



City of Westminster

CAZ Shopping Area 13: Wigmore Street

Shopping Area Health Check Survey



December
2008

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Background to the Health Check Studies

- i) The Government advises local authorities to base their development plans and policies on assessments of their shopping centres, as set out in Planning Policy Statement 6 (PPS 6)¹. Local authorities are advised to monitor the health of their centres and to regularly collect information on key indicators such as land uses and vacancy rates.
- ii) The City Council is in the process of producing a Local Development Framework (LDF) to replace its Adopted Unitary Development Plan (UDP) 2007. As part of this process, the Council has carried out Health Check Studies of its shopping centres, updating and replacing previous health check studies. This report sets out the findings of the Health Check Survey of Wigmore Street, and is designed to inform and support the development of LDF retail policies for this area.
- iii) The City of Westminster is currently divided into two zones in terms of retail policy, the Central Activities Zone (CAZ) including 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 other shopping areas, small parades and individual shops. For the purposes of the Health Check Studies, the CAZ has been divided into 19 shopping areas, including 4 Primary Shopping Areas². Each of which has been subject to an individual 'health check'. Outside the CAZ the UDP designates 7 District Centres and 39 Local Centres. All of which were subject to health checks in 2002 and 2007/8³.
- iv) In 1997, 46 health checks were undertaken throughout Westminster. In 2000, 4 of these health check surveys were updated and 2 health checks for new centres were also undertaken. In 2002 all of the previous health check surveys were updated, with additional surveys carried out for an additional 17 centres not previously surveyed.

Methodology

- v) The Council has considered the indicators of vitality and viability recommended in PPS6, however it is evident that a large number of shopping areas in Westminster do not function as 'town centres' in the way suggested in the policy statement. For example, accessibility by public transport is considered to be excellent for all the larger shopping areas in Westminster, and the Local Centres are accessible for people to walk to, therefore few customers need to drive to centres in Westminster, and the availability of car parking therein is not always vital for a centre's success.
- vi) The indicators recommended in PPS6 have therefore been adapted to suit Westminster's situation, and the information collated and analysed in the health checks surveys in Westminster is described below.

Connectivity

- vii) Accessibility by public transport has been assessed based on relative distances to London Underground tube stations, bus routes and national rail stations.

¹ Planning Policy Statement 6 (PPS 6): Planning for Town Centres, March 2005

² The 4 Primary Shopping Areas consist of the 4 designated Primary Shopping Frontages; Oxford Street, Regent Street, Bond Street (Old and New), and Knightsbridge/Brompton Road, plus adjacent streets or street blocks in retail use.

³ All of the Health Check areas are shown on map 2 of this report.

Total Retail Floorspace

- viii) The total retail floorspace (source: City of Westminster GIS System and GOAD Retail Data 2008) in each centre has been analysed and broken down into use classes and key categories including A1 (comparison and convenience shops⁴), A2, A3, SG and vacant shop units. Total floorspace is based on ground floor occupation. In the CAZ and CAZ Frontages, where a ground floor occupier also operates at upper or lower floor levels, this additional floorspace been included in the calculations. The floorspace figures exclude B1 office and residential space.

Diversity of Use

- ix) An analysis of the total number of shops and services (A1 and A2 uses) and other uses, such as restaurants, hotels and health facilities has been undertaken, based on Experian Goad, and on street surveys 2008. This section also contains a comparison with land use data from the 1997 and 2002 health checks.
- x) The amount of floorspace in different retail uses has also been analysed. Comparison retail uses have been broken down further for more detailed analysis, i.e., department/principal stores (including variety stores); international retailers; national retailers, specialist independents, and independents. The different types of entertainment uses (A3, A4, and A5) uses and the number of A1 café type uses has also been recorded.

Range of A1 Uses

- xi) The number of national non-food retail multiples present in a centre has been identified, based on the Retail Directory of the UK 2002 (Hemming Information Services). The analysis of diversity of comparison uses also includes an assessment of international retailers. Therefore, where appropriate, we have highlighted the presence of any international retailers in a centre. For example, Gianni Versace's flagship store in Old Bond Street is one of a number of such stores that the company operates internationally and is a major attraction in its own right.

Proportion of vacant street level property

- xii) The information is based on data collated from street surveys (2008) outside the CAZ and provided by Experian GOAD within the CAZ. Vacancy rates are compared with other centres in Westminster, as well as the Westminster average.

Zone A Retail Rents

- xiii) Zone A rental information for ground floor A1, A2 and A3 premises was collected in 2002, where available, by retail letting agents, Chesterton, and compared with data collected for the 1997 health checks.

⁴ The definitions of A1 comparison and A1 convenience are set out in Appendix 1.

State of centre's attractions and environmental quality:

Daytime Amenity

- xiv) Attitudinal tables reflecting the attractions and amenity of each centre are based on the findings of on-street surveys by field-workers visiting each centre in 2008. In the 1997 health checks, the attractions scores were weighted to reflect the type of centre i.e. CAZ, District Centres and Local Centres. No weighting was used in the 2002 or 2008 surveys and therefore the assessments are not directly comparable.

Night Time Amenity

- xv) Night-time amenity surveys were also undertaken for areas in CAZ, CAZ frontages in 2002. These were taken between the hour of 11 pm to 12 midnight. It should be noted that these surveys represent a snapshot of the situation at the time of the site visit. Night-time amenity surveys were not undertaken in 1997 or 2008. The 2002 health checks rate centres against the average for all centres.

Relative performance of centre

- xvi) Graphs compare the individual centre in terms of a number of variables, with the mean for each of those variables for CAZ/non-CAZ where relevant, and similar centres in London based on GLA data. A number of key factors were used, including a mix of quantitative and attitudinal measures:
- retail attractions (total retail floorspace, comparison floorspace, convenience floorspace, number of multiple shops, vacant floorspace);
 - arts, culture and entertainment (number of cinema/theatre and A3 uses); and
 - environmental quality (total attitudinal score).
- xvii) If data was not available for a particular variable in a centre, no figure is shown on the bar chart. Hence, the absence of a bar does not mean that the percentage difference from the mean for that variable is zero, rather that no data was available. Zero variation of a variable from the group mean is indicated by a '0' shown where a bar would otherwise appear. Vertical bars below the centre line on the charts are intended to show negative aspects of the town centre, and vice versa.
- xviii) Each centre has been compared against the other centres within Westminster - CAZ or non-CAZ as appropriate.

Pedestrian Flow

- xix) Pedestrian Market Research Services Ltd. (PMRS) were commissioned to undertake pedestrian flow count surveys in CAZ areas, CAZ Frontages and District Centres in 2002. With the exception of Strutton Ground, Harrow Road East and Harrow Road/Bourne Terrace, no pedestrian counts were taken for Local Centres.
- xx) The standard methodology used by PMRS to estimate total weekly flows comprises surveys on a Friday and Saturday. The results are then grossed up by a factor of

2.353 to allow for the days that were not enumerated (Monday-Thursday⁵). The use of a standard methodology enabled comparison over time, as well as comparison with other centres.

Summary of land use assessment

- xxi) A summary table of the attractions available in each centre is provided. Each health check concludes with a general overview of the health and vitality of the centre.

⁵ PMRS counts do not include Sundays.

1.0 CAZ AREA 13: WIGMORE STREET

Introduction

- 1.1 Wigmore Street is inside the CAZ in close proximity to Oxford Street.
- 1.2 Wigmore Street is a small linear CAZ shopping area extending approximately 600 metres east to west, running parallel to Oxford Street, which is located about 200 metres south of Wigmore Street. Wigmore Street is within close proximity to open space, with Portman Square at the western end of the street, Cavendish Square at the eastern end of the street, and Manchester Square north of Wigmore Street.
- 1.3 Wigmore Street is a much quieter street than many surrounding it, such as Oxford Street. The road is wide and relatively free-flowing, and contains a mix of uses serving local workers, visitors and residents of the area. The centre does contain attractions in its own right, such as Wigmore Hall and a variety of retail uses, including specialist showrooms and interior design retailers.

Connectivity

- 1.4 Wigmore Street is one of the less well connected CAZ centres in terms of public transport. There are no London Underground stations directly in the shopping centre, with the closest one being Bond Street station (Jubilee, Central lines), which is located on Oxford Street, roughly five minutes walk south of Wigmore Street.
- 1.5 No buses run directly along Wigmore Street itself, however many routes run along Oxford Street to the south of the centre, and along Baker Street and Gloucester Place at the western end of Wigmore Street.
- 1.6 The street is heavily used by cars and other motor vehicles, and is also used a lot by pedestrians, mostly coming from the Oxford Street area.

Total Retail Floor space

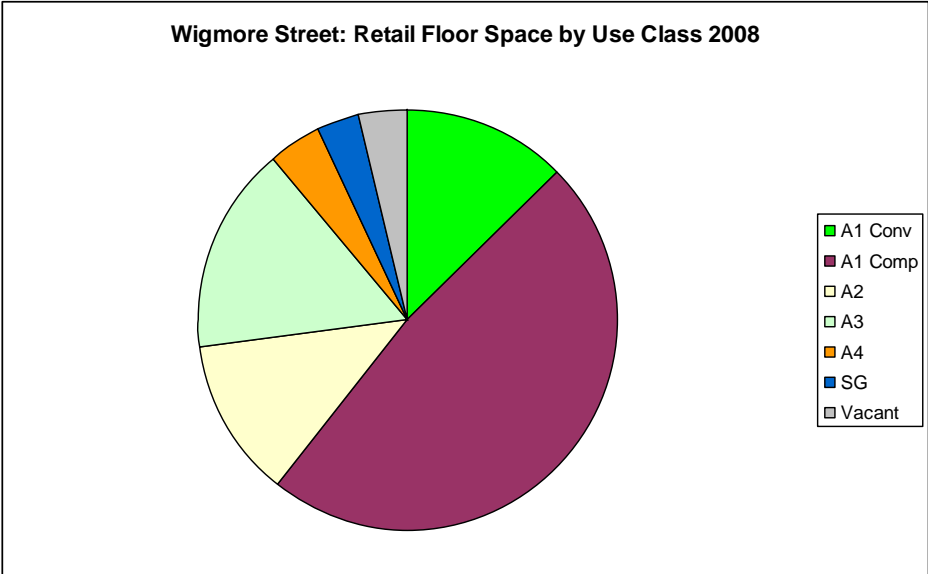
1.7 Total retail floorspace in Wigmore Street is broken down in Table 1. In total, Wigmore Street has 12,885 sqm of retail floorspace, which is significantly below the average of 51,643 sqm for the CAZ areas and frontages in the City, making it one of the smallest centres. Wigmore Street has a relatively high proportion of Class A2 and A1 convenience floorspace compared with the CAZ average. Food and drink uses, especially in the form of A3 restaurant/café's also make up a significant proportion of the floor space, which is above the CAZ centre average. Conversely the area has a relatively low proportion of comparison retail floor space, and does not contain any A5 class takeaways.

Table 1: Total Retail Floorspace

| Use | GF Fspace | % GF Fspace | All floors Fspace | % All floors fspace | CAZ Fspace % |
|--------------|--------------|----------------|-------------------------|---------------------------|--------------------|
| A1 Conv | 1640 | 12.7% | 1640 | 12.7% | 3.4 |
| A1 Comp | 6150 | 47.7% | 6150 | 47.7% | 73.7 |
| A2 | 1596 | 12.4% | 1596 | 12.4% | 4.1 |
| A3 | 2068 | 16.1% | 2068 | 16.1% | 8.8 |
| A4 | 549 | 4.3% | 549 | 4.3% | 3.9 |
| A5 | 0 | 0.0% | 0 | 0.0% | 1.1 |
| SG | 411 | 3.2% | 411 | 3.2% | 0.4 |
| Vacant | 471 | 3.7% | 471 | 3.7% | 4.5 |
| Total | 12885 | 100.0% | 12885 | 100.0% | 100 |

Source: GOAD retail survey 2008

Figure 1: Floor Space by Use Class, 2008



Source: GOAD retail survey 2008

1.8 Wigmore Street is a mixed-use area, serving mainly local residents and workers in the area. The area has a small number of sandwich shops and cafés to cater for local workers, and a number of local services including chemists and opticians. Wigmore Street has a good selection of A1 specialist comparison shops, particularly kitchen and furniture stores and a good range of restaurants. However, it is a relatively small CAZ area, which does not have the same range and selection of shops found in the larger CAZ areas.

Diversity of Use

1.9 The diversity of uses represented in the centre is summarised in Table 2.

Table 2: Diversity of Uses (1997-2008)

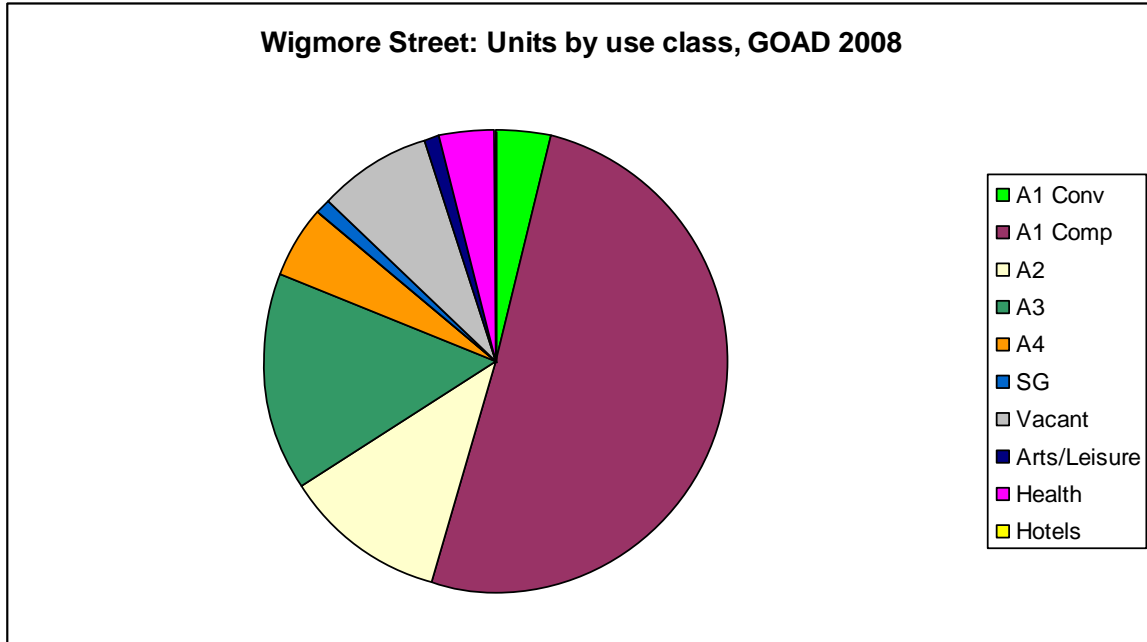
| Use Class | Units 1997 | Units 2002 | Units 2008 | Unit % 1997 | Unit % 2002 | Unit % 2008 |
|----------------------------|---------------|---------------|---------------|----------------|----------------|----------------|
| <i>A1 Retail (Total)</i> | 34 | 37 | 43 | 45.90% | 49.30% | 54.40% |
| A1 Department | 0 | 0 | 0 | 0.00% | 0.00% | 0.00% |
| A1 International | 0 | 0 | 0 | 0.00% | 0.00% | 0.00% |
| A1 National | 4 | 4 | 5 | 5.40% | 5.30% | 6.30% |
| A1 Specialist | 16 | 19 | 20 | 21.60% | 25.30% | 25.30% |
| A1 Independent | 11 | 12 | 15 | 14.90% | 16.00% | 19.00% |
| A1 Convenience | 3 | 2 | 3 | 4.10% | 2.70% | 3.80% |
| A2 Financial/Professional | 6 | 12 | 9 | 8.10% | 16.00% | 11.40% |
| <i>Food and Drink</i> | 5 | 11 | 16 | 6.80% | 14.70% | 20.30% |
| A3 Restaurant/Café | na | 9 | 12 | na | 12.00% | 15.20% |
| A4 Drinking Establishments | na | 2 | 4 | na | 2.70% | 5.10% |
| A5 Take-Away | na | 0 | 0 | na | 0.00% | 0.00% |
| Sui Generis | 1 | 0 | 1 | 1.40% | 0.00% | 1.30% |
| Vacant Units | 24 | 11 | 6 | 32.40% | 14.70% | 7.60% |
| Arts/Culture/Leisure | 1 | 1 | 1 | 1.40% | 1.30% | 1.30% |
| Health uses | 3 | 3 | 3 | 4.10% | 4.00% | 3.80% |
| Hotels | 0 | 0 | 0 | 0.00% | 0.00% | 0.00% |
| TOTAL | 74 | 75 | 79 | 100.00% | 100.00% | 100.00% |

Source: Land Use Survey 1997, 2002, GOAD retail survey 2008

- 1.10 The overall number of units has increased slightly since 2002, which could be a result of changes of use, or the inclusion of units that were not previously surveyed in 2002.
- 1.11 Between 2002 and 2008 there were 11 proposals for changes of use away from A1 class retail, two of which were proposals for a change of use to an A3/A4/A5 class food and drink use as part of mixed use developments. The remaining nine proposals were for changes of use from A1 class retail to non A-class uses. Four of these proposals retained a portion of A1 use as part of mixed use developments, while three involved changes of use to Sui Generis uses, and the remaining two proposed change to B1 class offices.
- 1.12 Figures 1 and 2 demonstrate that Wigmore Street has a significant proportion of comparison uses, predominantly due to the higher than average proportion of A1 specialist and independent uses. The overall proportion of retail units has risen by over 5%, with the largest increase within this coming in independent retail.
- 1.13 The proportion of food and drink uses has risen fairly significantly, by over 5% since 2002. The majority of food and drink uses are Class A3 restaurant/cafés, with a growing selection of pubs/bars. There are no takeaways, but there are several sandwich bars in the area. Several of the A1 independent uses are travel agencies and hairdressers rather than comparison shops.

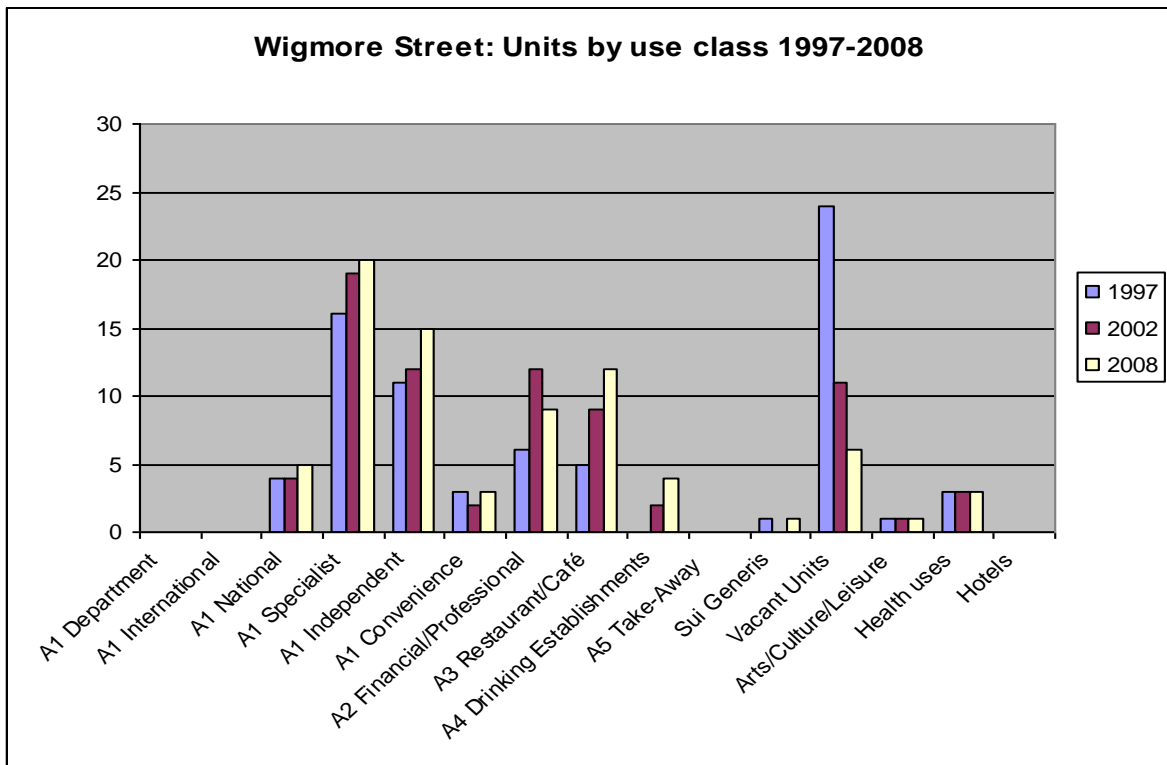
1.14 There are no hotels or leisure facilities. There are several health facilities, including a slimming clinic and medical clinic. The one art/cultural use is a concert hall, the Wigmore Hall. The proportion of vacant units has fallen significantly, which could account for the rises in other use classes.

Figure 2: Units by use class, 2008



Source: GOAD retail survey, 2008

Figure 3: Units by use class, 1997-2008



Source: Land Use Survey 1997, 2002, GOAD retail survey 2008

Range of A1 Uses

- 1.15 Wigmore Street has a limited number of multiple retailers and there are no department stores or international retailers. There are only 4 national A1 uses, compared with an average of 30 units in all CAZ centres in the City. The low number of multiples suggests that Wigmore Street is primarily a low order comparison and service shopping area. The area serves workers within the area, with several cafés and sandwich bars, banks and building societies.
- 1.16 Apart from the convenience shops and chemists serving local residents, most of the shops are specialist '*niche*' shops which do not compete with the comparison shopping facilities in Oxford Street. Several of the specialist shops are kitchen and bathroom showrooms. The service facilities include several hairdressers, coffee shops and sandwich bars. The A2 uses are spread throughout the area.

Proportion of Vacant Street Level Property

- 1.17 The unit vacancy rate in Wigmore Street has nearly halved since 2002, and is now below the CAZ centres average of 8.2%. As shown, the rate has dropped significantly between each of the three survey dates, and has dropped by nearly 25% in just over 10 years. The remaining vacant units are distributed evenly throughout the centre.

Table 3: Level of Vacant Street Level Property

| Wigmore Street | 1997 | 2002 | 2008 |
|-----------------------|-------------|-------------|-------------|
| Vacancy Rate | 32.4% | 14.7% | 7.6% |
| | (24/74) | (11/75) | (6/79) |
| CAZ Centre Avg | | 7.5% | 8.2% |

Zone A Retail Rents

- 1.18 Zone A rental retail levels for the area are shown in Table 4. Prime rental levels have stayed the same in Wigmore Street since 1997. The prime Zone A rental level now achieved in Wigmore Street (up to £1,076) is significantly below (less than half) the average for all CAZ areas (£2,379).

Table 4: Zone A Retail Rents

| Location | 1997 Zone A Rent £ Sq M | 2002 Zone A Rent £ Sq M |
|------------------------|-------------------------|-------------------------|
| Wigmore Street | 1,076 | 753 – 1,076 |
| Highest CAZ | 4,304 | 5,113 |
| Lowest CAZ | 269 | 646 |
| Highest in Westminster | 4304 | 5113 |
| Lowest in Westminster | 161 | 161 |

Source: Chesterton 2002.

State of the Centre's Attractions and Environmental Quality

- 1.19 The attitudinal assessment of the attractions and amenity of the area is summarised below. Wigmore Street's attractions have not changed significantly since 2002, and the areas overall score is 60%, compared with the CAZ average of 61.9%, which ranks Wigmore Street 12th out of the CAZ areas in the City.
- 1.20 The weaknesses of the centre include the poor provision of multiple retailers, food shops and the availability of sports and leisure facilities. The provision of pubs/bars, community events and local services are all rated as average, which is helped by the presence of Wigmore Hall in the centre.
- 1.21 The main strengths of the centre are the provision of independent and specialist shops such as the kitchen and bathroom showrooms. The provision and quality of restaurants is also very positive, and is still improving as more open in the centre. Finally, the centre is well rated in terms of the provision of office space, and banks and building societies.
- 1.22 The general quality of the retail environment is also rated as being good, which is also reflected later in the daytime amenity report. Wigmore street is one of the quieter CAZ centres despite its proximity to Oxford Street, meaning the environment is generally well kept.

Table 5: Attractions

| ATTRactions | 1997 | | | 2002 | | | 2008 | | |
|---|--------|----------|--------|--------|----------|--------|--------|----------|--------|
| | Good=2 | Average= | Poor=0 | Good=2 | Average= | Poor=0 | Good=2 | Average= | Poor=0 |
| Retail Provision | | | | | | | | | |
| Prominence of multiple retailers | | | X | | | X | | | X |
| Prominence of independent shops | X | | | X | | | X | | |
| Availability of food shopping | | | X | | | X | | | X |
| Prominence of specialist shops | | X | | X | | | X | | |
| Quality of market (frequency, variety etc) | na | na | na | na | na | na | na | na | na |
| Quality of retail environment | | X | | | X | | X | | |
| Art Culture | | | | | | | | | |
| Quality of restaurants (availability, number etc) | X | | | X | | | X | | |
| Quality of pub/club/bars | | X | | | X | | | X | |
| Range of cultural/ community events (theatre, concerts etc) | X | | | | X | | | X | |
| Availability of sports and leisure facilities | | | X | | | X | | | X |
| Service Provision | | | | | | | | | |
| Local services (information, library etc) | | | X | | | X | | X | |
| Employment/ office space | X | | | X | | | X | | |
| Bank/ building society provision | X | | | X | | | X | | |
| Total | 13/26 | | | 13/26 | | | 15/25 | | |
| Percentage | 50.0% | | | 50.0% | | | 60.0% | | |
| Rank | na | | | na | | | 12th | | |

Daytime Amenity

- 1.23 Wigmore Street's day time amenity rating is 89% compared with the average for all CAZ areas of 86.4%, and is ranked 9th out of the CAZ areas in the City.
- 1.24 The weaknesses of the centre are mainly found in the town centre identity categories, such as the feel good factor of the centre, and the lack of street/promotional events, which are all rated as being average. Other slight issues are the presence of chewing gum and refuse bags on the street, and features that identify the centre.
- 1.25 The main strengths of the centre are in the security and overall environment categories, where the centre is rated as being clean, attractive, with good daytime security for shoppers and visitors. This is expressed through an absence of anti social behaviour such as begging, street drinking, rough sleepers and vandalism, along with the overall good quality of buildings and the general physical environment.

Table 6: Daytime Amenity

| Wigmore Street | Average 1997 | Average 2002 | Average 2008 |
|--|--------------|--------------|--------------|
| Overall environment of public areas in the centre | | | |
| Presence of litter | n/a | 2 | 1.7 |
| Presence of refuse bags on the street | n/a | 2 | 1.3 |
| Evidence of street fouling | n/a | 2 | 2.0 |
| Evidence of Chewing Gum | n/a | n/a | 1.3 |
| Presence of glass/glasses/other debris incl. Food and food containers/wrapping | n/a | 2 | 2.0 |
| Condition of buildings | 1 | 2 | 2.0 |
| Quality of buildings | 1 | 2 | 2.0 |
| Special features (pedestrianisation, Street furniture, etc) | 1 | 1 | 2.0 |
| Impact of vacant sites | 1 | 1 | 2.0 |
| Security | | | |
| Evidence of Vandalism and Graffiti (incl. on street furniture) | n/a | 2 | 2.0 |
| Security during shopping hours (availability, access, security etc) | 1 | 1 | 1.7 |
| Ease of passage for pedestrians (incl. presence Of obstacles eg illegally parked vehicles) | n/a | 1 | 2.0 |
| Evidence of drunkenness, anti-social Behaviour, rowdiness | n/a | 2 | 2.0 |
| Presence of rough sleepers | n/a | 2 | 2.0 |
| Presence of beggars | n/a | 2 | 2.0 |
| Presence of street drinkers | n/a | 2 | 2.0 |
| Evidence of touting (e.g. mini cabs, rickshaws, Prostitution, drug dealing etc.) | n/a | 2 | 2.0 |
| Presence of illegal street traders e.g counterfeit goods, hot dogs, peanuts etc. | n/a | 2 | 2.0 |
| Effectiveness of any deterrent measures (CCTV, police patrols, door security etc) | 1 | 1 | 1.7 |
| Quality of street lighting | 1 | 1 | 1.7 |
| Safety perception in shopping hours | 1 | 2 | 2.0 |
| Identity of town centre | | | |
| Features which identify the centre (eg flagship stores, buildings etc) | 1 | 1 | 1.3 |
| Promotion/ Street events | 0 | 0 | 1.0 |
| 'Feel good' factor of town centre | 1 | 1 | 1.0 |
| Total for centre | 30 | 108 | 128 |
| Percentage score | 45% | 78% | 89% |
| Rank | 18 | 12 | 9 |
| nb. 2008 figures are averages of several survey points throughout the shopping centre. | | | |
| | 0=Poor | | |
| | 1=Average | | |
| | 2=Good | | |

Night Time Amenity

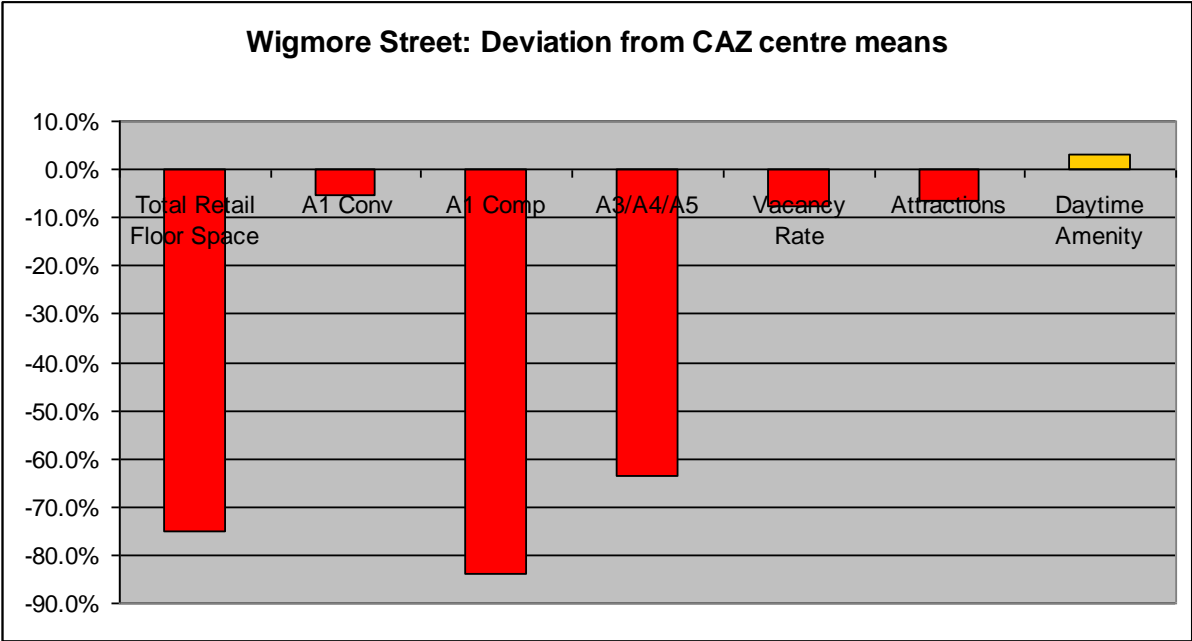
1.26 The night-time amenity rating is 78.9%, just above the daytime rating. Wigmore Street is ranked 4th out of the 19 CAZ areas in the City for night-time amenity. The centre's night-time rating is good in terms of absence of street fouling, glass and debris, beggars, illegal street traders, rough sleepers and touting. The centre is rated poor in relation to presence of refuse bags.

Table 7: Night-Time Amenity

| AMENITY – NIGHT TIME | 2002 | | |
|--|-----------------------|-----------|--------|
| | Good=2 | Average=1 | Poor=0 |
| Overall environment of public areas in the town centre | | | |
| General Cleanliness out of Shopping Hours: | | | |
| Presence of litter | | X | |
| Presence of refuse bags on the street | | | X |
| Evidence of street fouling | X | | |
| Presence of glass/glasses/other debris incl. food and food containers/wrapping | X | | |
| Security | | | |
| Feeling of security | X | | |
| Evidence of Vandalism and Graffiti (incl. on street furniture) | X | | |
| Ease of passage for pedestrians (incl. presence of obstacles eg illegally parked vehicles) | X | | |
| Evidence of drunkenness, anti-social Behaviour, rowdiness | X | | |
| Presence of rough sleepers | X | | |
| Presence of beggars | X | | |
| Presence of street drinkers | X | | |
| Presence of illegal street traders e.g counterfeit goods, hot dogs, peanuts etc. | X | | |
| Evidence of touting (e.g. mini cabs, rickshaws, Prostitution, drug dealing etc.) | X | | |
| Effectiveness of any deterrent measures (CCTV, police patrols, door security etc) | | X | |
| Quality of street lighting | | X | |
| Safety perception out of shopping hours | | X | |
| Identity of town centre | | | |
| Features which identify the centre (e.g. quality of food and drink premises, building etc) | X | | |
| Promotion/ Street events | | X | |
| 'Feel good' factor of centre at night | | X | |
| Total | 30/38 | | |
| Percentage | 78.9% | | |
| Rank | 4th | | |

Relative Performance of Centre

Figure 4: Deviation of centre from the CAZ mean



1.27 Wigmore Street is a reasonably small CAZ area, and therefore does not compare positively with a majority of the CAZ centre averages. The centre has below average amounts of all major types of floor space as shown above, illustrating the small size of the centre, which is backed up by the below average attractions score. However, the centre has a below average vacancy rate, meaning that occupancy is high, and the daytime amenity rating is above average, illustrating the quality of the retail environment.

Pedestrian Flows

1.28 The 2002 pedestrian flow survey showed that the busiest area of Wigmore Street is outside Whistles (12 St Christopher’s Place) with an average weekly flow of 21,600 compared with the area’s overall average of 13,910 per week, recorded at 11 points throughout the area. Pedestrian flow is generally stronger in the western part of the CAZ area and the lowest weekly flow was recorded outside Martin Barnett Furniture (68-72 Marylebone Lane) with an average of 8,680. The average weekly flow for the area as a whole was 13,910, which is ranked 14th out of the 15 CAZ areas and CAZ Frontage for which pedestrian flow data was recorded.

Table 8: Summary of Health Check Assessment

| Subject | Subject Matter | Data | Number | Sq M | |
|--------------|------------------|-------------------------------------|----------------------------------|--------|--|
| RETAILING | Floorspace | Total Floorspace | | 12,885 | |
| | | Total Convenience (A1) | | 1,640 | |
| | | Total Comparison (A1) | | 6,150 | |
| | | Total Service (A2) | | 1,596 | |
| | | Total Food % Drink (A3/A4/A5) | | 2,617 | |
| | | Total Sui Generis | | 411 | |
| | | Total Vacant | | 471 | |
| | | | | | |
| | | Retail Offer | Total Number of Shop Units | 79 | |
| | | | Total Number of A1 Units | 43 | |
| | | | a) Convenience shops | 3 | |
| | | | b) Department/principal stores | 0 | |
| | | | c) Prestige international shops | 0 | |
| | | | d) National comparison retailers | 5 | |
| | | | e) Specialist Independent shops | 20 | |
| | | | f) Independent shops | 15 | |
| | | | Total Comparison Multiples | | |
| | | | Total Number of A2 Units | 9 | |
| | | | Total Number of A3/A4/A5 Units | 16 | |
| | | | Total Number of Sui Generis | 1 | |
| | | | Total Number of Vacant | 6 | |
| | | | | | |
| | | Market | Days of operation | 0 | |
| | | Number of stalls | 0 | | |
| | | | | | |
| | Proposals | Changes of use A1 to A2 | 0 | | |
| | | Changes of use A1 to A3/A4/A5 | 2 | | |
| | | Changes of use A1 to other uses | 9 | | |
| | | | | | |
| | Prime Shop Rents | Zone A per sq M | £1,076 | | |
| | | | | | |
| ARTS/CULTURE | | (cinemas, galleries, theatres etc.) | 1 | | |
| HEALTH USES | | (clinics, surgeries etc.) | 3 | | |
| HOTELS | | | 0 | | |

1.29 Wigmore Street's strengths are its provision of independent and specialist shops, such as bathroom and kitchen showrooms. The area provides facilities for the office workers in and surrounding the area, including sandwich bars, banks and other uses. Wigmore Street is not a major comparison shopping area and does not offer the same facilities one would expect to find in a CAZ area. The evening economy is small but healthy with a growing number of restaurants and a concert hall in the area.

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

VIEWS OF WIGMORE STREET



Wigmore Street, with Wigmore Hall to the right hand side with the Art Deco entrance. This also shows the wide, clean pavements, and general high quality of the retail environment.

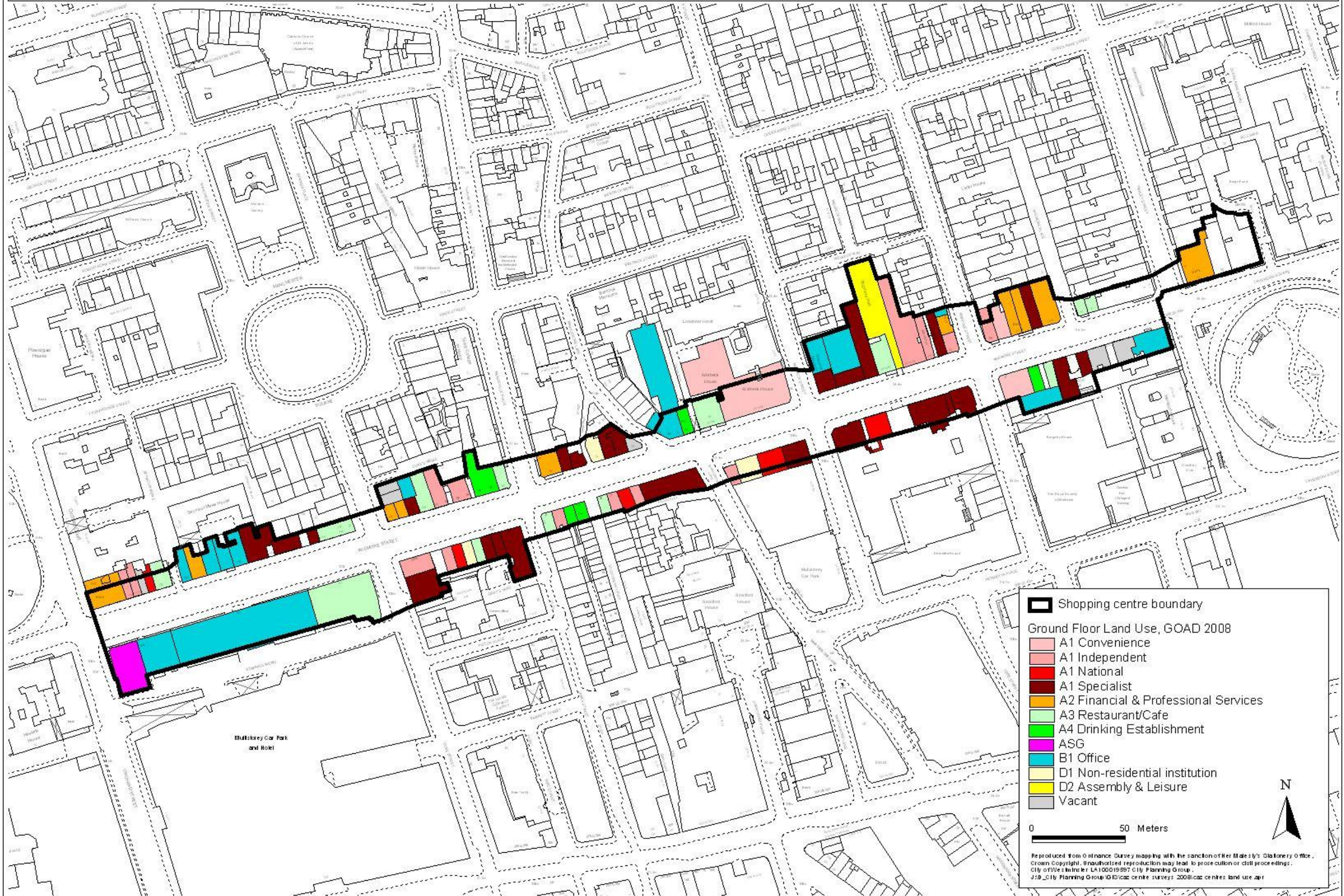


Modern mixed use development at the western end of Wigmore Street, comprising offices on the upper floors, with restaurant and show room uses on the ground floor.



St Christopher's Place, connecting Wigmore Street to Oxford Street to the south.

MAP 1: Wigmore Street Ground Floor Land Use 2008


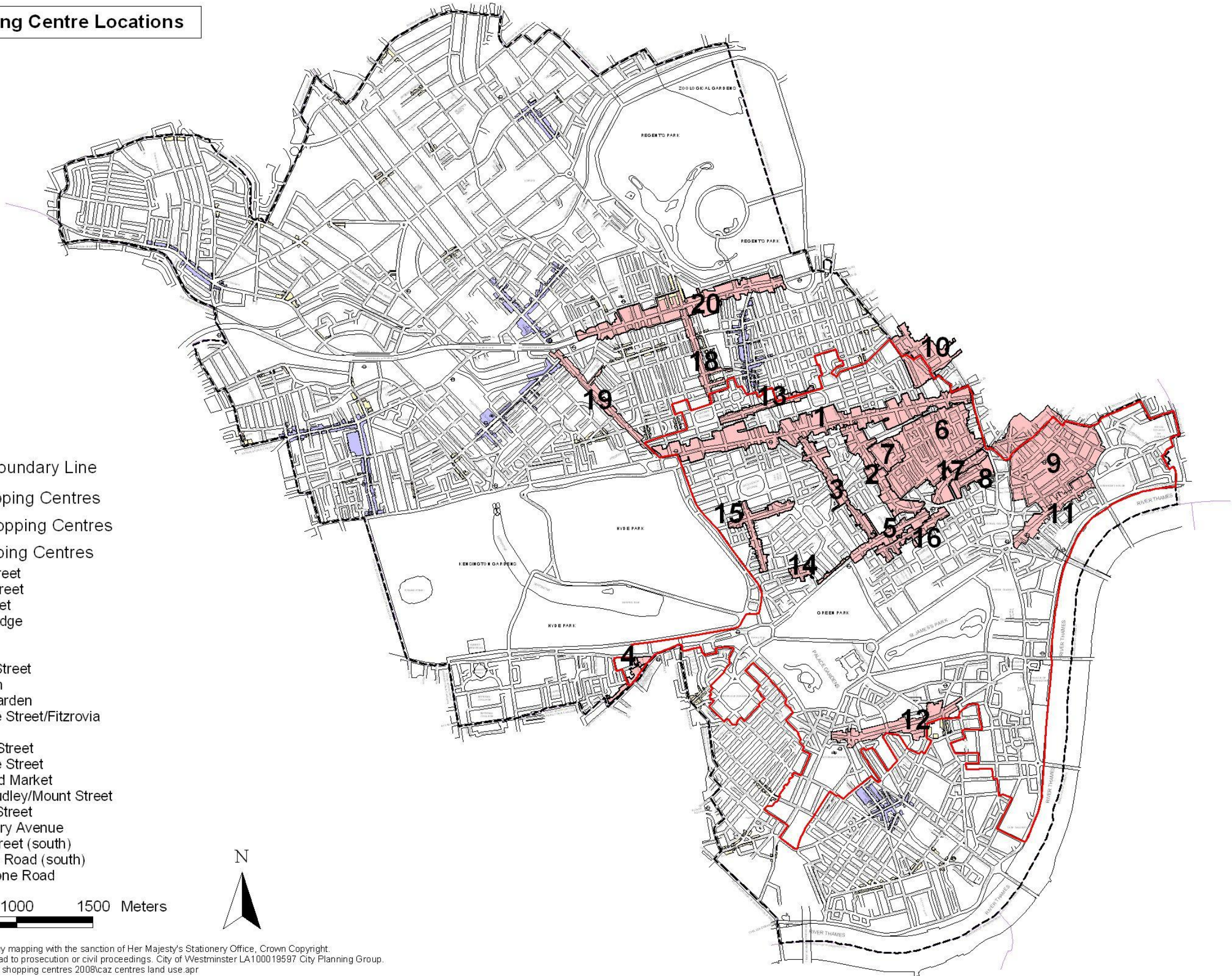


MAP 2: Shopping Centre Locations

-  Borough Boundary Line
-  Local Shopping Centres
-  District Shopping Centres
-  CAZ Shopping Centres

- 1 - Oxford Street
- 2 - Regent Street
- 3 - Bond Street
- 4 - Knightsbridge
- 5 - Piccadilly
- 6 - Soho
- 7 - Carnaby Street
- 8 - Chinatown
- 9 - Covent Garden
- 10 - Charlotte Street/Fitzrovia
- 11 - Strand
- 12 - Victoria Street
- 13 - Wigmore Street
- 14 - Shepherd Market
- 15 - South Audley/Mount Street
- 16 - Jermyn Street
- 17 - Shaftsbury Avenue
- 18 - Baker Street (south)
- 19 - Edgware Road (south)
- 20 - Marylebone Road

0 500 1000 1500 Meters

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 J:\D_City Planning Group\gis\CAZ shopping centres 2008\caz centres land use.apr

APPENDIX 1

Glossary of Terms

| | |
|--------------------------------|---|
| A1 | Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, dry cleaners, pet shops, sandwich bars, retail showrooms, and domestic hire shops. |
| A1 café type uses | Shops such as sandwich bars or coffee shops selling food and drinks to be consumed mainly off the premises, but not hot food takeaways. Examples include certain Pret a Manger shops, Costa Coffee and the Seattle Coffee Co. shops. |
| A2 | Banks, building societies, bureau de change, estate and employment agencies, professional and financial services, telephone bureaux, betting offices and beauty salons (excluding hair). |
| A3 | Food and drink uses such as restaurants, pubs, snack bars, cafés, wine bars and shops for the sale of hot food (hot food take-aways). |
| A4 | Drinking Establishments: Premises where the primary purpose is the sale and consumption of alcoholic drinks on the premises. |
| A5 | Hot Food Take-away: Premises where the primary purpose is the sale of hot food to take away. |
| B1 | Business uses such as offices, research and development and industrial uses. |
| CAZ | Central Activities Zone (CAZ). The CAZ is an area of mixed uses, many of which contribute directly to the national, regional and local economy. It is this mix of activities and their supporting resources which underpins the success of London's economy. |
| CAZ Frontages | 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. |
| 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. |
| 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. |
| 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. |
| PPS6 | Planning Policy Statement 6: Planning for Town Centres |
| 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. |
| 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. |
| Sui generis | Sui Generis is a term that refers to a use on its own. Any planning use not falling within a specific class within the Use Class Order falls within this category. Examples of sui generis uses in shopping centres are launderettes, mini cab offices, amusement centres and car showrooms. |
| Town centre | Town centre is defined in Annex A of PPS6 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 PPS6, 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. |
| Zone A Rent | The rental level per square metre achieved on the first six metres of a shop unit. |

APPENDIX 2

City of Westminster Centre Health Checks 2007/8

Primary Shopping Areas

- 1 Oxford Street*
- 2 Regent Street*
- 3 Bond Street *
- 4 Knightsbridge*

CAZ Shopping Areas

- 5 Piccadilly*
- 6 Soho*
- 7 Carnaby Street*
- 8 Chinatown*
- 9 Covent Garden*
- 10 Charlotte Street/Fitzrovia*
- 11 Strand*
- 12 Victoria Street*
- 13 Wigmore Street*
- 14 Shepherd Market*
- 15 South Audley/Mount Street*
- 16 Jermyn Street*
- 17 Shaftesbury Avenue*

CAZ Frontage Shopping Areas

- 18 Baker Street (South)*
- 19 Edgware Road (South)*

District Centres

- 1 Church St/ Edgware Road*
- 2 Harrow Road*
- 3 Marylebone High Street*
- 4 Praed Street*
- 5 Queensway/Westbourne Grove*
- 6 St John's Wood*
- 7 Warwick Way/Tachbrook Street*

Local Centres

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

*areas subject to health checks in 1997.

** reports containing pedestrian flow counts (2002).