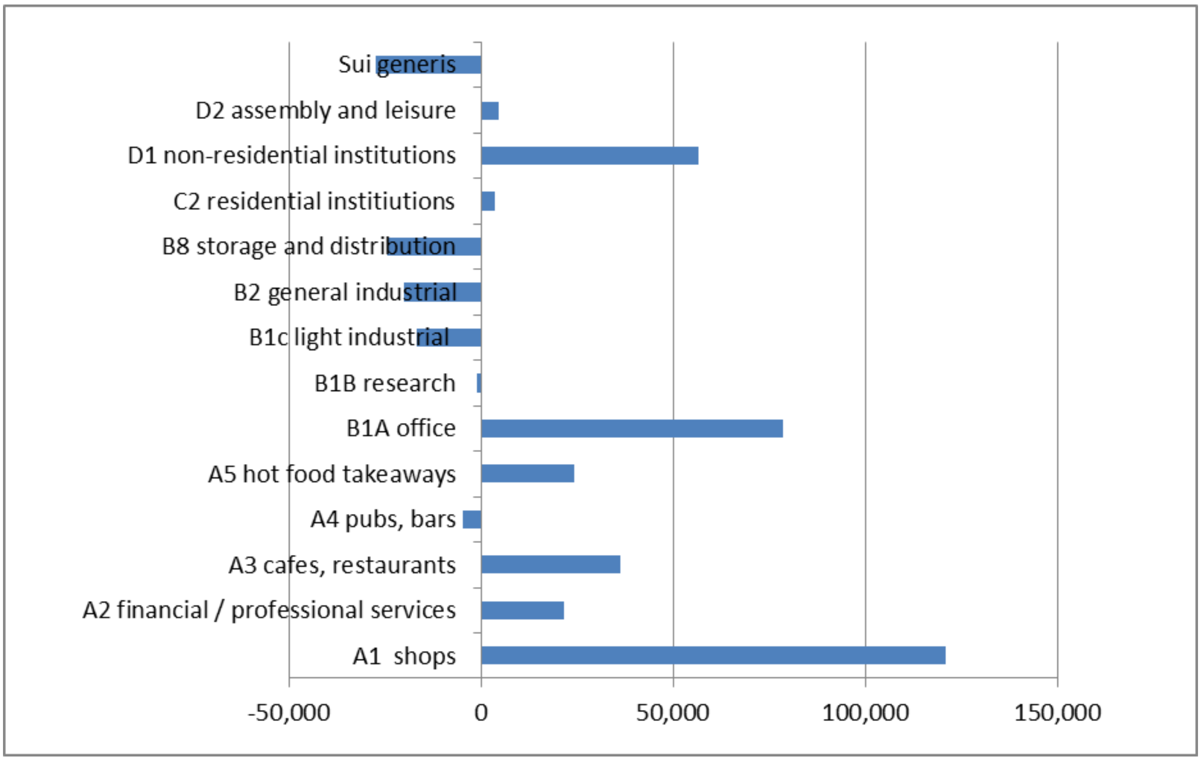
At the end of March 2013 there was approximately 830,000 sq.m of net additional non-residential floorspace under construction within London's town centres. A significant part of this (634,000 sqm) is in B1a office use. However, Canary Wharf alone accounts for 530,000 sqm of this total. There are 27 other town centres with net gains to B1a office floorspace under construction but only four resulting in more than 10,000 sq.m of B1 office space (London Bridge, Leadenhall Market, Liverpool Street and Hounslow). Fifty-six centres recorded net losses to B1a office floorspace in schemes under construction. A total of 157,000 sq.m of A1 retail use was under construction with notable gains at Woolwich, Hounslow and Canning Town.

In addition to these totals, there were 249,000 sq.m of non-residential floorspace with unimplemented ('not-started') planning permissions in town centres at the end of March 2013 (Figure 3.14). Net additional A1 retail floorspace accounted for over 120,000 sq.m, including 50,000 sq.m at Shepherds Bush. Net additional B1a office floorspace accounted for a further 78,000 sq.m in permissions not started in town centres. Thirty one town centres recorded net gains to B1a office floorspace in permissions not started, notably Croydon (+163,000 sq.m) and Hammersmith (+30,000 sq.m). In contrast, 93 town centres recorded net losses of B1a floorspace in permissions not started, with Harrow, Bexleyheath and Sutton recording the highest potential net

[23] For non-residential developments, LDD monitors planning permissions on development over 1,000sqm. Details of the LDD criteria can be found at http://www.london.gov.uk/webmaps/ldd/.

losses of B1a floorspace. In overall terms there are notable potential gains in permissions not started in A3 cafes and restaurants, A5 hot food takeaways and D1 non-residential institutions, with declines in A4 pubs/bars and in B1c/B2/B8 industrial uses.

Figure 3.14 Non-residential floorspace (sq.m) with unimplemented planning permissions in town centres, net totals (March 2013)



Source: London Development Database

<u>Town centre locations (residential)</u>

At the end of March 2013, a total of 16,843 net additional residential units were under construction <u>within</u> London's town centres with notable gains at Woolwich, Canning Town and Greenwich West (all in excess of 1,000 units). A further 21,585 net additional residential units with planning permission in town centres were recorded as 'not started'. Wembley, Elephant & Castle and Croydon recorded the highest totals of net additional dwellings in permissions not started at March 2013 (see Table 3.19). Of the total 21,585 units, 27% were in Metropolitan centres, 36% in Major centres and 35% in Districts. On average, the Metropolitan centres had the highest net additional residential units with 'not started' planning permission (483 units per centre).

Table 3.19 Housing capacity in town centres from 'not started' planning permissions, ranked top 20 by net additional units

Centre	Borough	Classification (LP2011)	Sum of net residential units
Wembley	Brent	Major	4,128
Elephant and Castle	Southwark	District	2,766
Croydon	Croydon	Metropolitan	2,026
Shepherds Bush	Hammersmith and Fulham	Metropolitan	1,774
Canada Water	Southwark	District	941
Lewisham	Lewisham	Major	827
Harrow	Harrow	Metropolitan	711
Ilford	Redbridge	Metropolitan	499
Woolwich	Greenwich	Major	432
Finsbury Park	Islington/Hackney/Haringey	District	383
Stratford	Newham	Major	342
Streatham	Lambeth	Major	323
Greenwich West	Greenwich	District	283
New Cross	Lewisham	District	260
Sutton	Sutton	Metropolitan	253
Barking	Barking and Dagenham	Major	234
Bromley	Bromley	Metropolitan	213
Putney	Wandsworth	Major	192
Canning Town	Newham	District	175
Wentworth Street	Tower Hamlets	CAZ Frontage	168

(Source: London Development Database)

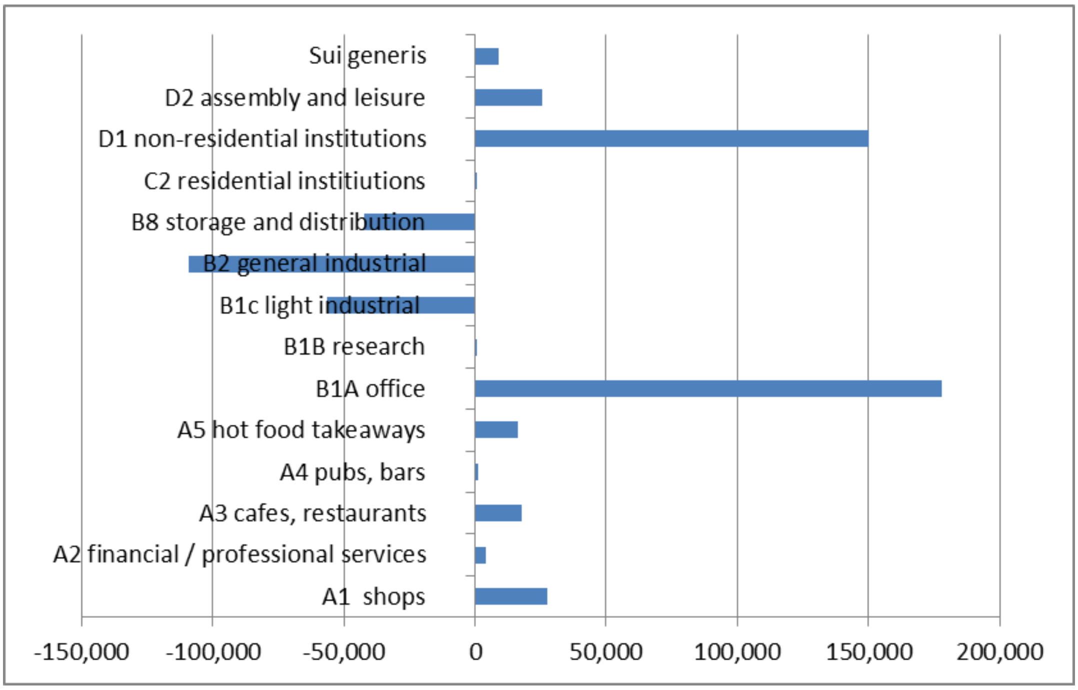
Edge of town centre locations (non-residential floorspace) [24]

At the end of March 2013 there was a total of 506,000 sq.m of net additional non-residential floorspace under construction on the edge of London's town centres, the majority of this is in B1a office use around the CAZ Frontages and Canary Wharf (which together account for 93% of the gains to B1a office floorspace under construction in edge of centre locations). Approximately 20,000 sq.m of net additional edge of centre A1 retail floorspace was under construction at the end of March 2013.

[24] The term 'edge of centre' is defined in this health check as a location within a 300 metre buffer zone of the town centre boundary used for data collection purposes (the TCHC polygon).

In addition to these totals, there were approximately 220,000 sq.m of net additional non-residential floorspace with unimplemented ('not-started') planning permissions on the edge of town centres at the end of March 2013. Net additional B1a office floorspace accounted for 178,000 sq.m (although almost 70% of this was around CAZ Frontages). Retail uses accounted for almost 28,000 sq.m of the net additional non-residential floorspace in edge of centre locations. Forty-four town centres recorded potential net gains to edge of centre retail floorspace, the largest of these at Southall, Lewisham and Wembley Park. Significant net loss of industrial and warehousing floorspace with planning permission in edge of centre locations is recorded with a potential overall reduction in B1c/B2/B8 use class floorspace of -208,000 sq.m (Figure 3.15).

Figure 3.15 Non-residential floorspace with unimplemented planning permissions in <u>edge of town centre</u> locations



(Source: London Development Database)

<u>Edge of town centre locations (residential)</u>

At the end of March 2013 there was a total of 15,915 (net) additional dwellings under construction on the edge of town centres across the network. A further 21,369 net additional residential units with planning permission in edge of town centre locations were recorded as 'not started'. Southall, Canning Town, Chrisp Street, Stratford, Wood Green and Wembley Park recorded the highest totals of net additional dwellings in edge of centre locations in permissions not started at March 2013 (all in excess of 1,000 units - see Table 3.20). Of the additional 21,369 units with planning permissions not started, 8% were on the edges of Metropolitan centres, 36% edge of Major centres and 52% on the edge of District centres.

Table 3.20 Housing capacity in edge of town centre locations from 'not started' planning permissions, ranked top 20 by net additional units

Centre	Borough	Classification (LP2011)	Sum of net residential units
Southall	Ealing	Major	3,471
Canning Town	Newham	District	1,721
Chrisp Street	Tower Hamlets	District	1,427
Stratford	Newham	Major	1,373
Wood Green	Haringey	Metropolitan	1,250
Wembley Park	Brent	District	1,062
Brentford	Hounslow	District	759
Rainham	Havering	District	747
Edgware Road/Church Street	Westminster	District	514
Lewisham	Lewisham	Major	493
Canada Water	Southwark	District	447
Kings Road East	Kensington and Chelsea	Major	434
West Green Road/ Seven Sisters	Haringey	District	303
Angel Edmonton	Enfield	District	290
Edgware	Barnet	Major	250
West Hampstead	Camden	District	245
Greenwich West	Greenwich	District	227
Walworth Road	Southwark	District	216
Woolwich	Greenwich	Major	213
Elephant and Castle	Southwark	District	190

(Source: London Development Database)

3.2.2 Development plan allocations

- **Technical Annex:**
Tab 2.2 DPD Proposals map allocations without planning permissions in centres;
Tab 2.6 DPD Proposals map allocations without planning permissions - edge of centres
- **Data source:** SHLAA and 2013 TCHC borough survey

The Strategic Housing Land Availability Assessment (SHLAA) identifies London's housing capacity and is an essential component of the evidence base required for the London Plan and borough Local Plans. The SHLAA has been carried out in partnership between the GLA, the London Boroughs, and the City Corporation and the London Legacy Development Corporation (LLDC).

There are a number of sources used to identify overall capacity, including: large sites (0.25ha and above), small sites (less than 0.25ha), non self-contained units and vacants returning into use. The capacity of large sites was assessed by each borough using a probability based approach (for detail see the 2013 SHLAA). This probability based approach provides an aggregate capacity figure at borough wide level and therefore, the town centre capacity is detailed by borough rather than by town centre.

Table 3.21 details the housing capacity identified in town centres in terms of allocations and potentials. It shows that there is capacity for 55,162 units in town centres over the period 2015/16 to 2024/25. If edge of town centre locations are included the capacity increases to 97,265. Combined with sites with planning permission, this suggests a significant capacity for housing in and around town centres. It is likely that the SHLAA actually underestimates potential capacity because many town centre sites were removed as they had multiple ownership issues and thus were not considered as having potential. However, town centre redevelopment programs could address such issues and open up these sites as part of the redevelopment and consolidation of town centres.

The health check survey also sought to identify non-housing development capacity from boroughs' Development Plan Document allocations. Indicators related to this question include the number of sites, premises and the total floorspace allocated for retail, leisure, hotels, offices, housing, mixed uses and other uses. Borough response rates to this question were very low as in the 2009 health check. This may be due to the lack of such information in boroughs' DPDs or because these documents do not always specify precise floorspace figures for the development allocation sites. Details of the borough returns on non-residential DPD allocation capacity is provided in Tab 2.2 and Tab 2.6 in the Technical Annex.

Table 3.21 Housing capacity identified within and on edges of town centres - allocations and potentials

Borough	Town Centre capacity - allocations and potential 2015/16 -2024/25	Town centre and edge of town centre capacity - allocations and potential 2015/16- 2024/25
Barking and Dagenham	1145	1754
Barnet	2180	3564
Bexley	1341	1663
Brent	3427	5558
Bromley	892	965
Camden	577	751
Croydon	3674	4636
Ealing	2787	4750
Enfield	172	265
Greenwich	3898	4443
Hackney	1162	1680
Hammersmith and Fulham	686	2817
Haringey	2135	5295
Harrow	620	1217
Havering	3647	4603
Hillingdon	901	1017
Hounslow	2439	3209
Islington	408	991
Kensington and Chelsea	194	1142
Kingston upon Thames	2071	2970
Lambeth	812	1014
Lewisham	695	2702
Merton	673	901
Newham	3357	8699
Redbridge	4630	4841
Richmond upon Thames	230	691
Southwark	4063	8667
Sutton	810	843
Tower Hamlets	2933	11640
Waltham Forest	1471	1779
Wandsworth	453	766
Westminster	679	1432
Total	**55162**	**97265**

Notes – The SHLAA data was collected summer 2013. As the approvals data is more up-to-date than the SHLAA data, there is potential for some double counting. The LLDC area has been included in its constituent boroughs. The City of London does not appear in the table as it has no allocations or potentials in town centres/edge of town centres.

3.2.3 Undesignated vacant premises/sites with development potential

- **Technical Annex:**

  Tab 2.3 Undesignated vacant premises with development potential in centres
  Tab 2.4 Undesignated vacant (clear) sites with development potential in centres
  Tab 2.7 Undesignated vacant premises with development potential on the edge of centres
- **Data source:** 2013 TCHC borough survey

Data on undesignated vacant premises/sites with development potential was received for only a minority of centres. Among the larger centres, undesignated vacant premises with development potential were identified in Croydon, Sutton, Wembley and Wimbledon. Vacant (clear) sites with development potential were identified in Croydon and Yiewsley/West Drayton. Details of the results for town centres and edge of centre locations are available in the Technical Annex Tabs 2.3, 2.4 and 2.7.

3.2.4 Local Retail Capacity Studies

- **Technical Annex:**
  - Tab 2.8 Retail Capacity Study – last 5 years
- **Data source:** 2013 TCHC borough survey

The health check survey was intended to collect information on whether a borough retail capacity study has been undertaken and how much of capacity in each town centre has been identified through the study.

A total of 18 boroughs responded to this question and indicated that they had a retail capacity study. The latest retail capacity studies were undertaken primarily between 2007 and 2012. The period covered by boroughs' retail capacity studies therefore varies. Tab 2.8 in the Technical Annex outlines all boroughs responses regarding their retail capacity studies. It is important to note that some boroughs provided combined retail data for their town centres (including Kingston) while others provided data for each individual centre. According to the available data in borough retail capacity studies, a few centres are projected to have surplus retail floorspace in the future, including Sidcup (-3,199 sqm in comparison goods floorspace) and Welling (-4,140 sq.m in convenience goods floorspace).

3.3 Financial Performance

3.3.1 Turnover

- **Technical Annex:**
    - Tab 3.1a Turnover (Experian)
    - Tab 3.1b Turnover (Borough data)
- **Data source:** 2013 TCHC borough survey returns

The level and growth of turnover in town centres are important indicators of town centre health. They are also vital to enable practitioners to derive robust estimates of retail sales densities, which in turn are used for other purposes including projections of future retail expenditure capacity and associated floorspace requirements. Obtaining accurate measurements of the annual turnover of town centres however is problematic as detailed transaction data is notoriously difficult to source. The 2013 London TCHC draws on modelled estimates of comparison goods retail turnover at centre level derived by Experian for the GLA report Consumer Expenditure and Comparison Goods Floorspace Need in London[25], based on a gravity model. The assumption is that an individual's expected level of expenditure at a given centre is proportional to the attractiveness of that centre and inversely proportional to a measure of distance to that centre.

According to the estimates from Experian, London's centres (including out-of-centre retail parks) had an estimated combined annual comparison goods turnover in the region of £ 18.6 billion in 2011. Of this total, the town centres identified in the 2011 London Plan had an estimated combined annual comparison goods turnover of almost £14.5 billion. A summary of the top twenty performing town centres in London is provided in Table 3.22 below. Note that these are modelled estimates and may differ from actual turnover recorded in more detailed studies of these centres. Further details of other centres are provided in the Technical Annex, Tab 3.1a and 3.1b.

The borough response rate to this question was low and reflects the difficulty in accessing data. For those boroughs that did respond, it is interesting to note in some cases a very wide variation in the Experian estimates and the borough estimates, for example Kingston £432m (Experian estimate) compared with £989m (borough estimate) and Wimbledon £162m (Experian estimate) compared with £277m (borough estimate). It is stressed therefore that the data on turnover should be treated with some caution.

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[25] Experian Business Strategies. Consumer Expenditure and Comparison Goods Retail Floorspace Need in London. GLA, 2013

Table 3.22 Estimated (modelled) annual comparison goods retail turnover, 2011 (ranked by town centre)

Centre	Borough	Classification (LP2011)	Modelled comparison goods retail turnover (£m)
West End	Westminster/Camden	International	2577
Shepherds Bush	Hammersmith and Fulham	Metropolitan	516
Stratford	Newham	Major	487
Kingston	Kingston upon Thames	Metropolitan	432
Croydon	Croydon	Metropolitan	353
Victoria Street	Westminster	CAZ Frontage	311
Bromley	Bromley	Metropolitan	301
Ealing	Ealing	Metropolitan	251
Knightsbridge	K & C / Westminster	International	248
Uxbridge	Hillingdon	Metropolitan	239
Hounslow	Hounslow	Metropolitan	235
London Bridge	Southwark	CAZ Frontage	213
Romford	Havering	Metropolitan	198
Kensington High Street	Kensington and Chelsea	Major	196
Kings Road East	Kensington and Chelsea	Major	193
Liverpool Street	City of London	CAZ Frontage	188
Sutton	Sutton	Metropolitan	181
Wimbledon	Merton	Major	162
Ilford	Redbridge	Metropolitan	160
Harrow	Harrow	Metropolitan	151

Source: Experian Business Strategies

3.3.2 Yields

- **Technical Annex:**
    - Tab 3.2 Yields
- **Data source:** 2013 TCHC borough survey returns

The yields identified in this health check are the ratio of rental income to capital value. Yields are calculated by dividing the annual rent (assumed to have been received as a single sum at the year ends), by the capital value or sale price of the property. The yield measure is often used as a simple benchmark to assess the comparative attractiveness of town centres for retail development. Yields need to be interpreted with care with particular reference to the circumstances in each individual town. In general terms, low yields indicate that a town centre is considered to be attractive and as a result be more likely to attract investment than a town with high yields. Yields measured consistently over time can give an indication of the direction in which a particular town centre is moving.

There is very limited access to data on yields. Only 7 boroughs collect '% of initial yield' data for their town centres (18 centres in total). Tab 3.2 in the Technical Annex outlines all available yield data received from boroughs. With such limited information, analysis of yield performance in the town centre network is problematic, however, it indicates that larger centres generally have lower retail yields (ranging from Kingston: 4.5% to Ilford: 7%) compared to smaller centres (ranging from 6% in New Malden to 10% in Morden). Where data was available, the yields for retail were typically lower than those for offices (6.5%-9.5%) and leisure (6.5%-8.5%), which in turn were lower than those for industrial (7.5%-8%).

3.3.3 Rents

- **Technical Annex:**
    - Tab 3.3 Rents
- **Data source:** Colliers Retail Rents map and supplemented by borough data

Retail rents have been sourced from Colliers International and are based upon agents' opinion of the open market Zone A rent in each centre. Table 3.23 identifies the town centres with the highest retail rents in 2012 with time series and growth rates for 2008-2012. Perhaps not surprisingly, the highest ranked centres are found within the Central Activities Zone including the West End, Knightsbridge and Covent Garden/Strand. Across the West End itself, rental values vary widely with Old Bond Street commanding rents of over £10,764/sq.m in 2012, compared to £8,611/sq.m in Oxford Street West, £5,920/sq.m in Regent Street and £5,113/sq.m in Oxford Street East.

The highest town centre retail rents in outer London in 2012 are found in Kingston £3,229/sq.m, Richmond £2,422/sq.m and Croydon £2,368/sq.m. In inner London, Kings Road (east), Queensway/Westbourne Grove and Canary Wharf recorded the highest retail rents at £3,875/sq.m, £3,875/sq.m and £3,714/sq.m respectively closely followed by Westfield at Shepherd's Bush (£3,498/sq.m).

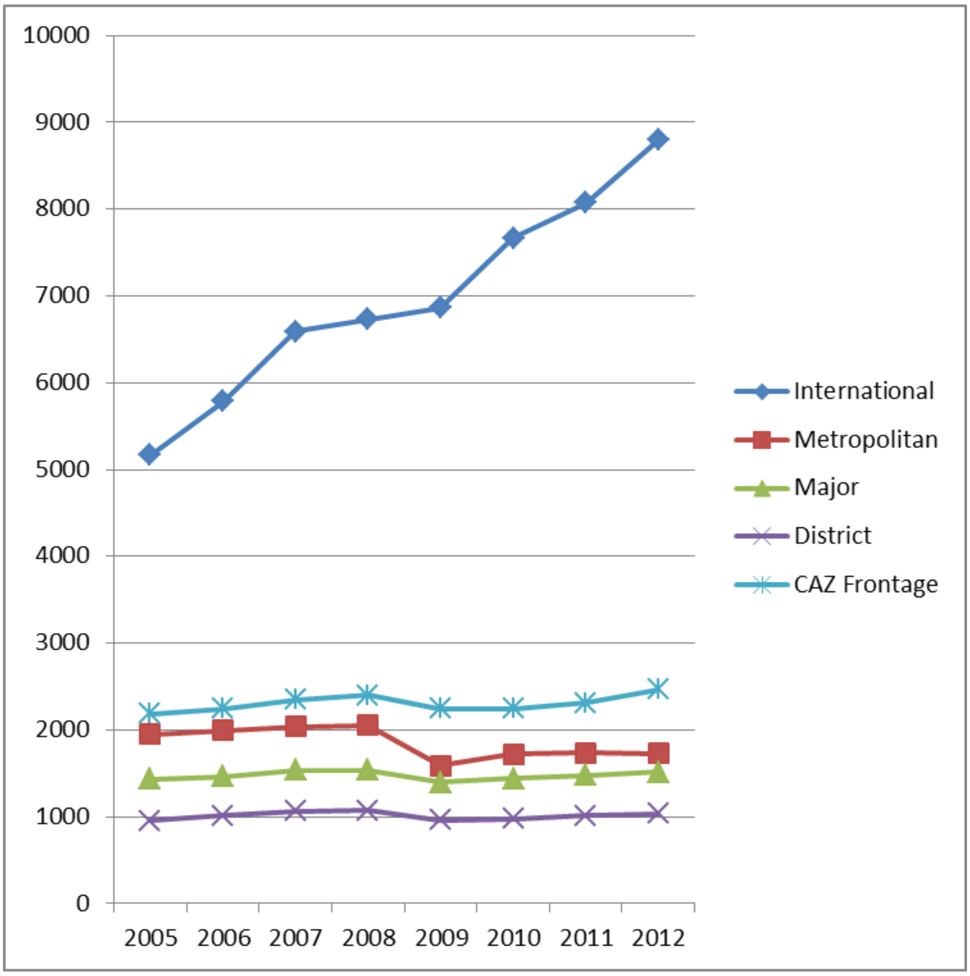
Table 3.23 Town centre annual retail rents 2008-2012, ranked top 20 in 2012 (£/sqm)

Centre	Class. (LP 2011)	2008	2009	2010	2011	2012	Change 2008 - 2009	Change 2009 - 2010	Change 2010 - 2011	Change 2011 - 2012
West End	Int.	7,804	8,073	9,688	10,226	10,764	3%	20%	6%	5%
Knightsbridge	Int.	5,651	5,651	5,651	5,920	6,835	0%	0%	5%	15%
Covent Garden/ Strand	CAZ F.	3,929	3,767	3,767	4,090	4,467	-4%	0%	9%	9%
Kings Road East	Major	3,875	3,767	3,767	3,767	3,875	-3%	0%	0%	3%
Queensway/ W'bourne Grove	Major	2,530	2,045	2,906	3,229	3,875	-19%	42%	11%	20%
Canary Wharf	Major	3,229	3,606	3,660	3,714	3,714	12%	1%	1%	0%
Shepherds Bush	Met.	--	--	3,229	3,229	3,498	--	--	0%	8%
Kingston	Met.	3,337	2,960	2,960	3,229	3,229	-11%	0%	9%	0%
Marylebone High Street	CAZ F.	1,938	2,153	2,153	2,153	3,014	11%	0%	0%	40%
Kensington High Street	Major	2,960	2,691	2,530	2,691	2,691	-9%	-6%	6%	0%
Tottenham Court Road	CAZ F.	2,637	2,583	2,583	2,583	2,583	-2%	0%	0%	0%
Richmond	Major	2,153	1,938	1,938	2,045	2,422	-10%	0%	6%	18%
Croydon	Met.	2,906	2,368	2,368	2,368	2,368	-19%	0%	0%	0%
Cheapside	CAZ F.	2,960	2,153	2,153	2,153	2,368	-27%	0%	0%	10%
Victoria Street	CAZ F.	2,368	2,368	2,368	2,368	2,368	0%	0%	0%	0%
Moorgate	CAZ F.	2,583	2,153	2,153	2,260	2,260	-17%	0%	5%	0%
Angel	Major	2,368	1,938	2,045	2,153	2,153	-18%	6%	5%	0%
Notting Hill Gate	District	1,722	1,722	1,776	1,776	2,045	0%	3%	0%	15%
Brixton	Major	1,561	1,561	1,561	1,561	1,938	0%	0%	0%	24%
Romford	Met.	2,260	1,938	1,938	1,938	1,830	-14%	0%	0%	-6%

Source: Colliers International

Figure 3.16 illustrates how in-town retail rental growth rates in Metropolitan, Major, District centres and CAZ Frontages eased in 2008-09, a reflection of the economic downturn. The impact on average rents in Metropolitan centres was particularly marked between 2008 and 2009 (-22%). Over the period from 2009 to 2012, average rents in London's centres have now returned to levels close to those of 2008. The International centres (West End and Knightsbridge) have shown strong growth over this period with an average growth of 8.6% (driven in particular by the West End). There has been modest recovery in average rentals over this period in the CAZ Frontages (3.3%), Metropolitan centres (2.8%), Major centres (2.8%) and District centres (2.5%).

Figure 3.16 Average retail rents (£/sq.m) in London's town centres[26]



Source: Colliers International

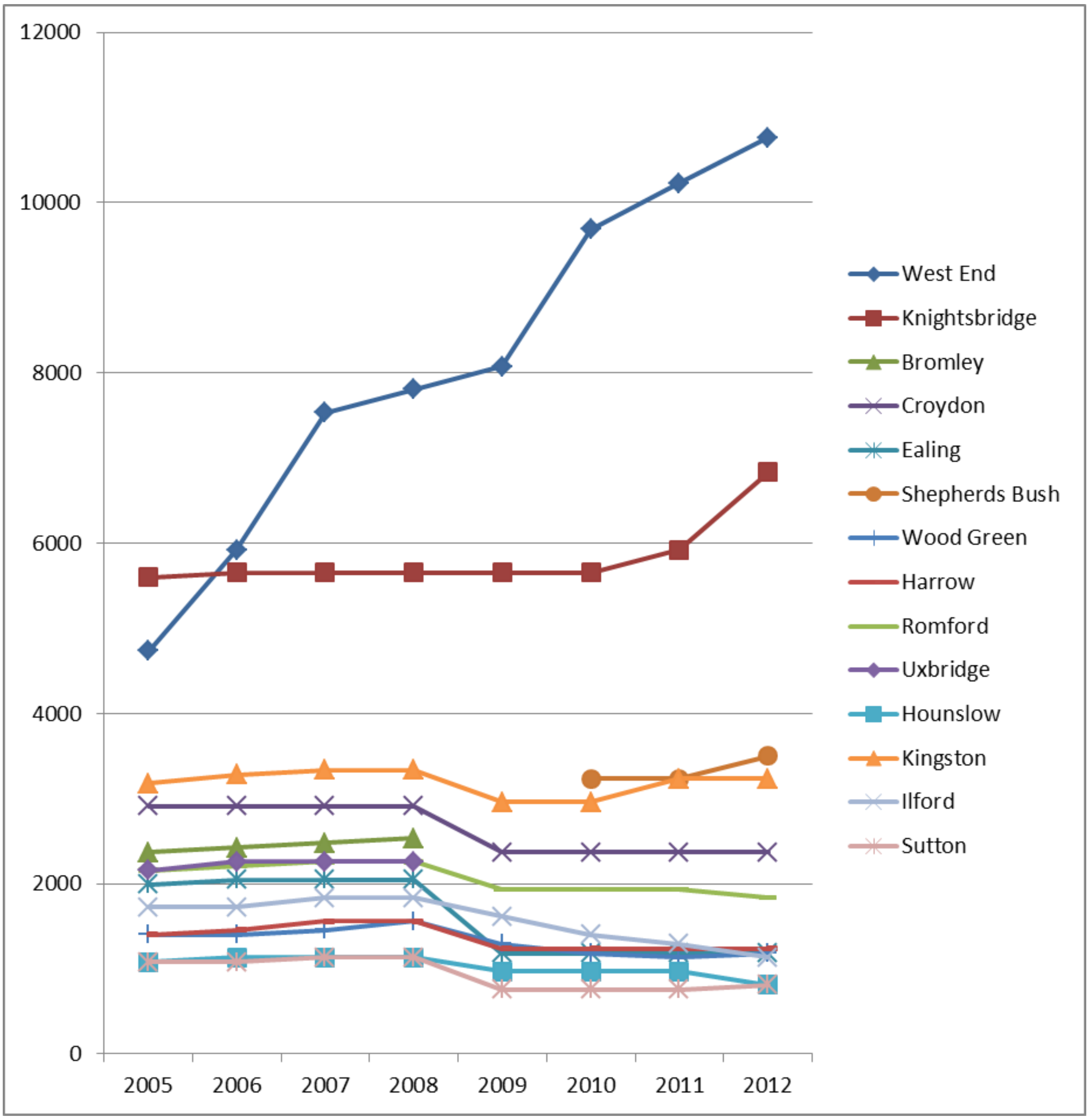
The average rents in Figure 3.16 above mask significant variations between centres. The rental values in some centres (e.g. Marylebone High Street, Brixton, Queensway/ Westbourne Grove, Richmond, Notting Hill Gate, Southall, Chiswick, Cheapside, Covent Garden/ The Strand) continued to grow strongly since 2009 and reached their highest level in 2012.

In contrast, the rents in some Metropolitan and Major centres and CAZ frontages have either declined or shown little growth, including Tottenham Court Road (part), Victoria Street, Fleet Street, Baker Street (part), Kensington High Street, Croydon, Harrow, Ealing, Romford, Ilford and Hounslow. Rental values at Shepherds Bush increased by 8% between 2011 and 2012. Figure 3.17 illustrates changes in retail rents in the

[26] Includes the 69 centres for which data is available

International and Metropolitan centres (where data is available) for the period 2005-2012. Further details of time series retail rents at centre level are provided in the report Annex 3, Table A3.4 and in the Technical Annex Tab 3.3.

Figure 3.17 Retail rents (£/sq.m) in London's International and Metropolitan town centres



Source: Colliers International. West End rents shown are for Old Bond Street.

For a few selected centres/locations, data has also been sourced for office rents (see Table 3.24 below – note figures expressed in £ per square foot). The highest typical prime office rents in the third quarter of 2013 (Q3) were found in Mayfair (£120/sq.ft) although this masks wide variation in the West End market including Euston (£60/sq.ft, Marylebone and Soho £87.50/sq.ft) and St.James's (£115/sq.ft). In Inner/Outer London, Chiswick and Hammersmith perform well in terms of absolute rents. Office rents in Richmond and Uxbridge both grew strongly 2012-13 with annual growth of 12.9% and 16.4% respectively.

Table 3.24 Prime office rents (£/sq.ft) in selected London centres (2013, Q3)

Central London/Canary Wharf		**Outer/Inner London**	
Centre/location	**Prime office rent (£/sq.ft)**	**Centre/location**	**Prime office rent (£/sq.ft)**
Mayfair	£120	Chiswick	£48
Covent Garden/ Strand	£75	Hammersmith	£47
Victoria	£72.50	Richmond	£39.50
City Core	£57.50	Wimbledon	£33
Knightsbridge	£57.50	Uxbridge	£32
Canary Wharf	£35	Croydon	£22

Source: Colliers International

3.3.4 Delphi Scores

- **Technical Annex:**
    - Tab 3.4 Delphi scores
- **Data source:** Experian

In this health check, the GLA collected 'commercial delphi score' from Experian to assess the commercial viability of town centres. Experian collects business data about the trading history of companies. This trading history is then classified into a risk of failure score based on past patterns. Each major multiple fascia has a risk score. The score ranges from 0 to 100 with the lowest scoring companies carrying the highest risk (i.e low average Delphi score = centre with higher overall risk). For ease of use, Experian have categorised groups of commercial Delphi Scores into risk bands. This allows users to determine at a glance the overall level of risk that a company potentially poses to the credit grantor. This risk score is banded and the proportion of outlets in fascias within the two highest risk bands (called percentage of high risk in a centre) is taken as a measure of the level of risk/vulnerability of the town centre in question. Some companies may declare their costs and profits internationally and in some cases their financial vulnerability in the UK may be overstated. As an overall average risk by centre is used in the health check, such anomalies should be smoothed out. In the case of a few centres significant discrepancies were found in % of high risk and Delphi score. These centres have been highlighted in the Technical Annex and replaced by 'no data'.

According to the data, Metropolitan centres and centres in Central London in general have marginally stronger commercial vitality (with average Delphi scores of 63.3 for Metropolitan centres, 62.1 for CAZ Frontages and 61.7 for the International centres), compared to businesses in District and Major centres (with average Delphi scores of 60.8 and 57.5 respectively). This however masks considerable variation within these classifications as illustrated in Table 3.25 and Tab 3.4 in the Technical Annex.

Table 3.25 Top 20 ranked centres (lowest overall risk) by Delphi score

Centre	Borough	Classification (LP2011)	% High Risk	Delphi Score
Watney Market	Tower Hamlets	District	6.3%	77.8
Thamesmead	Greenwich	District	14.3%	75.4
Victoria Street	Westminster	CAZ Frontage	16.7%	74.8
Wandsworth	Wandsworth	Major	11.5%	74.0
Harold Hill	Havering	District	5.8%	70.7
Cheapside	City of London	CAZ Frontage	16.5%	70.4
Liverpool Street	City of London	CAZ Frontage	15.3%	70.2
Erith	Bexley	District	13.5%	68.9
Stratford	Newham	Major	14.0%	68.4
Romford	Havering	Metropolitan	14.0%	67.9
Uxbridge	Hillingdon	Metropolitan	15.7%	67.7
Canary Wharf	Tower Hamlets	Major	17.7%	67.6
Moorgate	City of London	CAZ Frontage	21.4%	67.3
Bexleyheath	Bexley	Major	18.1%	67.2
Hounslow	Hounslow	Metropolitan	15.5%	67.2
Stanmore	Harrow	District	13.7%	67.2
Wallington	Sutton	District	8.2%	66.7
Leadenhall Market	City of London	CAZ Frontage	17.1%	66.6
Enfield Town	Enfield	Major	15.6%	66.4
Eltham	Greenwich	Major	15.7%	65.5

Source: Experian

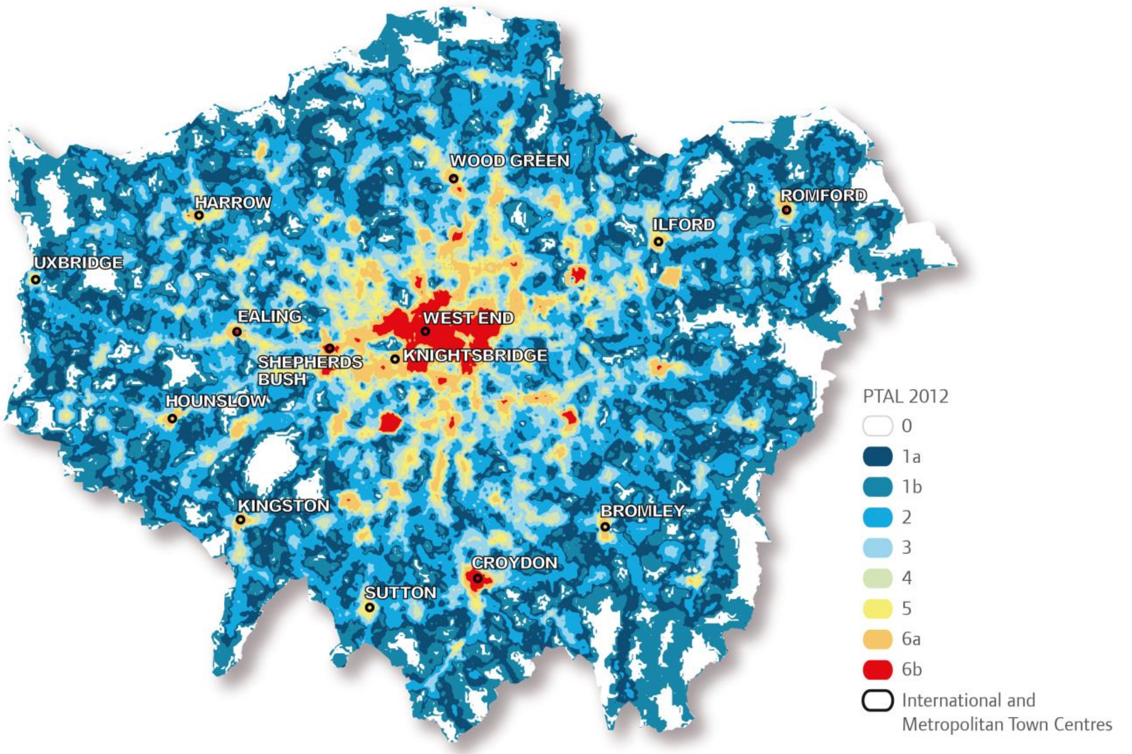
3.4 Accessibility

3.4.1 Public Transport Accessibility

- **Technical Annex:**
  - Tab 4.1a Public Transport nodes
  - Tab 4.1b Public Transport Accessibility
- **Data source:** Transport for London

Public transport accessibility impacts the health of town centres, allowing them to perform a wider role and draw expenditure from a larger catchment area. This health check applies Public Transport Accessibility Level (2012) data, to measure transport accessibility in London's town centre network (see Map 3.2).

Map 3.2: Public Transport Accessibility Levels in London (2012)



Source: Transport for London

According to the health check data, centres with the highest PTAL level 6 (measured at the centroid) include the International centres, CAZ frontages, the Metropolitan centres (excluding Sutton), 61% of the Major centres and 18% of the District centres. The public transport accessibility of District centres varies widely, ranging from PTAL level 2 to 6. The most accessible District centres (with PTALs above level 5) are primarily located in inner London (see Tab 4.1b, Technical Annex). District centres with relatively low levels of accessibility (PTAL level 2) meanwhile, include Green Lane, Brent Street, Temple Fortune, Colindale/The Hyde, West Wickham, Selsdon, Thamesmead, Stanmore, Harold Hill, Northwood, Downham, East Sheen, Whitton, North Cheam, and Roman Road (east). Of the Major centres, Orpington and Eltham have the poorest access to public transport (PTAL level 3).

This health check also collected data on bus stops, underground network stations, national rail stations, London Overground stations and Tramlink stations within and around a town centre. Such data provides a snapshot of public transport provision associated with a town centre and is outlined in Tab 4.1a in the Technical Annex.

3.4.2 Car Parking

- **Technical Annex:**
    - Tab 4.2 Car Parking
- **Data source:** 2013 TCHC borough survey

The London Plan (2011) 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. Where there are identified issues of vitality and viability, the need to regenerate such centres may require a more flexible approach to the provision of public car parking to serve the town centre as a whole, which London Plan Policy 6.13 allows.

Town centre data on car parking relied entirely on boroughs' data input through the 2013 TCHC survey. Responses were limited and it is difficult to draw any firm conclusions from the parking data. Approximately 96% of town centres had on-street parking restrictions within the town centre. A total of 78 centres (out of 105 centres for which data is available) provided Blue Badge parking bays (74% of centres and 2,387 spaces in total). Most are free of charge except Chipping Barnet, but with time restrictions. Only a few centres provide mobility scooter charging points, including Croydon, Uxbridge and Wealdstone (see Tab 4.2 in the Technical Annex).
Car club data was sourced by the GLA from Transport for London (TfL), with supplementary data provided by the boroughs. The health check data suggests that car clubs are available across the town centre network, with the highest level of provision in Kingston, Brentford, the West End and Ealing. Table 3.26 lists town centres with four or more car club bays.

Table 3.26 Town centres with car club bays (ranked)

Centre	Borough	Classification (LP 2011)	Total no. of car club bays
Kingston	Kingston upon Thames	Metropolitan	22
Brentford	Hounslow	District	13
West End	Westminster/Camden	International	12
Ealing	Ealing	Metropolitan	11
Woolwich	Greenwich	Major	7
Chiswick	Hounslow	Major	7
New Malden	Kingston upon Thames	District	6
Lewisham	Lewisham	Major	5
Acton	Ealing	District	5
Kensington High Street	Kensington and Chelsea	Major	4
Clapham Junction	Wandsworth	Major	4
Twickenham	Richmond upon Thames	District	4
Surbiton	Kingston upon Thames	District	4

(Source: Transport for London, supplemented by borough data in red)

3.4.3 Shopmobility Schemes (SMS)

- **Technical Annex:**
    - Tab 4.3 Shop Mobility Schemes
- **Data source:** GLA survey supplemented by borough survey returns

The London Plan seeks to promote the provision of Shop Mobility Schemes (SMS) to improve access to goods and services for older and disabled Londoners. Shop mobility is a scheme that lends manual and powered wheelchairs and scooters to members of the public with limited mobility, which allows them to travel to and visit, independently and with greater ease, local shops, leisure services and commercial facilities usually within a town or shopping centre.

The GLA sourced information on SMS through website search, which was checked and updated by boroughs through the 2013 TCHC survey. According to the combined GLA and borough health check data, there are 45 centres across the town centre network identified with an SMS, comprising of all of the Metropolitan centres, 13 Major, 16 District centres and four of the CAZ Frontages. Neither of the International centres have an SMS. Tab 4.3 in the Technical Annex provides details of these schemes such as opening hours and funding secured over the next 5 years.

3.4.4 Facilities for cyclists

- **Technical Annex:**
  - Tab 4.4 Facilities for cyclists
- **Data source:**
  - Data on cycle routes – Sustrans, and supplemented by borough data

Safe, convenient and direct access to and within town centres by bicycle, along with adequate and secure cycle parking facilities, are among a range of measures that can improve accessibility in accordance with London Plan policy. Data on cycle routes is sourced from Sustrans (a charity organisation for sustainable transport) using a 2 km buffer zone of the town centre boundary. This data is available for all centres within London's town centre network. Within a two kilometre buffer zone of the town centre boundary, centres in and around CAZ appear to have the most extensive cycle routes. Tab 4.4 in the Technical Annex indicates that the overall length of cycle routes around centres in Outer London are shorter relative to those in inner London, a reflection of the density of the network across the capital. Reliable data on secure cycle parking facilities in town centres is not available. This matter should be considered in more local town centre health checks and in future London-wide health checks.

3.4.5 Electric Vehicle Charging Points

- **Technical Annex:**
  - Tab 4.5 Electric vehicle charging points
- **Data source:** Transport for London and 2013 TCHC borough survey returns

According to data from Transport for London, there were an estimated 209 electric vehicle charging points lying within London's town centres. Supplementary data from the boroughs indicates an additional 13 points (see Tab 4.5 Technical Annex). The majority of charging points (64%) are found within Metropolitan and Major centres. Of the 217 London Plan centres, 47 had at least one EV charging point (60 according to the supplemental borough data), or in other words 170 town centres do not have any EV charging points according to the TfL data (157 centres according to the supplemental borough data). Shepherd's Bush[27] and the West End have the highest number of EV charging points (30 and 20 respectively).

[27] Shepherd's Bush data sourced from the borough

3.4.6 Pedestrian flows

- **Technical Annex:**
    - Tab 4.6 Pedestrian flows
- **Data source:** 2013 TCHC borough survey returns

Pedestrian flow is an important indicator to measure the vitality and viability of town centres. It can be defined as the movement of people past a particular location over a specified period of time. In this health check, the pedestrian flow analysis relied on borough data received from the 2013 TCHC survey.

Pedestrian footfall data are available for only a minority of London's town centres (28%). The survey responses indicated that counts of pedestrian footfall were collected in 60 town centres, including the West End, just over half of the Metropolitan centres, about a third of Major and less than a quarter of the District centres (see Table 3.27). Details of these pedestrian footfall counts are listed in the Tab 4.6, Technical Annex. However, these pedestrian footfall data were based on various methodologies (for example, data could be collected in different locations of the town centre and at different times of the day) and these are not suitable for comparative analysis across the town centre network as a whole. This matter should be considered in more local town centre health checks and in future London-wide health checks.

Table 3.27 Number and percentage of centres with footfall counts

Classification (LP2011)	Number of centres with footfall count	% of centres in classification with footfall count
International	1 (West End)	50%
Metropolitan	7	58%
Major	12	34%
District	34	23%
CAZ Frontage	6	30%
All centres	**60**	**28%**

Source: GLA/boroughs

3.4.7 Modal share for shopping trips

- **Technical Annex:**
  - Tab 4.7 Modal split for shopping trips
- **Data source:** 2013 TCHC borough survey returns

Modal share refers to the proportions of visitors using a particular transport mode to access town centres, including public transport, private transport, cycling and walking.

The London Travel Demand Survey (LTDS) provides information about Londoners' travel patterns and modal share. However, the LTDS is a survey designed to provide a London wide view and due to the small sample sizes it is not be possible to derive individual town centre data from this survey. Table 3.28 below provides aggregated data for the last 3 years available (2007/08 to 2009/10) for all shopping/personal business trips, with a trip destination a London town centre, grouped by inner and outer London. On average walking and public transport mode shares tend to be higher in Inner London, whilst Outer London centres are much more dependent on private transport than those in Inner London. Public transport shares tend to be higher in Metropolitan centres relative to Major and Districts in both Inner and Outer London.

Table 3.28 Modal share to London town centres, inner and outer London (2007/8-2009/10)

	Mode	International Centre	Metropolitan Town Centre	Major Town Centre	District Town Centre	All Town Centres
Inner	PT	56%	45%	32%	22%	31%
	Private	2%	10%	19%	21%	18%
	Walk	42%	46%	48%	54%	50%
	Cycle	1%	0%	1%	3%	2%
Outer	PT	n/a	28%	26%	16%	21%
	Private	n/a	31%	32%	42%	37%
	Walk	n/a	40%	41%	41%	41%
	Cycle	n/a	0%	1%	1%	1%

Source: TfL (London Travel Demand Survey). PT = public transport

Table 3.29 provides modal share data recorded in borough survey returns ranked by private transport share (lowest to highest). Although great care has to be taken comparing the data (particularly given the low sample size and the various data sources) it does illustrate that in general terms, the Outer London centres in the sample are typically more dependent on private modes of transport than those in Inner London (the same pattern as suggested by the LTDS data), though walking, public transport and cycling together still make up the majority of trips in most centres. Central and

Inner London town centres in the borough survey samples recorded the highest shares by walking mode. The highest modal shares by cycling were recorded in Stoke Newington (24%), Brick Lane (11%) and Watney Market (10%) – all notably high relative to the averages recorded in the LTDS surveys. Several boroughs however did not include data on cycling mode share and this represents an area for investigation in future surveys.

Table 3.29 Modal share data recorded in borough survey returns ranked by private transport share (lowest to highest)

CAZ/Inner /Outer London	Centre	Borough	Classification (LP2011)	Private transport	Public transport	Walk	Cycle	Other
CAZ	Warwick Way/Tachbrook St	Westminster	CAZ Frontage	4.0	11.0	82.0	3.0	0.0
IL	Harrow Road	Westminster	District	5.0	29.0	61.0	5.0	0.0
IL	Queensway/Westbourne Grove	Westminster/K&C	Major	6.0	42.0	50.0	2.0	0.0
IL	Whitechapel	Tower Hamlets	District	6.0	52.0	38.0	0.0	4.0
IL	Roman Road (west)*	Tower Hamlets	District	7.0	30.0	56.0	0.0	7.0
IL	Edgware Road/Church Street	Westminster	District	8.0	34.0	56.0	2.0	0.0
IL	Brick Lane	Tower Hamlets	District	9.0	28.0	52.0	11.0	0.0
IL	Stoke Newington	Hackney	District	12.0	25.0	39.0	24.0	0.0
IL	Bethnal Green	Tower Hamlets	District	12.0	18.0	64.0	6.0	0.0
IL	Canary Wharf	Tower Hamlets	Major	14.0	63.0	20.0	3.0	0.0
IL	Canning Town	Newham	District	15.4	DNA	DNA	DNA	84.6
IL	Roman Road (east)	Tower Hamlets	District	16.0	28.0	56.0	0.0	0.0
IL	Watney Market	Tower Hamlets	District	16.0	12.0	58.0	10.0	4.0
IL	Forest Gate	Newham	District	16.8	DNA	DNA	DNA	83.2
IL	Woolwich	Greenwich	Major	19.6	64.3	16.1	DNA	0.0
OL	Morden	Merton	District	20.4	46.3	29.6	1.9	1.8
IL	East Ham	Newham	Major	20.8	DNA	DNA	DNA	79.2
OL	Angel Edmonton	Enfield	District	24.5	44.0	29.5	2.0	0.0
OL	Edmonton Green	Enfield	District	24.5	41.0	31.0	3.5	0.0
IL	Upton Park	Newham	District	27.0	DNA	DNA	DNA	73.0
IL	Stratford	Newham	Major	27.5	DNA	DNA	DNA	72.5
OL	Harrow	Harrow	Metropolitan	29.0	34.0	35.0	2.0	0.0
OL	Palmers Green	Enfield	District	36.5	29.5	33.0	1.0	0.0
OL	Eltham	Greenwich	Major	38.0	26.0	30.0	6.0	0.0
IL	Shepherds Bush	Hammersmith and Fulham	Metropolitan	38.5	52.0	9.0	0.5	0.0
OL	Southgate	Enfield	District	39.5	36.0	23.0	1.5	0.0
IL	Chrisp Street	Tower Hamlets	District	44.0	12.0	42.0	2.0	0.0
OL	Enfield Town	Enfield	Major	48.0	28.5	22.0	1.5	0.0
OL	Wimbledon	Merton	Major	53.0	22.0	24.0	1.0	0.0
OL	Mitcham	Merton	District	54.0	8.0	36.0	2.0	0.0

Source: 2013 borough survey returns. DNA = data not available

3.4.8 Travel time to a town centre

- **Technical Annex:** Tab 4.8 Travel time to a town centre
- **Data source:** Transport for London (TfL)

Data on travel time to a town centre is sourced by the GLA, from TfL. Using the base year (2007) London transport network and a planned transport network in 2031, the data provides an estimate of the 45 minute catchment population and employment for 2011 and 2031 for each town centre. Table 3.30 lists the town centres with the highest 45 minute catchment population in 2011 based on the base year public transport network. Details of this are outlined in Tab 4.8 in the Technical Annex.

Table 3.30 Town centres and 45 minute catchment population and jobs 2011-2031 (base year transport network, ranked by 2011 catchment population)

		Total no. of population / jobs within 45 mins travel time to the centroid of town centre (Base year transport network)			
Centre	**Classification (LP2011)**	**Population 2011**	**Population 2031**	**Jobs 2011**	**Jobs 2031**
Cheapside	CAZ Frontage	3,099,055	3,997,783	3,067,677	3,581,442
Liverpool Street	CAZ Frontage	2,965,413	3,816,391	2,931,207	3,419,657
Borough High Street	CAZ Frontage	2,934,634	3,799,807	3,016,817	3,525,878
Moorgate	CAZ Frontage	2,803,688	3,644,541	2,872,550	3,347,493
London Bridge	CAZ Frontage	2,788,020	3,614,991	2,932,155	3,423,504
High Holborn/ Kingsway	CAZ Frontage	2,778,669	3,562,308	2,975,737	3,455,133
Leadenhall Market	CAZ Frontage	2,775,622	3,614,393	2,926,264	3,420,743
Charing Cross Road	CAZ Frontage	2,565,176	3,292,244	2,901,204	3,362,802
West End	International	2,552,299	3,287,331	2,888,139	3,354,808
Euston Road (part)	CAZ Frontage	2,458,398	3,151,068	2,807,693	3,248,652
Victoria Street	CAZ Frontage	2,426,887	3,066,759	2,883,988	3,324,794
Marylebone Road	CAZ Frontage	2,387,025	3,032,692	2,836,678	3,260,538
Tottenham Court Road (part)	CAZ Frontage	2,358,868	3,052,429	2,824,248	3,277,296
Angel	Major	2,260,593	2,945,862	2,699,972	3,133,340
Stockwell	District	2,251,934	2,827,902	2,731,022	3,139,760
Covent Garden/ The Strand	CAZ Frontage	2,251,036	2,905,939	2,753,043	3,192,363
Warwick Way/ Tachbrook St	CAZ Frontage	2,241,132	2,804,555	2,793,711	3,205,104
Finsbury Park	District	2,236,399	2,772,378	2,629,899	3,006,195
Camden Town	Major	2,228,589	2,845,776	2,676,099	3,075,141
Whitechapel	District	2,127,184	2,830,814	2,524,571	2,956,987

Source: Transport for London

The data also allows for comparisons between estimated population and employment catchments between 2011 and 2031, and between differences in the transport networks in the base year and 2031. For example, in Table 3.31 Column A ranks the centres with the largest relative increases in their 2031 population catchment arising from improvements to the transport network between the base year and 2031. It illustrates how improvements to the public transport network can support town centres by increasing their 45 minute catchment population. Column B shows the increase (2011-2031) in the town centre's population catchment arising from growth in population 2011-2031 and improvements to the transport network between the base year and 2031. On the same basis, Columns C and D show the corresponding calculations for the 45 minute employment catchments.

Table 3.31 Town centres and change in 45 minute catchment population and jobs 2011-2031, ranked by relative change in population catchment 2031 arising from change to transport network (TN)

Centre	Borough	Class. (LP2011)	A	B	C	D
			Change in catchment pop 2031, TN2031 relative to TN-base	Change in catchment pop 2011-2031, TN2031 relative to TN-base	Change in catchment jobs 2031, TN2031 relative to TN-base	Change in catchment jobs 2011-2031, TN2031 relative to TN-base
Canada Water	Southwark	District	2,060,486	2,121,952	2,657,562	2,679,168
Woolwich	Greenwich	Major	1,405,697	1,522,933	2,159,896	2,197,645
Whitechapel	Tower Hamlets	District	1,043,587	1,747,216	409,981	842,397
Angel	Islington	Major	962,261	1,647,529	393,964	827,333
Moorgate	City of London	CAZ F.	874,342	1,715,196	373,459	848,402
West End	Westminster/ Camden	Int.l	871,942	1,606,974	1,524,469	1,991,138
Marylebone Road	Westminster	CAZ F.	826,538	1,472,205	334,039	757,899
Canary Wharf	Tower Hamlets	Major	825,375	1,402,568	371,943	758,350
Camden Town	Camden	Major	817,137	1,434,324	330,477	729,519
Borough High Street	Southwark	CAZ F.	743,478	1,608,651	257,976	767,036

Source: Transport for London/GLA

3.4.9 Access audit

- **Survey Form:** Tab 4.9
- **Technical Annex:**
    - Tab 4.9 Access Audit
- **Data source:** 2013 TCHC borough survey returns

Access audits are designed to assess the town centre's accessibility for disabled and older people and should identify where improvements are needed including accessible pedestrian crossing facilities, dropped kerbs, blue badge parking bays, seats, accessible toilets and shop mobility schemes. The health check survey sought to find out whether access audits are undertaken in town centres. According to the responses, access audits had been undertaken in a total of 43 centres, or 32% of the total number of centres for which information was available (see Tab 4.9 in the Technical Annex). However, for just over 100 centres, the existence of an access audit is unknown.

3.5 Town Centre Initiatives

3.5.1 Town centre management and strategies

- **Survey Form:** Tab 5.1 & 5.2
- **Technical Annex:**
    - Tab 5.1 & 5.2 Town Centre Management and Strategies
- **Data source:** 2013 TCHC borough survey returns

The London Plan (2011) states that boroughs should support and encourage town centre management, partnerships and strategies including Business Improvement Districts (BID) to promote safety, security and environmental quality (see Policy 2.15D). 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.

According to the survey, only 26% of centres (for which a response was received) employ a town centre manager (compared to 39% in the 2009 survey). Just over one in four centres have a town centre strategy according to the borough responses (a proportion comparable to the 2009 survey), details of which are outlined in Tabs 5.1 and 5.2 in the Technical Annex. The majority of Metropolitan centres have town centre managers as well as town centre strategies.

3.5.2 Town Centre Tourist Attractions and Cultural Features

- **Survey Form:** Tab 5.3
- **Technical Annex:**
  - Tab 5.3 Town Centre Tourist Attractions and Cultural Features
- **Data source:** Local Data Company (LDC) and Experian GOAD data

The data on tourist attractions and cultural features is sourced by the GLA from the Local Data Company (LDC). This health check also sourced data on 'key retail attractors' in town centres from Experian. The retail trading fascia of each shop is recorded by the Experian GOAD survey. Certain trading fascias are deemed to be 'key attractors' as they will make the centre that they are located in more attractive for the shoppers to visit. The list is inevitably subjective and changes over time as brand and financial strengths vary. Indeed some of the key attractors listed a few years ago are now no longer trading and others have fallen in importance. By contrast other newer brands become key attractors as the retail mix changes. Tab 5.3 in the Technical Annex provides a detailed breakdown of the key retail attractors and tourist related features across the London town centre network.

3.5.3 Town centre related Business Improvement Districts (BID)

- **Survey Form:** Tab 5.4
- **Technical Annex:**
  - Tab 5.4 Town centre related Business Improvement District (BID)
- **Data source:** 2013 TCHC borough survey returns

In March 2014 there were an estimated 38 BIDs in London. There is an estimated total of 28 town centres with at least one active Business Improvement District (BID) (see Table 3.32 below). In the next six months, three BIDs are expected to go for ballot, Clapham, South Bank and Bermondsey. According to the survey responses at least twelve centres have supplementary business rates, including the West End, Ilford, Wimbledon, Angel, Ealing, Camden Town, Hammersmith, Streatham, Leytonstone, High Holborn/Kingsway, Tottenham Court Road (part) and Lower Marsh/The Cut.

Table 3.32 Town centres with Business Improvement Districts (existing)

Centre	Borough	Classification (LP2011)
West End	Westminster/Camden	International
Croydon	Croydon	Metropolitan
Ealing	Ealing	Metropolitan
Kingston	Kingston upon Thames	Metropolitan
Ilford	Redbridge	Metropolitan
Sutton	Sutton	Metropolitan
Bexleyheath	Bexley	Major
Orpington	Bromley	Major
Camden Town	Camden	Major
Hammersmith	Hammersmith and Fulham	Major
Angel	Islington	Major
Streatham	Lambeth	Major
Wimbledon	Merton	Major
Queensway/Westbourne Grove	Westminster/K&C	Major
New Addington	Croydon	District
Twickenham	Richmond-upon-Thames	District
Leytonstone	Waltham Forest	District
Praed Street/Paddington	Westminster	District
High Holborn/Kingsway	Camden	CAZ Frontage
Tottenham Court Road (part)	Camden	CAZ Frontage
Lower Marsh/The Cut	Lambeth	CAZ Frontage
Borough High Street	Southwark	CAZ Frontage
London Bridge	Southwark	CAZ Frontage
Baker Street (part)	Westminster	CAZ Frontage
Covent Garden/Strand	Westminster	CAZ Frontage
Marylebone Road	Westminster	CAZ Frontage
Victoria Street	Westminster	CAZ Frontage
Charring Cross Road (part)	Westminster/Camden	CAZ Frontage

Source: GLA/London boroughs

3.6 Accidents and Security

3.6.1 Accidents

- **Technical Annex:** Tab 6.1 Accidents
- **Data source:** Transport for London

The GLA collected accident data (2011) from Transport for London, the latest available complete calendar year of data. The accident data is based on the number of collisions by various travel modes, including walking, cycling, public transport and private transport. Over the whole town centre network there were 9,944 collisions recorded in 2011. Almost half (46%) of these collisions involved private vehicles, 26% pedestrians, 18% cyclists and 10% public vehicles. Table 3.33 shows town centres with the highest number of collisions in 2011. Most collisions occurred in central London, as well as Elephant and Castle and some Metropolitan and Major centres.

Table 3.33 Town centres with the largest number of collisions, 2011

Centre	Classification (LP 2011)	Pedestrian	Pedal cycle	Public vehicle	Private vehicle	Total No. Collisions
West End	International	189	84	49	105	427
Marylebone Road	CAZ Frontage	45	37	22	102	206
Covent Garden	CAZ Frontage	71	39	32	51	193
The Strand	CAZ Frontage	71	39	32	51	193
Covent Garden/ The Strand	CAZ Frontage	71	39	32	51	193
Elephant and Castle	District	33	61	16	73	183
Ilford	Metropolitan	26	7	11	101	145
Nags Head	Major	20	28	27	63	138
High Holborn/ Kingsway	CAZ Frontage	31	48	16	42	137
Croydon	Metropolitan	25	11	23	77	136
Lewisham	Major	32	21	20	63	136
Wood Green	Metropolitan	32	10	29	62	133
Shepherds Bush	Metropolitan	33	30	13	52	128
Camden Town	Major	35	31	8	50	124
Edgware Road South	CAZ Frontage	32	15	20	53	120
Brixton	Major	30	23	19	43	115
Peckham	Major	28	22	23	36	109
Streatham	Major	20	5	15	67	107
Tooting	Major	28	27	10	39	104
Clapham High Street	District	25	27	7	44	103

Source: Transport for London

3.6.2 Crime and anti-social behaviour

- **Technical Annex:** Tab 6.2 Crime and anti-social behaviour incidents
- **Data source:** 'data.police.uk' website

Crime data is sourced by the GLA from Crime and Policing in England, Wales and Northern Ireland for the year of 2012, based on different types of crime/incident, including anti-social behaviour, burglary, criminal damage, drugs, public disorder, robbery, shoplifting, vehicle crime and violent crime. In 2012, a total of 433,827 crimes/incidents were recorded in London's town centres. Anti-social behaviour and 'other theft'[28] are the most common types of incident across the town centre network, each accounting for 27% of recorded incidents (see Table 3.34). The hotspots of crimes and incidents of anti-social behaviour are primarily concentrated in central London, particularly the West End, Covent Garden/The Strand and Camden Town. District centres appear to have the least recorded number of incidents. Tab 6.2 of the Technical Annex provides a full breakdown of the dataset.

Table 3.34. Crimes and anti-social behaviour incidents in London's town centres 2012

Crime/Incident	No.	%.
Anti-social behaviour	118,968	27%
Other theft	115,086	27%
Violent crime	46,093	11%
Shoplifting	28,199	7%
Burglary	23,097	5%
Vehicle crime	21,635	5%
Drugs	20,622	5%
Criminal damage and arson	17,338	4%
Other crime	15,629	4%
Robbery	13,904	3%
Public disorder and weapons	13,256	3%
Total	**433,827**	**100%**

Source: data.police.uk

[28] Other theft includes: Blackmail; Theft in a Dwelling other than from an Automatic Machine or Meter; Theft by an Employee; Theft of Mail; Dishonest use of Electricity; Theft from an Automatic Machine or Meter; Making Off Without Payment.

3.7 Environment

The quality of the environment is an essential component of successful and healthy town centres. The 2013 Town Centre Health check focuses on matters relating to air quality, access to open spaces, conservation and heritage assets. Matters relating to the quality of the pedestrian environment should be considered in local town centre health checks.

3.7.1 Air quality

- **Technical Annex:**
  - Tab 7.1 Air quality
- **Data source:** London Atmospheric Emissions Inventory 2010[29]

The health check includes air quality data in the analysis of town centre environment across London's town centre network. The data was derived from the GLA's London Atmospheric Emissions Inventory (LAEI) 2010, which is a database with information on emissions from all sources of air pollutants in the Greater London area. The emissions data is modelled using observed activity data of the various emission sources (such as traffic flows and speeds and fuel usage). These pollutant emissions are then run through a model to calculate the average concentrations of those pollutants in the air in a given year. For the 'base year' (in this case 2010) meteorological data for 2010 is applied to the emissions along with information on building height and other determinants of concentrations. The modelled concentrations are then calibrated with monitored air quality data and where there is a difference a correction factor is applied. Future year emissions are run through the model using the base year meteorological data and applying the relevant correction factors. The dispersion model that is used gives a concentration value at every 20 metre point. The air quality data for nitrogen dioxide (NO2), PM10 and PM2.5 is available for all centres in the town centre network and listed in Tab 7.1 of the Technical Annex, with both the median and mean values for the years of 2010, 2012, 2015 and 2020.

According to the data, the highest mean NO2 and PM10 concentrations are found in Edgware Road South, the Euston Road and other CAZ Frontages and also in the West End, Knightsbridge and inner London District and Major centres. Outer London centres record the lowest relative concentrations of NO2 and PM10 with Harold Hill, Northwood, Upminster and New Addintgon among the lowest of all centres. The lowest mean NO2 and PM10 concentrations in the Metropolitan centres are found in Uxbridge and Sutton, and among the Major centres in Orpington and Edgware.

[29] http://data.london.gov.uk/datastore/package/london-atmospheric-emissions-inventory-2010

Concentrations of mean NO2 in town centres across London are projected to fall by 16% to 32% over the period from 2012 to 2020. Concentrations of mean PM10 are projected to fall by 2% to 9% over the same period. For both measures the largest percentage decreases are projected in central and inner London centres.

3.7.2 Access to open spaces

- **Technical Annex:**
    - Tab 7.2a Access to open space – GIGL
    - Tab 7.2b Access to open space – borough data
- **Data source:** GIGL and boroughs

Town centre data on open spaces has been sourced primarily from GIGL[30] Open Space data. The GIGL data is available for all centres in London's town centre network and includes the following analysis:

(a) The area of open space (in hectares) within each town centre boundary broken down by category of open space;
(b) The percentage by area of the town centre that lies within an area of open space deficiency
(c) The number of open spaces (by number and category of open space) that are accessible to the town centre (using the distance criteria defined in the London Plan – see Table 3.35).

Table 3.35 Distance criteria from the town centre, by type of park

Open space categorization	Size guideline	Distance from a town centre
Regional Parks	400 hectares	3.2 to 8 km
Metropolitan Parks	60 hectares	3.2 km
District Parks	20 hectares	1.2 km
Local parks and open spaces	2 hectares	400m
Small open spaces	Under 2 hectares	Less than 400m
Pocket parks	Under 0.4 hectares	Less than 400m
Linear open spaces	Variable	Wherever feasible

(Source: London Plan Table 7.2)

[30] Greenspace Information for Greater London

Table 3.36 lists the ten town centres with the highest quantity of open space. Greenwich West and Woolwich lead the ranking with the largest areas of surveyed open space within the town centre boundary with 31.4 and 28.8 hectares respectively. Fifty four of the 217 London Plan centres contain more than one hectare of open space. Fifty eight of the London Plan centres (27%) recorded no surveyed open space. Across all town centres 47% of the open space within town centre boundaries is recorded as 'other open space' (ie does not form part of the London Plan hierarchy in Table 3.35), 20% linear open spaces, 16% local parks and 10% small open spaces.

Table 3.37 illustrates those town centres accessible to two Regional Parks and at least 4 Metropolitan Parks (access defined by the distance criteria in Table 3.35). Just over half of the London Plan town centres are accessible to at least one Regional Park, 82% to at least one Metropolitan Park, 76% to at least one District Park and 90% to at least one local, small or pocket park. Only one centre in the network (Harrow Road) was recorded as having no accessibility to open spaces of any category in the open space hierarchy. Full details of the town centre access to open space data including open space deficiencies is contained in the Technical Annex, Tab 7.2a.

Table 3.36 Town centres with the highest quantity of open space[1] (rank, hectares)

Centre	Classification (LP2011)	All Open Space	Metropol. Parks	District Parks	Local Parks	Small Open Spaces	Pocket Parks	Linear Open Spaces	Other open space
Greenwich West	District	31.4	3.5	0.0	1.6	0.9	0.0	15.6	9.9
Woolwich	Major	28.8	0.0	0.0	1.7	1.0	0.7	21.4	4.0
Bromley	Metropolitan	12.9	0.0	0.0	5.7	0.0	0.4	0.0	6.9
Brentford	District	12.0	0.0	0.0	0.0	2.0	0.1	9.2	0.7
Ealing	Metropolitan	11.9	0.0	5.8	0.0	3.0	0.0	0.0	3.1
Canary Wharf	Major	10.5	0.0	0.0	0.0	1.1	1.3	0.0	8.1
Elephant and Castle	District	9.1	0.0	0.0	6.2	0.0	0.6	0.0	2.3
Kingston	Metropolitan	8.7	0.0	0.0	1.1	0.6	0.0	5.5	1.6
Wembley	Major	8.6	0.0	0.0	0.0	0.0	0.0	0.0	8.6
Upminster	District	7.5	0.0	0.0	6.9	0.0	0.0	0.0	0.6

Note 1: Open Space includes all surveyed open space including public and private spaces

Source: GIGL

Table 3.37 Number of open spaces accessible to town centres (ranked by access to open space hierarchy)

Centre	Classification (LP2011)	Regional Parks	Metropolitan Parks	District Parks	Local, Small and Pocket Parks
Leytonstone	District	2	5	2	5
South Woodford	District	2	5	2	3
Wandsworth	Major	2	5	2	2
Kings Road (west)	District	2	5	1	12
Leyton	District	2	5	1	4
Fulham	Major	2	5	0	3
Wanstead	District	2	4	4	5
East Sheen	District	2	4	4	2
Kings Road East	Major	2	4	2	15
Kingston	Metropolitan	2	4	2	6
Teddington	District	2	4	2	5
Clapham Junction	Major	2	4	2	4
Twickenham	District	2	4	1	10
Hammersmith	Major	2	4	1	6
Brentford	District	2	4	1	5
Stratford	Major	2	4	1	1
Fulham Road (west)	District	2	4	0	10

Source: GIGL

3.7.3 Conservation areas and heritage assets

- **Technical Annex:**
    - Tab 7.3 & 7.4 Conservation areas/Heritage assets
- **Data source:** English Heritage

The data for conservation areas and heritage assets are sourced from English Heritage. The GLA used town centre boundary polygons (see Chapter 2) to extract data for individual centres across the London Town Centre Network.

According to the analysis (see Tab 7.3 & 7.4 in the Technical Annex), a total of 133 town centres contain designated conservation areas (either wholly or in part[31]). These include the two International centres, 95% of the CAZ frontages, 75% of the Metropolitan centres, 80% of Major centres and 51% of District centres. Four centres are entirely within a conservation area, including Hampstead, Muswell Hill, Blackheath

[31] Minimum 0.1% threshold applied

and Cheam Village. Kensington High Street is among ten centres with at least one Registered Park partly within its town centre boundary. Nine centres have scheduled monuments within the town centre boundary, primarily in Greenwich West, CAZ frontages in the City of London and selected Metropolitan centres.

The definition of listed buildings provided by English Heritage refers to buildings with various grades to give an indication of the building's relative importance. Grade I buildings are of exceptional interest. Grade II* are particularly important buildings of more than special interest. Grade II are of special interest.

Table 3.38 illustrates those centres with the largest number of listed buildings including the West End, Richmond and Greenwich West. There are an estimated 47 Grade I listed buildings spread across 19 town centres in the town centre network, including Greenwich West (9), West End (8), Marylebone Road (4), Croydon (4), Kingston (3) Ealing (2) Fleet Street (2), Bromley (2), Mitcham (2), Canary Wharf (2), Kings Road East (1) Deptford (1) Cheapside (1) Ruislip (1), Leadenhall Market (1), Rainham (1), Woolwich (1), Tooting (1) and Upminster (1). Tabs 7.3 and 7.4 in the Technical Annex provides a detailed breakdown of the number of listed buildings in the town centre network.

Table 3.38 Town centres with the largest number of listed buildings (estimates)

Centre	Classification (LP 2011)	Grade I listed buildings (unit)	Grade II listed buildings (unit)	Grade II* listed buildings (unit)	Grand Total (unit)
West End	International	8	552	35	595
Richmond	Major	0	101	10	111
Greenwich West	District	9	80	1	90
Angel	Major	0	67	1	68
Hampstead	District	0	58	0	58
Kingston	Metropolitan	3	47	6	56
Uxbridge	Metropolitan	0	48	4	52
Fleet Street	CAZ Frontage	2	30	8	40
Woolwich	Major	1	33	5	39
Twickenham	District	0	33	2	35
Covent Garden/The Strand	CAZ Frontage	0	27	5	32
Elephant and Castle	District	0	31	0	31
Croydon	Metropolitan	4	21	1	26
Kings Road East	Major	1	20	4	25
Brentford	District	0	22	3	25
Bromley	Metropolitan	2	21	1	24
Clapham High Street	District	0	20	3	23
Borough High Street	CAZ Frontage	0	23	0	23
Ealing	Metropolitan	2	17	2	21
Camden Town	Major	0	18	3	21

Source: English Heritage/GLA

4 Reviewing the London Town Centre Network

This chapter draws on the main findings of the London town centre health check summarized in Chapter 3 and outlines the implications for the review of the Town Centre Network in the London Plan (Map 2.6 and Annex 2). This review has informed the draft Further Alterations to the London Plan (FALP) published in January 2014.

In the 2011 London Plan (Annex 2), town centres are classified according to their existing role and function in the Strategic Town Centre Network, based upon evidence from the 2009 town centre health check. For the draft Further Alterations to the London Plan (FALP), the classifications of town centres have been updated in light of up to date evidence in the GLA Consumer Expenditure and Comparison Goods Retail Floorspace Need Study, this 2013 Town Centre Health Check and its associated Technical Annex.

The review of the strategic Town Centre Network for the draft Further Alterations to the London Plan (FALP) adopts the same methodology as in the 2009 Town Centre Health Check. It includes an update of the London Plan town centre classifications, night time economy clusters and office guidelines.

4.1 Update of the town centre classifications

To review the classifications, nine core indicators have been identified (see Table 4.1). The indicators are based predominantly upon those used to update the town centre network in previous reviews of the Plan. Health check data on each of these indicators has been sourced by the GLA for the town centres in the London Plan, including CAZ frontages, and potential new centres. Using this data, the current role and function of each town centre in the network, plus potential new centres, is tested against a set of defined thresholds set out in Table 4.1.

<u>Current thresholds relative to the 2009 review</u>

There are minor changes to the 2013 thresholds relative to the 2009 review which informed the 2011 Plan (shown in parentheses and red italics in Table 4.1). The main changes to the criteria include the removal of those relating to estimated town centre turnover and modal share owing to the absence of robust data. The main threshold changes relate to rents which have been revised downwards to reflect the fact that so many centres were falling below the 2009 thresholds and it was deemed inappropriate to maintain the 2009 thresholds for these indicators for the current review. The main criteria and thresholds for total town centre floorspace, retail, leisure and office floorspace and public transport accessibility remain unchanged from the 2009 review. In this respect, the 2011 London Plan contains a minor anomaly since the specified thresholds in paragraph A2.3 of the Plan relate to "retail, leisure and service" floorspace and not just "retail" so a minor change to the wording in this paragraph is proposed in the draft FALP for factual correctness.

Table 4.1 Town Centre classifications: core indicators and broad thresholds

	Town centre classifications			
Core Indicators:	International	Metropolitan	Major	District
1. Total town centre floorspace (retail, service and leisure) sq.m	240,000 +	100,000 - 500,000	50,000 - 100,000	10,000 - 50,000
2. Total retail floorspace (sq.m)	200,000 +	85,000 - 500,000	35,000 - 85,000	6,000 - 35,000
3. Total comparison goods retail floorspace (sq.m)	180,000 +	65,000 - 500,000	20,000 - 65,000	4,000 - 20,000
4. Comparison goods retail as a % of total retail floorspace	85% - 100%	75% - 100%	60% - 80%	33% - 60%
5. Convenience goods retail as a % of total retail floorspace	0% - 10%	5% - 15%	5% - 30%	10% - 60%
6. Leisure services (sq.m)	250,000 +	20,000 +	10,000 +	2,000 - 10,000
7. Office floorspace (by 31 March 2012) (sq.m)	10,000,000+	70,000 - 10,000,000	40,000 - 70,000	2,000 - 40,000
8. Zone A Rentals 2012 (£/sqm)	4,000+	1,000 - 4,000 *(1,500-4,000)*	700 - 1,500 *(1,000-1,500)*	400 - 1,000 *(500-1,000)*
9. Public Transport Accessibility Level (PTAL) – at centroid point	6	5 - 6	5 - 6	3 - 5

Note: 2009 thresholds are shown in parentheses and red italcs, where different from 2013 thresholds

Review of the town centre classifications:

Most of the current town centre classifications in the London Plan have been confirmed by the analysis (i.e. no changes proposed). However, the indicators suggest that the following changes to the London Town Centre Network should be identified in the draft FALP:

- Stratford, identified in this health check as a new Metropolitan centre;
- King's Cross / St Pancras is identified as a new CAZ Frontage.

- Three town centres (Highams Park, Lavender Hill/Queenstown Road and Earlsfield) identified with potential for promotion to the 'District centre' status.

- Three town centres (Plumstead, Elm Park, Lee Green) are identified for de-designation due to several of the indicators falling significantly below the thresholds for a District centre.

- Wembley Park is now confirmed as District centre - no longer 'subject to monitoring'.

- Three town centres (North Harrow, Harold Hill and Downham) are identified as being borderline cases, where several indicators are marginally below the relevant thresholds. These centres are still identified as District centres but 'subject to ongoing monitoring'.

- Croydon is identified as a centre for regeneration

The review recommendations are summarized in Table 4.2 and illustrated in Figure 4.1. Recommended revisions to the London Plan town centre network (Annex 2) are contained in Annex 4 to this report.

Table 4 2. Updating the existing role and function of town centres

Centre	**Borough**	**LP 2011 classification**	**Recommended classification**	**Comments**
Stratford	Newham	Major	Metropolitan	With implementation of Stratford City, the location is functioning at 'Metropolitan' scale in terms of all nine indicators in the review including town centre floorspace, rents and PTAL. The potential to improve integration with original town centre should continue to be explored.
Croydon	Croydon	Metropolitan	Metropolitan (with potential for regeneration)	Centre with significant potential for regeneration with proposals submitted for the redevelopment of the Whitgift centre by Hammerson and Westfield.

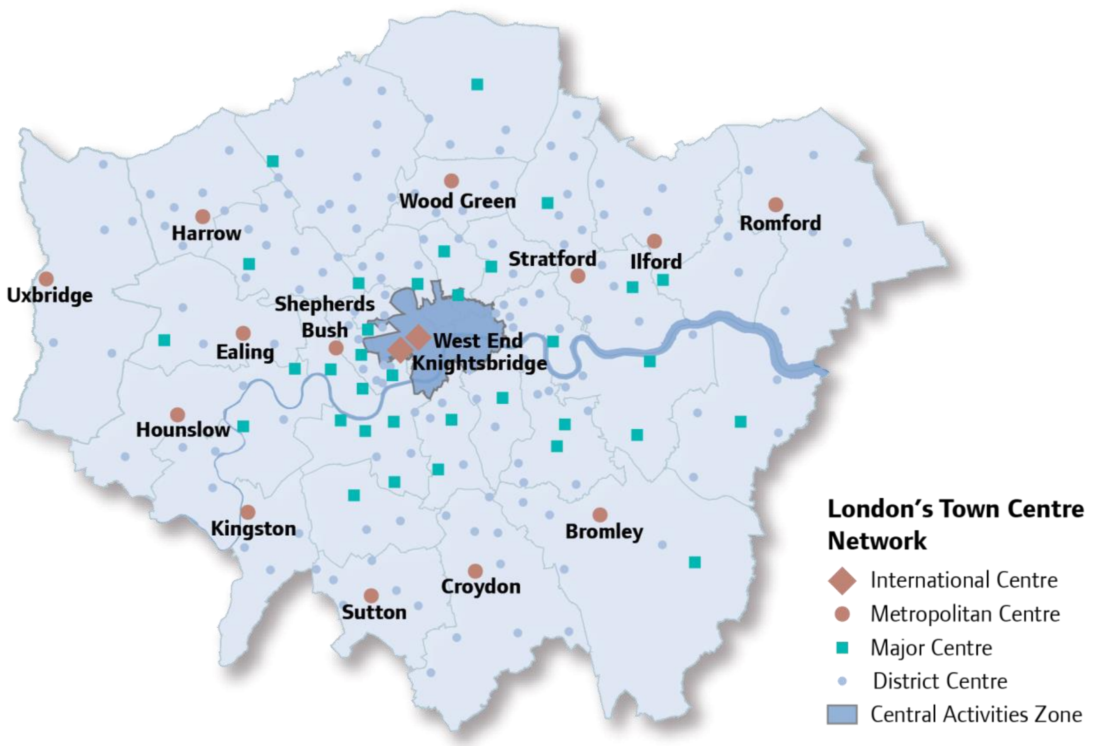
Centre	Borough	LP 2011 classification	Recommended classification	Comments
King's Cross / St Pancras	Camden	Unclassified	CAZ Frontage	Kings Cross is identified in the London Plan as a potential CAZ Frontage. Since the implementation of retail and associated floorspace at King's Cross/St Pancras, the data suggests that this location can now be confirmed as a CAZ Frontage.
Highams Park	Waltham Forest	Unclassified	District	Data sourced from the Borough supports designation as new District centre. Data is within range for a District centre on total town centre floorspace and total retail floorspace.
Lavender Hill / Queenstown Road	Lambeth/ Wandsworth	Unclassified	District	Data is within range for a District centre on total town centre floorspace, retail and leisure floorspace and proportion of comparison and convenience retail floorspace. Potential to designate as a new District centre.
Earlsfield	Wandsworth	Unclassified	District	Data is within threshold range for a District centre on total town centre floorspace and only marginally below threshold on retail floorspace. The centre is supported by a strong leisure floorspace offer. Overall, the centre is considered to be functioning as a new District centre.

Centre	Borough	LP 2011 classification	Recommended classification	Comments
Plumstead	Greenwich	District*	Unclassified	Data is significantly below thresholds for a District centre on several key indicators including total town centre floorspace, total retail floorspace, comparison retail and leisure floorspace. The evidence suggests that the centre should be de-designated.
Elm Park	Havering	District*	Unclassified	Data is significantly below thresholds for a District centre on several key indicators including total town centre floorspace, total retail floorspace, comparison retail and leisure floorspace. The evidence suggests that the centre should be de-designated.
Lee Green	Lewisham	District*	Unclassified	Data is significantly below thresholds for a District centre on several key indicators including total town centre floorspace, total retail floorspace, comparison retail (including as a % of total retail) and leisure floorspace. The evidence suggests that the centre should be de-designated.
Wembley Park	Brent	District*	District	Indicators for total retail (particularly convenience) and leisure floorspace suggest that the centre can now be confirmed in draft FALP as a District centre - no longer 'subject to monitoring'. The relationship between this centre and neighbouring Wembley (Major centre)

Centre	Borough	LP 2011 classification	Recommended classification	Comments
				should be monitored in light of recent and emerging development proposals for the area.
North Harrow	Harrow	District	District*	Data is below thresholds for a District centre on several key indicators including total town centre floorspace, total retail floorspace, comparison retail and leisure floorspace. Status as District centre should now subject to monitoring (ie "District*").
Harold Hill	Havering	District	District*	Data is marginally below thresholds for a District centre on several key indicators including total town centre floorspace, comparison retail and leisure floorspace and PTAL. It is however within the threshold range for total retail floorspace. Having regard to these indicators its status as a District centre should now be subject to monitoring (ie "District*").
Downham	Lewisham	District	District*	Data is below thresholds for a District centre on several key indicators including total town centre floorspace, comparison retail and leisure floorspace and PTAL. It is marginally below threshold on total retail floorspace. The centre's status as a District centre should now be subject to monitoring (ie "District*").

* Indicates centre is a borderline case and status is 'subject to ongoing monitoring'

Figure 4.1. Review of the London Plan town centre network classifications



4.2 Update of the Night time economy clusters

Town centres that have specialist roles supporting strategic clusters of night time economic activities of more than local significance are identified in Annex 2 of the London Plan. For the FALP, only one change to the identified clusters is recommended. **Gants Hill** in Redbridge has been put forward by the borough as meriting designation as 'NT3', that is, a night time economy cluster of 'more than local importance'. This designation is supported in recognition of the level of night time economy floorspace in the centre (including pubs, bars, clubs and restaurants) and that the centre has recently been awarded Purple Flag status through the Association of Town and City Management (ATCM) in recognition of its evening economy offer.

4.3 Update of the Office guidelines

London Plan Annex 2 also contains office guidelines (Policy 4.2) for town centres. These provide a broad indication of the approach to office development, distinguishing between centres where:

A. speculative office development could be promoted on the most efficient and accessible sites in the context of wider schemes to enhance the environment and offer of the centre as a commercial location. This might entail some long-term net loss of overall office stock through change of use of provision on less attractive sites.

B. 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.

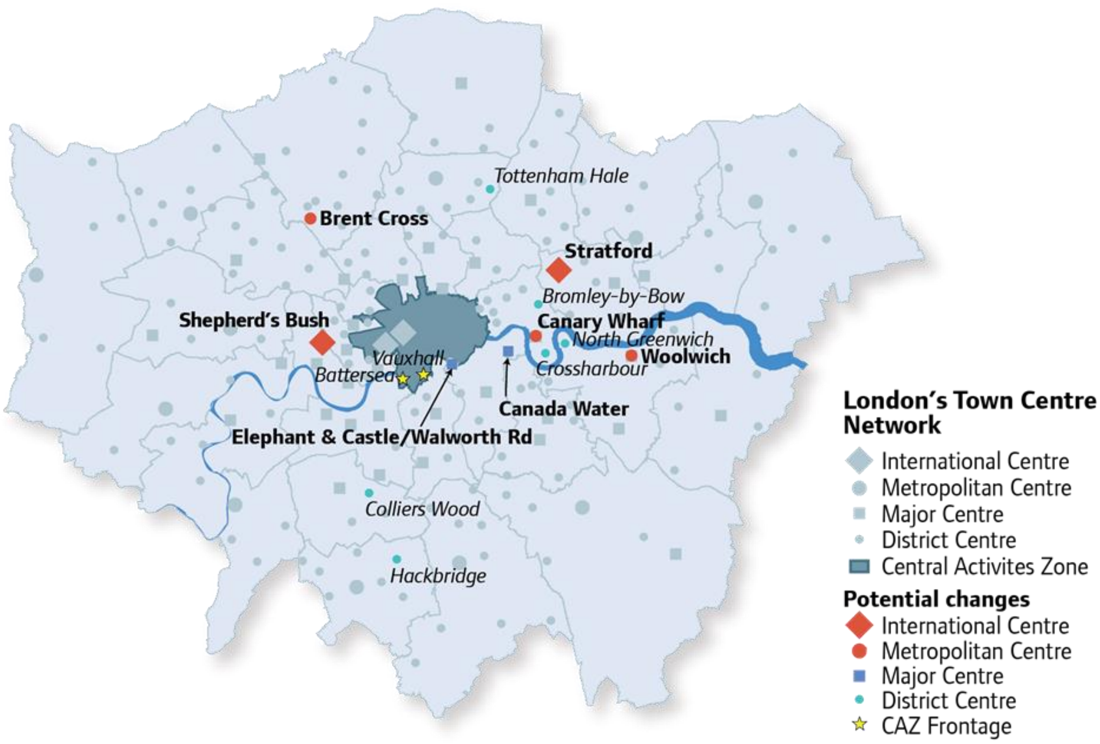
Current London Plan office guidelines are based upon research in the London Office Policy Review 2009. These guidelines were updated through more recent research in the London Office Policy Review 2012. The 2012 review suggests that in Bromley and Kingston there is perhaps now less potential for speculative office development than was considered at the previous 2009 review, but that offices as part of mixed use development may still be viable in these locations. Ealing is re-graded to be appropriate for a mix of speculative and mixed use office development potential. The 2012 review suggests that for a number of other centres including Acton, Dalston, Finsbury Park, Kilburn, Mare Street, Nags Head, Orpington, Sidcup, Stoke Newington, Walthamstow, Wandsworth, Wood Green and Woolwich, there is perhaps now less potential for significant new office floorspace even as part of mixed use development. It is recommended that amendments to the classifications of these centres should be taken forward through the FALP.

4.4 Potential future changes to the network over the Plan period

Stratford and **Shepherd's Bush** are considered to have future potential to attain International centre status in the London Plan town centre network in recognition of their global renown and wide range of high quality and high order comparison goods retailing and specialist offers. Both centres have excellent levels of public transport accessibility (PTAL 6). Stratford is already recognised as one of Europe's largest urban shopping centres and stands at the gateway to the Queen Elizabeth Olympic Park, itself an iconic global visitor destination. Westfield London at Shepherd's Bush is likewise an internationally recognised centre, with plans for further expansion and set to become an even stronger magnet for overseas visitors to London. It is already recognised as one of the top five tourist destinations in London[32], with its luxury retail precinct and overall quality of offer enabling the centre to compete on an international level.

Colliers Wood in Merton is recognised as having future potential to become a District centre in the town centre network. This should be subject to the genuine integration of a number of edge of centre sites to form a coherent centre. **Kings Cross** is removed from the list of potential centres as it is now considered to be functioning as a CAZ Frontage in the town centre network (see section 4.1). The recommended potential future changes to the town centre network, including the potential centres identified in the 2011 London Plan, are illustrated in Figure 4.2.

Figure 4.2 Recommended potential future changes to the town centre network



[32] Estates Gazette Retail Supplement Winter 2013

5 Conclusions

This London-wide strategic town centre health check spans a period (2007-2012) which experienced a tough economic climate and the emergence of longer-term structural challenges arising from reduced levels of growth in consumer expenditure and the expansion of internet/multi-channel retailing. The evidence in this health check suggests that despite rising levels of vacancy 2007-2012, London's town centres are beginning to adapt to these challenges with a pronounced shift towards more-leisure oriented functions, particularly cafes and restaurants, alongside retailing, offices, housing and civic and community functions. The challenge going forward will be to facilitate their evolution, diversification and intensification (including for higher density housing), reduce vacancy rates, improve quality and accessibility, and realise their potential as thriving, liveable centres at the hub of their communities.

Within the retail sector, the health check recorded reductions in comparison goods floorspace in the majority of centres and where growth in comparison goods floorspace has occurred, it has typically been focussed on the larger centres in inner and outer London, notably at Shepherd's Bush, Stratford and Kingston. In overall terms, convenience retail floorspace in town centres continued to experience strong growth, supported by demographic and consumer expenditure trends. Both vacant floorspace and the vacancy rate in town centres have risen since 2007 reflecting the challenging economic context but the vacancy rate in 2012/13 for London remains well below that for the country as a whole.

Growth in certain uses highlighted in this health check, for example betting shops (+23%) and hot food takeaways (+8%), may give rise to issues of their impact on town centre vitality, viability, diversity and quality. This is a matter being considered for policy amendments through draft Further Alterations to the London Plan. Similarly, the reduction in the number of public houses in town centres, reflecting the decline across London more generally, may give rise to concerns noting the important role that these facilities play in the social fabric of communities.

Over the period 2007 to 2012, a greater number of town centres recorded net reductions in office floorspace than those with net increases and there was an overall net loss of office floorspace of 16,000 sq.m. Emerging results from office to residential permitted development prior approval monitoring indicates that at least 400,000 sq.m of office floorspace is potentially affected with approximately 60% of this space in town centres and a further 16% in edge of centre locations.

The health check reveals how town centres and edge of town centre locations have been an important source of housing capacity over the period 2008-2013 yielding over 40,000 net completions or more than 8,000 per annum. At the end of March 2013, developments under construction or with permission and not started, could yield a further 38,400 units in town centres and a further 37,200 in edge of centre locations. These totals could be supplemented further by development plan allocations and other 'potential' housing sites. The GLA has commissioned research into how the full potential of town centres to accommodate housing can be realised in ways that supports town centre vitality and viability, contributes to London's housing need and supports a high quality environment.

London's town centre network is dynamic and this is reflected in the 2013 Town Centre Health Check. The most significant change since the last health check in 2009 is at Stratford where the implementation and integration of Westfield at Stratford City has raised its status to a Metropolitan centre. In the future, both Stratford and Shepherd's Bush are considered to have potential to attain International centre status in the London Plan town centre network in recognition of their global renown and wide range of high quality and high order comparison goods retailing and specialist offers.

King's Cross / St Pancras is identified as a new CAZ Frontage. Three town centres (Highams Park, Lavender Hill/Queenstown Road, Earlsfield) are identified as having potential for promotion to the 'District centre' status, while three other centres (Plumstead, Elm Park, Lee Green) are identified for de-designation. Three centres (North Harrow, Harold Hill and Downham) are identified as District centres but 'subject to ongoing monitoring'. Development in the pipeline should yield still further changes in the network over time. The most significant of these include Brent Cross and Canary Wharf which, subject to planning approvals and implementation of proposals, could see these locations functioning as Metropolitan centres in the network.

Improvements to the methodology have been made in the 2013 London Town Centre Health Check relative to previous health checks, in terms of the efficiency in data collection and analysis, and filing the data gaps. However, there still remain gaps and further potential for efficiency gains in future health checks, including sourcing more robust data for office floorspace, employment levels and turnover in town centres.

The GLA would like to extend thanks to all London boroughs that have contributed data and resources to this health check which will be used as part of the evidence base for the Further Alterations to the London Plan. It can be complemented by more local evidence base data gathered for the preparation of local development plan documents. It is also hoped that the data will inform more detailed local strategies to promote healthy, resilient and thriving town centres across London.

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Chinese
如果需要您母語版本的此文件，
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Vietnamese
Nếu bạn muốn có văn bản tài liệu này bằng ngôn ngữ của mình, hãy liên hệ theo số điện thoại hoặc địa chỉ dưới đây.

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

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

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

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

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

Urdu
اگر آپ اِس دستاویز کی نقل اپنی زبان میں چاهتے هیں، تو براہ کرم نیچے دئے گئے نمبر پر فون کریں یا دیئے گئے پتے پر رابطه 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.