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Retail Strategy Summary
Westbourne Grove, Queensway and Porchester Road

Westminster High Streets





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. 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 Place Strategies 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 Bayswater Town Centre

The context

Westminster City Council is developing approaches to support improvement to local high streets through the Paddington-Bayswater High Streets Programme. While the Place Strategies put forward spatial interventions for Bayswater high streets, Praed Street, and Edgware Road, 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.

Bayswater Town Centre

Queensway and Westbourne Grove form a complementary cluster of high streets in Bayswater, lying between Hyde Park to the south and Notting Hill to the west. Together with Porchester Road, they function as the commercial and civic heart of Bayswater and Lancaster Gate, and are classified as a Major Centre within London's town centre hierarchy.

Historically, Westbourne Grove, Queensway and Porchester Road have functioned as Bayswater's primary town centre, serving a large residential population alongside visitors to Hyde Park and nearby hotels. Over time, the area has developed a broad mix of independent shops, national retailers and cafés, with recent investment beginning to reshape parts of Queensway in particular.

The cluster has evolved into two distinct but connected high street characters. Queensway has traditionally provided a diverse, mixed and visitor-facing offer, underpinned by hotels, small-format units and a strong food and leisure economy, including long-standing attractions such as the ice rink and bowling. By contrast, Westbourne Grove has developed into a more lifestyle-led street, with a higher-quality mix of independent and multiple retailers, fashion and homewares brands, and destination cafés and restaurants serving a comparatively affluent and stable customer base drawn from Bayswater and Notting Hill.

Today, the area is increasingly shaped by regeneration and reinvestment, particularly on Queensway. Major schemes — including the redevelopment of Whiteleys and other mixed-use projects — are changing the area's retail infrastructure and supporting a shift towards a more curated, higher-quality offer.

Alongside this, Porchester Road plays a distinct civic role, anchored by community facilities including Paddington Library, Porchester Hall and the leisure centre, as well as smaller shops and a supermarket that support day-to-day local needs.

However, the cluster faces a set of shared challenges. Vacancy levels are relatively high, and there are tensions between rising rents and the need to retain an inclusive mix that remains accessible to local residents.

A key objective for Bayswater Town Centre should be to manage the area's transition and investment so that it delivers a higher-quality, more resilient town centre while retaining a mixed, locally useful offer.

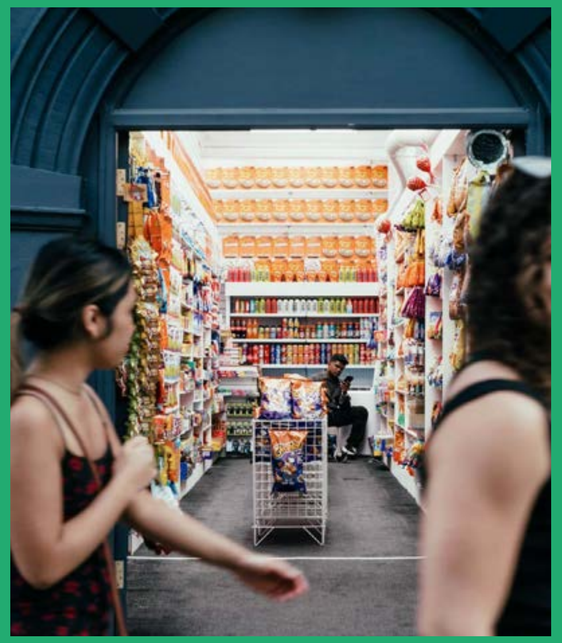
This summary draws on a combination of data analysis, site visits, and stakeholder engagement to provide a clear, up-to-date understanding of Bayswater Town Centre. The study reviewed high street health indicators, retail composition and vacancy data, relevant planning policy, and undertook on-site observations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



Bayswater Town Centre shops

The retail offer across the high streets reflects their role as Bayswater's primary town centre. **Together, the streets provide the broadest mix of retail, leisure and civic uses** of the three high streets in this study, serving a large residential population alongside visitors to Hyde Park and nearby hotels.



Westbourne Grove, Queensway and Porchester Road
Westminster High Streets - Retail Strategy

Recent redevelopment activity on Queensway, including the Whiteleys scheme and other mixed-use projects, is **actively reshaping the retail mix towards a more curated and higher-quality offer.**



Food and beverage forms the single largest sector overall.
In addition to the 56 pubs and restaurants, there are 39 cafés and takeaway outlets, creating a strong leisure and dining offer that supports both daytime and early evening activity.



Sainsbury's
Waitrose
MARKS & SPENCER

3

main supermarkets

Waitrose, Marks & Spencer and Sainsbury's - serve the residential community, with a new Whole Foods store due to open, further strengthening this provision.



The centre contains a significant number of entertainment and leisure venues, including a cinema, bowling and ice skating.

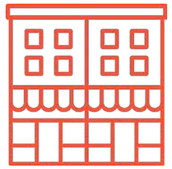


Independent businesses account for

68%

lower than neighbouring high streets, including Praed Street and Edgware Road.

Bayswater Town Centre's property market



Vacancy levels are broadly in line with the London average at around

10.6%

Leasing and investment activity has been strong in recent years, reflecting active redevelopment and repositioning, particularly on Queensway



Property values are high in the context of London's wider high street market, creating affordability pressures for independent and community uses.



Rents vary across the area with Queensway achieving higher asking rents than Westbourne Grove

How does Bayswater Town Centre perform?

The performance of Westbourne Grove, Queensway and Porchester Road reflects their **combined role as a resident-focused town centre with a strong leisure and weekend economy.** Resident footfall exceeds that of visitors and workers, underlining the area's importance as a place for everyday shopping and local activity

Footfall from visitors and workers is relatively low, particularly when compared with more destination-led or employment-focused centres. Activity primarily driven by the local residential population.

Trading patterns are consistent throughout the week, with less pronounced peaks and troughs. This indicates a stable, everyday high street economy rather than one heavily shaped by weekend or evening surges.

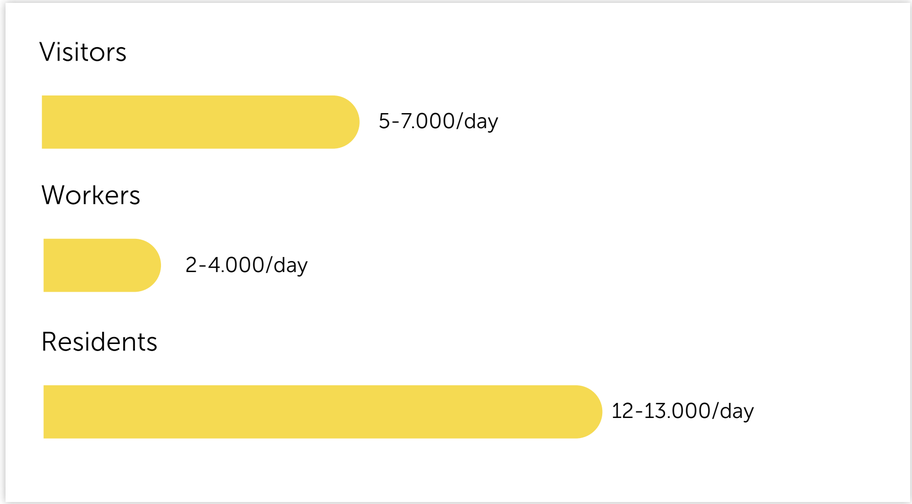
Residents account for the largest share of footfall, reinforcing the area's function as a local town centre providing day-today goods, services and leisure for its immediate community.

Spending patterns reflect a leisure-led town centre. Overall spend is steady across the week, with clear peaks on Saturdays. Average spend per visit is relatively high, suggesting a customer base engaging with higher-value retail and dining offers.

The evening economy is active but largely early-evening and food-led rather than late-night. A high proportion of outlets remain open until 8pm and 10pm, supporting dining and family-oriented leisure, but trading reduces later at night.

Overall, Bayswater Town Centre performs as a broad and functional town centre serving everyday needs while also supporting leisure and destination uses. The current transition towards a higher-quality retail and lifestyle offer presents opportunities to strengthen performance, but careful management will be required to maintain diversity, affordability and inclusivity as the area evolves.

Total weekly footfall by user type





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.

Whilst Queensway and Westbourne Grove, along with Porchester Road, share a local catchment and sense of identity, feedback highlights distinctive experiences and priorities across the area. Locals describe Queensway as a more functional street, while Westbourne Grove is perceived to have a stronger sense of community and local character, anchored by independent retail and services.

- Many people value Queensway and Westbourne Grove for the range of everyday shops and services and for the convenience of having leisure and community facilities nearby
- Residents of the area highlighted the independent character of the street, the sense of community and everyday social life and that it is easily accessible
- However, across the cluster residents have expressed concern about the decline in retail quality, the loss of the market and rising affordability.

Residents and visitors said:

"The kind of everyday places people use"

"Useful local high street"

"Not very inviting after dark"

"As a local without deep pockets. I hope the [future] retail offering will be well-balanced and not just high-end boutique shops."

Landowners

Landowners and developers recognise the shared catchment area but describe two distinct contexts. Queensway is perceived as a traditional yet evolving high street undergoing significant reinvestment whereas Westbourne Grove is viewed as a more established, organically successful high street.

Landowners and developers are committed to maintaining quality and avoiding lower-quality uses. However, there is a shared view that high rents are seen as a barrier to smaller independent and community uses. Additionally, some parts of the centre are seen as performing less well than others, which can make coordinated improvements more challenging.

"We held [units] for quite a long time...we could have accepted offers very quickly, but they were not the tenants we wanted."

"Everyone believes there's so much investment going into this that... it will be the next big, exciting area of London."

"It's getting the units looking right and presenting them in the right way so that we can attract good tenants."







What could Bayswater Town Centre be like in the future?

Westminster City Council wants to support Bayswater Town Centre to evolve into a stronger, more resilient area that builds on recent investment and continues to serve its local residential community. This means managing change carefully: supporting higher-quality retail and leisure provision while ensuring the area remains inclusive, diverse and functional for everyday needs.

This would involve interventions, policies and incentives that:

- Support landowners to curate a **more balanced and higher quality retail mix**, building on recent investment while retaining everyday services
- Retain a shopping offer **affordable to local families** such as those on the Hallfield Estate
- **Improve shopfront quality** and visual consistency and strengthen the overall street character
- **Enhance cultural and artistic initiatives** in the area by leveraging the already strong civic offerings and expanding the community activities centred around Porchester Road
- Address **crime, anti-social behaviour** and perceptions of safety, particularly around supermarkets, transport nodes and late trading
- Ensure **regeneration activity contributes to the wider public realm** improvements, including alfresco dinning, active frontages, servicing, landscaping and pedestrian experience.

Westbourne Grove, Queensway and Porchester Road


Coworking Space - Oru Sutton



Central Parade, Bakery & Retail Incubators

Affordable retail and business spaces offer subsidised start-up environments for new businesses and entrepreneurs


Living Room Library, Edmoton (Jan Kattein)



Marylebone Farmers Market, (Westminster Times)


Dumbo Burger, Shorditch

Street or indoor markets provide accessible trading opportunities



Noodle Inn, Soho (Corner)

Cultural and community programming enhance Bayswater's civic offer


Burnley Community Grocery, Burnley

Local financial services enable people to perform daily banking without requiring a full branch



Banking Hub (itab)



Ruben's Reubens


Soft play cafes - Mome, Angel (Mome)

Independent retailers providing everyday goods and services



Independent Boutique Shops, Chilterns Street

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 Bayswater'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. The affordability and vacancy levels present opportunities for selective leasing or property acquisition.
- Deliver a new phase of the shopfront improvement scheme, focusing on Bayswater high streets.
- Monitor vacancy to identify opportunities for High Street Rental Auctions, where appropriate.
- Explore options for providing local cultural grant funding to support the growth of cultural activity on the high street.

Medium term

- Keep market trends under active review as major private sector developments complete, monitoring the impact on rental levels, vacancy rates and the number of independent businesses operating in the area.
- Identify suitable sites and operating models for a market or markets that support local enterprise, affordability and placemaking objectives. This work should align with the Place Strategy and complement existing retail provision.
- Expand opportunities for cultural and community activity and spaces through Porchester Hall, Paddington Library, Porchester Square and collaborations with landowners and businesses.

Long term

- Explore opportunities for high street property freeholder acquisition for high quality curation of the high street and protect affordability for SMEs. (*Case study: SEM Paris Commerces programme)*



Methodology, references and sources

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.

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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.

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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Acknowledgements

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