

The background of the slide is a teal-tinted photograph of a city street. On the left, a tall building has a vertical sign that reads 'HARRODS'. In the foreground, the rear of a white double-decker bus and a dark car are visible. The street is lined with historic buildings, and a traffic light is visible on the right.

Brompton Road District | Strategic Vision

Final report

28 January 2021

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Source: Unsplash

Executive summary

The Brompton Road district has historically been a vibrant place with a distinctive retail offer and a range of attractions with international renown. High-end luxury shopping in the Knightsbridge International Centre (most notably in Harrods and Harvey Nichols) is familiar to people the world over – some who have never visited London. The intensity of use by day and into the night is amongst the highest in Britain.

However, as with all retail districts, changes in consumer preferences for in store shopping has presented some challenges for Brompton Road. Alongside this the public realm of the area has become less welcoming in recent years. The devastating effect of Covid-19 has re-doubled these impacts, and in-turn has strengthened the case for some form of intervention to reinvigorate Brompton Road.

A meeting of stakeholders chaired by Cadogan Estates in early 2020 discussed the future of Brompton Road. This led to a feasibility study to explore the creation of a business improvement district (BID) to drive an area action plan. Subsequent to this Arup was appointed in June 2020 to develop a strategic vision for the prospective BID.

Arup has been working with a commissioning group comprising representatives from the Royal Borough of Kensington & Chelsea and the City of Westminster; local property owners, occupiers, residents, Transport for London and other local institutions. A multi-disciplinary analysis of the Brompton Road district was undertaken to help develop the vision and to pave the

way for a BID to secure improvements needed in the area. It is envisaged that the BID will play a leading role in ensuring the delivery of the strategic vision presented in this report.

Brompton Road has a number of strengths. It is a major employment area with almost 12,000 jobs and 7,000 residents (ONS data). It has a concentration of finance and corporate employment alongside significant levels of retail and hospitality employment. Brompton Road has strong appeal to international visitors with Harrods acting as a draw its own right. The area also has a range of transport advantages that mean it is accessible to millions of people within modest travel times. Furthermore, it is surrounded by arts, education and culture assets.

Despite these strengths the district suffers from a number of weaknesses some of which have been exacerbated by the impact of Covid-19 (in particular the fall in international visitors). The significant challenges identified through this research and through consultation to date include:

- **Retail attractiveness and agility**
- **Transport impacts**
- **Quality of place**
- **Urban experience (in particular for residents and workers)**
- **Visitor experience (pathfinding, storytelling, locally generated amenity)**
- **Long term sustainability – especially from an**

environmental perspective

Retail attractiveness and agility / and urban experience

Challenge

Covid-19 has dramatically accelerated the need for retail to evolve. International visitor numbers to the UK have already halved according to Visit Britain (March 2020). With the exception of the K1 development (that is under construction), the (very few) additions to floorspace in recent years have been located north of Harrods. There is a limited food and beverage offer throughout the proposed BID area compared to other mixed-use places in central London.

Furthermore On January 1st 2021, the Government ended the VAT Retail Export Scheme. The VAT RES allows non-EU visitors, in certain circumstances, to reclaim the VAT paid on goods purchased in the UK as they leave the UK. This is an important attraction for high-spending international visitors, particularly from China and the Middle East. HMRC estimate that in 2019 there were around £3bn tax free shopping sales throughout the UK. The UK will be the only country in Europe not to offer tax free shopping. Retailers fear that high-spending international visitors will divert their shopping to other European countries. This may have an impact on tax-free sales and sales of other goods and services.

Executive summary

The Office for Budget Responsibility estimates that between 20,000-30,000 of the 16 million non-EU visitors (in 2019) may decide not to visit the UK as a result of ending the VAT RES.

Retailers are actively campaigning to restore tax free shopping. They are also exploring alternative ways of offering tax-free shopping within existing regulations. In the short term, through much of 2021, the impact of ending tax-free shopping is likely to be disguised by the lack of international visitors due to COVID-19. In the longer term, it will be more important than ever that the Knightsbridge International Centre works to attract international visitors and their spending.

Opportunity

Supporting economic vitality on Brompton Road could involve bringing more community uses to its edges. A more imaginative mixture of food and beverage, culture and creative offers could help to retain and attract visitors willing and able to spend. In a post Covid-19 world (notwithstanding social distancing in the short term) there is an opportunity for more dense employment offerings should new development come forward or if existing retail space be used (i) more intensely (ii) if land use mixes and business types become more diverse. Additional mixed-use

development could support employment growth particularly if the offer was diversified to include evening entertainment, similar to that of the West End. The district could also serve wider employment goals for London by showcasing emerging luxury brands- through low cost retail spaces. The BID if formed should set a clear vision of the offer.

Executive summary

Challenge

Since August 2020, Covid-19 has triggered a near-total shutdown in international tourism to/from the UK. The range of negative impacts of the pandemic on Brompton Road stem from a collapse in in-person shopping from both local resident workers and tourists as well as overseas tourists.

Opportunity

Interventions to aid recovery could take many forms, from supporting temporary community and recreational activities, to arts, culture and commercial uses. Using ground floor spaces in these ways can optimise the use of assets by local communities and workers, facilitating the human connections that build community resilience. With respect to the luxury retail market, globally it could contract by between 20-35 percent according to Bain, a consultancy. Bain forecasts that recovery to 2019 sales will not occur until 2022 or 2023. Chinese consumers are forecast to be the largest groups of buyers of luxury, accounting for nearly half of all purchases worldwide by 2025. A Brompton Road BID will need to consider how best to attract this market - but in such a way that enhances the district's positioning and standing with all its principal stakeholders.

Transport impacts

Challenge

Whilst traffic has been falling in and around Brompton Road, competing demands on local transport from

cars, the high number of traffic signals, delivery vans, buses and pedestrians creates congestion and create negative impacts on the public realm. The road creates severance and feeds into a sense that the district is not really welcoming for Londoners or other visitor groups.

Opportunity

Trade offs may need to be made between different users – perhaps by time of day, day of the week and month of the year. There may be an opportunity for freight consolidation centres to reduce delivery traffic. A wider “median strip” and some greening of pedestrian areas could create a greater sense of separation between traffic and pedestrians. The BID together with K&C and Westminster could jointly lobby TfL for a Brompton Road Corridor Study. This could be a movement and place study that should consider the status quo, forecast future demand for vehicular traffic through the area compared against a ‘new normal’ with an increased level of walking and cycling due to Covid-19 and with the aspiration in mind to meet the Mayor’s Transport Strategy of 80% modal share for public transport and whilst testing a number of interventions to try and address the negative effects of the current layout.

The BID could also pursue walking improvement schemes with local authorities to resolve the pinch-points and crossing issues that occur at busy parts of the road where many pedestrians can be seen be waiting a while for a free passage to cross (especially on the southern footway).

Whilst cycling may not be appropriate for all visitors to the area – local residents should be encouraged to use active modes where possible and dedicated protected infrastructure for people cycling could be key to unlocking this latent demand. This area also seems highly likely to want to investigate new forms of mobility (electric scooters etc.) – the benefits of dedicated cycling infrastructure is that it can help facilitate the use of these innovative mobility solutions.

Long term sustainability – especially from an environmental perspective

Challenge

Brompton Road suffers from amongst the worst air quality in London. The district was recorded as breaching the hourly legal limit for nitrogen dioxide (NO₂) for the whole of 2017. The tree canopy is low compared to surrounding areas and side streets off Brompton Road, and this lack of tree coverage also means vehicular exhaust noise is more acutely experienced by pedestrians and residents.

Opportunity

With regard to air quality, the use of electric vehicles and restrictions on polluting vehicles and energy sources, including buses, refuse collection vehicles, heavy goods vehicles, taxis (already being converted) and private hire vehicles could be considered.

Executive summary

Quality of place, Urban experience (in particular for residents and workers) and Visitor experience (pathfinding, storytelling, locally generated amenity)

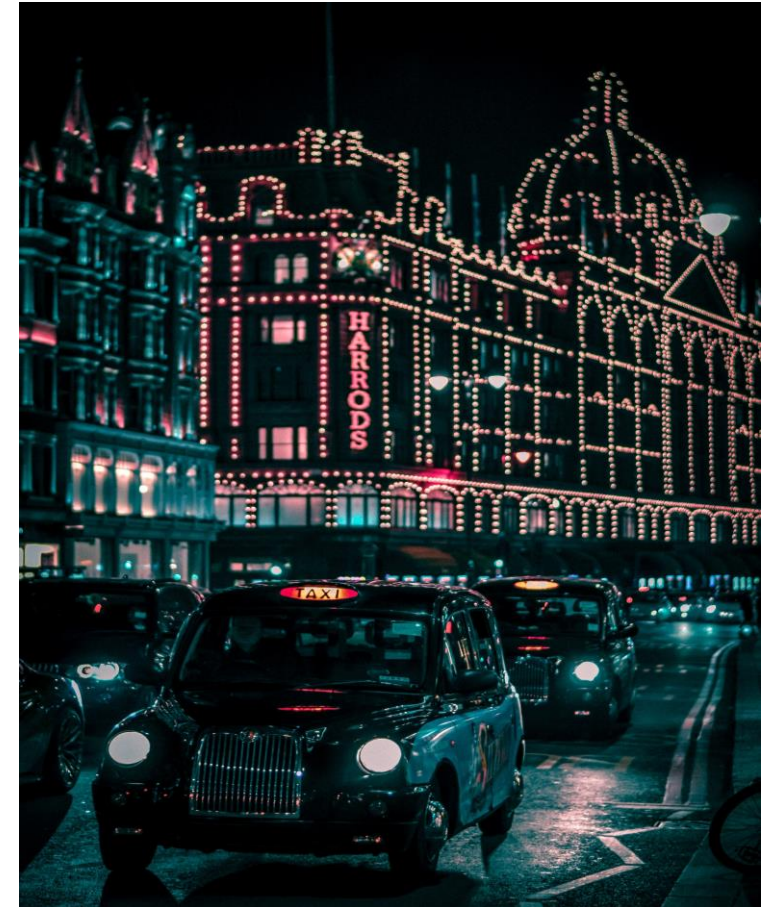
Challenge

In recent years Brompton Road has lost many local shops and amenities. Residents have experienced a rise in noise and anti-social behaviour. Pavements are overcrowded, and at times the street is not a very pleasant environment. These problems are compounded by some of its legacy design challenges including prevalence of street clutter. There are ongoing improvements to the wider public realm in other parts of central London along with changes to transport provision such as Crossrail, and more immediately other rail, bus and Tube service changes. All of these may create competitive challenges for the Brompton Road district.

Opportunity

The BID could also help with delivering marked

‘gateways’ for Brompton Road to improve signage and wayfinding and to encourage appropriate routes to and from key surrounding assets. The BID could help with setting design guidance and standards. Noise pollution could be curbed through increased enforcement by local authorities. Pavement resurfacing with different materials could also help to reduce noise impacts in combination with greening to create a more “boulevard like”, less noisy environment.



Source: Unsplash

Executive summary

Unlike other shopping and entertainment districts in London, Brompton Road does not have a place strategy. Historically, the core objectives for Brompton Road as a place have arguably not been planned for sufficiently. A plan for the district as a place is needed to enhance its attractiveness for stakeholders in the face international and domestic competition. The external shock of Covid-19 provides a critical moment for this to happen. The BID if formed could work with RBKC and Westminster to design guidance that responds to local character. This could help to ensure Brompton Road becomes an attractive destination for retail, leisure and employment as well as residents over a longer period.

Turning to longer-term place making strategies and projects, we think the following should be considered:

- Promote flexible ground floor uses in the existing commercial buildings, such as spaces for coworking, innovation rooms, and small boutique design retail offers.
- Expand the food and beverage offer on ground floors of the existing commercial buildings.
- Introduce enhanced (but friendly) street warden/security patrols to reassure stakeholders and help reduce retail crime and anti-social behaviour.
- Explore the opportunity of including a new community use which could serve both residents and employees in the area.
- Investigate the potential conversion of on-street taxi ranks, parking and loading areas into Parklets,

footway build-outs and landscaping. Introducing opportunities to cross informally by narrowing the width of the footways. Taxi-ranks, parking and loading could be relocated to side streets.

- Pursue walking improvement schemes at side road junctions and encourage the delivery of continuous footways. This will resolve many of the pinch-points and crossing issues that occur at busy parts of the road
- Investigate with TfL potential temporary traffic management to address the excessive width of the road (see Kensington High Street). This could be resolved in the short-term by introducing landscaped wooden planters
- Removal of guard railing along sections of the road to gain back more usable footway widths at key pinch points and to mitigate against the funnelling of people towards certain formal crossing points.
- Improved cycle infrastructure and facilities and secure cycle parking locations to enable local residents to access their local centres safely and efficiently.
- Temporary partial closure of the road during weekends (highest footfall) to allow for more space for the pedestrian and to host leisure activities and events
- Identify 'gateways' to Brompton Road and improve signage and wayfinding to encourage routes to and from key surrounding assets.

- Develop wayfinding and signage that encourages people to explore the district and its unique offer whilst maintaining residential amenity.
- Use street furniture and wayfinding to strengthen the district's identity as a sustainable and attractive destination.
- Commission seasonal lights.
- Use (temporary) planters to increase green infrastructure and improve air quality.
- Promote an increase in green spaces through a combination of green roofs, green walls, planters on existing buildings to create valuable habitats for wildlife.
- Introducing wellbeing hotspots for residents and employees.
- Promote lunchtime and weekend temporary food markets on side streets and public spaces to expand the existing offer.
- Install social-distancing pods in selected areas to provide a unique food and beverage experience.
- Use lighting strategies to activate spaces and encourage evening economy.
- Temporary occupation of parklets in side streets with green infrastructure and seating areas.

Executive summary

The next steps to deliver on the projects listed are development of concept designs for priority projects including cost projections and setting out of the post-construction maintenance and upkeep required for each project along with desired objectives, KPIs and governance arrangements.

Projects should incorporate:

- A capital and operating budget phased over time.
- A funding strategy which outlines the public and private funding options to cover both capital and operating expenditure, alongside viability testing to identify their appropriateness.
- A partnership governance and organisational structure, with the public sector, to oversee a delivery programme.

The vision and leadership of the Brompton District BID will be vital to delivery of these investments to make the Brompton district regionally, nationally and globally competitive as a centre for high end retail and quality amenities.

Ove Arup & Partners Limited
October 2020



Source: Unsplash

Introduction

The Brompton Road district has historically been a vibrant place with a distinctive retail offer and a range of attractions, renown internationally. Brompton Road's offer to visitors is unlike anything else in the UK (**See History of Brompton Road at Appendix A**). High-end luxury shopping in the Knightsbridge International Centre (most notably in Harrods and Harvey Nichols) is familiar to people the world over – some who have never visited London, or indeed, Britain.

Such popularity comes at a cost. The intensity of use by day and into the night is amongst the highest in Britain. The challenge in ensuring the district is clean and safe for all users, goes well beyond what is usually required in most districts of cities. Moreover, the district must constantly be on top of change so as to respond to new leisure and consumer trends. Improvement and maintenance of the district's streets at historical levels is unlikely to be able to cope with the demands the area has experienced (at pre-Covid-19 levels).

Brompton Road is highly connected, both physically and culturally. The district offers a diverse mix of uses and provides an important social context for community life. However, in recent years the district has lost many local shops and amenities. Residents have experienced a rise in noise and anti-social behaviour. Concerns over the quality and comfort of the Brompton Road district mean that investment to enhance its sense of place and to support its attractiveness for investors in the face of international and domestic competition is required.

Users of the main road's pavements experience overcrowding, restricted movements and at times a not very pleasant environment. These problems are compounded by some of its legacy design challenges including prevalence of street clutter. Anti-social behaviour (noise, organised begging and theft).

In response to the problem, a meeting chaired by Cadogan Estates to discuss the future of Brompton road, attended

by landlords, occupiers, residents and representatives of the local authorities led to a feasibility study to explore the creation of a business improvement district (BID) to drive an district action plan for Brompton Road.

The BID would put forward and then deliver a number of proposals to improve the quality of the public realm and in so doing enhance the overall visitor experience in one of the world's finest shopping districts and crucially sustain a successful and prosperous luxury retail economy.



Source: Unsplash

Introduction

Some 83 stakeholders were consulted for the feasibility report. They appear to have been largely united in their desire for a strong Strategic Vision for the district.

The feasibility study recommended that a cross-local authority linear Business Improvement District grouping both owners and occupiers should be formed, utilising a traditional levy benchmark of 1% of rateable value to unlock the budget needed to support the operationalisation of the Strategic Vision (with appropriate thresholds and caps). We understand that the Strategic Vision study will be undertaken in parallel to the BID formation (aimed for Spring 2021), and that the BID will be a key driver for the delivery of the Strategic Vision.

Arup was appointed to work with a commissioning group comprising representatives from the Royal Borough of Kensington & Chelsea and the City of Westminster; local property

owners, occupiers, residents, Transport for London and other local institutions. This has been established to enable the Strategic Vision to be developed simultaneously to the BID formation. It is envisaged that the BID will then play a leading role in ensuring the delivery of the Strategic Vision presented in this report.

An important aspect of Strategic Vision is to demonstrate to stakeholders in the Brompton Road district that change and improvement can come quickly. A primary objective for the Brompton Road district is to develop an evidence base to justify much needed interventions in the district, and to bring together a delivery plan that will secure support from all interested parties.

Key to the delivery and integration of a successful Strategic Vision is to fully understand the aspirations and current issues from the local community and other stakeholders' perspective. A

Brompton BID feasibility report provided insights to bring the community together and harness a shared vision to act as the catalyst for meaningful improvements in the district. As part of this work Some 83 stakeholders were consulted as part of a feasibility report commissioned by Cadogan (in 2019). They appear to have been largely united in their desire for a strong Strategic Vision for the district.



Source: Unsplash

The case for a Brompton Road Business Improvement District (BID)

Brompton Road is home to some of London's most iconic and renowned attractions such as the Exhibition Road museums and Hyde Park. This is in addition to its historically successful retail and business enterprises.

Despite these factors, the district is in need of better management and indeed investment to secure improvements to its public spaces and become more of a destination for shoppers, residents and workers in particular.

As things stand, Brompton Road is in danger of becoming a place which is highly dependent on a single flagship department store, with limited shared residential, visitor or employee amenities. It is at risk of becoming a thoroughfare for those just passing through, surrounded by disconnected and even somewhat isolated residential streets.

At a time of increasing competition from other world cities, a transformation in the structure of the retail sector, the uncertainty of Brexit and more immediately the ongoing and dramatic impact of Covid-19, the

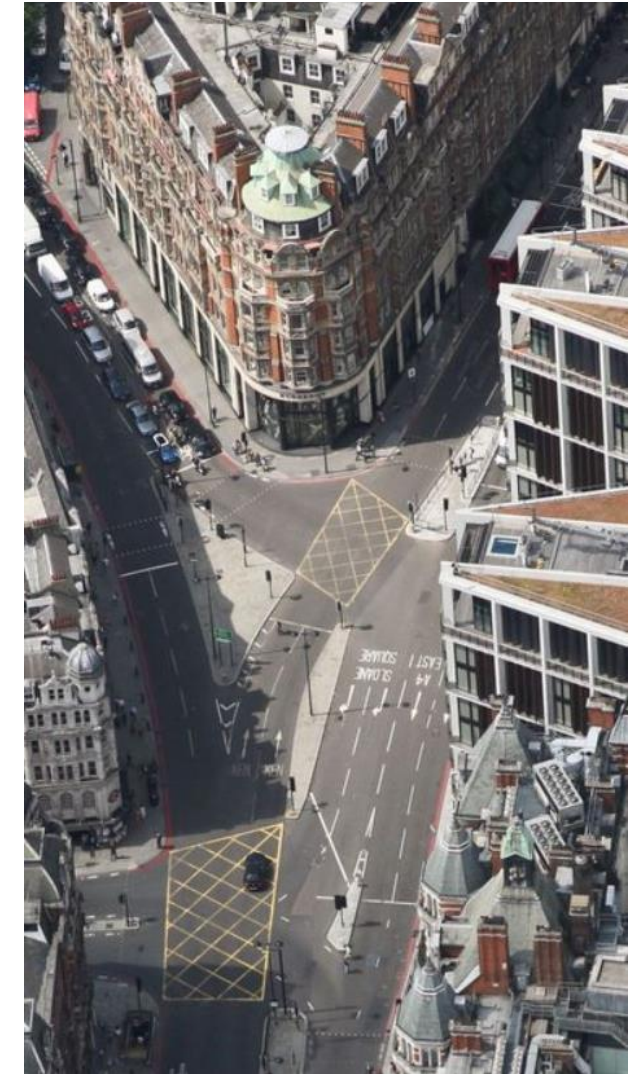
Brompton Road district has an opportunity (and indeed compelling need) to reinvent itself. To do so it will need to capitalise on opportunities that will (hopefully) be on the horizon by capitalising on its intrinsic strengths as well as London's long-term popularity as a destination for retail, tourism, doing business and as a centre for arts and culture.

There are ongoing improvements to the wider public realm in other parts of central London along with changes to transport provision such as the advent of Crossrail, and more immediately other rail, bus and Tube service changes. All of these may create opportunities and competitive challenges for the Brompton Road district.

Work has gone into identifying some options for improvements in the district already. These sit alongside other measures to improve the quality of the environment of the district. But to secure funds to pay for them, the case for investment and delivery has to be justified based on a robust evidence base, including the socio-economic benefits they can bring.

A Business Improvement District for Brompton Road would allow the area to traverse the Royal Borough of Kensington & Chelsea and City of Westminster boundary. A BID would allow for a joined up approach to licensing, management and planning – as well as provide a unified voice in communicating and working with the residential community and the statutory authorities.

In order to support the case for a BID a multi-disciplinary analysis of the Brompton Road district was required to help develop an economic vision and outline the improvements needed in the district (of which the BID could subsequently pursue in its first 5 year term)



Source: Unsplash

The problems a BID could address

Notwithstanding the challenges it has and continues to face, the Brompton Road district represents a major economic asset for London, including the internationally recognisable Harrods department store. Despite the uncertainty caused by Covid-19, the retail offer on Brompton Road and luxury brand shopping it represents remains.

Pre Covid-19 the district accommodated almost 12,000 jobs and 7,000 residents (ONS). It has a concentration of finance and corporate employment. Brompton Road has deep and appeal to international visitors with Harrods acting as a draw its own right.

Despite all of this, the wider perception of Brompton Road to the average Londoner is perhaps one of exclusivity and even remoteness. As such Brompton Road is more dependent on international visitors than other shopping districts in London (insert source). For the foreseeable future demand has been dramatically pared

back because of the impact of Covid-19.

Even pre-pandemic, Brompton Road was not cited as an district of dynamic change; this is reflected in its time series of falling employment and stagnating rents. The impact of Covid-19 provides a compelling requirement for Brompton Road to evolve into something more attractive, accessible and sustainable to a range of stakeholders whilst maintaining and strengthening its roots as a luxury retail destination.

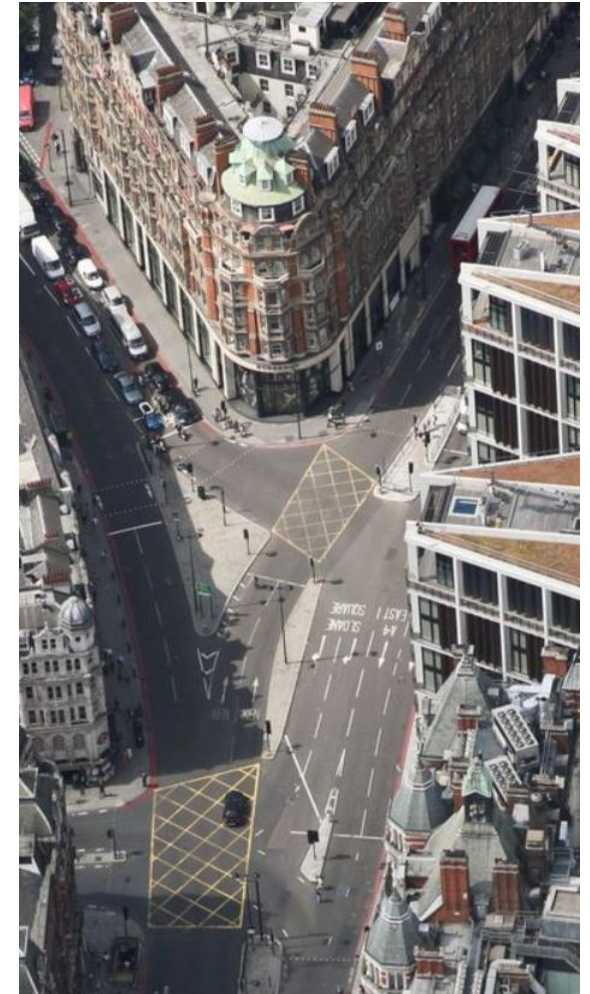
Brompton Road's location in the Central Activity Zone of London means it has a density, scale and mix of business functions and activities that few other district have in the UK. The district has a range of transport advantages that mean it is accessible to millions of people within modest travel times. It is also accessible to those walking or cycling (Hyde Park is one of a number of green space in local proximity to the district).

Furthermore, it is surrounded by arts, education and culture assets

In summary, the significant challenges identified through this research and through consultation to date include:

- **Quality of place**
- **Transport impacts**
- **Retail attractiveness and agility**
- **Urban experience (in particular for residents and workers)**
- **Visitor experience (pathfinding, storytelling, locally generated amenity)**
- **Long term sustainability – especially from an environmental perspective**

The detailed baseline analysis is **provided at Appendix B**. An overall rating against key themes is provided overleaf. Evidence from the baseline is then used to determine priority areas for the potential BID.



Source: Unsplash

Evidence base and SWOT analysis

Brompton Road district baseline approach

In undertaking the baseline review the following user groups of Brompton Road were identified:

- Residents
- Workers
- Tenants
- Property owners
- Local and international visitors
- Non users (including motorists and bus users)

For each of these user groups the baseline analysis assess how each of these users needs and requirements are met across the following themes:

- Economic performance (including as an international centre for retail)
- Placemaking trends
- Borough priorities/governance
- Transport performance
- Sustainability performance
- Planning and licensing

The rating have been used to determine priority areas should the BID be formed.

Evidence base assessed using a traffic light system highlighting current performance of the district across each user group



Not performing well, needs improvement



Performing well



Performing adequately but needs enhancing

Summary of Baseline | SWOT analysis

| THEME | User groups | | | | |
|---|--|--|---|--|---|
| | RESIDENTS | LAND OWNERS | VISITORS | LOCAL WORKFORCE | TENANTS |
| <div>Economic performance</div> <div></div> | <ul style="list-style-type: none">• Mature retail and commercial employment offer but doesn't have a diverse food and socially attractive evening economy• Some stakeholders consider Knightsbridge's International (Retail) Centre status is being eroded by its loss of retailers | <ul style="list-style-type: none">• Brompton Road retail rents have been in decline• Major challenges brought about by CV19• Land ownership fragmentation preventing consolidation on some parts of Brompton Road | <ul style="list-style-type: none">• Historically, excellent luxury shopping experience but lacking diverse evening offer• Lack of integration with surrounding cultural offer | <ul style="list-style-type: none">• There is a need for more diverse offer for local workers | <ul style="list-style-type: none">• Brompton Road economy is showing signs of shrinking.• There is a need for more diversity to drive economically significant footfall |
| <div>Placemaking</div> <div></div> | <ul style="list-style-type: none">• Perceptions of noise, crime and unclean streets on Brompton Road reduce attractiveness – as noted in the Brompton Ward Survey and Knightsbridge Neighbourhood Plan | <ul style="list-style-type: none">• Narrow footpaths, noise and air pollution impose economic costs on local properties• Pressure to put more tables and chairs on the pavements (whilst understandable) risks creating pinch points where pedestrian movement is constrained and creates tension between footway users | <ul style="list-style-type: none">• Traffic noise, a “metallic feel” with a lack of greenery and limited places to rest disincentivise visitors from dwelling on Brompton Road• Some of the surrounding cultural anchors and Hyde Park are not well signposted• Potential as a dynamic place of retail and cultural assets is not being met | <ul style="list-style-type: none">• Lack of green areas, lack of amenity and places to enjoy outside of work hours make Brompton Road less appealing as a location choice for some workers | <ul style="list-style-type: none">• Whilst drawing visitors in large numbers Brompton Road as a place has not evolved to attract a balanced range of customers• Noise, reduced amenity is a risk to growth in footfall that is economically productive |

Source: Arup analysis

Summary of Baseline | SWOT analysis

| THEME | User groups | | | | |
|---------------------------------------|---|--|---|---|--|
| | RESIDENTS | LAND OWNERS | VISITORS | LOCAL WORKFORCE | TENANTS |
| <div>Sustainability</div> <div></div> | <ul style="list-style-type: none">The district sustainability from an economic, community and environmental perspective is not as advanced as it perhaps ought to be | <ul style="list-style-type: none">Falling rentals impacting on valuesLack of green areas, lack of amenity, hold back the district's image and therefore its footfallOpportunity for greening of building energy use | <ul style="list-style-type: none">From an environmental perspective the lack of green areas and high energy consumption with car use doesn't position Brompton Road as well as some other more green focused retail districts | <ul style="list-style-type: none">Lack of green spaces for workers during daytime hours reduces attractivenessFrom an business sustainability perspective a bricks and mortar focused retail district which is less experience driven means people may not find the location as appealing as working in the West End for example | <ul style="list-style-type: none">Lack of green areas, lack of amenity hold back footfall and value to tenants and landowners |
| <div>Planning</div> <div></div> | <ul style="list-style-type: none">Active local business voice needed to ensure the right trade offs reflecting the different functions of the districtConflict between commercial night-time economy and residential environment needs to be managed | <ul style="list-style-type: none">Strong policy framework to support vision of the districtRecognition of the areas role as an International CentreLack of governance structureSplit between two boroughs could result in (unintended) conflicting priorities or slow speed of delivery | <ul style="list-style-type: none">Access to a broad range of commercial and food offers.Limited stewardship of assets including public realm and open space, and marketing of areasWayfinding could be improved and severance of road should be overcome. | <ul style="list-style-type: none">Policies to strike a balance of employment options in retail, offices and entertainment.Travel Plans supported to ensure multiple modes of travel | <ul style="list-style-type: none">Policy support for a range of daytime and evening activities and high-quality commercial usesNeed for a more supportive licensing frameworkLimited governance for business voiceSome planning restrictions of other uses and late night economies |

Source: Arup analysis

Summary of Baseline | SWOT analysis

| THEME | User groups | | | | |
|---|--|---|---|---|--|
| | RESIDENTS | LAND OWNERS | VISITORS | LOCAL WORKFORCE | TENANTS |
| <div>Borough priorities</div> <div></div> | <ul style="list-style-type: none">Local residents split on whether the councils get the balance right between residents and local businessRisk that Knightsbridge Neighbourhood Plan aspirations may not be being met | <ul style="list-style-type: none">Knightsbridge Neighbourhood Plan notes that property owners need to be held more accountable for actions emanating from their propertiesSome further enforcement of building sustainability requirements in new and existing buildings is required | <ul style="list-style-type: none">Current gaps in policy aspiration for high quality streets, pavements, paths and publicly accessible open spaces that meet the needs of high volumes of workers, students and visitors | <ul style="list-style-type: none">Gaps in meeting the needs of visitors through place provisions as well as allowable context sensitive evening offer on Brompton Road | <ul style="list-style-type: none">Need for more engagement between tenants and landowners to strike the right balance in meeting needs of residents and retail tenants |
| <div>Transport</div> <div></div> | <ul style="list-style-type: none">Traffic incidents and concentrations of pollution noted in neighbourhood planTraffic volumes limit appeal, noise issuesCrowds make Brompton Road a less attractive destination for local residents | <ul style="list-style-type: none">Externalities created by transport noise and narrow footpaths make the district less competitive compared to other shopping districts in London and suppress growth in real estate values | <ul style="list-style-type: none">Unpleasant noise and pollution impacts on the overall visitor experiencePedestrian movement and sustainable transport need to be better prioritisedConnection between Brompton Road and South Kensington Museum Complex/Royal Albert Hall in terms of walkability and connectivity needs thinking through | <ul style="list-style-type: none">Public transport access is perhaps sufficient for workers arriving by PT (post Covid-19) but noisy and crowded public realm.Pedestrian movement and sustainable transport needs to be better prioritised | <ul style="list-style-type: none">Traffic volumes and crowded streets can act to reduce economically desirable footfall and are contributing to reduced value generated on Brompton Road |

Source: Arup analysis

SWOT| Summary

When considering the future vision for the Brompton Road District, we have taken into account baseline conditions and future external drivers as shown in the economic evidence gathered (as show in in Appendix B)

Economic trends around retail trading conditions related to COVID-19 and evolving retail requirements are material threats for Brompton Road. As the baseline identified, quality of place and a high dependence on retail leave the district very exposed to these risks (outlook for luxury retail is shown in the baseline analysis at Appendix B page 50). Furthermore a lack of flexibility in the planning system given the predominately residential area surrounding Brompton Road is something that needs consideration. Other competing districts are evolving to more mixed use, side streets offering different experiences and without this flexibility Brompton Road offer cannot evolve to meet changing needs of residents and visitors of the district.

Despite this the baseline analysis identified some parts of Brompton Road as having the potential to become a major economic asset for London, including the internationally recognisable Harrods department store. Opportunities are both linked to the Covid-19 recovery and can also be seen as separate opportunities.

If a vaccine is developed in the next 12 to 18 months, there is an opportunity for a major relaunch for the Brompton Road. The Harrods anchor provides an opportunity to pivot the retail offer to be more experiential as this is a key trend influencing the luxury retail market. Brompton Road stands to capture a share of this and should take steps to do ensure it remains a prominent international destination for retail.

Key opportunities identified through the baseline analysis include:

- More community uses to meet the needs of locals (CV19 accelerating

the need for this)

- Leverage major relaunch of UK tourism post Covid-19
- Use the BID to position Brompton Road and surrounds as a collective visitor destination
- Initiatives to increase dwell time, using BID to help coordinate actions
- To become a diverse luxury brand experiential retail format district for London, complementing the West End
- A special area place policy to be developed focusing on a more diverse Brompton Road with collaboration between councils

BID objectives / key performance indicators

Evidence Base | Emerging Objectives

The table opposite takes objectives for Brompton Road based on the baseline evidence and opportunities and threats. If formed the BID could take these objectives to select, score and rank them for the first five year period.

The long list of possible projects (discussed overleaf and in Appendix D) could be scored / shortlisted based on these objectives. These projects have been informed by consultation and baseline reviews along with detailed case study analysis (Appendix C).

Furthermore we also set out a range of KPIs projects should deliver on. These could be used by the BID if formed as a tool in project planning and delivery.

| Theme | Problem / weakness | Possible BID Vision / Objective | Possible project KPIs |
|----------------|---|--|--|
| Economy | Lack of diversity in the retail offer, need to broaden appeal to wider demographic and look at ways to grow employment | To grow and enhance future proof the retail offer of Brompton Road whilst recognising its history: <ul style="list-style-type: none"> • Improve area character • Support economic activity / vitality • Be more of a place for Londoners in a way that balances its luxury focus | <ul style="list-style-type: none"> • Mixture of uses • % of industry diversification • rent values • Business rates generated • Employment numbers • Planning rules enforced • Visitor numbers • Diversity in retail offer |
| Transport | Traffic situation is a challenge, needs to be more of a street for people | Improve economic and environmental sustainability for Brompton Raod for residents, workers and visitors <ul style="list-style-type: none"> • Enforce a healthy environment • Create a walkable 10 minute city type offer • Excellent public spaces | <ul style="list-style-type: none"> • Average walk times • Crossing points • Average time • Trees plants • Heat index |
| Place | Lacks consistent look and feel, is not a place of dynamic change and does not serve the needs of visitors and communities as it should | Needs to be more of a diverse place of activities that stitches together neighbouring parks, cultural assets and celebrates the districts history | <ul style="list-style-type: none"> • Mixture of uses • % of industry diversification • rent values |
| Sustainability | Sustainability is a key focus for London, the RBCK and Westminster but currently Brompton Road does not promote this – car dependency, not pedestrian or cycle friendly | To be a sustainable place in different ways – environmentally (consolidated good vehicles), reduce car uses, showcasing sustainable retail, providing activities for sustainable communities | <ul style="list-style-type: none"> • Vehicle movements • Safety incidents • Emissions • Employment |
| Governance | There is currently no place based strategy for Brompton Road. Limited partnerships with property owners/occupiers | To develop key partnerships between councils and other actors to address specific problems - for example to address crimes – joint initiatives with charities, RBCK, landowners | <ul style="list-style-type: none"> • Number of joint BID initiatives • Annual levy payer/stakeholder surveys |

Priority projects

Long list of placemaking strategies | Possible activities

Set out below are a set of initiatives that a BID could focus on in its first term. Detailed discussion of the main initiatives are shown in **Appendix D**.

Area character

- Identify 'gateways' to Brompton Road and improve signage and wayfinding to encourage routes to and from key surrounding assets.
- Develop wayfinding and signage that encourages people to explore the district and its unique offer whilst maintaining residential amenity.
- Use street furniture and wayfinding to strengthen the district's identity as a sustainable and attractive destination.

Economic Growth – vitality

- Promote flexible ground floor uses in the existing commercial buildings, such as spaces for coworking,

innovation rooms, and small boutique design retail offers.

- Expand the food and beverage offer on ground floors of the existing commercial buildings.
- Introduce enhanced (but friendly) street warden/security patrols to reassure stakeholders and help reduce retail crime and anti-social behaviour.

Residential amenity

- Explore the opportunity of including a new community use which could serve both residents and employees in the district.
- Explore the opportunity of repurposing underused spaces into temporary facilities for the existing community (e.g. a library/café).

Community culture

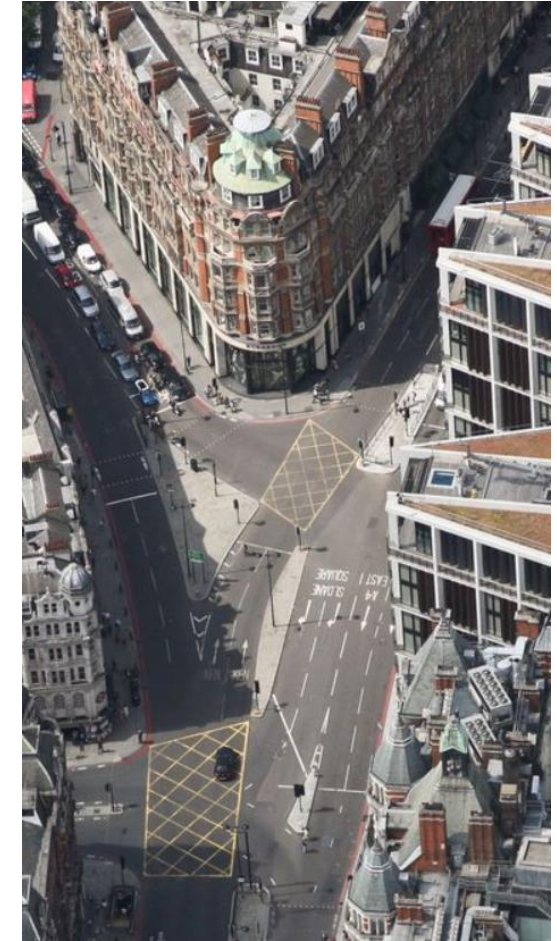
- Define a space for cultural activities

and exhibitions which could be linked to nearby cultural anchors.

- Embrace digital technologies to bring people closer to businesses and activities happening in the district.

Connectivity and severance

- Make sure that adequate pedestrian crossings support key routes crossing the road to address existing severance.
- Temporary partial closure of the road during weekends (highest footfall) to allow for more space for the pedestrian and to host leisure activities and events.



Source: Unsplash

Long list of placemaking strategies | Possible activities

Connectivity and severance (continued)

- Introduce landscaped wooden planters within the central hatched areas along the road that are not used for specific traffic capacity purposes. This would again allow for more informal crossing points and try and address lack of permeability and reduce severance as well as introducing some much needed greening of the street.
- Removal of guard railing along sections of the road to gain back more usable footway widths at key pinch points and to mitigate against the funnelling of people towards certain formal crossing points.
- Improved cycle infrastructure and facilities and secure cycle parking locations to enable local residents to access their local centres safely and efficiently. Local residents should be encouraged to use active modes where possible and dedicated protected infrastructure for people

cycling could be key to unlocking this latent demand.

- This district also seems highly likely to want to investigate new forms of mobility (electric scooters etc.) – the benefits of dedicated cycling infrastructure is that it can help facilitate the use of these innovative mobility solutions.

Healthy environment

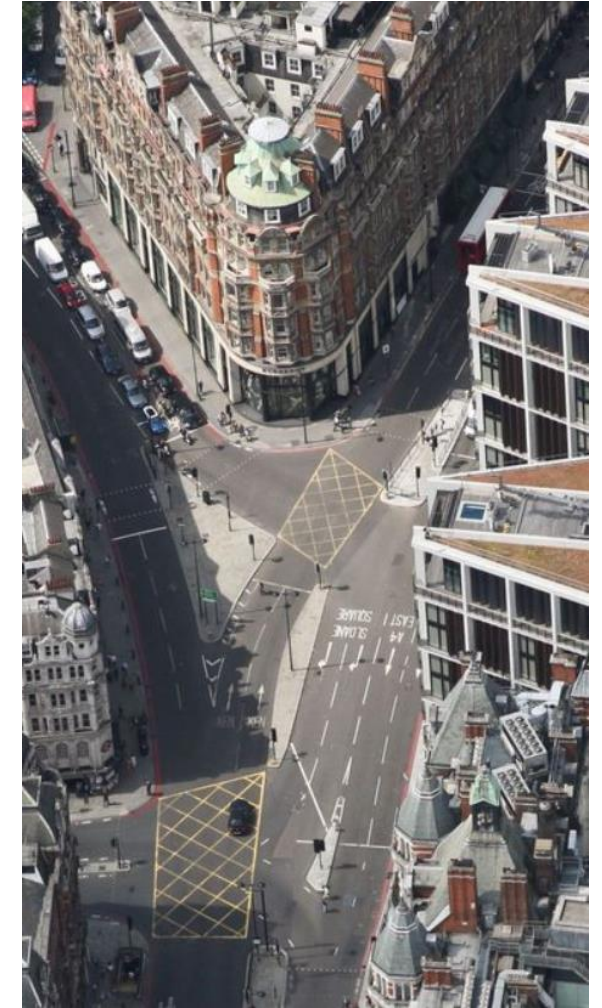
- Use (temporary) planters to increase green infrastructure and improve air quality
- Promote an increase in green spaces through a combination of green roofs, green walls, planters on existing buildings to create valuable habitats for wildlife.
- Introducing wellbeing hotspots for residents and employees

Public space

- Promote lunchtime and weekend temporary food markets on side

streets and public spaces to expand the existing offer.

- Install social-distancing pods in selected areas to provide a unique food and beverage experience.
- Introduce playful furniture and promote interactive activities that attract a wider range of users into the area – ensuring they are well managed.
- Use lighting strategies to activate spaces and encourage evening economy
- Temporary occupation of parklets in side streets with green infrastructure and seating areas.



Source: Unsplash

Delivery plan

Delivery Plan

After visioning and setting the objectives for Brompton Road the initial set of projects needs to be consolidated to fit within the initial five year budget.

This vision and objectives will set the parameters for prioritising interventions to come forward and inform a delivery a strategy in collaboration with identified stakeholders.

For example, it might be the that BID wishes to address anti-social behaviour and this would involve working with councils and the police and charity sector. Projects should be developed and mapped to the needs of key stakeholders and developed jointly.

Key actions to develop the delivery plan

Typically this would involve development of concept designs for priority projects including cost projections and setting out the post-construction maintenance and upkeep required for each project along with desired objectives, KPIs and governance arrangements.

- Projects should incorporate:
- a capital and operating budget phased over time
 - a funding strategy which outlines the public and private funding options to cover both capital and operating expenditure, alongside viability testing to identify their appropriateness
 - a partnership governance and organisational structure, with the public sector, to oversee a delivery programme

The vision and leadership of the Brompton District BID will be vital to delivery of these investments to make the Brompton district regionally, nationally and globally competitive as a centre for high end retail and quality amenities.



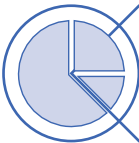
Develop strategy and vision



Map stakeholders



Agree list of options



Assess benefits of each option



Undertake design



Commission

Conclusions and next steps

Conclusion

The Strategic Vision was commissioned to understand the current economic performance of Brompton Road and to establish a set of priorities for a future BID.

Brompton Road has historically been internationally renowned as a luxury shopping destination in (most notably in Harrods and Harvey Nichols). It is an important economic centre for London. The intensity of use by day and into the night is amongst the highest in Britain.

Despite Brompton Road's reputation as a premier retail destination in London, right now there are a number of stresses placed on its performance.

Whilst local traffic has been falling in recent years, competing demands on Brompton Road from cars, high number of traffic signals, delivery vans, buses and pedestrians creates congestion and has negative impacts on the public realm.

Furthermore, unlike other shopping districts in central London, (such as Oxford Street, Regent Street, Soho) Brompton Road does not have a place strategy. Historically, the core objectives for Brompton Road as a place have not been planned for sufficiently. As such a lack of strategic planning about how all of the activities

in this dense area complement each other has meant it has not been able to develop a sufficiently diverse offer over time.

Overall these challenges have led to community discontent about the role of Brompton Road and its relevance to their needs. Currently, Brompton Road is in danger of becoming a place which is highly dependent on a single flagship department store, with limited shared residential, visitor or employee amenities. It is at risk of becoming a thoroughfare, surrounded by disconnected residential streets.

The Strategic Vision seeks to address challenges and raise the ambition for Brompton Road to outwards to surrounding cultural anchors and Hyde Park – strengthening the wider attraction going forward. The district could serve wider employment goals for London by showcasing emerging luxury brands- through low cost subsidised retail spaces

While there is general agreement that Brompton Road maintains its focus on luxury retail a number of strategic objectives were identified to strengthen the offer:

- Area character

- Economic Growth – vitality
- Residential amenity
- Community culture
- Connectivity and severance
- Healthy environment
- Public space

A programme of work for the BID will be required to deliver the district's fullest potential and a long list of projects have been set out in this report. The next steps will be to consolidate these projects to fit within the initial five year budget. The vision and objectives will set the parameters for prioritising interventions to come forward and inform a delivery strategy in collaboration with identified stakeholders.

The vision and leadership of the Brompton District BID will be vital to delivery of these investments to make the Brompton district regionally, nationally and globally competitive as a centre for high end retail and quality amenities.



Source: Unsplash

Appendices

Appendix A | History

Context | History¹

As an official name, 'Brompton Road' did not exist until 1863. It now denotes the portion of the old highway from London to Fulham stretching south-westwards from Knightsbridge as far as Pelham Street, beyond which it becomes Fulham Road. What was horticultural land in 1760, administrative divisions did not coincide especially well with property boundaries at the time of first development. On the south side one major freeholder, the trustees of Smith's Charity, held lands both in Kensington and in Chelsea, whilst on the north side the boundary between Kensington and St. Margaret's, Westminster, divided another freehold of some antiquity.

A survey from 1811 records the appearance of 'New Brompton' (as the district was sometimes now called to distinguish it from Old Brompton further west) just before a new wave of

building occurred. In 1826–9 'New Brompton' acquired its own church west of Brompton Square. The suburb by now boasted some coherence, individuality and prosperity. A directory of 1827–8 lists altogether a hundred 'nobility, gentry and clergy' inhabiting Queen's Buildings, Brompton Grove, Brompton Square (as yet unfinished) and Brompton Row; of these, forty-three lived in Brompton Row. In the 1830's and '40's the Brompton Road district, though engulfed now in the broader development of London, remained prosperous and residentially desirable.

Two things focused increasing public attention upon the state of Brompton's roads in the 1850's and 60's. One was the growth of official 'South Kensington' round Exhibition Road, deriving from the Great Exhibition of 1851 and confirmed by the establishment of the South Kensington

Museum and the formation of Cromwell Road, started in 1855 to serve the rapid growth of residential South Kensington, that 'city of palaces' which arose in these years. Henceforward, Brompton Road became the main thoroughfare leading to London's new cultural quarter.

This wide new road (not carried to its full length for over twenty years) connected with the eastern end of Brompton Road via Thurloe Place, highlighting a growing difference between the sections west and east of the old Bell and Horns. From now on the upper part of the old highway began to take on a candidly commercial character, whereas the section between the Bell and Horns and Pelham Street was quieter and still predominantly residential.



Source: Unsplash

¹ This section has been reproduced from the following source: <https://www.british-history.ac.uk/survey-london/vol41/pp1-8>

Context | History

In confirmation of these changes, the name of Brompton Road became official in 1863 and the old terrace names and numbers disappeared. Henceforward commercial activity gathered pace. Tattersalls, the horse auctioneers, removed in 1864 from Hyde Park Corner to a large site in St. Margaret's parish. Opposite, C. D. Harrod was between 1860 and 1889 in the process of transforming a small grocer's shop into a great department store. The instance of Harrods was not an isolated one; in Knightsbridge further east, Woollands and Harvey Nichols went through similar stages in the same years. Knightsbridge and Brompton Road, particularly their southern sides, were thus becoming fashionable for shopping. By 1884 Harrods' custom could be described as 'world-wide'. The problems of the street's ownership were finally resolved in 1888, when the freehold effectively passed to the Goddard family, who undertook rebuilding as soon as the leases expired. The dominant achievement of this reconstruction was the new Harrods. The designer of Harrods, C. W. Stephens, was also active on neighbouring sites making his much the most powerful hand in

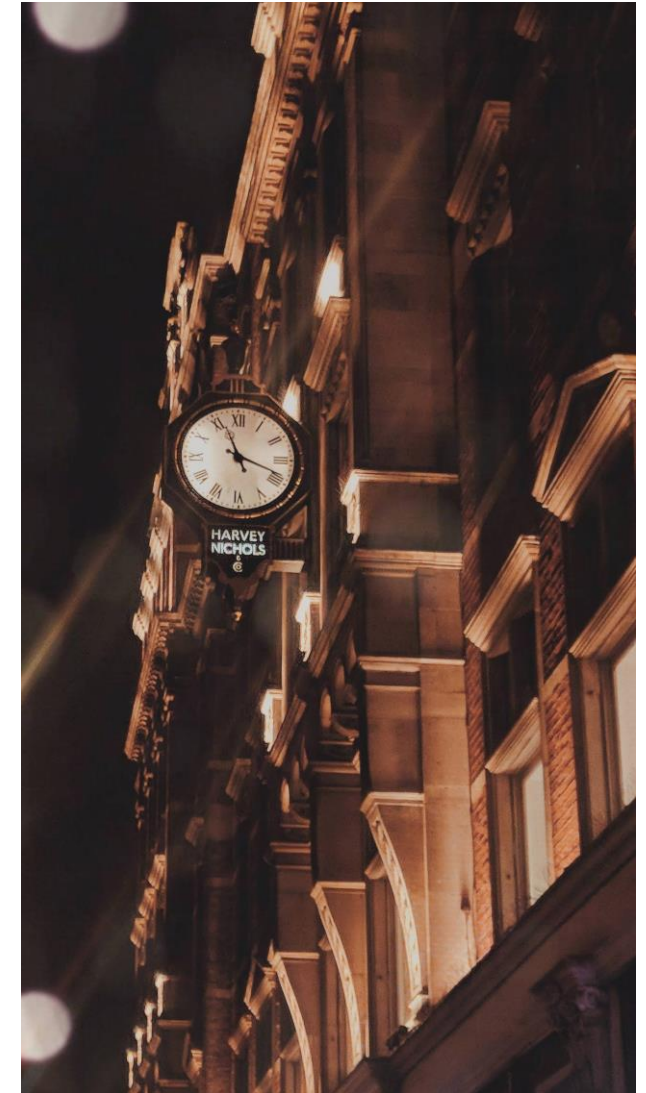
this part of the street.

This rebuilding and the several pieces of infilling that occurred on the north side of Brompton Road in the same period. Some small shops and public houses were still built whilst most of the older shops remained modest. But along the main frontage they were increasingly overshadowed by grander concerns, drapers like Tudor Brothers, Gooch, Owles and Beaumont, and of course the overwhelming emporium of Harrods. There were also daintier small shops like Spikings the bakers with its tearoom and, close to Knightsbridge, several arcades: Park Mansions Arcade on the north side of the street (1897–1900), Brompton Arcade (1903–4) and the Knightsbridge Station Arcade (1903–4) opposite. This last was built in connexion with the Piccadilly tube railway, which opened in 1906. As this line originally offered two stations close together, 'Knightsbridge' and 'Brompton Road', it improved further on the road's commercial significance.

The history of Brompton Road since 1918 broadly confirms previous trends.

Big blocks of flats arose but there were no new department stores to rival Harrods, but several smaller smart shops, the harbingers of today's boutiques. In the squares and residential areas behind, there was some infilling and conversion of small houses in streets like Rutland Street, Fairholt Street and Montpelier Walk into bijou dwellings.

Since 1945, rebuilding has taken place on a much-enlarged scale, with office blocks predominating now over flats. On street level, few of these, particularly on the north side, have developed into a monoculture of café's, many shisha and some supermarkets. Changes on the south side of Brompton Road, though considerable, have been less drastic. The numerous boutiques, notably between Sloane Street and Hans Crescent and in Beauchamp Place, continue to provide a window-display and shop-front. Between them, Harrods continues to offer a reassuring token of permanence and prosperity.



Source: Unsplash

Appendix B | Baseline

Baseline context

The baseline analysis is undertaken is based on two definitions of the Brompton Road district being 'core' and 'walkable'.

The walkable catchment (shown in Figure 1) recognises the host of assets directly within the Brompton Road District including anchor retail assets such as Harrods and Harvey Nichols and transport hubs such as Knightsbridge Station.

Figure 1: Brompton Road District



Source: Arup GIS mapping

Evidence base and SWOT analysis context

The Brompton Road District

The wider area in which the Brompton Road District serves (shown in Figure 2 overleaf) includes within a 15 minute walking catchment to the west significant economic infrastructure including the :

- Sloan Street
- Pavilion Road
- Natural History Museum
- Victoria & Albert Museum
- Imperial College
- Hyde Park
- The Royal Albert Hall

Figure 2: Brompton Road District walkable catchment



Source: Arup GIS mapping

Evidence Base | Covid-19: future impact on Brompton Road

Since mid-March 2020, Covid-19 has triggered a near-total shutdown in international tourism to/from the UK. Forecasting at this time is difficult, given the fast-moving situation and the unique circumstances the economy is facing. The impact of this on key tourism asset such as the Brompton Road district is significant.

The nature of the measures to slow down the spread of Covid-19 will impact some areas of the economy more than others and retail from physical stores are one such area. The range of negative impacts of the pandemic on Brompton Road stem from a collapse in in-person shopping from both local resident workers and tourist, as well as overseas tourists. Visit Britain estimate that inbound tourism to the UK in 2020 is likely to see a decline of 59% in visits to 16.8m and a 63% reduction in spend to £10.6bn. This would represent a loss vs the pre-Covid-19 forecast of 25.3m visits and £19.7bn spend. Meanwhile Visit Britain also expect domestic tourism to decline by 49% for both overnight and leisure day trips.

There are a number of different outcomes that could result from Covid-19. Many retail and hospitality businesses were already facing challenges before the virus spread. Demand for certain services on high streets have changed fundamentally. In-person shopping has gone down substantially and it may be a long time before the same level of footfall returns. Interventions can take many forms, from temporary community and recreational activities, to arts, culture and commercial uses. Using ground floor spaces in these ways can optimise the use of assets by local communities and workers, facilitating the human connections that build community resilience.

Short Pause Contained and managed virus with short term economic implications followed by a rapid recovery

- Significant impact on international visits but less so than for other scenarios
- Presents some short term opportunity to experiment with road space allocation for pedestrians similar to other parts of the CAZ – shopping days for example
- Trend towards online retail, accelerated by CV19

Prolonged downturn CV19 managed and contained, but economic implications deep and long-lasting

- Prolonged reduction in footfall from international visitors impacting businesses adversely and increasing vacancy rates
- But this could provide an opportunity to experiment with different ground floor businesses (shops, food and beverage, and leisure focused on local catchment)

Partial recovery Long-lasting virus spread with economic implications that are short-term and regional

- Eventual recovery in international visits, albeit long term trend towards consolidation to continue
- Presents some short term opportunity to experiment with road space allocation for pedestrians similar to other parts of the CAZ
- Continued trend towards online retail, accelerated by Covid-19

Evidence base | Economic insights | There has been stagnation and some decline in rental values (pre-COVID 19) especially for the retail sector

Rents on Brompton Road can be thought of as an overall indicator of economic success for the district.

As can be seen in Figure 4, retail rents for the potential BID area show a long-term gradual decline. This trend differs from the wider area (Figure 3) which in contrast shows (in average terms) stable rental values per square metre.

Not shown on the graphs, average rents on Brompton Road are also lower compared to the West End. Vacancy rates pre COVID are around 1.8%, below the 10 year average of 3.54% but higher than in Soho (0.8%) and Oxford Street (1.4%).

On a real basis (in 2020 prices) since the financial crisis retail rents recovered but are still below their peak of 2003, almost double the current average value. Savills research (Source: Market in Minutes: Central London Retail May 2020) indicates West End luxury rents increased on average by more than twice since the GFC. West End luxury retail and all Central London retail rental values peaked in 2018/2019. By contrast office rents per square metre on Brompton Road have doubled since 2000 based on CoStar analysis and this market for Brompton Road has

performed broadly in line with the wider area.

Savills research (Source: Market in Minutes: Central London Retail May 2020) indicates West End luxury rents increased on average by more than twice since the GFC. West End luxury retail and all Central London retail rental values peaked in 2018/2019.

By The impact of Covid-19 makes forecasting future rents problematic. Savills reported in May 2020 that that across the UK, high streets saw footfall decline of 41.8% in March compared with the previous year. Meanwhile there was year-on-year decline in headline retail rents across central London in Q1 2020. How quickly trading conditions improve will be a key determinant of rental values in the medium term.

Anecdotally, the limited number of major retail 'anchors' (Harrods and Harvey Nichols) have made the district less competitive compared to the West End. A relative decline in the quality and experience of the physical environment has arguably placed downward pressure on rents.

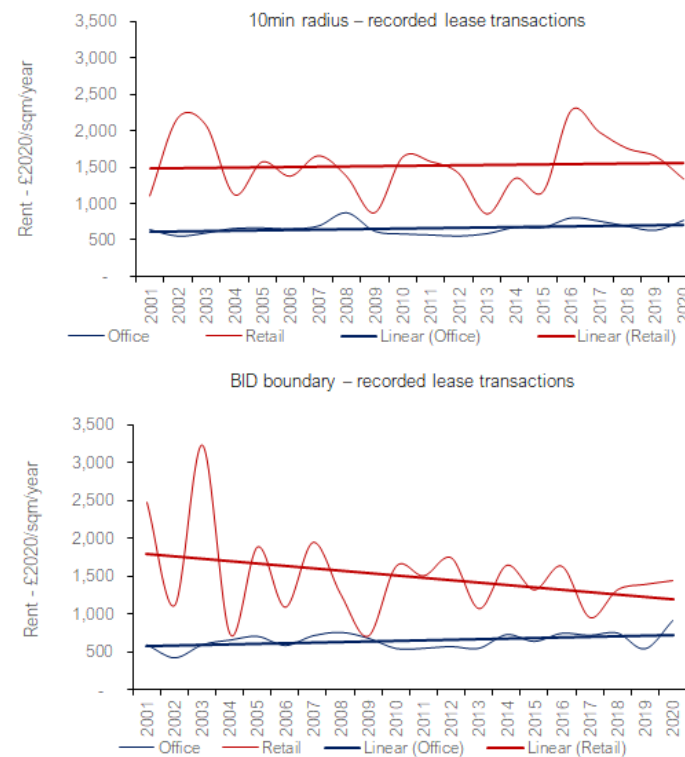
Key Insights

Savills research notes that Prime West

End vacancy rate was 4.6% compared to 1.8% on Brom, (according to CoStar analysis). However even before CV19 Brompton Road was experiencing lower growth rates in rent compared to central London averages.

Improvements to the quality of the built environment could help to stabilise and potentially increase land values and hence rental levels in and around the proposed BID area. The concentration of land ownership for South Kensington Estates presents some opportunities for site consolidation for development of a major anchor at this end of Brompton Road. Setting a broader mixed use vision for this part of the district could help the district more generally in its quest to become more attractive to a range of stakeholders. The majority of proposed development is for minor residential activity with the exception of some mixed use projects closer to Knightsbridge station.

Figure 3: Recorded lease transactions for 10 minute radius of the Brompton Road BID boundary 2001-2020 (price per square metre (2020 prices)



Source: CoStar, Arup analysis

Source: CoStar, Arup analysis

Figure 4: Recorded lease transactions within the Brompton Road BID boundary 2001-2020 price per square metre (2020 prices)

Evidence base | Economic insights | With the exception of the K1 development, development activity has been relatively subdued over the last decade

With the exception of the K1 development (that is under construction), the (very few) additions to floorspace in recent years have been located north of Harrods. Analysis of pre-Covid-19 CoStar data for the properties along Brompton Road indicate prime yields of 4.1% which is broadly in line with the 10 year average of 4.20% achieved in the area – and broadly in line with yields across other parts of Central London. Cushman and Wakefield note in their Q419 Market Beat report the Prime West End yields were around 3.75%. There are a number of sites held by South Kensington Estates where there may be consolidation opportunities for major development in the future.

A significant addition to floorspace(Figure 8) within the BID boundary since 2011 is the mixed use K1 development which is adding 340,000 square metres to the district. Live planning applications show that there are also no planned major developments in the district. Most of the development activity is residential

with the exception of office/mixed use on Montpelier Street (shown overleaf). There are several smaller landholdings on Brompton Road which present some opportunities for site consolidation for major future development. This southern part of the district could benefit from a major mixed use development to draw people further south from the Harrods Site and would complement the food and beverage offer on Sloane Street.

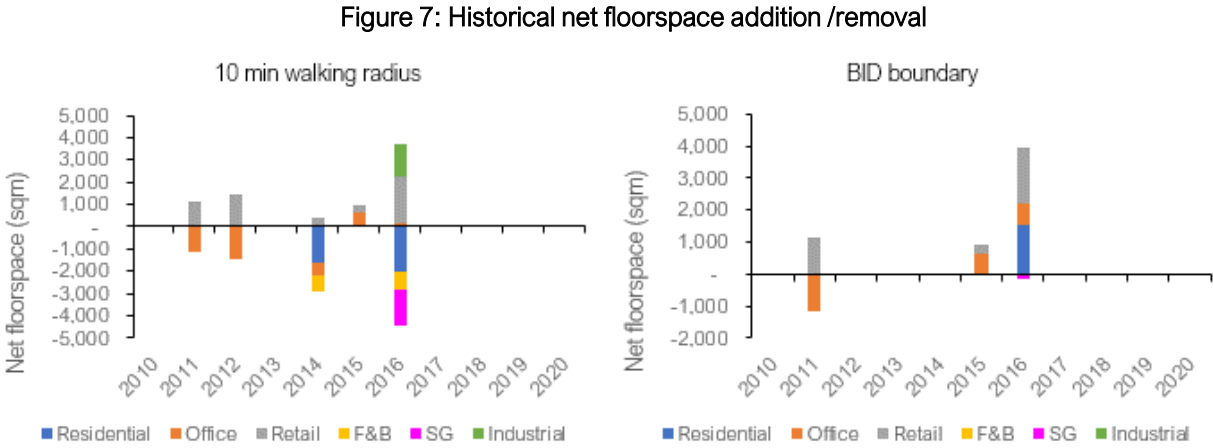
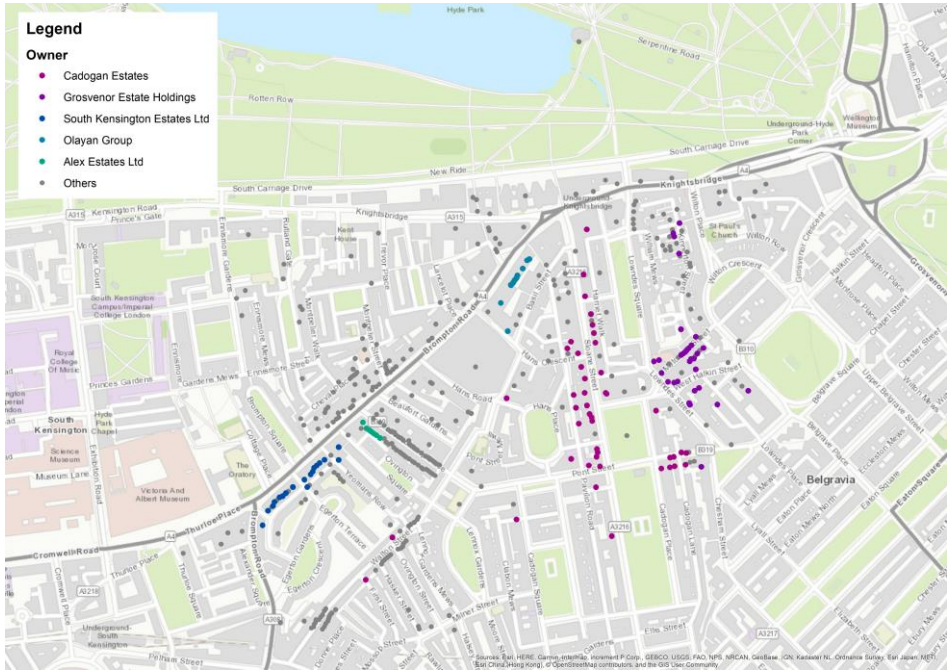
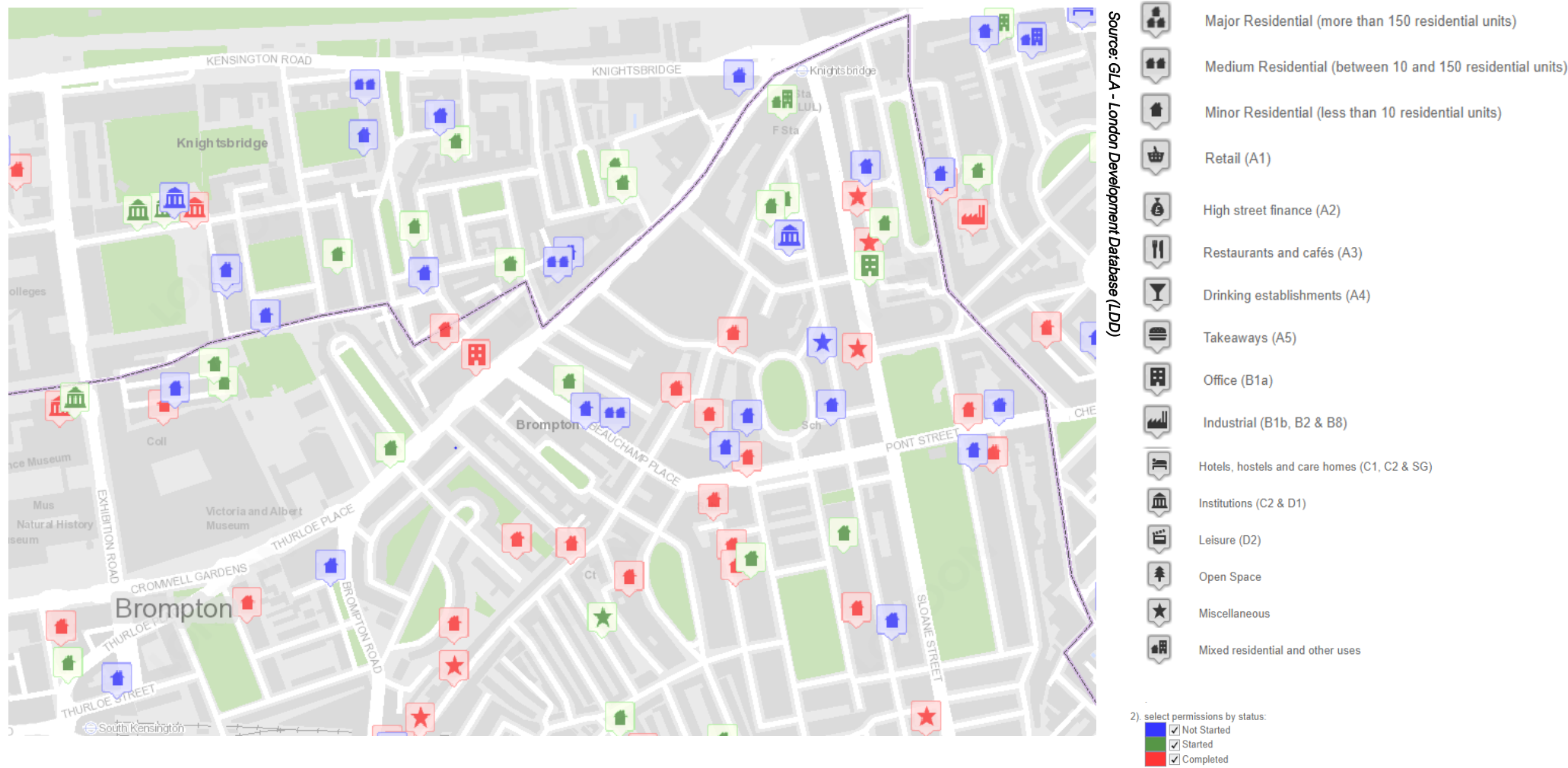


Figure 6: Land ownership (2020)



Evidence base | Economic insights | With the exception of the K1 development, development activity has been relatively subdued over the last decade

Figure 8: Live planning applications (2020)



LUXURY RETAIL TRENDS

Since 2000, the personal luxury goods market has more than doubled, growing from £115 billion to £252 billion a CAGR of 4.1%. Over the last twenty years, the personal luxury goods market comprising apparel, fashion accessories, beauty, jewellery and watches advanced through five stages of growth: Democratization (2001-2007); Crisis (2008-2009); Chinese Shopping Frenzy (2010-2013); Reboot (2015-2016); and now the New Normal (2017 onward), according to Bain & Company and Altagamma's analysis. The current 'New Normal' growth trajectory was expected to continue into 2020, characterized by moderate growth in the 3-5% range, with Asian markets driving most of the industry's growth.

The sector's performance in London

Before Covid-19, Savills examined 19 European cities with respect to potential trading performance (retail spend, international visitors, presence

of high net worth individuals (HNWIs), relative affluence of domestic population) and occupier terms (average lease lengths and rent review structures) to try and identify those markets that may prove more attractive to investors with respect to current pricing (transaction yields).

The data model created based on the metrics detailed above, identified London as the most attractive investment market despite it being one of the most expensive cities to buy into, due to the size of its retail market and its relatively attractive occupier terms for investors/landlords (15 year upward only rent review leases being the norm in prime locations). To London's advantage the luxury sector appeals to a global consumer: 20 to 30 percent of industry revenues are generated by consumers making luxury purchases outside their home countries according to McKinsey and Company in its 2020 report 'A perspective for the luxury-goods industry during—and after—coronavirus'. In 2018, Chinese

consumers took more than 150 million trips abroad.

Some place making trends in luxury shopping (pre-Covid-19 that might be even more important post the pandemic)

Across London retail formats have not stood still. In the face of increased competition the layering of the retail offer has changed so as to set the physical store experience apart from an online retail purchase. This is very much a place based trend, using urban design to enhance the retail experience.

One example is Pavilion Road. Following a consultation with the local community, Cadogan pledged to create a destination for independent, artisan traders behind the recent George House development on Sloane Street. Established fashion and beauty boutiques were joined by exciting new artisan food shops including a butcher, baker, wine merchant, cheesemonger and greengrocer, as well as a barbers, stationers, general store and fishmonger. The overall visual quality of this place making has been associated

positively total property values.

The density of uses for example in the West End provides users the opportunity to explore. Stores with trees along the frontage street have significantly higher numbers of shoppers and higher ratings of overall visual quality, compared to those without trees.

Work undertaken by Arup for the Heart of London Business Alliance 'The Economic Case for Public Realm Investment in the Heart of London Area' analysed the impact of strategic public realm investment on footfall, dwell time, and real estate values. Interventions considered included – wider street widths, dropped kerbs, removal of obstruction, better street permeability, improved security, better surface quality, removal of vehicle conflict points, better environment. The impact on rental values across the central case studies was estimated to be up to 80% over a 10 year period. Similarly CABA in its 2007 report 'Paved with Gold' outline the potential

positive impacts of public realm on the pedestrian environment

Looking towards the future for Brompton road: The luxury experience place driven

Bain & Company anticipates that a recovery to 2019 levels will not occur until 2022 or 2023. Chinese consumers are forecast to be the largest groups of buyers of luxury, accounting for nearly half of all purchases worldwide by 2025. As a region, mainland China will account for 28 percent of the luxury market, up from 11 percent in 2019. A Brompton Road BID needs to *consider how best to attract this market - but in such a way that enhances the district's positioning and standing with all its principal stakeholders.*

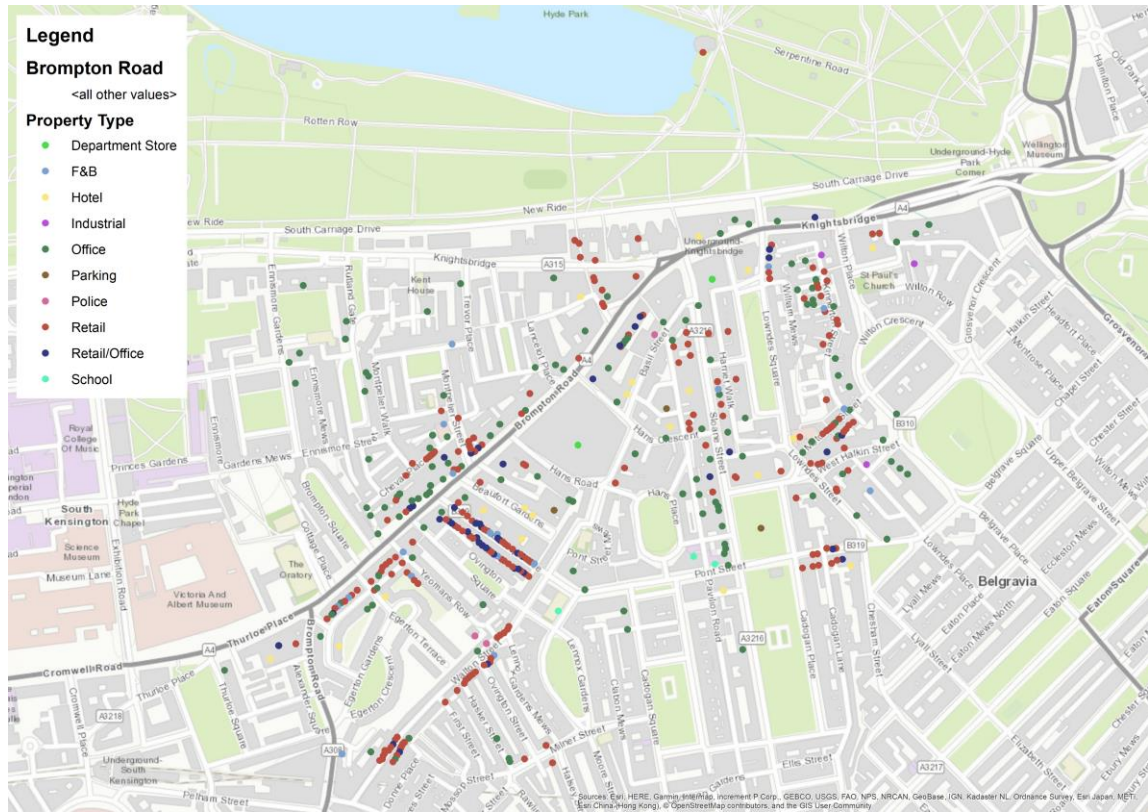
Evidence base | Economic insights | Retail as a proportion of total floorspace is high but the type of retail is not as diverse or attractive as it needs to be in order to serve the needs of residents, workers and visitors

In overall terms, retail (including department store floorspace) make up around 56% of floorspace within the proposed Brompton Road BID district (CoStar data). Within a 10 minute walk retail and department stores account for 30% of space. The office sector comprises 26% of total commercial floorspace in the BID district, followed by 18% for hotels and 6% for retail uses. Restaurants, bars, and cafes in the Brompton district accounts for only 1% of total commercial floorspace.

This mix of retail may in part reflect one of the challenges identified in the feasibility study; surrounding residential areas have little connection with with Brompton Road proper. In fact, the road itself arguably acts as a barrier in relation to residential streets (and indeed between activities on either side of the road). This creates a “chicken and egg situation whereby

residents are reluctant to use the main street and in turn there is limited perceived demand for the sorts of ground floor uses that residents would use.

Figure 8: Property type, associated floor space and employment within the 10 minute walk plus proposed BID area 2020 (pre-Covid 19)



Source: Costar data; Arup analysis

| | NIA floorspace (sqm) | | Property count | | Jobs | |
|-----------------------|----------------------|---------|----------------|-----|--------|-------|
| | 10min | BID | 10min | BID | 10min | BID |
| Retail | 40,068 | 13,468 | 85 | 25 | 2,290 | 770 |
| F&B | 5,087 | 2,187 | 17 | 6 | 291 | 125 |
| Office | 159,164 | 59,629 | 140 | 48 | 13,264 | 4,969 |
| Police / Fire Station | 2,929 | - | 1 | - | 146 | - |
| Hotel | 169,629 | 40,136 | 16 | 3 | 7,710 | 1,824 |
| Parking Garage | 16,107 | - | 2 | - | 322 | - |
| Department Store | 113,257 | 113,257 | 2 | 2 | 4,530 | 4,530 |
| Schools | 4,388 | - | 3 | - | 219 | - |

Evidence base | Economic insights | Retail as a proportion of total floorspace is high but the type of retail is not as diverse or attractive as it needs to be in order to serve the needs of residents, workers and visitors

Key Insights

There is a limited food and beverage offer throughout the proposed BID district compared to other mixed-use places in central London. Most of the food and entertainment offer is concentrated on Beauchamp Place.

Supporting economic vitality on Brompton Road could involve bringing more community uses to its edges – providing more for local residents and workers plus other types of visitor. In terms of what a more balanced floorspace profile could look some suggestions for each user group include:

Residents – more multifunctional local offer. This could be located along the edges of Brompton Road. Books stores, flower stores, interesting bespoke/local types of retail offering, plus food and beverage providers.

Workers – are currently not offered a great deal of food or

beverage or post-work convenience retail.

Visitors – improved food and beverage, plus fashion and clothing, other boutique retail to complement the remaining anchor retailers.

Supporting vitality on Brompton Road could involve bringing more community uses to its ground floor to draw out local residents. A more imaginative mixture of food and beverage, culture and creative offers could help to retain and attract visitors willing and able to spend. Ground floor businesses (shops, food and beverage, and leisure) and bustling commercial districts play a big part in developing sense of place and attracting investment in core-real estate products (such as offices).

Evidence base | Economic insights | Employment has experienced decline in the district despite long term growth elsewhere in London

Employment on Brompton Road has declined in recent years

Figure 9 shows total employment in the 10 minute walking area was around 26,000 in 2015, this had fallen to 24,500 by 2018 (a compound growth rate of -1.6%). This is against a backdrop of overall growth in employment in London as shown in Figure 10.

Without much development occurring in the immediate area and low property vacancy rates, job growth has been limited to a large extent by changes in density of employment. Retail employment densities per sqm of workspace have declined over time.

Without a greater variety of activities on Brompton Road the district the district may well struggle to recover and grow its employment base or to be able to support gains in productivity by attracting higher paid jobs to the district.

Key Insights

In a post Covid-19 world, there is an opportunity for more dense

employment offerings should new development come forward or if existing retail space be used (i) more intensely (ii) if land use mixes and business types become more diverse.

Additional mixed use development could support employment growth particularly if the offer was diversified to include evening entertainment uses similar to that of the West End (currently a very low allocation of this type of floorspace is present on Brompton Road).

The district could also serve wider employment goals for London by showcasing emerging luxury brands-through low cost subsidised retail spaces

In terms of understanding different employment outcomes for Brompton Road The BID if formed should set a clear vision of the offer. The BID could co-ordinate planning and management with the boroughs to target the businesses and services that could locate here.

Figure 9: Employment distribution by property type (2018)

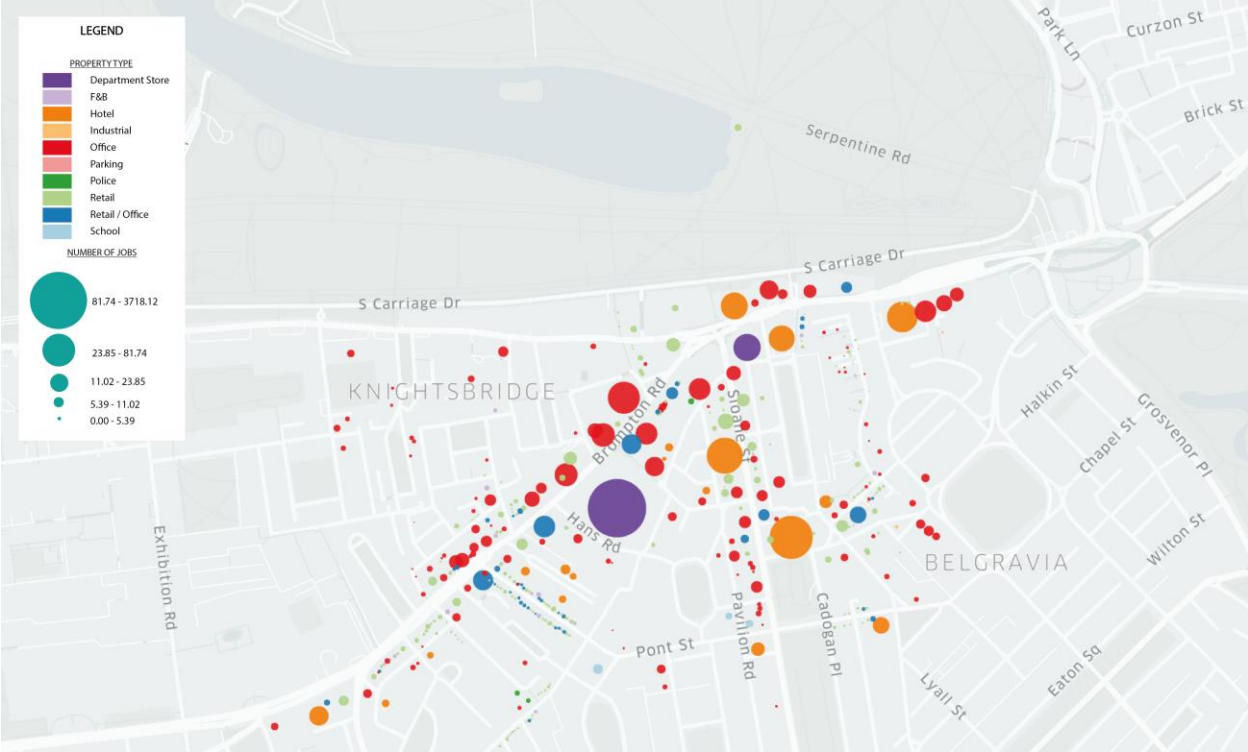
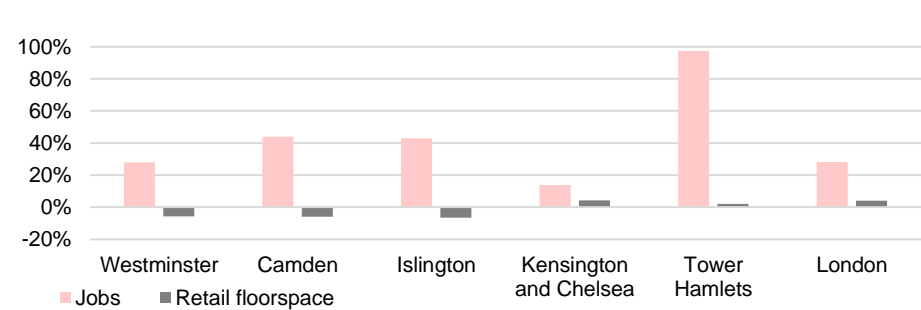


Figure 10: Percentage change in total employment and retail space for London and selected boroughs between 2000 and 2016



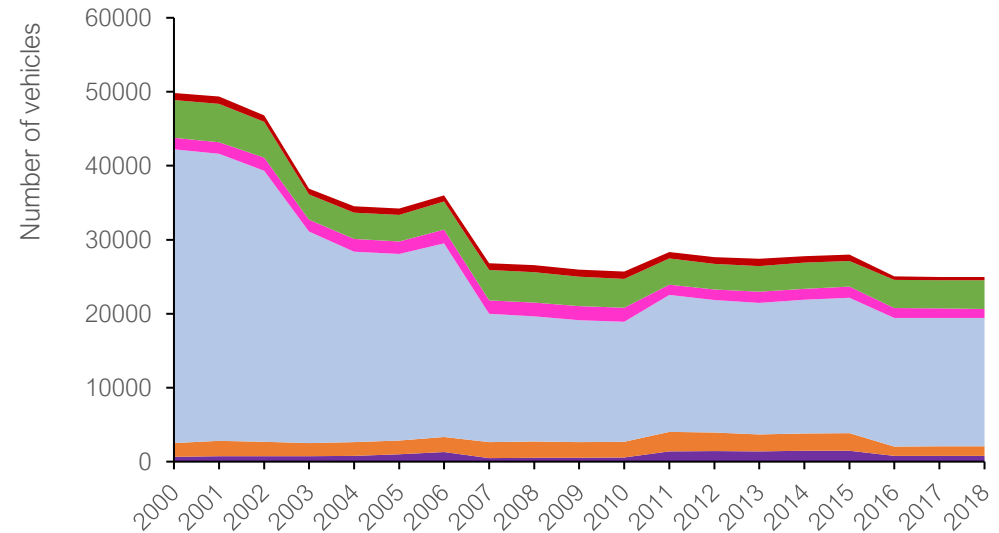
Source (both): GLA data, except for the West End, where we used Business Register and Employment Survey 2016 apportioned to the study area; Arup analysis

Evidence base | Transportation insights | The Brompton Road and its associated traffic dynamic creates severance and erodes its positioning as a destination

Traffic on Brompton Road sees around 25,000 vehicles per day. As can be seen from Figure 11, volumes halved between 2000 and 2008 but have remained largely stable since then. Remarkably, congestion is still a major issue. Buses make up a minimal share of traffic.. Around 1,000 vehicles turn right from Hans Road into Basil Street, 55% of which are taxis. Around 1,000 vehicles also make the movement from Walton Place to Basil Street, 20% of which are taxis. Whilst the A4/Brompton Road experiences the heaviest demand flows, both the A315 (Knightsbridge and Soane Street have a number of bus routes operating on them and long queues can appear. Data collected by Uber (shown in Figure 12 overleaf) suggest that the queuing of taxis has continued despite the remove of the feeder rank. Taxis queuing in the new location are apparently disruptive to local residents and interrupt the flow of two-way traffic on Hans Road. The highest density of traffic on Brompton Road can be found at the junction with Beauchamp Place. This is despite TfL improvements implemented on the Brompton/Beauchamp junction in 2018.

There are other pinch points, with data showing lower than average speeds around main junctions with Cromwell Gardens and Knightsbridge. Taxi queue along Basil Street for the taxi rank at the junction of Hans Crescent and Basil Street. For several years it has been common for this queuing to extend across the junction of Hans Road / Walton Place / Basil Street and along Hans Road towards Brompton Road. Kensington & Chelsea introduced a permanent yellow box marking in 2018 and trialled a taxi feeder rank in 2019. The yellow box junction has resulted in a significant reduction in the number of vehicles blocking the junction but also led to a new problem of taxis waiting in the eastern arm of Hans Road.

Figure 11: Average annual daily flows on Brompton Road by vehicle category 2000-2018



Source: Department for Transport (Count point 26115); Arup analysis

Legend:

- Pedal cycles
- Two wheeled motor vehicles
- Cars and taxis
- Buses and coaches
- Light goods vehicles
- Heavy goods vehicles

Source: Department for Transport; count point 26115

Evidence base | Transportation insights | The Brompton Road and its associated traffic dynamic creates severance and erodes its positioning as a destination

Whilst in overall terms public transport provision is good, many high spending visitors to Brompton Road may well make the trip using a car and consequently experience delays and congestion. As shown overleaf in Figure 13, compared to other shopping districts in London and indeed internationally, pavement widths are narrow. The immediate surrounding area lacks accessible space for non-residents such as workers, students and visitors. Access and wayfinding to Hyde Park appears minimal.

Feedback from the community has highlighted a growing concern about the declining quality of the public realm and the need to improve the street appearance. Intense usage of street pavements creates the need for more investment to improve and maintain various aspects of the street scene. This includes street furniture, paving and lighting. This has been added to by the increasing clutter of street furniture e.g. signage and telecommunication cabinets

competing demands on Brompton Road from cars, high number of traffic signals, delivery vans, buses and pedestrians creates congestion and create negative impacts on the public realm. The road creates severance and indeed feeds into a sense that the district is not really welcoming for Londoners or some other visitor groups. The competing transport demands on Brompton Road and its surrounding larger streets suggests indicate that trade offs may need to be made between different users – perhaps by time of day, day of the week and month of the year. There may be an opportunity for freight consolidation centres to help to reduce delivery traffic. A wider median strip and some greening of pedestrian areas could create a greater sense of separation between traffic and pedestrians.

Key findings

Whilst traffic has been falling,

Evidence base | Placemaking insights | Increased pedestrian space could enhance make the area more pleasant for visitors to explore and more inviting for local residents

Figure 12: Vehicular speeds for 2019/20 – weekdays and weekends

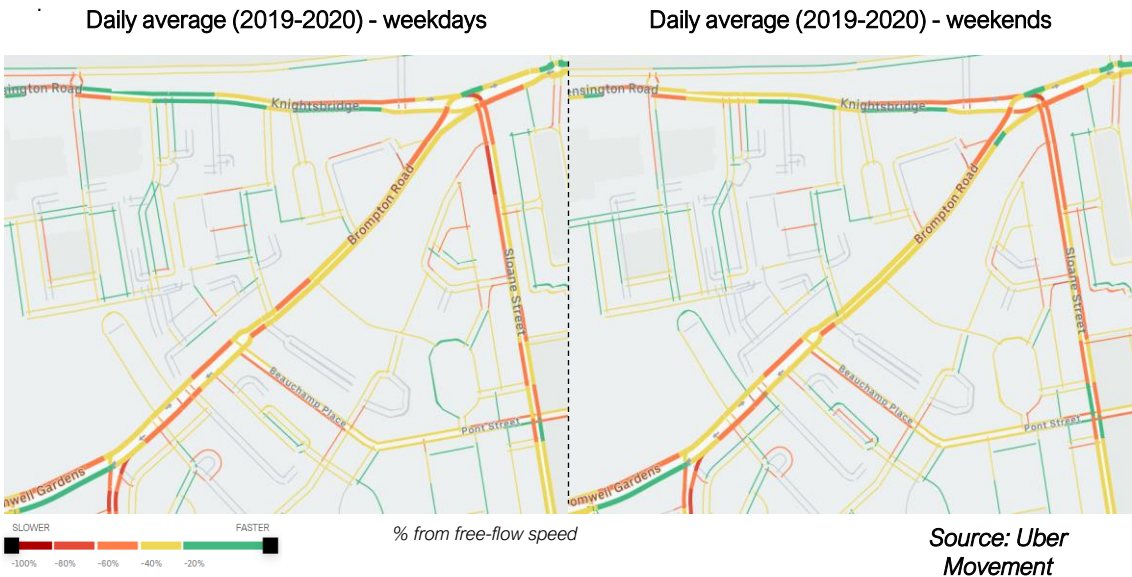


Figure 13: Comparative street widths for Brompton Road, New Bond Street and Regent Street



Evidence base | Transportation insights | There are opportunities to improve road safety along the Brompton Road

There have been a number of serious traffic incidents on Brompton Road in recent years (as shown in Figures 14, 15 and 16). TfL data from the past few years indicate a number of problematic issues in regards to transport. In 2017 a collision at Brompton Road junction with Brompton Square resulted in serious pedestrian injury. A collision also occurred at Hans Road junction with Brompton Road in Kensington and Chelsea involving a motorcycle. In 2018 a collision occurred at Brompton Road junction with Brompton Square in Kensington and Chelsea involving a heavy goods vehicle and pedestrians. An adult pedestrian was fatally injured. Slight collisions also occur in large numbers on Brompton Road (see Figure 16 overleaf). Data from 2018 show accidents occurring not just at intersections but right along the road. The accidents often show conflicts between different vehicle types and cyclists.

Key findings

Despite some activity by TfL in recent years to improve junction performance, the nature of competing demands on Brompton Road and its

surrounding streets results in a significant number of traffic incidents, some of them fatal. Interventions could involve lower speed limits, providing more crossing points for pedestrians as well as perhaps limiting turning at key junctions.

Figure 14: Fatal and serious collisions (2017)

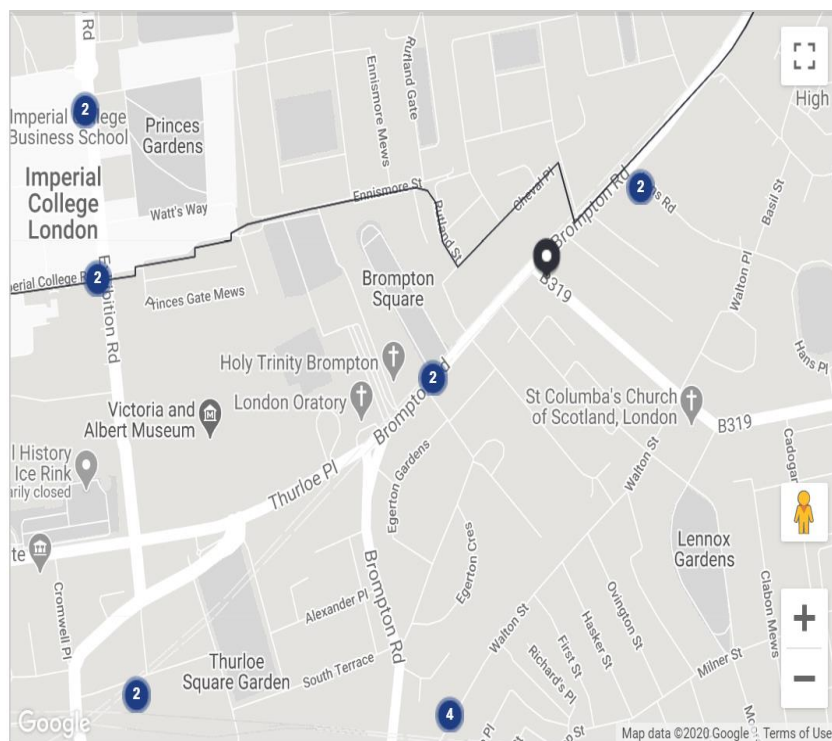
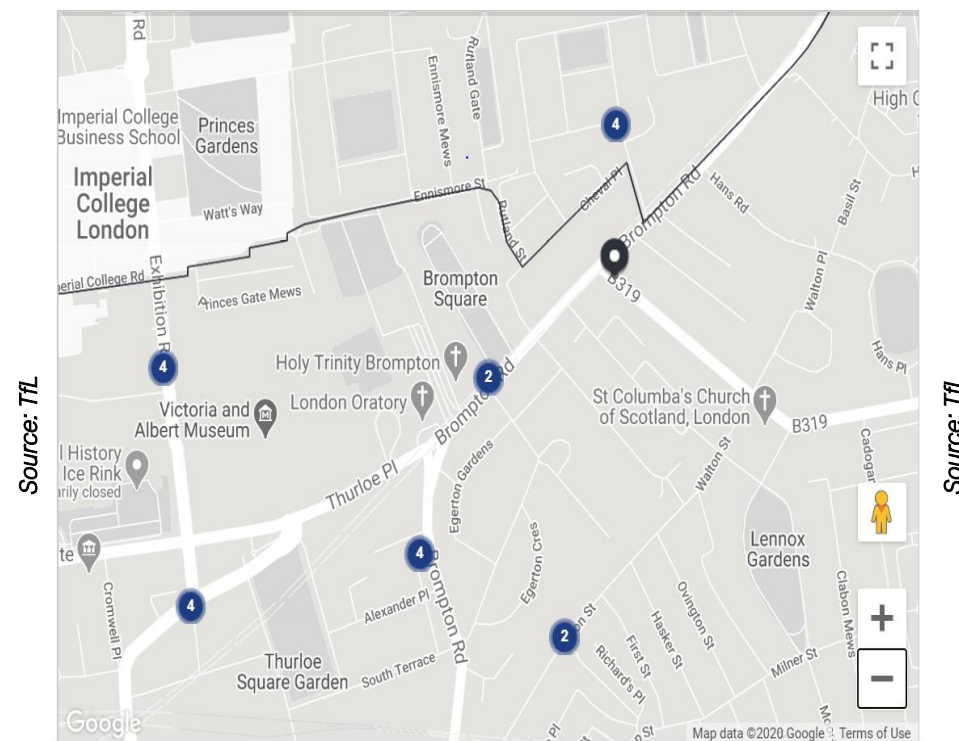
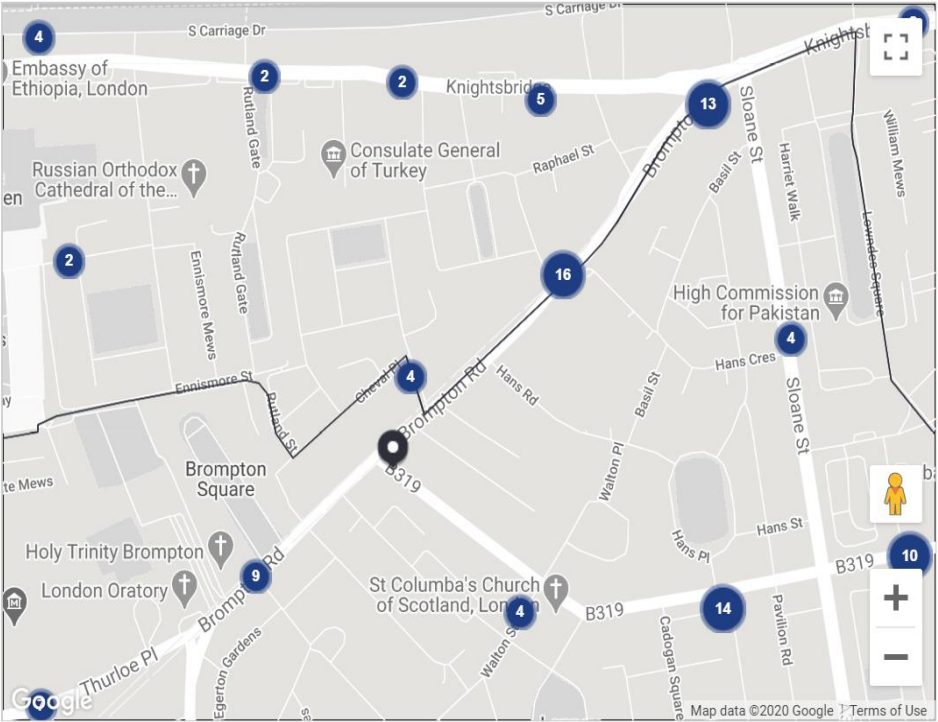


Figure 15: Fatal and serious collisions (2018)



Evidence base | Transportation insights | There are opportunities to improve road safety along the Brompton Road

Figure 16: Slight collisions (2018)



Source: TfL data

Evidence base | Place making insights | Noise, poor air quality and a lack of greenery reduces the attractiveness of the Brompton Road district

Noise pollution on Brompton Road is a challenge exacerbated in part from its narrow width, traffic volumes and congestion levels. The district also suffers from amongst the worst air quality in London. Brompton Road was recorded as breaching the hourly legal limit for nitrogen dioxide (NO₂) for the whole of 2017 by 18 January of the same year. This is a major global and London-wide issue that is a matter of great concern to local residents, businesses and others.

Tree canopy is low compared to surrounding areas and side streets off Brompton Road. This lack of tree coverage also means vehicular exhaust noise is more acutely experienced by pedestrians and residents. High powered cars and motorcycles are a chronic problem in the district. Late night activity creates additional noise as noted by residents.

Luxury shoppers, tend to use cars over public transport. These vehicles will be contributors to traffic, air and noise pollution. The extent to which they

should be facilitated in order to sustain demand for the retail economy in the district is a moot point.

Key Insights

With regard to air quality there is need for more efficient, low energy technology. The use of electric vehicles and restrictions on polluting vehicles and energy sources, including buses, refuse collection vehicles, heavy goods vehicles, taxis (already being converted) and private hire vehicles could be considered.

With respect to noise, increased enforcement of local council infringement notices would help to address noise related to anti-social behaviour. Pavement resurfacing with different materials could also help to reduce noise impacts in combination with greening to create a more “boulevard like” feel. There is a need to undertake an assessment of street clutter to determine what can be realistically be moved to make way for more green space.

The BID could work with councils to provide high quality, ambitious and practical interventions aimed at improving the streetscape that help to deliver:

- More space for pedestrians and cyclists;
- Better way finding;
- Improved landscape quality and tree-planting; and
- New traffic free public spaces

The BID could also help with delivering marked ‘gateways’ for Brompton Road to improve signage and wayfinding and to encourage appropriate routes to and from key surrounding assets. The BID could help with setting design guidance and standards.

Evidence base | **Place making insights** | Noise, poor air quality and a lack of greenery reduces the attractiveness of the Brompton Road district

Figure 17: Annual average noise levels 23h-07h - Lnight

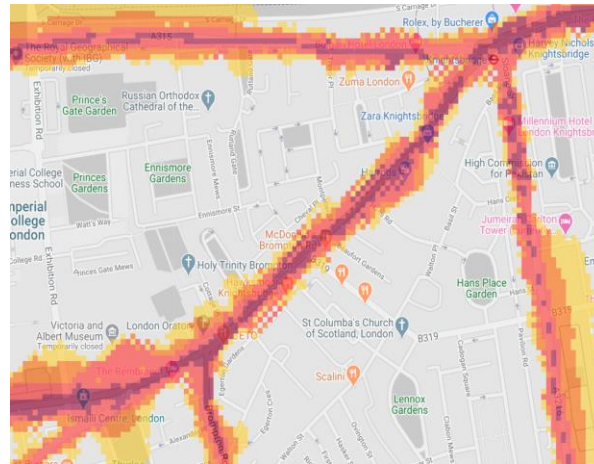


Figure 18: Annual average noise levels 07h-23h - LaEQ 16h

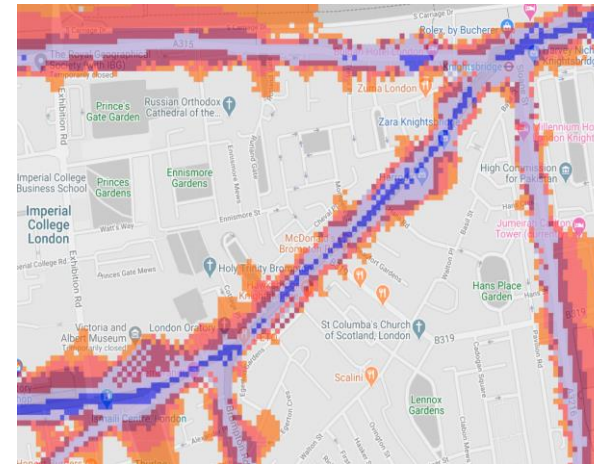
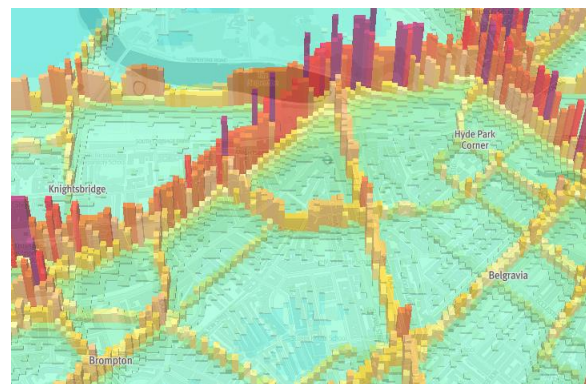


Figure 19: Air quality



Key: Annual mean NO2 air pollution for 2016, in microgrammes per metre cubed (ug/m3)

<16 16 19 22 25 28 31 34 37 40 43 46 49 52 55 >58

Passes annual mean objective Fails annual mean objective

Figure 20: Tree canopy cover



Source: European Space Agency; GLA London Street Tree Map

Evidence base | Placemaking insights | A place strategy is needed to define the purpose of Brompton Road as a dynamic place and to direct its future growth and development

Brompton Road is a dense, mixed use area, surrounded by established residential communities and cultural assets. It is also part of a borough boundary. Brompton Road provides an important retail context for the RBKC area and London. Building heights along the road combined with a relatively narrow road create a canyon effect. Crowding of footpaths and road congestion (despite declining volumes) has led to some deterioration in the quality of the built environment.

The visual quality of commercial properties as shown in the Figure 19 do not have consistent look in terms of façades composition, building materials or colours

Conservation areas are areas where extra planning constraints apply due to special architectural and historic interest. Figure 18 opposite shows the indicative boundaries of conservation areas (in blue) in the contiguity of Brompton Road.

In recognition of the sensitivity of the historic and lower-scale environment of the Brompton district area, tall buildings are generally not appropriate.

Proposals for floor additions need to comply fully with London Plan policy on their design (including matters such as their relationship to nearby buildings).

Key findings

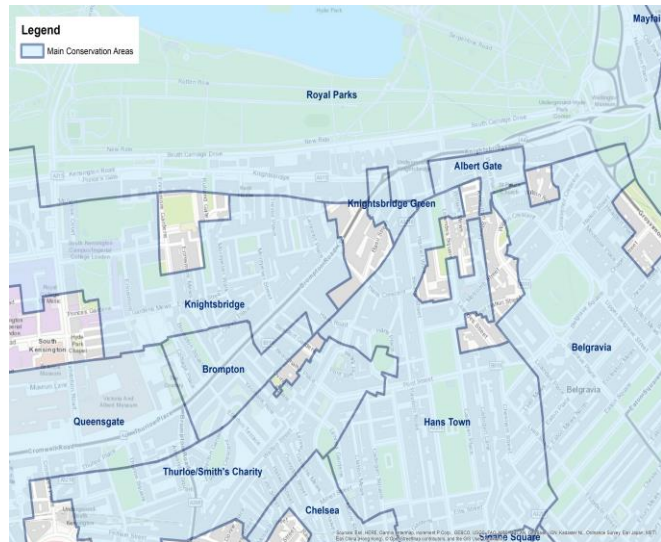
Unlike other shopping and/or entertainment districts in central London, (such as Oxford Street, Regent Street, Soho) Brompton Road does not have a place strategy. Historically, the core objectives for Brompton Road as a place have arguably not been planned for sufficiently. As such a lack of strategic planning about how all of the activities in this dense area complement each other has meant it has not been able to develop a sufficiently dynamic offer over time.

A plan for the area as a place is needed to enhance its attractiveness for stakeholders in the face international and domestic competition. The external shock of Covid-19 provides a critical moment for this to happen. The BID if formed could work with RBKC and Westminster to design guidance that responds to local character. As noted elsewhere, an increase in pedestrian

space may improve user experience and enhance capacity. This could help to ensure Brompton Road becomes an attractive destination for retail, leisure and employment as well as residents over a longer period. As well as generating income, property values changes are a measure of the attractiveness of an area for visitors, shoppers and businesses.

- Litman (2017) estimates that walking and cycling projects typically increase land value from 70 to 300 per cent
- Retail and commercial rates increase in the range of 10-30% following pedestrianisation
- Access to quality green space has also been seen to increase commercial rents by up to 20%
- A 1% increase in green spaces has been seen to lead to a 0.3-0.5% rise in average house prices
- Genecon's (2010) evaluation of regeneration in Sheffield reported a net increase in rental value of £1.60-£2.40 / sq. ft. and a 1-1.5% yield improvement (based on 40 – 60% attribution rate)

Figure 21: Conservation areas in the Brompton Road district



Source: GLA; Arup analysis

Figure 22: Brompton Road ground floor frontages



Source: Google Maps

Evidence Base | Outlook for luxury retail

What a more experience driven Brompton Road could look like

Covid-19 has encouraged local and central governments around the world to undertake temporary use and experimental place making. Paris has added 650 kilometres of cycle lanes, Lima has added 300 kilometres, and New York has added sixty-four kilometres since the lockdown. Similar measures are being rolled out across the UK with road closures, speed restrictions, pop-up bike lanes and wider pavements. The Mayor of London and TfL recently unveiled their 'London Streetspace' programme, which will rapidly transform London's streets to accommodate a possible ten-fold increase in cycling and five-fold increase in walking when lockdown restrictions are eased. The government has pledged a two billion pound fund to boost active mobility. Some suggestions for interventions that could be applied specifically for retail could include:

Traffic free days that showcase history of the Brompton Road area and present it to a wider audience

Traffic free days are opportunities to revive, liven and transform. When Paris held its first car-free day in 2015, there was a 40% reduction in exhaust emissions and a 50% reduction in sound

levels in the city centre. These days could be used to showcase Brompton Road's luxury retail (independent brands, pop up space) as well as its immediate catchment (V&A art installations), and its cycle-making history (Brompton Bikes). This could include a Harrods day for Londoners where activities spill out onto the street.

For a Brompton Road BID, thinking about how road space could be allocated to pedestrians for street dining and fashion events could help to widen the area's appeal to a greater number of people particularly in a period where international tourism has been so dramatically affected.

Open days for private squares

The private squares adjacent to Brompton Road should be respected as being space for residents. However open days for visitors could be a way enhance the areas appeal. The Open Garden Squares Weekend organised by London Parks and Garden Trust involves opening up private gardens for special garden tours, family activities, art trails and poetry events etc and could be a model to follow.

Focusing on shared values around sustainability

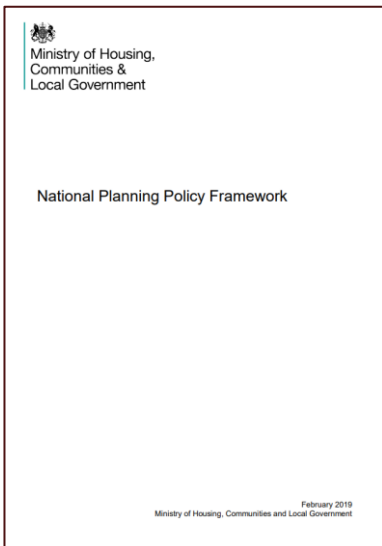
In Brompton Road, having a focus on

sustainable luxury as well as promoting sustainability in street design and stores through landscaping elements and curation of stores would serve not just needs of consumers but would buy into a common purpose for RBKC and Westminster. Lab-grown diamonds, is just one high end luxury example of how to create sustainable new business models for luxury products that address the growing concern for sustainability amongst consumers

Creating an Experience the better reflects the areas history and uniqueness

– Consumers have a quest for experience and luxury that somehow tells a story. Handmade, artisanal products and personalized services are examples of these but services and experience of the spaces that surround it are also important. Pre-Covid-19, places such as Soho were destinations in their own right, with a "layering" of experiences. For Brompton Road there could be a future where people combine high-end shopping with a walk to Hyde Park, visit the V&A dine in side street restaurant and make a day of the experience.

Evidence Base | Planning insights



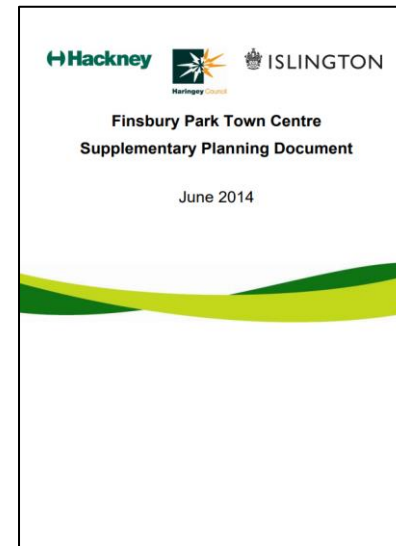
National Policy

- Sustainable development
 - Building a strong and **competitive economy**
 - Support strong, vibrant and healthy **communities**; and
 - To contributing to protecting and enhancing our **natural, built and historic environment**
- Commitment to ensuring the vitality of **town centres**. Takes a positive approach to their growth, management and adaptation.



London Policy

- **Central Activities Zone**
- Supports the adaptation and diversification of the **international shopping centre** destination of Knightsbridge
- Recognises its **strategic and local** function
- Enhance the attractiveness and inclusiveness of the CAZ to **residents, visitors and businesses**.



Informing Policy and Licencing

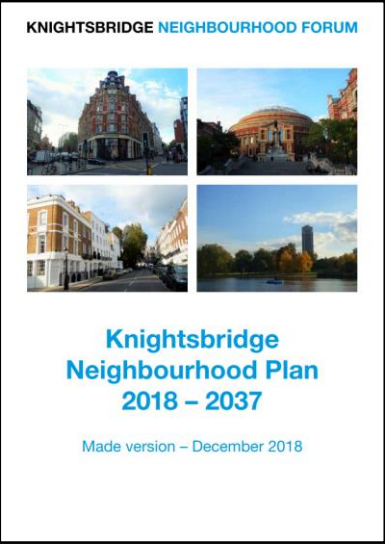
Local Plans

- Both authorities have very up to date Local Plans;
- Unlikely to be reviewed for five years;
- Evidence bases will be reviewed periodically and show how well policies are working in area.

Local Development Orders and Article 4 Directions

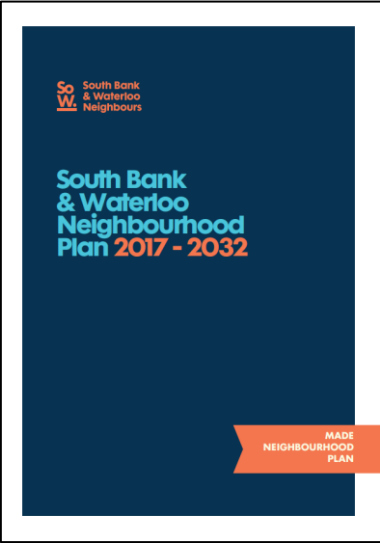
- Can be made by an LPA to extend permitted development rights, or grant planning permission, for specific proposals or classes of development in a particular area.

Evidence Base | Planning insights



Knightsbridge Neighbourhood Forum

- Residential led;
- Active **local policies** to guide new development;
- Ensures development **appropriability** and ability to meet the intended objectives.
- Policies on a **range of matters** including character, heritage, community uses, retail, officers, housing, cultural uses, transport and the environment.
- Development should be **directed to the International Shopping Centre**
- Proposals must demonstrate they **mitigate impacts on local residents**. Including congestion, litter, and pavement obstruction.
- Night-time entertainment **should not cause significant adverse effects** on local residents.



Neighbourhood Development Order

- Can grant planning permission for specific types of development in specific neighbourhood area – ie a site or type of development (ie retail)
- Can grant planning permission outright or subject to conditions.
- Restrictions on development that can be granted permission.

Cross-boundary working – Potential Challenges

In 2017 Westminster City Council and Kensington and Chelsea reluctantly serve notice on Tri-borough arrangements that were established in 2011 with Hammersmith. Commitment to working together for the benefit of local people.

Two visions for the area, two planning and licencing departments, different leadership model, and funding pools

Requires a joined-up approach. Combining statutory functions with strategic coordination, and economic development with partners.

Need clear understanding of town brand and marketing campaign, local stakeholder activity and cross- departmental partnerships.

Successful Cross-Boundary BID



Business Improvement District

- Went live in April 2020;
- Partnership between City of London and Tower Hamlets
- Key socio-economic differences but both benefit from fast developing new industries and an established business base;
- Similar aspirations for the area;
- Boundary edge has begun to blur;
- Memorandum of Understandings prepared;
- Levy raised from properties in each borough ring fenced for BID area;
- Ensure all proposed projects align with their borough priorities;
- Operational Plans and KPIs.

Evidence Base | Planning insights

Town Centre Investment Zones and Management

Steering group – ways to overcome fragmented ownership and enable adaptation through asset management.

Development of a model to overcome the barrier of fragmented ownership and attract investment on the high street.

Requires pooling of a critical mass of freeholds. Can be achieved it three ways:

- Voluntary pooling by the asset owners themselves, especially where there are some significant blocks of ownerships already;
- Acquisition of assets – not necessarily the businesses – by a new investment vehicle itself, or the council;
- As a last resort, compulsory acquisition by the supporting local authority.

Benefits:

- Allows the mix of occupiers to be curated
- Investment to be asset managed
- Destination to be more effectively marketed.

Challenges:

- Requires vacant properties and substantial up-front capital
- Few examples of successful implementation.

Stewardship Models

- How assets generated by the development process will be managed in perpetuity;
- Includes commercial estates, green space, community assets;
- Locally driven and can generate local support, place making and entrepreneurialism;
- Requires good governance, investments, and dialogue with partners.
- Can include private sector management companies to manage assets (land, property, facilities) as part of a development.
- Benefit developers who can use community assets to attract new investment. Increase in land and property values over time.
- Can be income generating through trading activities (property hire, events).

Case study:

North Essex Garden Communities
Partnership between 8 Councils, developers, business and local authorities.
Developer funded

Partnership models: Property owners voluntary agreements

- Mechanism for joint venture between property owners.
 - Establishes shared vision across fragmented ownership.
 - Could encourage longer lease term across portfolio to preferred occupier.
 - Look at meanwhile uses to stimulate interest in preferred occupiers.
 - Move away from monoculture high street uses;
 - Benefits from group purchasing power, joint marketing and new town centre activities
-
- Relies on voluntary commitment
 - Time consuming to develop
 - Potential for conflicts between parties
 - Requires a cost to establish

Meanwhile uses



THINGS
MADE
PUBLIC

Meanwhile Use



Appendix C | Case studies

Case Study | Ginza, Tokyo

Ginza is Tokyo's luxury retail and entertainment district, many department stores, international boutiques, art galleries, exclusive bars and restaurants and the city's most iconic kabuki theatre.

Often puts on car-free days. In the evenings, its designer stores are brightly illuminated. Ginza Pedestrian Paradise happens on weekends and holidays and is the oldest in Tokyo (1970).

The character transforms from a shopping destination at day to a theatre and entertainment district at night, extending the hours the district is active with people.

Strengths

- Powerful BID involved in planning decision-making helps define and protect the local character whilst managing growth. Strong planning principles and shared vision, rooted in past culture provides clear design guidelines
- Interestingly, fragmented land ownership is seen as a key driver of the area's distinct architectural diversity and mix of uses, contributing to the area's distinctiveness and visitor attraction.
- Long-standing weekly 'Pedestrian Paradise' is a family-friendly activity for Tokyo residents
- Dense network of human scale side streets provide complementary retail and experiential offer to flagship and luxury stores on main arteries.
- Innovative retailer strategies embrace digital opportunities

Challenges and threats

- Declining population forecast (still growing at moment) and ageing population represent greater challenges in Tokyo and Ginza in a context of structural changes in the retail sector and Japan more generally.
- Lack of public open spaces.
- Pedestrian overcrowding.
- Volume and logistics of loading bays impact pedestrian experience and traffic congestion.
- Very high land and property prices.

Case Study | Champs-Élysées – Haussmann – Saint Lazare, Paris

Historic tourism anchors at either end. Many flagship stores and iconic restaurants. Traditionally a luxury retail destination (Guerlain, Louis Vuitton), demand from mass market retailers seeking flagship stores in key tourist locations has been increasing in recent years.

The Champs Élysées is evolving with the arrival of a concept department store the Galleries Lafayette. The district is also an employment hub – with some of the highest densities in Paris – and residential communities in the surrounding areas. Large amounts of traffic, pedestrian crowding, safety issues mean it is apparently avoided by local residents and workers.

Strengths

- High density employment hub,
- A centre of culture, entertainment and nightlife
- Public transport accessibility across modes and high ridership volumes
- Variety of retail and restaurants offer, proximity of cultural landmarks and good public transport accessibility options
- Network of streets with diverse character and offer
- City policies to improve cycling and reduce car traffic

Challenges and threats

- High traffic volumes on main arteries (pedestrian / cyclist safety and air quality issues)
- Cluttered sidewalks, narrow pedestrian space in side streets
- Residents and workers avoid major shopping streets when possible
- Department store model struggling.

Appendix D | Project list

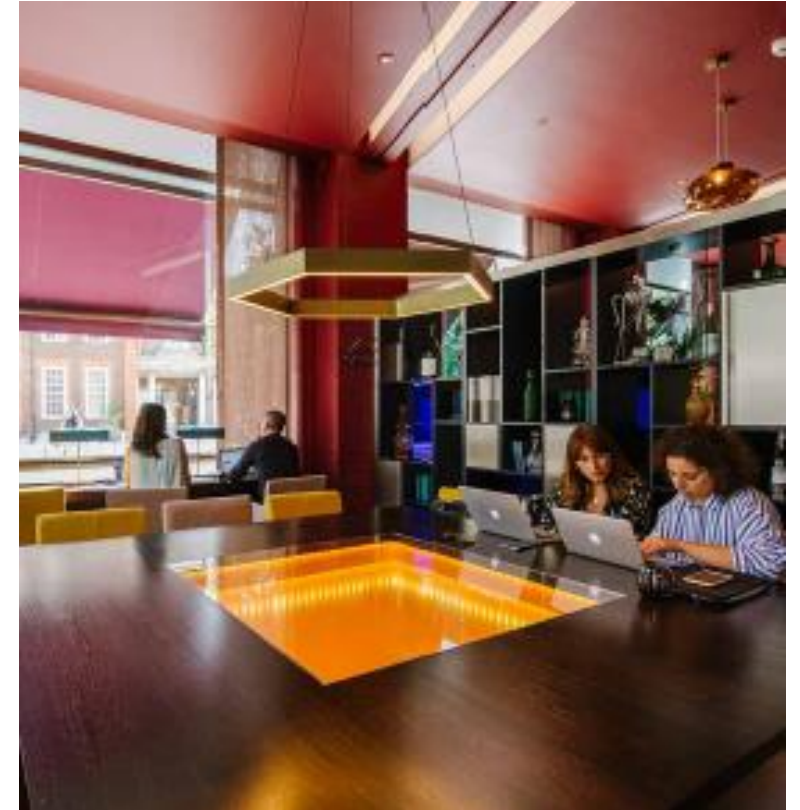
Long list of placemaking strategies | Economic Growth / Vitality

Promote flexible ground floor uses in the existing commercial buildings, such as spaces for co-working, innovation rooms, and boutique design retail offers.

Expand the food and beverage offer on ground floors of the existing commercial buildings.



Imperial College Innovation Rooms, London, UK



Club Zetter co-working spaces, London, UK

Long list of placemaking strategies | Residential Amenity

Explore the opportunity of including a new community use (eg childcare facility) which could serve both residents and employees in the area.

Explore the opportunity of repurposing underused spaces into temporary facilities for the community (eg a library/café).



Meadows Nursery, UK



Amsterdam Central Library, Amsterdam, Netherlands

Long list of placemaking strategies | Community Culture

Define a space for cultural activities and exhibitions which could be linked to nearby cultural anchors.

Embrace digital technologies to bring people closer to businesses and activities happening in the area



The Space, 3fa On Finsbury Avenue, London, UK



The Space, 3fa On Finsbury Avenue, London, UK

Long list of placemaking strategies | Connectivity and reducing severance

Make sure that adequate pedestrian crossings support key routes crossing the road to address existing severance.

Temporary partial closure of the road (eg during weekends) to allow for more space for the pedestrian and to host leisure activities, events and arts.



Artistic Pedestrian Crossing, London, UK



Bandera Street, Santiago, Chile

Long list of placemaking strategies | Area Character

Identify the 'gateways' to Brompton Road and improve signage and wayfinding to encourage routes to and from key surrounding assets

Develop wayfinding and signage that encourages people to explore the area and its unique offer

Use street furniture and wayfinding to strengthen the districts identity as a sustainable and attractive district



Tacoma Art Museum signage and wayfinding, US



Strawberry Smart Benches, London, UK

Long list of placemaking strategies | Healthy Environment

Use temporary planters to increase green infrastructure and improve air quality

Promote an increase in green spaces through a combination of green roofs, green walls, planters on existing buildings to create valuable habitats for wildlife. Eg Wild West End

Introducing wellbeing hotspots for residents and employees



Wild West End, London, UK



Pocket Habitat (Arup)

Long list of placemaking strategies | Public Space

Promote lunchtime and weekends temporary food markets on side streets and public spaces to expand the existing offer.



Charlotte Street Summer Fayre, London, UK



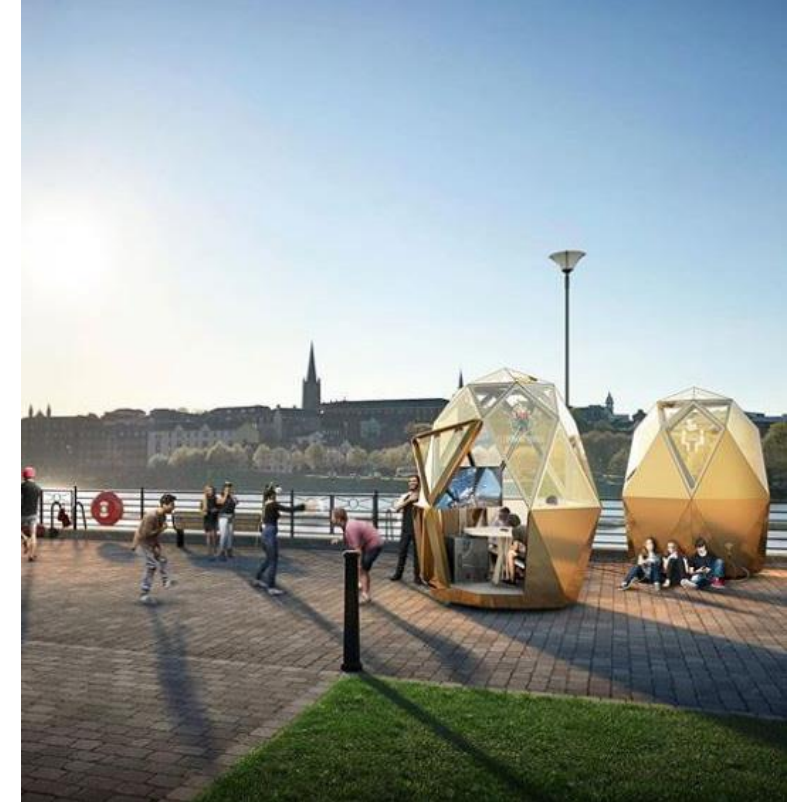
The Pravha Food Market Pop Up at Centenary Square, UK

Long list of placemaking strategies | Public Space

Install social-distancing pods in selected areas to provide a unique f&b experience.



Amsterdam's 'safe and intimate' dining concept



Foyle Bubbles, Derry, UK

Long list of placemaking strategies | Public Space

Introduce playful furniture and promote interactive activities that attract a wider range of users into the area.



Playful urban furniture



Park[ing] Day, Sacramento, US

Long list of placemaking strategies | Public Space

Use lighting strategies to activate spaces and encourage night time economy

Temporary occupation of parklets in side streets with green infrastructure and seating areas



Tree Lungs, Lille, France



Zuccotti Park, NY, US



Wild West End, London, Uk



Bandera Street, Santiago, Chile


Preparing for post-Covid reopening | Potential strategies & examples from other retail districts

- After-hours shopping
- Additional entertainment offer
- Pop-up physical shops for virtual stores with special activities like workshops
- Development of Covid-secure guidelines by the BID – to include instructions for safe retail operations, as well as how public space and transport will be managed.
- Footpaths across the road to include clear markings to help visitors observe social distancing
- Store visitor numbers to be closely managed with clearly marked waiting areas to the left of retailer entrances to avoid long-queues.

Allons-y! Galeries Lafayette sets store by an augmented retail experience for a post-COVID world

By **Stuart Lauchlan** June 26, 2020

SUMMARY: The French retail institution has re-opened its doors to a new world of different customer expectations - and needs to build out the people skills to



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(Galeries Lafayette)

Selfridges to offer “joyful experience” as part of reopening plans

By **Sahar Nazir** - June 10, 2020





London’s West End preparing for reopening

Danielle Wightman-Stone | Tuesday, 12 May 2020

Priority projects

Arup parklets

Demand for the provision of high quality, multi-functional public space is becoming a necessity, not just a luxury.

Recognising Brompton road needs to provide more than connectivity, it must provide space for people to dwell, socialise, exercise, eat and enjoy. The streets need to be flexible, allowing for a range of activities and events throughout the day to cater for all users.

Fitzpark is an example of new quality temporary public space that is transforming a delivery bay on a busy urban street into a parklet containing seating and planters for local residents, employees and visitors to enjoy. The parklet demonstrates how small spaces can be adapted to provide people-friendly uses. This promotes health and wellbeing and encourages people to walk, cycle and spend more time outdoors. The park highlights the very real benefits of urban greening and small scale interventions.

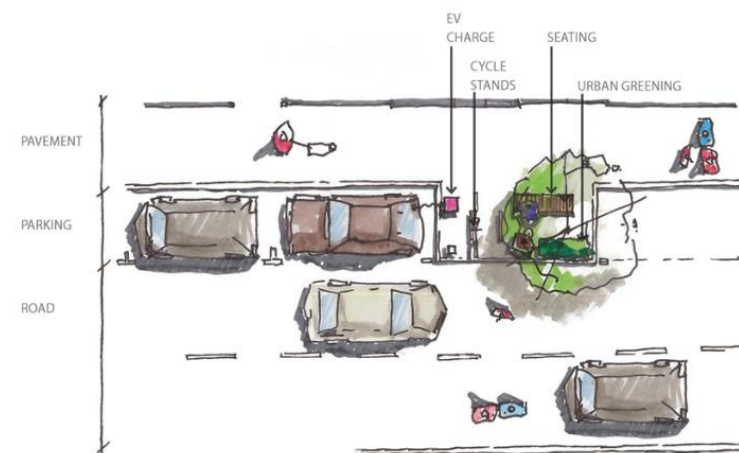
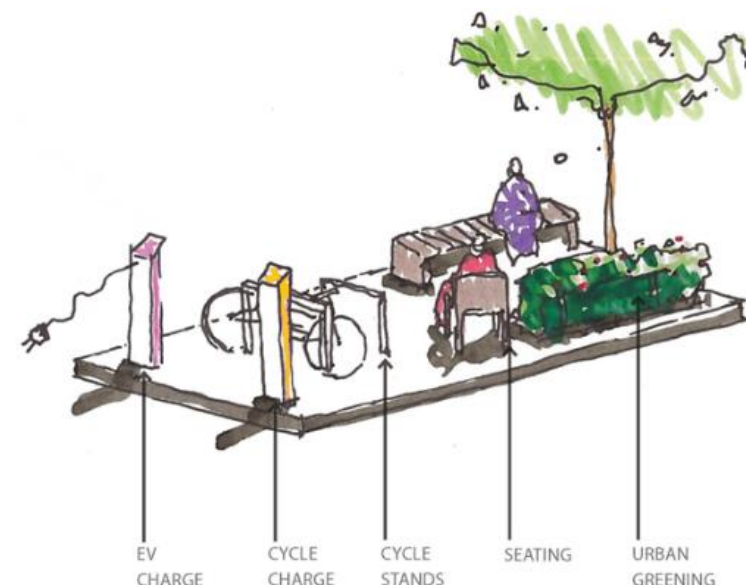
Fitzpark objectives:

- To provide accessible space for pedestrians that encourages dwell time
- To enhance local character and sense of place
- To improve pedestrian capacity to accommodate future growth
- To encourage social cohesion and local pride
- To promote biodiversity through the provision of planting

Funding through the BID, and through the Mayor of London's Clean Air Better Business (CABB) fund could be sought. The installation would be supported by the borough of Kensington and Chelsea and Westminster City Council.

Recharge Parklets

<https://www.arup.com/news-and-events/arups-recharge-parklets-ensure-electric-car-points-dont-obstruct-city-walkers>



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