



City of Westminster

Central Activities Zone Shopping Area 14: Shepherd Market

Shopping Area Health Check Survey



2008

CONTENTS

Background to the Health Check Studies..... 2
Methodology..... 2

Introduction..... 6
Connectivity..... 6
Total Retail Floorspace..... 7
Diversity of Use..... 8
Range of A1 Uses..... 10
Proportion of Vacant Street Level Property..... 10
Zone A Retail Rents..... 10
State of the Centre’s Attractions and Environmental Quality..... 11
Daytime Amenity..... 11
Night Time Amenity..... 13
Relative Performance of Centre..... 14
Pedestrian Flows..... 14

Summary of Health Check Assessment..... 15

Views of Oxford Street..... 16
19

Map 1: Ground Floor Land Uses..... 18
Map 2: Shopping Centre locations..... 18

Appendix 1: Glossary of Terms..... 20
Appendix 2: City of Westminster Health Check Centres..... 21

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 Shepherd Market, 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 has 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 14: SHEPHERD MARKET

Introduction

- 1.1 Shepherd Market is a small shopping and entertainment area located in Mayfair, to the north of Piccadilly and to the east of Park Lane. Shepherd Market extends approximately 100 metres east to west by 100 metres north to south.
- 1.2 The area is within close proximity to both Green Park and Hyde Park. The area is compact, encompassing Hertford Street, Trebeck Street and Shepherd Street as well as Shepherd Market.
- 1.3 The Shepherd Market CAZ area is somewhat isolated from other CAZ shopping areas and relies upon its own attractions to draw visitors and customers to the area. There is however considerable employment space in the vicinity of Shepherd Market, which provides a strong daytime presence in the area. The centre is also very close to many hotels on Park Lane, which helps to strengthen the night time economy.

Connectivity

- 1.4 Shepherd Market is fairly self contained, and is situated away from main roads, with Piccadilly to the south and Park Lane to the west. Curzon street is the busiest street in the centre, which runs along its northern border and connects Park Lane to the southern part of Mayfair.
- 1.5 Although no public transport passed through the centre directly, there are many options within walking distance. The nearest London Underground stations are Hyde Park Corner (Piccadilly Line), which is located roughly five minutes walk to the west of the centre, and Green Park (Jubilee, Victoria, Piccadilly lines), which is located on Piccadilly, just over five minutes walk from the centre.
- 1.6 Although no bus routes run directly through Shepherd Market, many serve neighbouring roads, making the centre reasonably easy to access. Many routes run along Piccadilly to the south of the centre, and Park Lane to the west of the centre, serving many parts of London.
- 1.7 Due to the location of public transport options, many people visit the centre on foot, which is the only way to access certain parts of the centre, specifically Shepherd Market itself.

Total Retail Floor Space

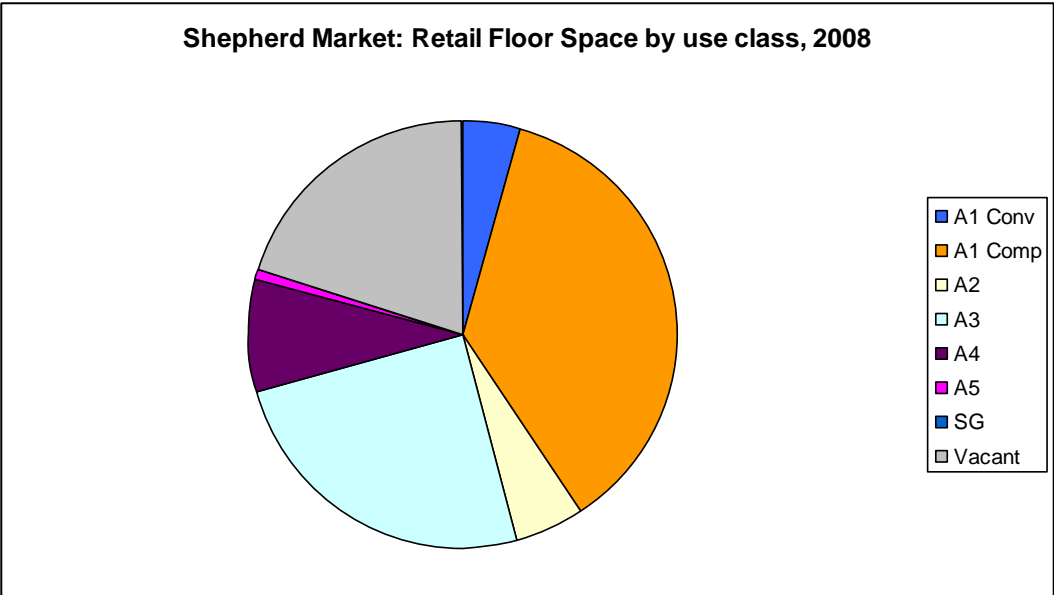
1.8 Total retail floorspace in Shepherd Market is broken down in Table 1. In total, Shepherd Market has 4,128 sq. m of retail floor space, making it the smallest CAZ centre by far, compared to the CAZ centres average of 51,643sqm of retail floor space. Shepherd Market has a high proportion of Class A3 and A4 floor space compared with the CAZ centres average. The proportion of food and drink uses reflects its attractions to workers, tourists and other visitors to the area. Conversely the area has a significantly lower proportion of comparison retail floor space. Class A1 convenience and Class A2 floorspace is comparable with the CAZ average. The high vacancy rate will be discussed later in this report.

Table 1: Total Retail Floor space

Use	GF Fspace	% GF Fspace	All floors Fspace	% All floors fspace	CAZ Fspace %
A1 Conv	186	4.5%	186	4.5%	3.4
A1 Comp	1489	36.1%	1489	36.1%	73.7
A2	212	5.1%	212	5.1%	4.1
A3	1022	24.7%	1022	24.7%	8.8
A4	365	8.8%	365	8.8%	3.9
A5	29	0.7%	29	0.7%	1.1
SG	0	0.0%	0	0.0%	0.4
Vacant	827	20.0%	827	20.0%	4.5
Total	4128	100.0%	4128	100.0%	100

Source: GOAD retail survey, 2008

Figure 1: Retail Floor Space by Use Class, 2008



Source: GOAD retail survey, 2008

1.9 Shepherd Market is a mixed-use area primarily serving visitors/tourists and workers in addition to its local residents. The area is one of the smallest CAZ areas but still has a good range of food shops, restaurants and bars. The area does not offer the same selection of shops, especially in terms of comparison shopping that can be found in other areas within the CAZ, reflecting the centre’s reliance upon restaurants and bars.

Diversity of Use

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

Table 2: Diversity of Uses, 1997-2008

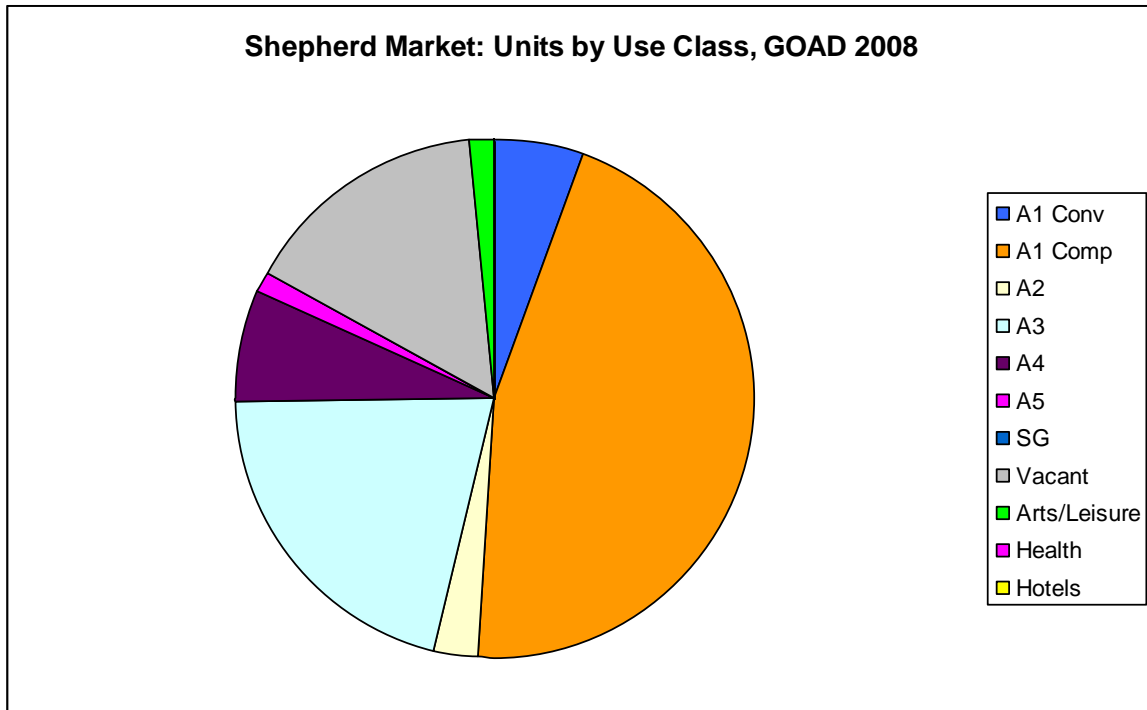
Use Class	Units 1997	Units 2002	Units 2008	Unit % 1997	Unit % 2002	Unit % 2008
<i>A1 Retail (Total)</i>	37	30	36	48.10%	39.50%	50.70%
A1 Department	0	0	0	0.00%	0.00%	0.00%
A1 International	0	0	0	0.00%	0.00%	0.00%
A1 National	3	2	2	3.90%	2.60%	2.80%
A1 Specialist	15	3	9	19.50%	3.90%	12.70%
A1 Independent	13	19	21	16.90%	25.00%	29.60%
A1 Convenience	6	6	4	7.80%	7.90%	5.60%
A2 Financial/Professional	5	3	2	6.50%	3.90%	2.80%
<i>Food and Drink</i>	18	24	21	23.40%	31.60%	29.60%
A3 Restaurant/Café	na	17	15	na	22.40%	21.10%
A4 Drinking Establishments	na	5	5	na	6.60%	7.00%
A5 Take-Away	na	2	1	na	2.60%	1.40%
Sui Generis	0	0	0	0.00%	0.00%	0.00%
Vacant Units	16	17	11	20.80%	22.40%	15.50%
Arts/Culture/Leisure	1	2	1	1.30%	2.60%	1.40%
Health uses	0	0	0	0.00%	0.00%	0.00%
Hotels	0	0	0	0.00%	0.00%	0.00%
TOTAL	77	76	71	100.00%	100.00%	100.00%

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

- 1.11 The overall number of units has decreased by 5 since 2002, however this is most likely caused by several fairly significant redevelopments taking place in the centre at the time of survey, which may have removed them from the survey data whilst under construction.
- 1.12 Between 2002 and 2008 there was one proposal in the centre, for the redevelopment of a site, which would retain the existing A1 retail use on the site, and include a new Sui Generis use in addition to other existing uses.
- 1.13 Table 2 shows that the proportion of A1 retail units has risen since 2002, with the biggest growth appearing in the A1 specialist category, which has risen by nearly 9%. The amount of independent retailers has also risen, while the number of convenience units has dropped.
- 1.14 Food and drink continues to account for a significant proportion of the units, at nearly 30%. A majority of these are class A3 restaurant/café's, along with a fairly significant number of A4 class drinking establishments serving the area. There is also one takeaway in the centre.

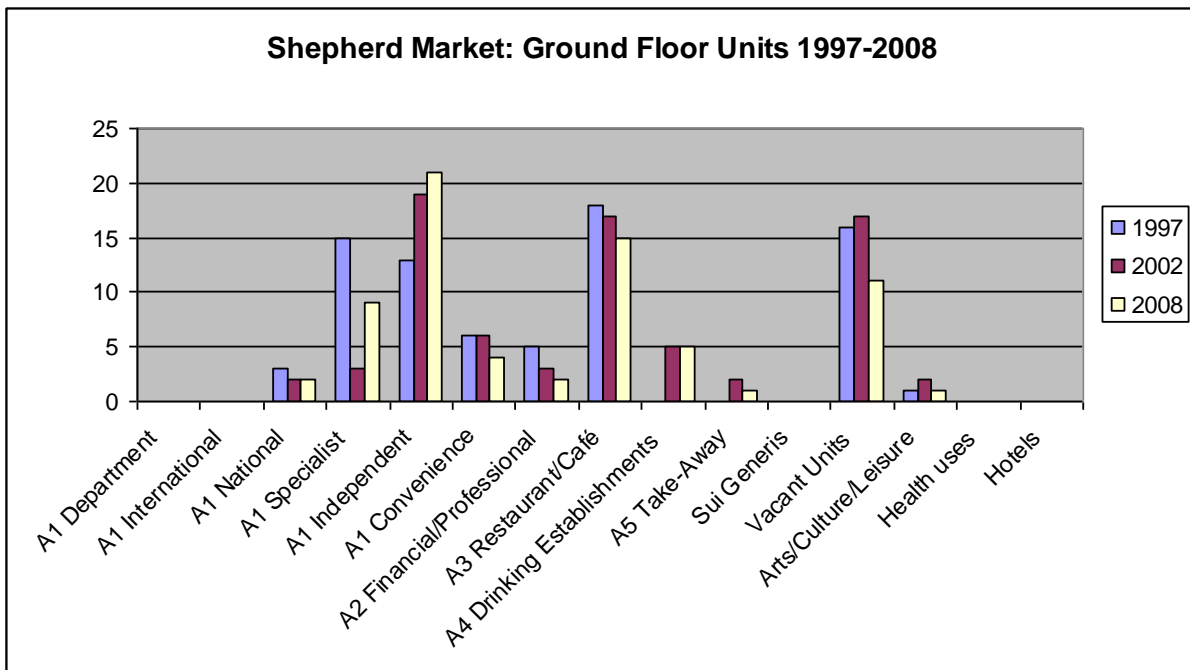
1.15 Outside of A class uses, there is one leisure use, a Cinema, but no other non- A class uses. The vacancy rate has decreased since 2002 and will be discussed later in this report.

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

1.16 Shepherd Market has very low number of multiple retailers. The area has no department store or international traders. There are only two national A1 uses, compared with an average of 30 units in all CAZ areas in the City. The low number of multiples and the low proportion of comparison shops suggest that Shepherd Market is a service and entertainment area rather than a comparison shopping destination. The retail that does exist is mostly specialist or independent in nature, including several hairdressers, cobblers, jewellers and art dealers. Within the area, on Hertford Street, there is the Curzon Cinema. For a small CAZ area there are a large number of pubs and bars, these include, Ye Grapes, Shepherds Market Tavern, The Kings Arms, and L'Autre.

Proportion of Vacant Street Level Property

1.17 The unit vacancy rate in Shepherd Market is much higher than the average vacancy rate for all CAZ areas. However, the vacancy rate has decreased fairly significantly since 2002. Many of the vacant units are actually located in development sites within Shepherd Market and are therefore likely to be re-occupied once redevelopment has been completed. This includes the site bound by Shepherd Market, Shepherd Street, Hertford Street and Trebeck Street, along with the units on White Horse Street. Within Shepherd Market itself, the number of vacant units is not surprising, due to the fairly high turnover of these specialist and independent retailers.

Table 3: Level of Vacant Street Level Property

Shepherd Market	1997	2002	2008
Vacancy Rate	20.8%	22.4%	15.5%
	(16/77)	(17/76)	(11/71)
CAZ Centre Avg		7.5%	8.2%

Zone A Retail Rents

1.18 Zone A retail rental levels for the area are shown in Table 4. Prime rental levels have increased only slightly in Shepherd Market since 1997. The prime Zone A rental level now achieved in Shepherd Market (up to £969) is significantly below 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
Shepherd Market	645	646 – 969
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. Shepherd Market's attractions score has increased slightly since 2002, but remains quite low, standing now at 50% compared with 46.2% in 1997. The average for all CAZ areas is slightly higher at 61.9%, meaning Shepherd Market is ranked =16th out of the CAZ areas in the City.
- 1.20 Shepherd Market has a poor provision of multiple retailers, local services, and bank/building societies, reflecting the small size of the centre and limited range of services on offer. The centre is rated as average in terms of the availability of food shopping, specialist shops, cultural events, leisure facilities and employment space.
- 1.21 The main strengths of the centre include the number of independent shops, restaurants/café's and pubs/bars, and the overall quality of the retail environment, which is also reflected in the daytime amenity survey later in this report.

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)		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	15/26			12/26			13/26		
Percentage	58.0%			46.2%			50.0%		
Rank	na			=15th			=16th		

Daytime Amenity

- 1.22 Shepherd Market's day time amenity rating is 91% compared with the average for all CAZ areas of 86.4%, and is ranked =5th out of the CAZ areas in the City, which is an improvement on the 2002 ratings and ranking.
- 1.23 Only one category is rated as being average, the effectiveness of any security deterrent measures. The remainder of the categories are all rated very positively, with the main strengths being the security categories, which are nearly all rated as being good, and most of the overall environmental categories, which are also rated very positively.
- 1.24 Overall, Shepherd Market is rated as a clean, attractive and secure shopping destination.

Table 6: Daytime Amenity

Shepherd Market	Average 1997	Average 2002	Average 2008
Overall environment of public areas in the centre			
Presence of litter	n/a	2	2
Presence of refuse bags on the street	n/a	0	2
Evidence of street fouling	n/a	2	2
Evidence of Chewing Gum	n/a	n/a	2
Presence of glass/glasses/other debris incl. Food and food containers/wrapping	n/a	2	2
Condition of buildings	2	2	1.5
Quality of buildings	2	2	1.5
Special features (pedestrianisation, Street furniture, etc)	2	2	2
Impact of vacant sites	1	0	1.5
Security			
Evidence of Vandalism and Graffiti (incl. on street furniture)	n/a	2	2
Security during shopping hours (availability, access, security etc)	2	2	2
Ease of passage for pedestrians (incl. presence Of obstacles eg illegally parked vehicles)	n/a	2	2
Evidence of drunkenness, anti-social Behaviour, rowdiness	n/a	2	2
Presence of rough sleepers	n/a	2	2
Presence of beggars	n/a	2	2
Presence of street drinkers	n/a	2	2
Evidence of touting (e.g. mini cabs, rickshaws, Prostitution, drug dealing etc.)	n/a	2	2
Presence of illegal street traders e.g counterfeit goods, hot dogs, peanuts etc.	n/a	2	2
Effectiveness of any deterrent measures (CCTV, police patrols, door security etc)	1	1	1
Quality of street lighting	2	1	1.5
Safety perception in shopping hours	2	1	1.5
Identity of town centre			
Features which identify the centre (eg flagship stores, buildings etc)	2	1	2
Promotion/ Street events	0	1	1.5
'Feel good' factor of town centre	2	2	1.5
Total for centre	36	74	87
Percentage score	82%	80%	91%
Rank	=7	=10	=5
nb. 2008 figures are averages of several survey points throughout the shopping centre.			
0=Poor			
1=Average			
2=Good			

Night Time Amenity

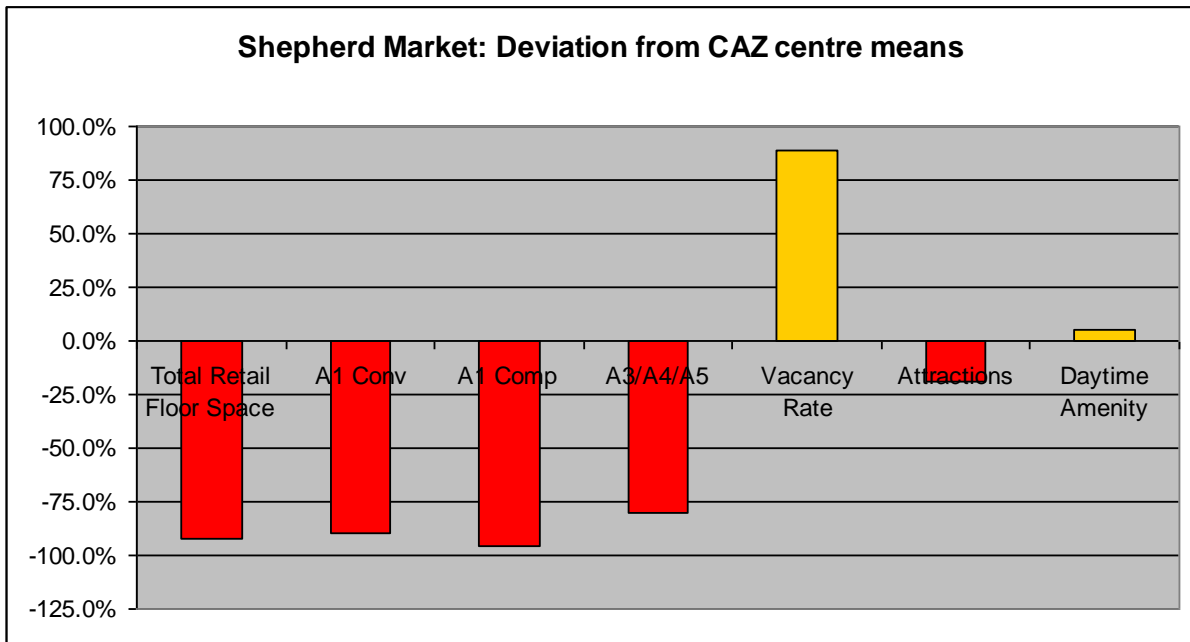
- 1.25 The night-time amenity rating is 86.8% higher than the daytime rating. Shepherds Market is ranked 1st out of 19 CAZ areas in the City for night-time amenity. The centre's night-time rating is good in terms of absence of street fouling, overall security and the identity of the area which includes promotion/street events and the 'feel good' factor of the area.

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	33/38		
Percentage	86.8%		
Rank	1st		

Relative Performance of Centre

Figure 4: Deviation of centre from the CAZ mean



- 1.26 Shepherd Market is a small CAZ area, which is reflected in most of the performance indicators above. The centre does not compare favourably with the CAZ average for all of the floor space categories, and has a vacancy rate that is well above average. The attractions rating is also below average, illustrating again the small size of the centre and limited range of services and uses on offer. However, the daytime amenity rating compares favourably with the CAZ average, indicating the quality of the retail environment in the centre.
- 1.27 The area has 76 retail units which is significantly lower than the GLA average of 232 units for all Major Centres. The area also has a lower number of Class A2 and A3 service uses (27 units) compared with the GLA average (68 units). However, the proportion of service uses in Shepherd Market (35%) is higher than the GLA average of 29.3%.

Table 8: Summary of Health Check Assessment

Subject	Subject Matter	Data	Number	Sq M	
RETAILING	Floor space	Total Floor space		4,128	
		Total Convenience (A1)		186	
		Total Comparison (A1)		1,489	
		Total Service (A2)		212	
		Total A3		1,416	
		Total Sui Generis		0	
		Total Vacant		827	
	Retail Offer	Total Number of Shop Units		71	
		Total Number of A1 Units		36	
		a) Convenience shops		4	
		b) Department/principal stores		0	
		c) Prestige international shops		0	
		d) National comparison retailers		2	
		e) Specialist Independent shops		9	
		f) Independent shops		21	
		Total Comparison Multiples		2	
		Total Number of A2 Units		2	
		Total Number of A3 Units		21	
		Total Number of Sui Generis		0	
		Total Number of Vacant		11	
	Market	Days of operation		0	
		Number of stalls		0	
	Proposals	Changes of use A1 to A2		0	
Changes of use A1 to A3			0		
Changes of use A1 to mixed use			1		
Prime Shop Rents	Zone A per sq M		£969		
ARTS/CULTURE	(cinemas, galleries, theatres etc.)		1		
HEALTH USES	(clinics, surgeries etc.)		0		
HOTELS			0		

1.28 Shepherd Market's strengths are its provision of restaurants, bars and independent retailers, providing a good evening economy. It is particularly attractive to local workers, visitors and tourists. However the area does not offer the range of facilities one would expect to find in a CAZ shopping area, with limited provision of comparison shopping and only two multiple retailers, and limited local services.

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

VIEWS OF SHEPHERD'S MARKET



Shepherd Street, containing a mix of retail and food and drink uses.



One of several pubs in Shepherd's Market, attracting local workers and tourists.



The clean, well kept pedestrianised section of Shepherd's Market, with attractive street trees.



Independent retailers and food and drink outlets in the pedestrianised part of Shepherd's Market.



Shepherd Street, with a mix of uses including convenience shops, food and drink and other uses.



White Horse Street, containing a large development site and vacant units.

MAP 1: Shepherd Market Ground Floor Land Use 2008



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 laundrettes, 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).