

Edgware Road Insights Study: Final Report

Marble Arch London BID commissioned an Edgware Road Insights Study in August 2020. The primary aim of the study was to establish an evidence base for future planning policy and infrastructure interventions, as the BID looks towards creating a vision for the district as part of its second term.

We appointed [Pragma](#), with [Gerald Eve](#), to carry out the Insights Study, which was completed in July 2021. The cost of the study was met through Neighbourhood Community Infrastructure Levy (CIL) funding, from the [Hyde Park Paddington](#) and [Marylebone](#) Neighbourhood Forums.



The study was undertaken using a wide range of primary and secondary data, including:

- A thorough audit of all premises accessible to the general public including merchandise category, price positioning, unit size and selling area, estimated sales performance, quality of shop fit and visual merchandising standards.
- GOAD data showing trading name, retail category, floor space and exact location of all retail outlets and vacant premises across the study area.
- Demographic data from Experian including age, life stage, Socio-Economic Group, household income, home ownership, ethnicity and Mosaic classification.
- Worker numbers and profile from 'Business Register and Employment Survey'.
- Footfall data (from Marble Arch BID) and tube entry / exit figures (from TfL).
- Tourism demand model using data from Visit Britain, Experian demographic data and the Business Rates valuation service.

- Input from major landlords of lease lengths complemented by extracts from the property register to inform ownership, lease duration and rental tone.
- Pipeline development information (from Marble Arch BID and Westminster Council), supplemented by desk research.
- Online survey to residents, distributed via the Neighbourhood Forums and Amenity Societies, BID newsletter and promoted on social media. Respondents were asked to opt in to a second stage of more detailed one on one telephone surveys. 48 surveys were completed. This was then followed up with 10 more detailed interviews with a selection of residents, ensuring a representative sample by age, race and gender.
- Detailed telephone interviews with local office workers, retail traders, and hotel and venue operators.
- Interviews with landlords and estate representatives.
- A usage and satisfaction survey with Westminster City Council's Lead Member for Edgware Road.

Economic Overview

- The Insights Study covered the BID area from Marylebone Flyover to Marble Arch, and contains 696 businesses, of which 212 are ground floor commercial units.
- This section of Edgware Road contributes £165m to the UK economy each year, breaking down as £87m from office-based activities, £45m from hotels and the remainder from the retail and food and beverage sectors.



Catchment Area

- Over 21,000 residents live within a ten-minute walk of Edgware Road, dominated by child-free families and a higher-than-average household income. There is an annual spend of £218m available from local residents.

- The residential catchment area is supplemented by a ‘worker’ catchment of 133,000, again within a ten-minute walk of Edgware Road. These are pre-Covid figures. Office workers account for 60%, with the remainder working in hospitality and leisure.
- Tourism also brings significant potential spend, with approximately 22,000 hotel rooms within a ten-minute walk of Edgware Road. Pre-Covid there were 1.1m annual tourist visits (staying at least one night), generating £583m of turnover. Of these visits, 62% are international visits, and 38% domestic.
- With competing provision taken into account, the addressable market has an annual market size of £172m. Workers and visitors make up two thirds of Edgware Road’s addressable spend, with the food and beverage sector accounting of half of this total spend.

A Closer Look at Edgware Road’s ground floor occupiers

- Edgware Road is dominated by independent occupiers, with 81% of individual units occupied by independent operators, compared to the national average for high streets of 62%.
- When calculated by floorspace, independent operators occupy 45% of the available floorspace, compared to the national average of 22% for high streets.
- 26% of individual units are occupied by food and beverage operators; this compares with a national benchmark of 15%. There are 27 separate bureau de change and money transfer operators between the Marylebone Flyover and Seymour Street.



Lease Lengths and Rents

- A third of leases on Edgware Road are due to expire in the next five years. A further 32% in five to 10 years’ time and the remaining 35% having more than 10 years before expiry.

- Zone A rents along Edgware Road are between £140 and £200 per square foot per year. This would be on a par with cities such as Cardiff and Leeds. Nearby Oxford Street the average is £750, Bond Street £2,175 and the City £260.

Footfall and Accessibility

- Footfall peaks along Edgware Road during the summer months of June, July and August. Footfall is typically higher on the eastern side, where underground stations and multiple retailers tend to be found. On the western side of Edgware Road footfall is 39% lower.
- The two Edgware Road Underground Stations have a combined total of 12m annual entries and exits. For Marble Arch station this figure is slightly higher at 14m.



Vacancy Rates

When Pragma commenced the study in September 2020 the vacancy rate on Edgware Road was 10%. When this was repeated in May 2021 vacancies had risen to 16%, although some of these related to forthcoming developments and the securing of vacant possession. The nearest comparator, Oxford Street, saw vacancy rates increase from 9% in January 2021 to 17% in May 2021.



The Night-Time Economy

Footfall peaks along Edgware Road at 8pm to 9pm, in contrast to nearby Oxford Street which peaks at 3pm to 4pm. Casinos, hotels and the high proportion of food and beverage outlets are the main contributors to this. 20% of those who work in the night time economy in Westminster are employed in and around the Edgware Road area.



Impact of the Local Development Pipeline

- The completion of Marble Arch Place and Regent House on Edgware Road provide not only new homes and commercial space but quality retail and public realm. One Marble Arch follows in 2022, with flagship offices and retail, and comprehensive redevelopment of Garfield House commences in 2023, consolidating the area's position as one of London's prime commercial locations.
- At the other end of Edgware Road, the Church Street masterplan aims to achieve transformational change, with an improved street market, additional housing and improved access for pedestrians and cyclists. West End Gate and the former Paddington Green police station site by Berkeley Homes and Merchant Square provide a substantial residential pipeline. Three new hotels are proposed on Edgware Road and on Old Marylebone Road, two of which are well underway.
- New residents, staff and visitors to the area bring a potential additional annual spend of £172m. Taking into account competing destinations, £24m of which is directly attainable by Edgware Road businesses.



Perceptions and Satisfaction Levels

Usage and satisfaction levels were tested in all interviews and surveys, with the aim of determining strengths and weaknesses. In some cases what is perceived as a weakness by one cohort is perceived as a strength by another. Its vibrancy, cultural diversity and uniqueness are seen as great positives, but are offset by anti-social issues that reinforce negative associations. The key issues of note include:

- Edgware Road is a highly accessible location, with strong transport links. Its convenience-based offer drives frequent visits.
- The night time economy and international grocery and F&B offer are seen as strong leisure assets.
- The high incidence of sub-divided retail units creates a cluttered and tatty impression, exacerbated by low standards of shop fitting, a high number of bureau de change and money transfer operators and poor visual merchandising.
- Edgware Road is bisected by the inner ring road, with low levels of green infrastructure and few opportunities to pause or rest.
- Begging and rough sleeping were cited frequently as concerns, especially by businesses who feel it damages their trade.



- Gender was raised by local residents and workers, who feel that Edgware Road has become a male-centric environment, particularly associated with the café culture. Concerns were raised by women about feeling safe on Edgware Road itself.
- Shisha was mentioned as both a positive and a negative, drawing people to the location, yet creating associated problems on the pavement and being a public health concern.
- Cleanliness, environment and atmosphere were the top three negative comments, with fly-tipping and poor-quality shopfronts contributing to this perception.
- A lack of clear identity for Edgware Road was mentioned consistently, as it attempts to simultaneously serve both the international and local market.

You can read the full report and detailed analysis [here](#).

Recommendations

The primary purpose of the Insights Study was to provide an evidence base for future planning policies within the Hyde Park Paddington and Marylebone Neighbourhood Plans, effectively creating an Edgware Road corridor policy framework that straddles both Neighbourhood Areas. We sought a broad series of recommendations across under the themes of BID actions, public realm and sustainability, and planning policy.

BID Actions

In the short to medium term, the priority for Marble Arch BID is to support businesses, especially those reliant on the worker market and tourism industry, to ensure they remain viable for when the market picks up – by stepping up the promotion of businesses to local residents, assisting business to access funding and specialist support to increase their agility to adapt, develop online profiles and expand their reach, and work with landlords to tip the balance slightly between independent and multiple retailers to broaden the appeal to key local user groups.

Security and feeling safe is a key concern for businesses and users of Edgware Road. The street team is seen as a very positive addition, combatting and managing anti-social behaviour. Increasing patrols and engagement with businesses is essential to provide reassurance. This will also promote sustainable transport options such as walking and cycling as users will feel safer exploring and moving around the area.



There is a huge opportunity for discovery and education on Edgware Road through an exploration of the diversity of cuisine, culture and tradition within the area. The BID can identify and promote the vast variations in types of cuisine available, such as from Turkish, to Lebanese, to Iranian and more. The annual printed eating out guide, Taste of Marble Arch, is an excellent example of steps the BID have already taken alongside themed food tours and this should be continued, with increased frequency post pandemic. Longer term a leasing strategy should increase the variance in international, both in type of offer and price point. Whilst this is beyond the BID's remit, through facilitating greater communication across landlords and businesses, a clearer identity of what Edgware Road represents can be built.



Bring forward assets and events which encourage community engagement and attract visitors to the area. The success of current events such as Winter Wonderland that attract

visitors to the area should also be built upon, light displays (e.g. Lumiere) or the development of routes which encourage linked / extended trips should be considered. These types of events have been well received and help to raise the area's profile, build on its identity and create reasons to visit.



The nature of retail and office working is fundamentally changing and the requirements for physical space are likely to change in the coming years. It will be important for the BID to work with the estates to drive the retention of commercial uses to support the local supply chain, and to bring forward retail innovation, including the move to experiential uses, along with leisure and cultural uses at ground floor.

Public Realm and Sustainability Recommendations

Litter and cleanliness were cited as negative detractors to the environment on Edgware Road, despite surveys and audits scoring the street highly on waste management and collection. Through the BID's dedicated Neighbourhood Co-ordinator the BID should target fly-tipping and poorly presented waste hotspots on the street.



The appearance of vacant units is inconsistent on Edgware Road. Whilst some units are well presented with vinyls, others are in a state of disrepair. There is an opportunity for the BID to work with landlords especially where clusters are emerging as leases come to an end, to improve the appearance of these units. Such improvements would provide the opportunity to animate vacant units and to encourage meanwhile uses or pop ups.



Develop opportunities for more pause points and an improved public realm, working with Transport for London, City of Westminster and Neighbourhood Forums. Green infrastructure in particular was perceived as being in short supply on Edgware Road.



Improving the quality of visual merchandising, particularly among independents, can be a challenge, in the absence of a regulatory regime to underpin this. A design palette could be developed to achieve better shopfronts and signage.

Forecourt displays and highway boundaries are complex along Edgware Road. It is recommended that a detailed highways search is undertaken to define those parts of the footway and forecourts where licences are required for outdoor tables and chairs and shopfront displays.



Promotion of walking routes around the district can be undertaken, with the BID producing digital maps for download on for example its eating out guide. These can not only promote assets but encourage active travel and contribute towards sustainability and area promotion.

Planning Policy Recommendations

Due to the recent adoption of the City Plan by Westminster Council, there is very little immediate opportunity to influence planning policy at a city level in respect of Edgware Road. Both Neighbourhood Forums are, however, in the early stages of the preparation of neighbourhood plans. Given the road's location as the boundary between the two forums, a degree of coordination and consistency of approach between the two should be encouraged, which this study will assist with. The resultant outcome could be in the form of an Edgware Road corridor policy, or set of policies, that the BID, with other stakeholders, leads the preparation of, building on the recommendations of this study and other analysis. The objective would be for these policies to be included within both the Hyde Park and Paddington Neighbourhood Plan, and the Marylebone Neighbourhood Plan, to provide consistency on both sides of the street to achieve a sustainable and prosperous outcome for Edgware Road.

These policies should sit alongside and complement Westminster's City Plan (2021) designations, which include the: CAZ, CAZ Retail Cluster, Paddington Opportunity Area (small portion to the NW of the BID), West End Retail and Leisure Special Policy Area (small portion to the south of the BID), Church Street Housing Renewal Area, Areas of Open Space Deficiency and several Local Centres. These destinations illustrate the opportunity that lies within the BID, with areas designated to promote growth and enhance the unique attributes of the area, while other areas are in need of additional investment to support enhancements to open space / green infrastructure. Working under this framework of designations to develop more neighbourhood specific policies can further enhance the BID's economic profile while developing its sustainability credentials.

Subdivision of shop units can detract from the quality of the environment and retail offer, for example by breaking up frontage or disrupting signage zones. This can be controlled by developing policies, at a Neighbourhood Plan level, which sit in tandem with Westminster City Plan policies (Local Centres, WERLSPA, etc.) which seek to protect and improve the leisure and retail experience and protect the unique character of these areas. The resistance against subdivision in key areas could be specifically referenced in local policy to provide additional weight.



Support more tailored planning guidance for outdoor seating to ensure activities which create public nuisance, amenity or public order concerns can be controlled in terms of being able to operate externally.

The City Council, with the support of the BID, should continue to work with the various Forums and Amenity groups to identify gaps in the existing Policy framework and develop policies in the neighbourhood plans to ensure plant and ventilation equipment is designed, installed and maintained to an appropriate standard. The driver is the concern at the proliferation of poorly serviced, low-quality cafes, restaurants and shisha with inadequate

servicing arrangements. Better enforcement could contribute to improved standards generally. It may, however, require greater monitoring and enforcing for the installation of unauthorised lower-level plant, and joint use of licencing and environmental health powers, to resist the proliferation of restaurants and cafes under Class E by:

- Imposing appropriate conditions on planning permissions to require additional approvals for plant and equipment should an occupier intend to change between different uses within Class E;
- Ensuring that proposals for new plant and equipment are of a high standard and will not lead to amenity impacts;
- Taking into account the wider land use effects when considering proposal for new plant and extract equipment in line with Westminster City Plan Policy 33D and London Plan Policy D13 including, for example, the intensification of existing clusters of restaurants and developing policies at a Neighbourhood Plan level to support this.

Seek to include local policies that would promote comprehensive redevelopment of appropriate sites, to strengthen the area's working population, providing investment for the renewal of the physical environment and replacing outdated high polluting buildings with sustainable efficient ones, and potentially creating the opportunity to re-establish some planning control over ground floor uses.

Proposals for national planning reform suggest that greater use may be made of design codes and masterplans, led by a combination of Neighbourhood Forums and Westminster Council, to provide greater design input and greater certainty. This should be kept under review; design codes or master planning exercises led by the BID may provide an opportunity to exercise greater influence over the form and scale of development coming forward. It is also possible that design codes could be used as a tool to improve local streetscape quality.