Retail Strategy Summary

Edgware Road

Westminster High Streets

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City of Westminster

Augarde & Partners

What is a Retail Strategy?

A Retail Strategy sets out a clear, evidence-based plan for how high streets can evolve to meet the changing needs of their communities, businesses and visitors. It defines the role and character of each area, identifies market opportunities and challenges, and establishes practical actions to support long-term vitality. At its core, a Retail Strategy provides a framework for shaping the right mix of uses, strengthening local identity, and ensuring that commercial activity contributes positively to the wider place.

This Retail Strategy was commissioned by Westminster City Council as part of the Paddington Bayswater High Streets Programme. The programme focuses on three key areas: the Queensway/Westbourne Grove cluster, Praed Street, and Edgware Road (south). Together, these high streets play an important role in the economic and social life of the area and present significant opportunities to better serve residents, workers and visitors.

The Strategy explores how each high street develops a distinct and sustainable offer, informed by local demographics, visitor patterns and market demand. It considers tenant mix, vacancy, affordability and investment conditions, and sets out a realistic and deliverable plan that aligns Council levers with commercial realities.

Why have we developed a Retail Strategy?

The Retail Strategy aims to complement the 2024 Placemaking Strategy by introducing a crucial layer of market analysis and visioning. By focusing on the economic perspective, we aim to create a framework for a dynamic and responsive retail environment that meets the needs of residents and visitors, aligns with the viability requirements of executive stakeholders and fosters long-term growth and development.

How will we use the Retail Strategy?

By integrating insights from targeted studies, conversations, and data analysis, the strategy proposes optimal tenant mixes to position the future retail offer in a manner that is attractive within the broader London context, locally relevant, and reflective of the area's heritage and character.

The Retail Strategy is linked with and will inform several projects:

- **Place Strategies**: the character of the commercial offer proposed for each High Street will need to align with the vision proposed by the Place Strategies
- **Matchmaking Platform & Meanwhile On:** the proposed tenant mixes will aide our selection process of eligible and desirable uses for each location
- **High Street Rental Auction:** the proposed tenant mixes will inform the bidding framework and define the commercial uses that should be targeted.



Matchmaking Platform

The Matchmaking platform is a strategic service designed to curate and connect high-quality, diverse independent brands and tenants with available retail spaces. Its primary goal is to reduce vacancy rates while fostering vibrant, resilient high streets that reflect and serve the unique character and needs of local communities and their visitors.



Meanwhile On

Meanwhile On is a supportive platform for emerging brands, entrepreneurs, and creatives to launch stores. By transforming shops that are currently empty or with an undesirable use, we are introducing new concepts and experiences to add vibrancy to high streets while incubating brands that have the potential to become long-term occupiers.



High Street Rental Auction

The High Street Rental Auction would allow Westminster City Council to take action to fill persistently vacant commercial properties by forcing landlords to rent them out to new businesses or community groups.

About Edgware Road

The context

Westminster City Council is developing approaches to support improvement to local high streets through the Paddington-Bayswater High Streets Programme. While the Edgware Road Placemaking Strategy (commissioned by Marble Arch BID and landowners The Portman Estate and The Church Commissioners) propose spatial interventions, for Bayswater high streets, Praed Street, and Edgware Road (south), the Retail Strategies delve deeper into the commercial, leisure and community offer.

The aim of this work is to provide the Council and our partners with a clearer overview of the challenges and opportunities for interventions to improve the offer in response to resident and visitor needs.

Please note that this document is a summary of the full Retail Strategy, which has been prepared for local landowners and investors. The full technical report is available on request.

Edgware Road

Edgware Road is one of Westminster's most recognisable high streets, connecting the West End with Paddington and North West London. Historically forming part of the Roman road of Watling Street, it has long functioned as a major route into central London and developed into a significant commercial corridor. This Retail Strategy focuses on the south section of the high street between Marble Arch and Edgware Road Stations.

Over time, Edgware Road has become strongly associated with the Middle Eastern community, culture and business. This influence is reflected in its concentration of restaurants, cafés and specialist retailers, giving the street a character that is unique within Westminster.

Today, Edgware Road serves a broad mix of people, including long-standing residential communities, visitors staying in nearby hotels, workers from surrounding commercial areas and a significant evening and late-night audience. It functions both as a District Centre and as a regional destination for food and beverage. However, the street's role is heavily shaped by its food and beverage offer and night-time activity. Daytime retail diversity is more limited, and the balance between visitor uses and services that meet everyday local needs is uneven. Fragmented ownership and the concentration of similar uses also influence how the high street performs and how it is perceived.

A key objective for Edgware Road should be to protect and celebrate its distinctive cultural identity and thriving evening economy, while broadening its daytime appeal, diversifying its retail mix and strengthening its function as a balanced District Centre that better serves residents alongside visitors.

This summary draws on a combination of data analysis, site visits, and stakeholder engagement to provide a clear, up-to-date understanding of Edgware Road. The study reviewed high street health indicators, retail composition and vacancy data, relevant planning policy, and undertook on-site observations and discussions with local stakeholders.

The findings bring together quantitative evidence and qualitative insights to identify key strengths, challenges, and opportunities and to inform thinking on how the high street could evolve in the future.



Edgware Road's shops

Edgware Road's retail offer is **strongly shaped by food, dining and socialising**, reflecting its role both as a District Centre and as a destination for eating out. Restaurants, cafés and shisha lounges are defining features of the street and contribute significantly to its identity and evening economy.



Edgware Road

Westminster High Streets - Retail Strategy

Independent businesses dominate, around

80%

of shops are independently run. This contributes to the area's distinctive character but also reflects a fragmented ownership pattern and varied unit quality.

Food and beverage uses form a substantial proportion of the overall mix. Restaurants and cafés represent the largest use type within the F&B category, with over a third reflecting Middle Eastern cuisine — a defining characteristic of the street.

The largest category is

Services & Amenities

25%

of the street

including travel agents, dry cleaners and bureaux de change.

There are

291

retail and leisure units within the Edgware Road study area.

Connaught Village, included within the wider study area, exhibits a distinctly different character.

It comprises around

70 smaller independent retailers and services,

primarily serving the residential community. The local centre is under the Church of England's direct control and presents a more curated and relatively high-end retail offer.

A wide range of everyday services are present, including convenience retail, supermarkets, health and personal services.

However, there are **fewer shops focused on browsing** or comparison retail, and **limited provision of community, cultural or civic spaces.**

Edgware Road's property market

Rents are high compared with other London high streets, including nearby places such as Bayswater, Praed Street and Marylebone High Street.

Edgware Road has **fewer empty shops than many high streets in London,** although inactive or shuttered shop fronts in places can still create a poor visual impression

How does Edgware Road perform as a high street?

Edgware Road is a busy, high-performing street. The composition of retail outlets reflects its role as a **well-known food and beverage destination and a place for socialising and evening activity.**

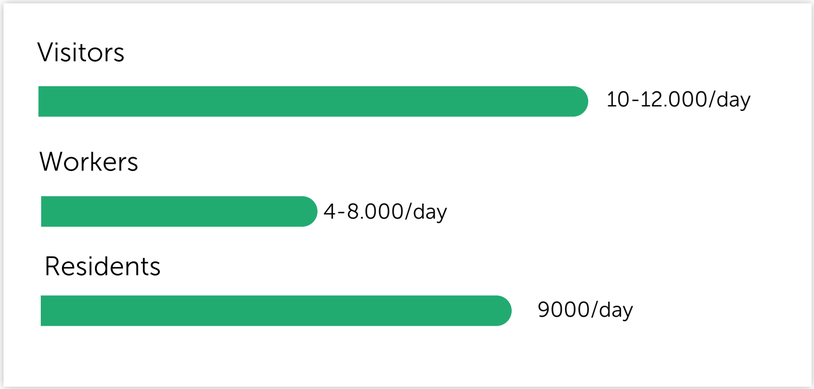
Its trading profile is underpinned by a large visitor economy and a high proportion of independent businesses complemented by a small number of major anchors, creating a distinctive identity for the street. However, the clustering of similar shops (for example 11 bureaux de change) diminishes variety and may restrict its overall attractiveness for daytime shopping and browsing.

Footfall is comparatively lower than might be expected given its turnover, indicating that performance is driven by higher spend per visit rather than high pedestrian volumes.

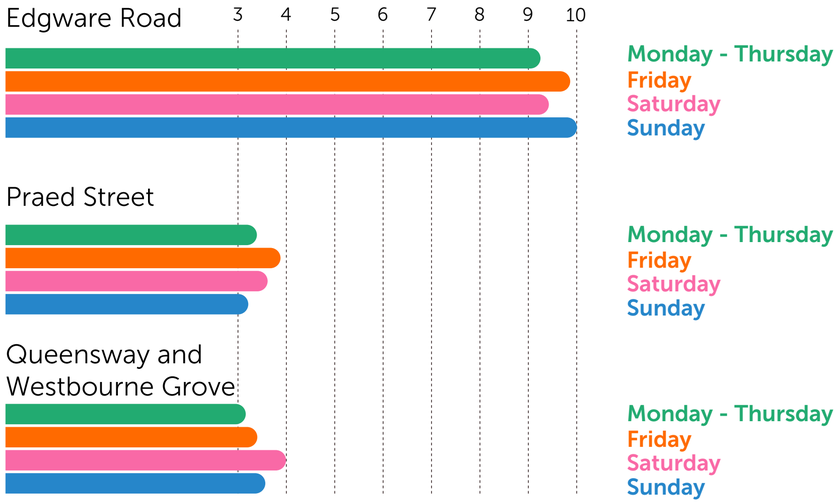
Overall spend is high, both in total transaction volume and in average spend per outlet. This is high, each reflecting the street's concentration of hospitality and evening uses.

Visitors play a more significant role than residents in underpinning activity. Visitor footfall represents a larger share of overall activity of user types than in neighbouring centres.

Total weekly footfall by user type



Average spend index per outlet by day



Source: Mastercard Spend Data



What do local people and businesses think?

Findings in this section draw on engagement undertaken in 2023 and 2025 as part of the Paddington-Bayswater High Streets Programme, including surveys, stakeholder interviews and workshops with residents, businesses, BIDs and landowners.

Residents and visitors consistently describe Edgware Road as lively, distinctive and culturally rich, but recognise challenges around balance, quality and the public environment.

- Edgware Road is valued for its strong food offer and Middle Eastern cultural identity
- Many respondents appreciate the wide range of restaurants, cafés and everyday services
- The street's energy and evening activity are seen as part of its character
- However, some feel the offer is overly concentrated in food uses, with limited reasons to visit during the daytime
- Concerns are raised about cleanliness and safety, particularly later in the evening
- A lack of welcoming spaces to sit, gather or take part in community activity was frequently mentioned.

Residents and Visitors said:

"Has a range of shops for different needs."

"I come for the restaurants."

"Edgware Road could be magnificent, a food extension of Oxford Street."

"There aren't a good range of shops. Very expensive."

"The growing number of empty shops on Edgware Road will prompt concerns about the overall safety and quality of the road."

Landowners

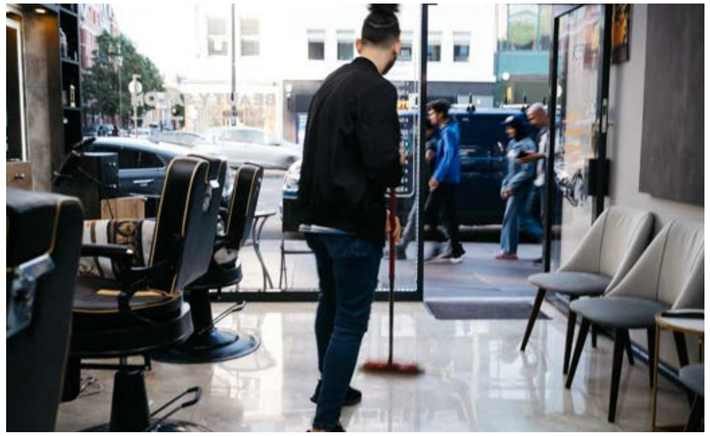
Landowners, developers and Business Improvement Districts (BIDs) recognise Edgware Road's strong identity and trading performance, particularly its established food offer and its role as a distinctive destination within central London. Major estate owners take a long-term view of the street and emphasise the importance of delivering high-quality space and attracting operators that strengthen the overall mix rather than simply maximising short-term rent.

However, they also highlight structural challenges, including fragmented ownership along parts of the street, affordability pressures for independent operators, and the difficulty of rebalancing an oversupply of food and beverage uses. There is a shared view that broadening the offer – particularly to support daytime activity, community uses and higher-quality retail – will be important to sustaining Edgware Road's long-term resilience.

"If you want to attract the best brands, one, you have to take a long term view as it relates to leases and incentives. And two, you have to deliver high-quality space."

"There's an oversupply of F and B"

"It's about broadening the offer"







What could Edgware Road be like in the future?

Westminster City Council wants to support Edgware Road to continue to thrive as a lively high street, while working better for local people and nearby communities. The focus is on building on what works well, including the cultural identity and established food offer, while managing the impacts of a very busy street.

This would mean interventions, policies and incentives that:

- Strengthen and celebrate Edgware Road's **Middle Eastern and independent food identity**
- **Support a broader daytime offer**, including cultural, community, retail and wellbeing uses
- Improve shopfront quality, reduce clutter and enhance the public realm to **create a more attractive and walkable street**
- **Address over-concentrations** of specific uses and encourage a more resilient and diverse retail mix
- Support a **well-managed evening and night-time economy** that balances vibrancy with the needs of residents
- **Prioritise incremental improvements** and targeted interventions, recognising that large-scale redevelopment opportunities are limited.



Morito, Hackney (Morito)

Higher-quality, distinctive food and beverage operators that reinforce its reputation as a destination



Cafe Younes, (Lebanon Traveler Website)



Morito, Hackney (Morito)



More Yoga

Retail and leisure offer targeting the Middle Eastern population, such as women's modest fashion shops



Abaci, Modest Fastion Retailer, (London Designer Outlet)

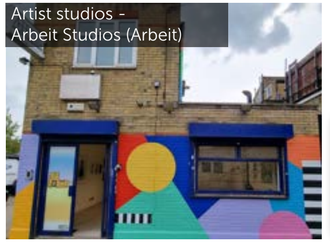
These examples are drawn from London and the UK and are the type of offer that could work on Edgware Road.

Cultural spaces, including screening rooms, performance venues, galleries and bookshops, that reflect and celebrate the area's identity



Centre for Contemporary Arts, Glasgow

A broader health and wellbeing offer, including gyms, yoga studios and accessible community health services


Artist studios - Arbeit Studios (Arbeit)



Rising Green Youth Hub Wood Green (JA Projects)

Affordable workspace, studios and meanwhile space for independent businesses and creative operators



Arab contemporary culture - Mosaic Rooms, Kensington (Culture Calling)


Shubbak Festival

Flexible community and event spaces, including hireable meeting rooms and venues suitable for families and local groups


The Common Rooms, Clapton Commons


SENSAS, Vauxhall

Family-friendly and youth-focused leisure, including indoor play, creative studios and sport and wellbeing uses

Next steps for Westminster City Council

The next phase focuses on translating the Retail Strategy into coordinated, deliverable action. This includes shaping major regeneration proposals, actively influencing development sites and working closely with landlords, businesses and delivery partners to rebalance the retail and leisure mix.

A structured programme will align planning, property, licensing and economic development tools to support change. Real-time market intelligence, proactive engagement and targeted interventions will help seed priority uses and address vacancies.

Alongside physical improvements and public realm enhancements, the approach strengthens Edgware Road's identity and ensures regeneration activity supports a vibrant, inclusive and commercially sustainable high street.

Short term

- Work with major landowners and head leaseholders to shape the occupier mix using the matchmaking service, Meanwhile On and Curate On. This should help to broaden and rebalance the offer to include more cultural uses, community-facing services and high-quality independent retail
- Develop a coordinated approach to strengthening Edgware Road's identity and reputation as a food destination, building on its Middle Eastern specialism while raising quality and diversifying the offer
- Deliver a new phase of the shopfront improvement scheme.

Medium term

- Bring forward specific intervention opportunities for community, cultural and workspace uses, to increase dwell time and provide more family-friendly and inclusive spaces, including:
  - Potential "pod"/small-format space on Burwood Place for events, cultural and community activity
  - Define Nutford Place as the central public space for community and family programming and enhance the Food & Beverage offer to activate the public space
  - Underused space held by Criterion Capital with potential for affordable workspace/ studios and meeting space
  - Winchester House as a potential pipeline for meanwhile or experimental uses ahead of longer-term redevelopment
- Consider selective acquisitions or partnership interventions in more fragmented northern parades where poorer-quality frontages, shuttered units or weak covenants undermine the street's overall performance.

Long term

- Consider undertaking joint master planning and development viability work with some of the larger estates, notably the Church Commissioners.



Methodology, references and sources

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References

The Retail Strategy was shaped by a number of datasets, existing borough-wide strategies, engagement with executive stakeholders and findings from the extensive engagement exercise carried out in 2023:

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- Office for National Statistics (ONS) (2025) – Mid-Year Population Estimates.
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