



City of Westminster

Local Centre 5: Kilburn Park Road

Shopping Area Health Check Survey



**Summer
2007**

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(i) Background

(ii) Purpose of the Study

This study will help inform the Council's Local Development Framework (LDF) process, including the formation of the Council's Core Strategy. The last full Health Check Surveys were carried out in 2002, updating 1997 surveys, and included detailed analysis of Westminster's 39 Local Shopping Centres.

Planning Policy Statement (PPS) 6: Planning for Town Centres, states that Local Authorities should measure the vitality, viability and health of their town centres, recording how this changes over time.

The London Plan (2004) aims to enhance London's town centre network by enhancing access to goods and services, and to strengthen the wider role of town centres in London.

Based on the advice in PPS 6 and the London Plan, shopping centres in Westminster have been designated on the basis of their size, catchment, character and function.

Local centres are small shopping centres, usually with convenience goods shops, local service uses, restaurants and pubs, mainly providing facilities for people living or working nearby, which the City Council wishes to safeguard in accordance with national guidance.

Westminster's UDP policy SS7 seeks to protect the designated Local Shopping Centres for the service they provide to residents, visitors and workers, and because they reduce the need to travel.

Planning Policy Statement 6: Planning for Town Centres, DCLG (2005)

London Plan, GLA (2004)

Westminster City Council Unitary Development Plan (2007)

(iii) Health Checks in Westminster

The City of Westminster is divided into two zones in terms of retail policy, the Central Activities Zone (CAZ) and CAZ Frontages; and areas outside the CAZ. The CAZ contains the two international shopping centres in London, the West End and Knightsbridge, as well as numerous small parades and individual shops. Outside the CAZ there are 7 District Centres and 39 Local Centres designated in the UDP.

In 2007, the District and Local Centres health check reports were all updated, as were 17 shopping areas inside the CAZ.

(iv) Methodology

The Council has considered the indicators of vitality and viability recommended in PPS6. It is evident that a large number of shopping areas in Westminster do not function as town centres in the way suggested by PPS6. For example, accessibility by public transport is considered to be excellent for all the larger shopping areas, and Local Centres are accessible for people to walk to. Few customers need to drive to centres in Westminster, and the availability of car parking is not always

important. The night-time activity in many areas in Westminster is also much greater than an average shopping centre. The indicators recommended in PPS6 have therefore been adapted for the Westminster situation. The information collated and analysed in Westminster's Local Centre health checks surveys is described below;

Land Use

(1) Diversity of town centre uses

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

Accessibility

(2) Pedestrian flows (footfall): measure the vitality of the Local Centres, and were conducted on comparable days of the week. Each Local Centre is compared to the average for all of the Local Centres combined;

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

Environment

(4) State of the town centre environmental quality assessment: includes a subjective assessment of problems such as security, air pollution, noise, clutter, litter and graffiti, as well as positive factors such as trees, landscaping and open spaces. Each centre is assessed as per the Attractions table 5, and the Daytime Amenity table 6 in the 2002 Health Check Survey. A comparison is made between the 1997 and 2007 surveys.

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

(6) Relative performance of the centre: measures the performance of the centre compared to the Westminster Local Centre average in terms of land use, attractiveness, and daytime amenity. Graphs compare the performance of centres relative to one another, and consider the centre's strengths, weaknesses, opportunities and threats, which are highlighted in a SWOT analysis diagram.

(7) The potential capacity for growth or change of centres in the network: opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development. Based on levels of demand, assessments are made to ascertain how much capacity each Local Centre has to accommodate retail growth, looking at retail related planning applications and appeal decisions in and around the Local Centres. Consideration is given to whether the current Local Centre boundaries and Core and Secondary Frontage designations are still valid. Consideration is also be given to whether the Council's UDP policy SS7 is still valid to enable the Council to enhance the vitality and viability of the Local Centres;

(8) Summary of health check:

Contains a comparison of the relative performance of each centre, and summary of land use assessment as per the 2002 Health Check reports. General comments and analysis of each centre are included, along with any problems/issues; with reference to night-time activity, comparison with other centres inside Westminster and London-wide – looking at competition from nearby shopping centres, including those outside the borough. A classification as ‘in decline’, ‘neutral’, or ‘healthy’; plus whether things have improved, deteriorated, or remained the same since 2002 (see 2002 Health Checks, Tables 6 and 7) is also included. Where a Local Centre is considered to be “in decline” or “neutral”, consideration is made on ways to improve the vitality and viability of the Centre.

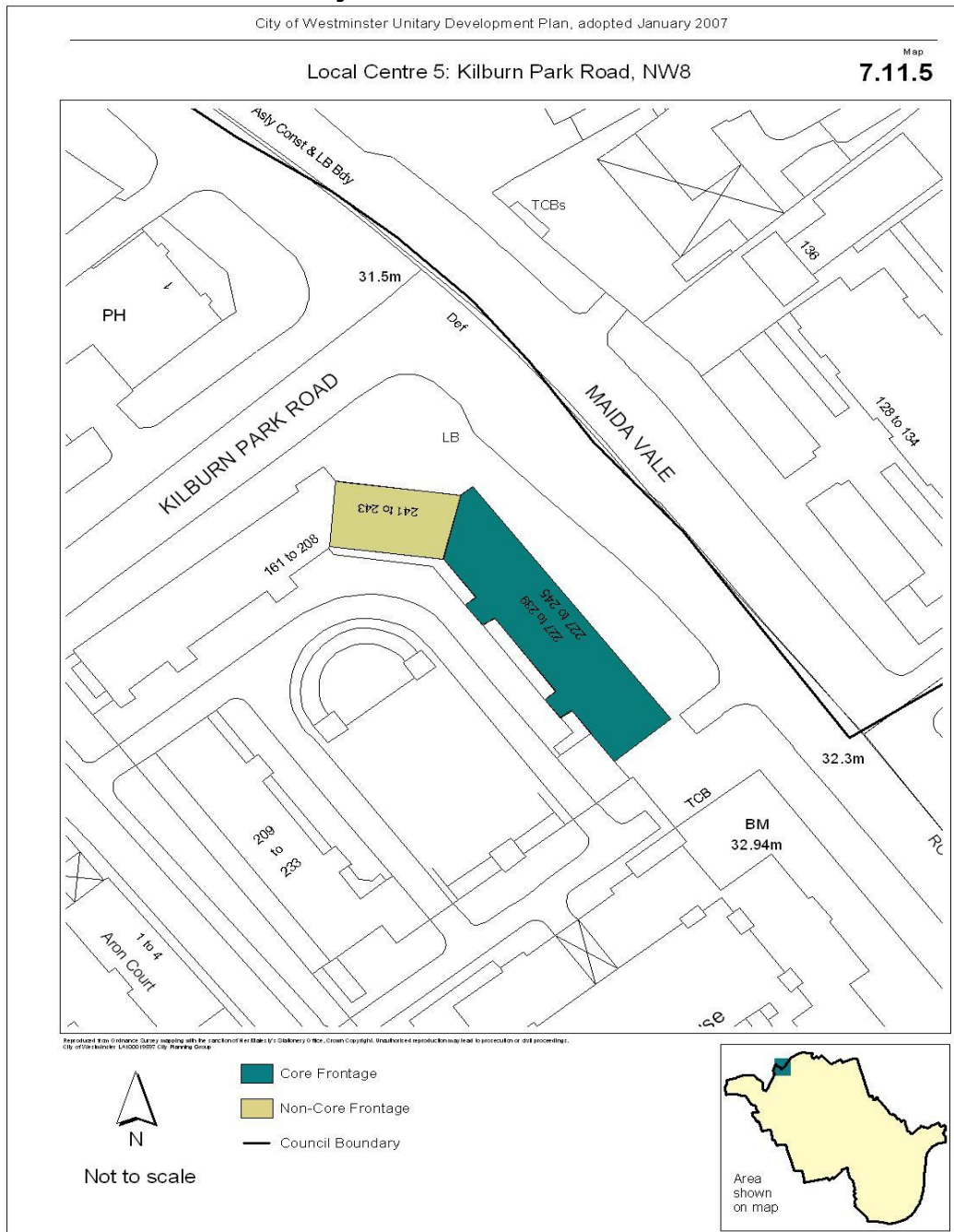
Local Centre 5: Kilburn Park Road

1. Introduction

1.1 Location

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

Figure 1: Local Centre Boundary 2007



2 Land Use

2.1 Range of Uses

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

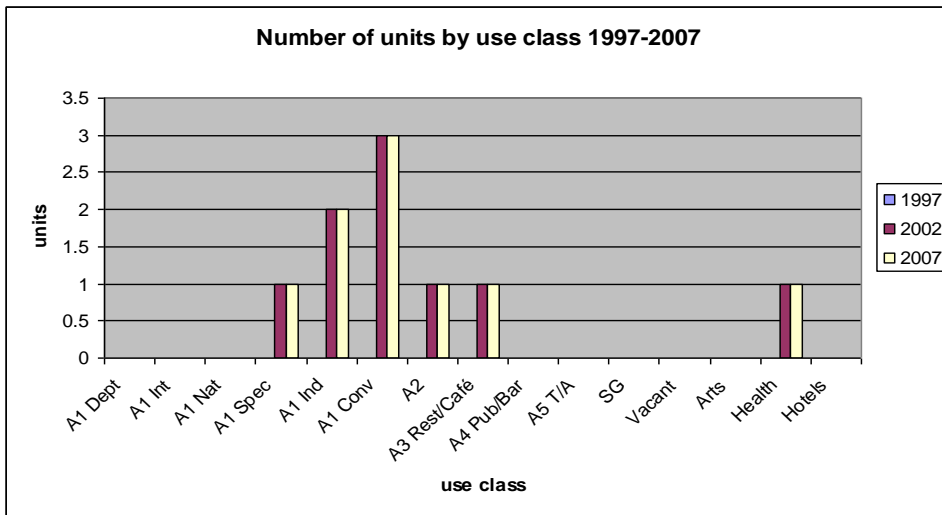
Table 1: Range of Town Centre Uses (1997-2007)

Use Class		Number of Units 1997	Number of Units 2002	Number of Units 2007
Class A1 Retail		n/a	6	6
	<i>Department/principle stores</i>	n/a	0	0
	<i>International retailers</i>	n/a	0	0
	<i>National retailers</i>	n/a	0	0
	<i>Specialist Independent</i>	n/a	1	1
	<i>Independent</i>	n/a	2	2
	<i>Convenience</i>	n/a	3	3
Class A2		n/a	1	1
Class A3		n/a	1	1
	<i>Restaurant/Café</i>	n/a	1	1
Class A4	<i>Pubs/Bars</i>	n/a	0	0
Class A5	<i>Takeaway</i>	n/a	0	0
	<i>Takeaway/Restaurant</i>	n/a	0	0
Sui Generis		n/a	0	0
Vacant Units		n/a	0	0
Arts/Culture		n/a	0	0
Health uses		n/a	1	1
Hotels		n/a	0	0
TOTAL		n/a	9	9

Source: Land Use Survey June 2007

In total there are 9 units, with no change from the previous survey in 2002.

The composition of units has remained constant from the last survey in 2002. There are 6 A1 uses, 3 of which are convenience stores, along with 2 independent shops and 1 specialist shop. The centre also contains one A2 use in the form of an estate agent, one A3 café and one health use.



2.2 Range of A1 Uses

There are no national retailers within the Kilburn Park Road Local Centre. In total there are only six A1 retail units. Three of these are convenience stores, a newsagent and two grocers. There is once specialist shop, a carpet and flooring store, and there are two independent retailers, an optometrist and a hairdresser.

2.3 Total Retail Floor space

Total retail floor space in Kilburn Park Road is broken down in Table 1. In total, Kilburn Park Road has 469 sqm of retail floor space, which is below the average of 2,965 sqm for the 39 Local Centres in the City, due to the very small size of the centre. A1 uses account for roughly two thirds of the total floor in the centre, with convenience stores being the largest single use class in terms of floor space. The rest of the space is made up of a combination of the single A2, A3 and Health units that make up the rest of this small local centre. The size of the centre makes it difficult to make meaningful comparisons to the larger local centres.

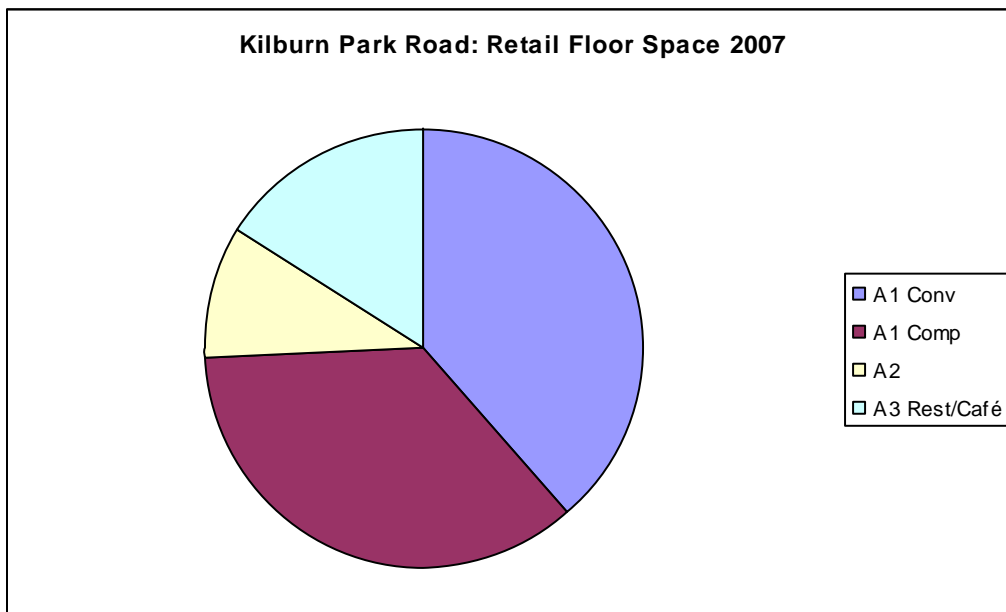


Table 2: Total Retail Floor space 2007

Use Class	Floor Space	% Floor Space	All local centres average floor space %
A1 Conv	164	38.7	16.1
A1 Comp	151	35.6	40.5
A2	41	9.7	10.6
A3 Rest/Café	68	16.0	13.3
A4 Pub/Bar	0	0.0	5.6
A5 Take away	0	0.0	2.9
SG	0	0.0	3.2
Vacant	0	0.0	7.7
Total	424	100	100

Source: City of Westminster GIS System and site survey June 2007

Kilburn Park Road is a Local Centre with a small selection of local services and food shops as noted. There are no banks or building societies, and one class A2 use which is an estate agent's. The Local Centre does not provide the same range and selection found in large Local Centres or District Centres.

2.4 Proportion of Vacant Street Level Property

The unit vacancy rate in Kilburn Park Road is lower than the average rate for Local Centres in the City, as shown in Table 3. There are no vacancies in the centre, however there are only nine units in the centre as mentioned. This is consistent with the results from previous surveys, and means that the centre's vacancy rate is lower than the overall average for all local centres, which stands at 9%. The national average vacancy rate stands at over 10%.

Table 3: Level of Vacant Street Level Property 2007

	% Vacant Units 1997	% Vacant Units 2002	% Vacant Units 2007	% Local Centre Average 2007
Kilburn Park Road	N/A	0% (0 units)	0% (0 units)	9% (3 units)

Source: City of Westminster GIS System and site survey June 2007

3. Accessibility

3.1 Pedestrian Flows (footfall)

The centre was found to be busy when the Health Check Survey was carried out on a weekday afternoon in June 2007.

3.2 Accessibility on foot and by public transport

The local centre is situated very close to Kilburn Park London Underground station (Bakerloo line) which is situated in the neighbouring London Borough of Brent, and is roughly 5-10 minutes walk from Maida Vale London Underground station (Bakerloo line). The local centre is also situated very close to Kilburn High Road mainline train station, and there are several bus routes which serve the centre on Maida Vale (A5), including the number 16 and 98 which serve the centre of the city.

4. Environmental Quality

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

The attitudinal assessment of the attractions and amenity of the centre is summarised in Table 5 below. The centre's overall score for attractions is 7.7%, meaning that this is lower than the Local Centre average of 28.5%, and therefore ranks Kilburn Park Road =37th out of the 39 Local Centres in the City. Kilburn Park Road scored no 'good' ratings and only two 'average' ratings, illustrating the limited range of services and attractions that the centre has to offer.

Table 4: Attractions within the Local Centre 2007

ATTRactions	2002			2007		
	Good=2	Average =1	Poor=0	Good=2	Average =1	Poor=0
Retail Provision						
Prominence of multiple retailers			X			X
Prominence of independent shops		X			X	
Availability of food shopping		X			X	
Prominence of specialist shops			X			X
Quality of market (frequency, variety etc)			X			X
Quality of retail environment			X			X
Art/Culture						
Quality of restaurants (availability, number etc)			X			X
Quality of pub/club/bars			X			X
Range of cultural/ community events (theatre, concerts)			X			X
Availability of sports and leisure facilities			X			X
Service Provision						
Local services (information, library etc)			X			X
Employment/ office space			X			X
Bank/ building society provision			X			X
Total		2/26			2/26	
Percentage		7.7%			7.7%	
Rank		=35th			=37th	

Source: City of Westminster site survey June 2007

4.2 Daytime Amenity

Kilburn Park Road is a relatively unattractive Local Centre, with a day time amenity rating of 45.7% compared with the average for all Local Centres of 63.7%, and is ranked =34th out of the 39 Local Centres in the City. The centre's rating is good in terms of the absence of vacant sites, rough sleepers, street drinking, beggars, touting and illegal street traders. The centre has a poor 'feel good factor'. Presence of litter and food containers, street fouling, the condition of the area, the presence of graffiti, and absence of features that identify the centre and lack of promotion/street events reduces the centre's overall rating. The presence of refuse bags, quality of buildings, security, street lighting and passage for pedestrians are rated as average.

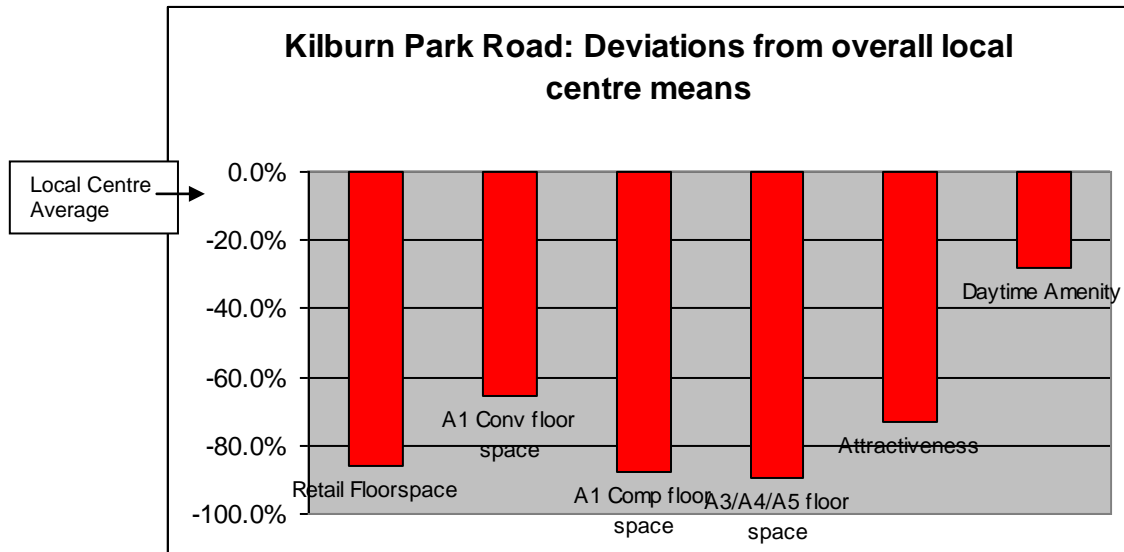
Table 5: Day Time Amenity within the Local Centre 2007

AMENITY – DAYTIME	1997			2002			2007		
	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0	Good=2	Average=1	Poor=0
Overall environment of public areas in the centre									
General Cleanliness in Shopping Hours:									
Presence of litter		N/A				X			X
Presence of refuse bags on the street		N/A			X			X	
Evidence of street fouling		N/A			X				X
Presence of glass/glasses/other debris incl. Food and food containers/wrapping		N/A				X			X
Condition		N/A			X				X
Quality of buildings		N/A			X			X	
Special features (pedestrianisation, Street furniture, etc)		N/A				X			X
Impact of vacant sites		N/A		X			X		
Security:									
Evidence of Vandalism and Graffiti (incl. on street furniture)		N/A				X			X
Security during shopping hours (availability, access, security etc)		N/A			X			X	
Ease of passage for pedestrians (incl. presence Of obstacles eg illegally parked vehicles)		N/A		X				X	
Evidence of drunkenness, anti-social Behaviour, rowdiness		N/A		X			X		
Presence of rough sleepers		N/A		X			X		
Presence of beggars		N/A		X			X		
Presence of street drinkers		N/A		X			X		
Evidence of touting (e.g. mini cabs, rickshaws, Prostitution, drug dealing etc.)		N/A		X			X		
Presence of illegal street traders e.g counterfeit goods, hot dogs, peanuts etc.		N/A		X			X		
Effectiveness of any deterrent measures (CCTV, police patrols, door security etc)		N/A			X			X	
Quality of street lighting		N/A			X			X	
Safety perception in shopping hours		N/A			X			X	
Identity of town centre:									
Features which identify the centre (eg flagship stores, buildings etc)		N/A				X			X
Promotion/ Street events		N/A				X			X
'Feel good' factor of town centre		N/A			X				X
Total:	N/A			25/46			21/46		
Percentage	N/A			54.3%			45.7%		
Rank	N/A			=29 th			=34 th		

5. Performance of the Centre

5.1 Relative Performance of the Local Centre 2007

Figure 5: Deviation of centre from the mean for Local Centres 2007



Kilburn Park Road is a small Local Centre and therefore has a lower than average amount of retail floor space when compared to the overall average for the 39 local centres. This is also true for A1 convenience and comparison floor space figures, and for food and drink floor space figures (A3/A4/A5). In terms of the rating of the physical environment, the centre has a much lower than average attractiveness rating, and a below average score for daytime amenity.

5.2 Strengths, Weaknesses, Opportunities and Threats
SWOT analysis

Strengths Unit occupancy rate Pedestrian vibrancy	Weaknesses Environmental Quality Daytime Amenity
Opportunities	Threats Peripheral Location

6. Future capacity

6.1 Potential Capacity for Growth

Between 2002 and 2007, there were no permitted or refused planning applications involving A1 class uses in the centre.

Additional capacity could be accommodated in currently vacant shop units.

7. Health of the Centre Summary

Table 6: Summary of Health Check Assessment 2007

Subject	Subject Matter	Data	Number	Sq M	
RETAILING	Floor space	Total Floor space		424	
		Total Convenience (A1)		164	
		Total Comparison (A1)		151	
		Total Service (A2)		41	
		Total A3		68	
		Total A4		0	
		Total A5		0	
		Total Sui Generis		0	
		Total Vacant		0	
	Retail Offer	Total Number of Shop Units		9	
		Total Number of A1 Units		6	
		a) Convenience shops		3	
		b) Department/principal stores		0	
		c) Prestige international shops		0	
		d) National comparison retailers		0	
		e) Specialist Independent shops		1	
		f) Independent shops		2	
		Total Comparison Multiples		3	
		Total Number of A2 Units		1	
		Total Number of A3 Units		1	
		Total Number of A4 Units		0	
		Total Number of A5 Units		0	
		Total Number of Sui Generis		0	
		Total Number of Vacant		0	
	Market	Days of operation		0	
		Number of stalls		0	
	Proposals	Changes of use A1 to A2		0	
Changes of use A1 to A3			0		
Changes of use A1 to A4			0		
Changes of use A1 to A5			0		
ARTS/CULTURE		(cinemas, galleries, theatres etc.)	0		
HEALTH USES		(clinics, surgeries etc.)	1		
HOTELS			0		

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

Appendices

Views of Local Centre 5: Kilburn Park Road

Land Use Table (Westminster land use survey 2007)

Land Use Map (GOAD retail data 2007 and Westminster land use survey 2007)

Location Map of all local centres

Glossary of Terms

Views of Kilburn Park Road local centre



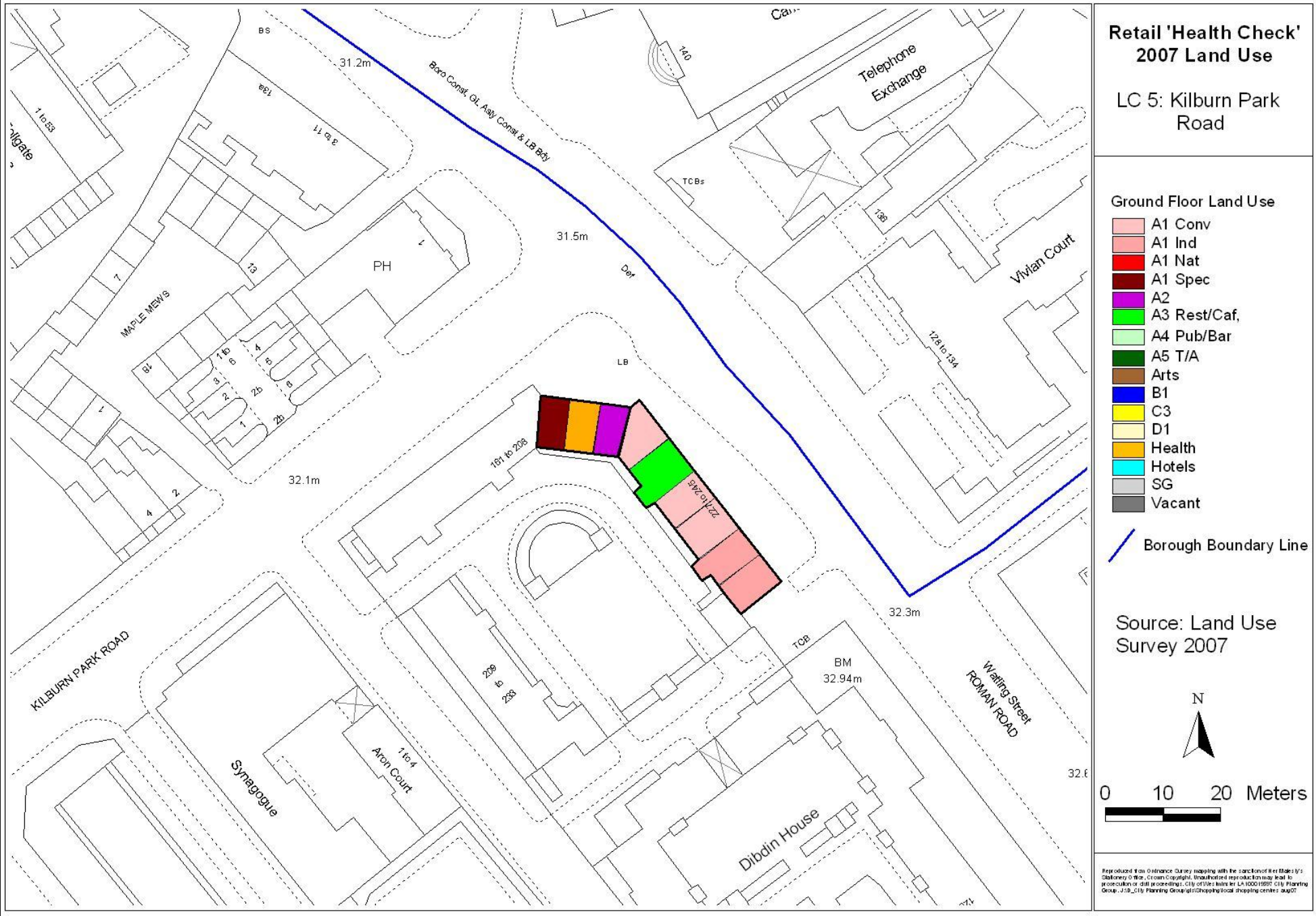
The core shopping frontage of Kilburn Park Road local centre.



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



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

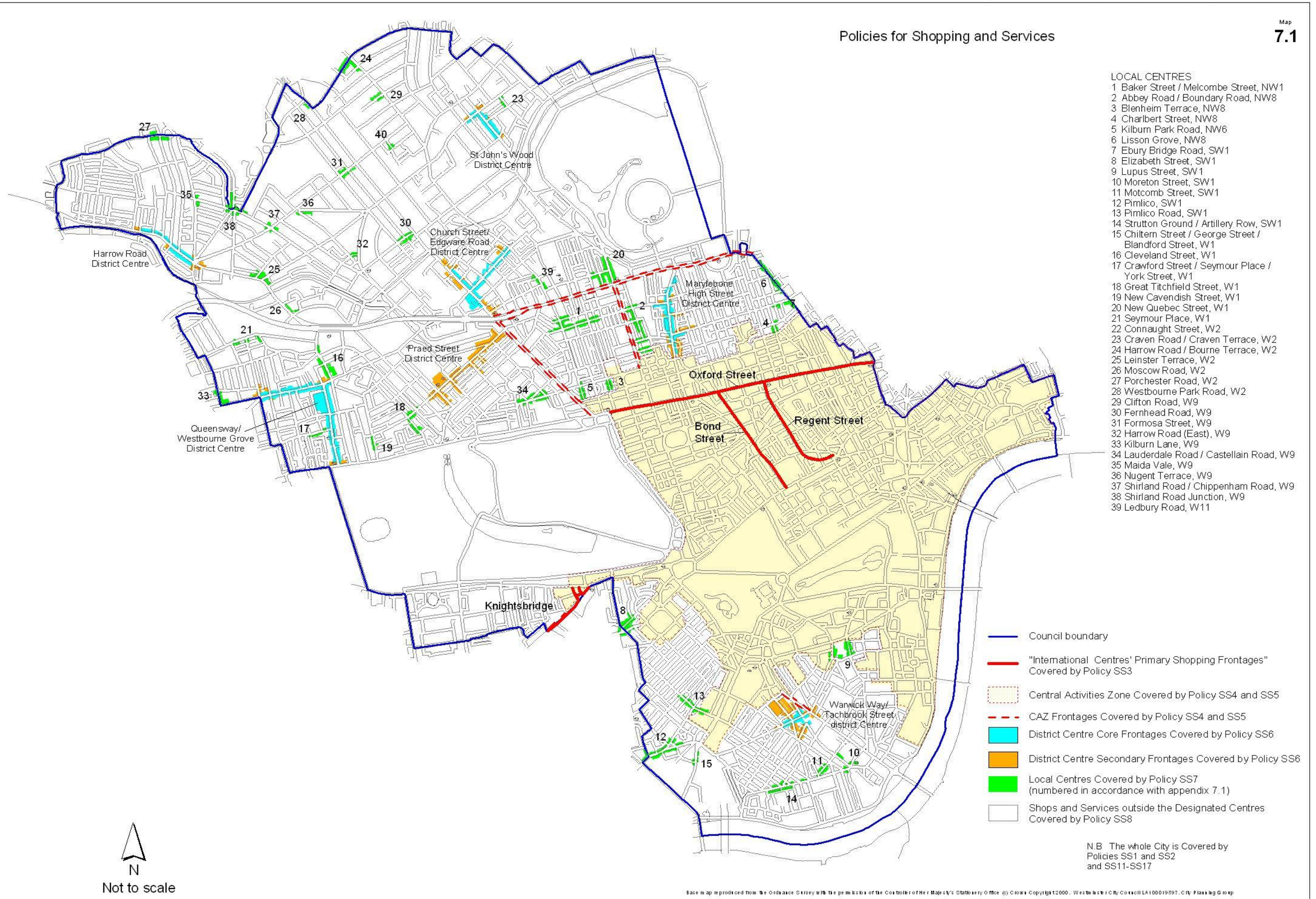


Policies for Shopping and Services

Map
7.1

LOCAL CENTRES

- 1 Baker Street / Melcombe Street, NW1
- 2 Abbey Road / Boundary Road, NW8
- 3 Blenheim Terrace, NW8
- 4 Charlbert Street, NW8
- 5 Kilburn Park Road, NW6
- 6 Lisson Grove, NW8
- 7 Ebury Bridge Road, SW1
- 8 Elizabeth Street, SW1
- 9 Lupus Street, SW1
- 10 Moreton Street, SW1
- 11 Motcomb Street, SW1
- 12 Pimlico, SW1
- 13 Pimlico Road, SW1
- 14 Strutton Ground / Artillery Row, SW1
- 15 Chiltern Street / George Street / Blandford Street, W1
- 16 Cleveland Street, W1
- 17 Crawford Street / Seymour Place / York Street, W1
- 18 Great Titchfield Street, W1
- 19 New Cavendish Street, W1
- 20 New Quebec Street, W1
- 21 Seymour Place, W1
- 22 Connaught Street, W2
- 23 Craven Road / Craven Terrace, W2
- 24 Harrow Road / Bourne Terrace, W2
- 25 Leinster Terrace, W2
- 26 Moscow Road, W2
- 27 Porchester Road, W2
- 28 Westbourne Park Road, W2
- 29 Clifton Road, W9
- 30 Fernhead Road, W9
- 31 Formosa Street, W9
- 32 Harrow Road (East), W9
- 33 Kilburn Lane, W9
- 34 Lauderdale Road / Castellain Road, W9
- 35 Maida Vale, W9
- 36 Nugent Terrace, W9
- 37 Shirland Road / Chippenham Road, W9
- 38 Shirland Road Junction, W9
- 39 Ledbury Road, W11



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Glossary of Terms

A1	Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, dry cleaners, pet shops, sandwich bars, retail showrooms, and domestic hire shops.
A1 café type uses	Shops such as sandwich bars or coffee shops selling food and drinks to be consumed mainly off the premises, but not hot food takeaways. Examples include certain Pret a Manger shops, Costa Coffee and the Seattle Coffee Co. shops.
A2	Banks, building societies, bureau de change, estate and employment agencies, professional and financial services, telephone bureaux, betting offices and beauty salons (excluding hair).
A3	Restaurants & Cafés: Primary purpose is sale and consumption of food on the premises (excludes internet café's, which are A1).
A4	Drinking Establishments: Premises where the primary purpose is the sale and consumption of alcoholic drinks on the premises.
A5	Hot Food Take-away: Premises where the primary purpose is the sale of hot food to take away.
B1	Business uses such as offices, research and development and industrial uses.
CAZ	Central Activities Zone (CAZ). The CAZ is an area of mixed uses, many of which contribute directly to the national, regional and local economy. It is this mix of activities and their supporting resources which underpins the success of London's economy.
CAZ Frontages	Frontages outside CAZ shown on the UDP Proposals Map where the City Council envisages the maintenance or growth of Central London Activities.
Comparison	A1 floorspace selling predominantly durable items and not in convenience use.
Convenience	This is based on the classification provided by the unit for Retail Planning Information (URPI) set out in URPI brief 99/2. The classifications are: food, alcoholic drink, tobacco and other goods (newspapers and magazines, cleaning materials and matches). For the purposes of this assessment, convenience includes shops selling food or drink (excluding A1 café-type uses), newsagents, (including specialist tobacco stores), chemists (including Boots the Chemist stores) and post offices.
Core Frontages	Shopping frontages identified in District Centres and some Local Centres. Within these areas UDP policies aim to maintain a high concentration of shops.
District Centre	District Centres provide a range and level of services below GLA defined Major Centres, but above that of Local Centres, and are a focus for shopping and other town centre activities.
Department/ principle store	This includes the main department stores such as John Lewis, Liberty, and Selfridges, as well as variety stores such as Marks & Spencer and Virgin Mega-stores.
Experian GOAD	An independent retail data consultancy who provide maps of ground floor uses in shopping centres.
Greater London Authority (GLA)	A new form of strategic government for London established in July 2000.
Gross Floorspace	Floorspace of buildings on all floors including external walls, half the thickness of parting walls and circulation areas.
Independent store	This includes non-convenience stores (see definition above) irrespective of size, that are not considered to be specialist retailers (see definition overleaf), that are operated by retailers that are not included within national retail chains or groups.
Local Shopping Centres	Smaller shopping centres defined in the UDP where the City Council will aim to safeguard shopping facilities for local residents, and concentrations of specialist shops.
LPAC	London Planning Advisory Committee

National retailers	This includes all retailers (Class A1 only) that operate within the context of a national retail chain or group, such as Sears. A schedule of all national retail multiples can be found in Retail Directory of the UK 2002 (Hemming Information). Specialist shops that are part of a retail chain or group, such as Whittards and Thorntons, are classified as national retailers. Although there are national chains of betting shops, such as Ladbrokes, these are classified as A2 uses and not national retailers.
PPG6	Planning Policy Guidance Note 6 - Town Centres and Retail Developments
Prestige international retailers	This includes prestigious retailers that operate in more than one country, such as Gucci, Gianni Versace, and Giorgio Armani. It also includes flagship stores that are only found in select town centres in Britain. National airline shops, such as British Airways, have also been classified as international retailers.
Primary Frontages	Internationally recognised shopping destinations. The Primary Frontages defined in the UDP are Oxford Street, Regent Street, Bond Street and Knightsbridge/Brompton Road.
Secondary Frontages	Shopping frontages identified in District Centres, where an element of non-A1 uses may be allowed.
Sex establishment	Premises for the provision of goods or services of a sexual nature, requiring a licence.
Retail floorspace	This is all A1, A2, A3 and sui generis floorspace, and vacant floorspace of any of the aforementioned categories.
Specialist independent	Similar to an independent store, but this category reflects the quality and specialisation of the retailer so that a shopper may make a specific shopping trip to that shop. For example, The Pen Shop on Regent Street or antique shops.
Stress Areas	Areas designated in the Replacement UDP that have become saturated with A3 and entertainment uses to the extent that their character is being eroded.
Sui generis	Sui Generis is a term that refers to a use on its own. Any planning use not falling within a specific class within the Use Class Order falls within this category. Examples of sui generis uses in shopping centres are laundrettes, mini cab offices, amusement centres and car showrooms.
Town centre	Town centre is defined in Annex A of PPG6 to cover city, town, and traditional suburban centres, which provide a broad range of facilities and services which fulfil a function as a focus for both the community and for public transport. It excludes parades of purely local significance.
Town Centre Health Check	Required under PPG6, these contain information on the mix of uses, environmental quality and general economic health of shopping centres/areas.
UDP	Unitary Development Plan produced by Westminster City Council as the statutory development plan for Westminster.
Vacancy	This category includes vacant street level units, as well as units that are under alteration. However, if at any time the survey was completed it was evident who the unit would be occupied by, the unit was treated as being occupied.
Welfare advice centres	These are classified as A2 uses.
Zone A Rent	The rental level per square metre achieved on the first six metres of a shop unit.

Information Sources

- Planning Policy Statement 6: Planning for Town Centres:
www.communities.gov.uk/planningandbuilding/planning/planningpolicyguidance/planningpolicystatements/planningpolicystatements/pps6/
 - The London Plan, The Mayor's Spatial Development Strategy 2004:
www.london.gov.uk/mayor/strategies/sds/index.jsp
 - Westminster City Council's Replacement Unitary Development Plan (RUDP) policies relating to Shopping and Services are available on the Council's website:
http://www3.westminster.gov.uk/docstores/publications_store/UDP_Chapter_07_Shopping_&_Services_Adopted_January_2007.pdf
Policy SS7 deals specifically with the Local Centres
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