

# 4. Route wide environmental baseline

#### 4.1 Introduction

4.1.1 This section provides the baseline assessment of the route. This is done at two main levels, firstly at the route wide or one of the four sub sections of the route and secondly at a station or local area encompassing a number of stations in a defined geographical area.

# 4.2 London's economy

- 4.2.1 While Crossrail serves areas both to the east and west of Greater London its main impact will be felt within the capital itself and this section highlights a few key points about London and its economy.
- 4.2.2 London is home to 7.2 million inhabitants split between 2.8m in Inner London and 4.4m in Outer London, (source: 2001 Population Census). This represents 12% of the UK population. The city's population grew by 5% between 1991 and 2001 which was twice as fast as the country as a whole. The two main distinctive features of London's population are its youth and its ethnic diversity. With regard to the former 46% of London's workforce is under 34 compared to 39% nationally. Furthermore, only 60% of the population is defined as "White British" (Census category) whereas the respective figure for England and Wales is 87%.
- 4.2.3 The capital is a highly specialised and productive economy. Inner London has the highest GDP per head in Europe almost 2.5 times the European Union average (excluding the recent accession states). Overall, Gross Value Added is 50% higher than the UK average although this hides stark disparities between areas of extreme deprivation and economic decline and areas of tremendous wealth and productivity.
- 4.2.4 At the end of 2003 there were around 287,000 VAT registered businesses in London with a disproportionate number operating in Financial and Business Services: 41.3% of total compared to 27.5% at UK level. The other traditionally large sector in London is Public Administration and Other Services, 13.3% of the total against 8.7% for the UK. The manufacturing, construction and transport sectors are under-represented.
- 4.2.5 There are 3.4m London residents in employment but over 4 million jobs within the city highlighting the importance of commuting to the London economy. However, the city's economic



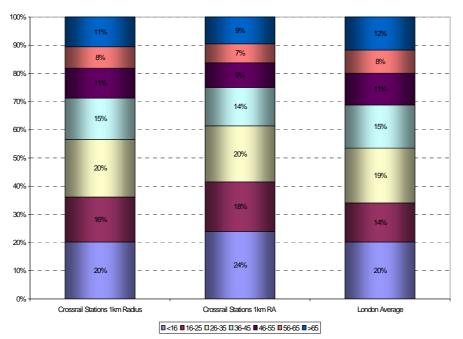
- activity rate of 75.8% is below the UK average of 78.5%. London also fares worse than the nation in terms of unemployment with a rate of 3.2% against 2.2% for the UK at the end of 2004.
- 4.2.6 Incomes in London are on average 20-25% higher than in the rest of the UK. This hides a picture of stark differences between some of the richest and poorest areas in the land. London is a region of considerable deprivation with almost 20% of its wards ranked amongst the 10% most deprived wards in the country in 2000.
- 4.2.7 London is a major international tourist destination with 26.0 million visits in 2003 (that is, visitors staying one night or more), 11.7 million of whom came from overseas. These visitors represent a considerable source of income for the local economy.
- 4.2.8 Transport is a major issue for any one living and/or working in London. Londoners rely on public transport more than residents elsewhere in the UK. A higher proportion has no car and fewer have 2 cars although there is a marked split between Inner and Outer London. The number of people entering London during the morning peak has remained relatively stable over the last 20 years but there has been a significant modal shift from car to rail and underground which has put pressure on the system. As an illustration, passenger journeys on London Underground have increased by 76% between 1981-2001 and passenger kilometres by 82%. In the same period train kilometres have risen by 30%.

## 4.3 Route wide baseline

- 4.3.1 This section provides an overview of the socio-economic characteristics along the Crossrail route. Data is presented for London as a whole and the one kilometre catchment area of Crossrail stations including separately for regeneration areas within that catchment area.
- 4.3.2 The combined population living within a one kilometre radius of stations on the Crossrail route is around 600,000, according to the 2001 Census. Of this number approximately 90% live within Greater London and 10% outside. The combined population living within a two kilometre radius is approximately 1.6 million representing over one fifth of London's population. The age structure of the people living along the route is very similar to that of the London average, *Chart 4.1*, and reflects London's younger than average age structure compared with the UK. For example, only 11% of the population within the one kilometre catchment area are over 65 compared with 16% for the UK as a whole. However, the age profile within regeneration areas is even lower with over 40% aged under 25.



**CHART 4.1: AGE STRUCTURE** 

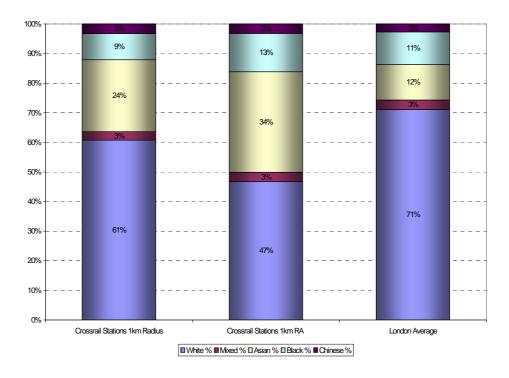


Source: 2001 Population Census

4.3.3 The population living along the route has a much greater degree of ethnic diversity than London as a whole. There is a lower percentage of white residents and a higher percentage of residents with an Asian ethnic background. The Asian population makes up a quarter of the population living across the Crossrail route, compared to just over a tenth for London as a whole. The full ethnic make-up comparison is illustrated in *Chart 4.2*. Within the regeneration areas over half the population is non-white.



## **CHART 4.2: ETHNIC GROUPS**

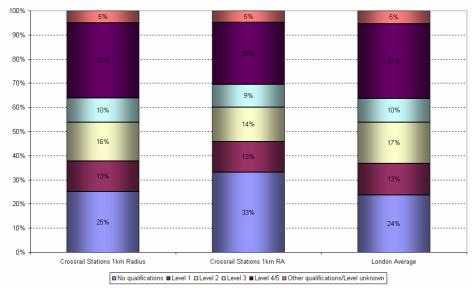


Source: 2001 Population Census

4.3.4 Qualification levels of people living across the route are almost identical to the London average; a quarter of the population has no qualifications at all, up to a third in regeneration areas, while almost a third is qualified to Level 4/5, that is to degree level and above (*Chart 4.3*).



## **CHART 4.3: QUALIFICATION LEVELS**



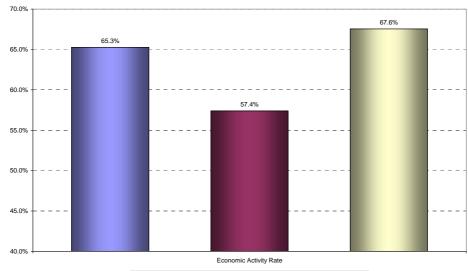
Source: 2001 Population Census

4.3.5 The Economic Activity rate is lower than the London average (*Chart 4.4*) especially in regeneration areas. However, the differences are marginal. Unemployment is higher across the Crossrail route than it is in London as a whole although again the difference is marginal (*Chart 4.5*). Although in the regeneration areas it is almost twice as high as the London average.

<sup>&</sup>lt;sup>1</sup> Economic activity rates and unemployment rates reported here are taken from the 2001 Population Census and the definitions are different than those used in other official statistics, for example, the unemployment rate derived from the Claimant Count. The census economic activity rates are based on those aged 16-74.



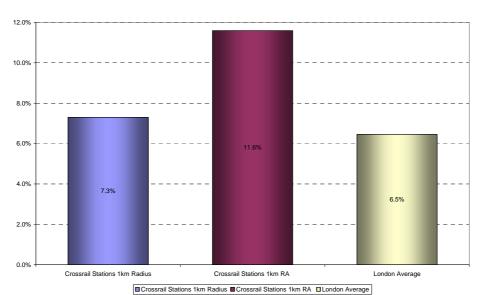
## **CHART 4.4: ECONOMIC ACTIVITY**



■ Crossrail Stations 1km Radius ■ Crossrail Stations 1km RA ■ London Average

Source: 2001 Population Census

## **CHART 4.5: UNEMPLOYMENT**

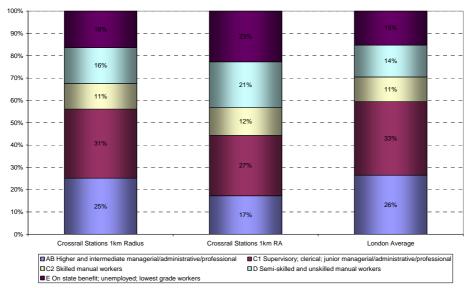


Source: 2001 Population Census

4.3.6 People living across the Crossrail route have slightly lower approximated social grades than the London average, with a lower proportion classified in the upper two managerial, professional and clerical grades and a higher proportion classified in the bottom two manual semi-skilled, unskilled and unemployed social grades (*Chart 4.6*).







Source: 2001 Population Census

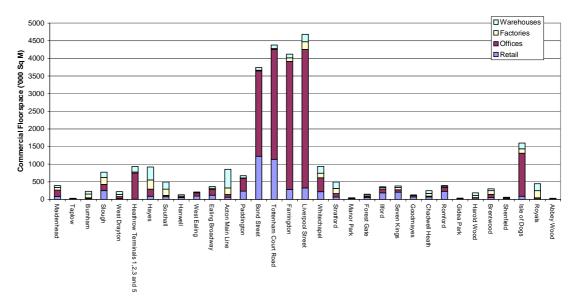
4.3.7 There are close to 1 million jobs located within the one kilometre catchment area accounting for almost a quarter of all London's employment. Over 700,000 of these are located in the areas served by Bond Street, Tottenham Court Road, Farringdon and Liverpool Street stations.

# 4.4 Commercial floorspace

4.4.1 Chart 4.7 provides an indication of the total commercial floorspace by station catchment area wards<sup>2</sup>. The chart shows the dominance of the central area. The Isle of Dogs has grown enormously, over the past 10-15 years, but the catchment area served by the station still contains between a half and a third of the floorspace of City, Mid-Town and West End stations. However, floorspace in the Isle of Dogs' is set to double over the next 10 to 15 years.

<sup>&</sup>lt;sup>2</sup> Data for Langley and Iver is incomplete or unavailable and have been excluded.





Source: ODPM Commercial and industrial floorspace and rateable value statistics 2003 and Drivers Jonas

# 4.5 Defining Regeneration Areas

4.5.1 London's key spatial policies are set out in the Mayor's London Plan (Spatial Development Strategy for Greater London). This identifies 28 Opportunity Areas (nine of which have Crossrail stations³) and 14 Areas for Intensification (two of which have Crossrail Stations⁴). It also defines areas of regeneration as those covering the most deprived 20 per cent of wards in London with high levels of unemployment and social exclusion.⁵ ODPM's Sustainable Communities Plan has further raised the aspirations for the area, especially in terms of housing growth in the Thames Gateway. The Regional Planning Guidance for South East England (RPG 9) identifies the Thames Gateway as a regional and national priority for regeneration and growth. The Regional Planning Bodies⁶, Government Offices for London, East of England and the South East, Thames Gateway Strategic

<sup>4</sup> Namely Farringdon/Smithfield and Tottenham Court Road

<sup>&</sup>lt;sup>3</sup> These are Paddington, Bishopsgate, Isle of Dogs, Ilford, Royal Docks, Stratford, Whitechapel/Aldgate, Heathrow North and Heathrow South.

<sup>&</sup>lt;sup>5</sup> Since the London Plan was published a new Index of Multiple Deprivation has been produced that uses Super Output Areas rather than wards. These areas are much smaller than wards and allow regeneration areas to be more closely delineated. Regeneration areas in London have, therefore, been defined as those Super Output Areas in the lowest 20% as ranked by the Index of Multiple Deprivation as well as areas defined by regeneration areas by the relevant Regional Economic Strategies.

<sup>&</sup>lt;sup>6</sup> East of England Regional Assembly, Greater London Authority and South East England Regional Assembly



Executive, Thames Gateway London Partnership and Essex and Kent County Councils are influential in the development of policies for the planning of the area and regional economic development. London Plan policies cover East London in the Thames Gateway and the West London sub-region (the "Western Wedge"). These high-level policies guide local authority UDP policies in these areas to exploit public transport accessibility and potential for increases in residential, employment and other uses through higher densities and more mixed and intensive use.

- 4.5.2 The overall objectives for Crossrail include the facilitation of the regeneration of priority areas including Thames Gateway and the Lea Valley in line with policies set out in the London Plan and RPG9.
- 4.5.3 There is no national definition of what constitutes a regeneration area. This has led to regeneration areas being defined as those areas designated by the relevant regional development agency as regeneration areas. Or failing that those wards that fall within the lowest 20% in terms of the index of multiple deprivation. The latter definition is effectively the one used by the London Development Agency to define regeneration areas in London. For this reason Crossrail has taken the 20% definition although the 2004 Index of Multiple Deprivation is based on Super Output Areas rather than wards. Hence regeneration areas served by Crossrail are defined as those Super Output Areas in the lowest 20% in the Index of Multiple Deprivation within one and two kilometre radii of Crossrail stations depending on the analysis being undertaken.

# 4.6 Regeneration areas served by Crossrail

# Regeneration areas within a 1km radius of Crossrail stations

- 4.6.1 Twenty Crossrail stations have areas within their one kilometre catchment areas that are ranked in the bottom 20% in the Index of Multiple Deprivation. There are approximately 200,000 people in total living in these deprived areas which means that one third of the population living within a one kilometre radius from the Crossrail stations is amongst the 20% most deprived in England.
- 4.6.2 As expected the demographic and socio-economic characteristics of these areas are unique reflecting the higher levels of deprivation. A detailed listing of these characteristics is set out in the Appendices C and D.
- 4.6.3 In general, the regeneration areas have a younger age structure, with 42% of residents aged less than 26 years old compared to the overall one kilometre average of 36% and the London average of 34%.



- 4.6.4 The white community accounts for less than half (47%) of the population in these areas with the Asian community accounting for 34% and the black community for 13%. This ethnic distribution is much more diverse than the one kilometre average (61% 24% 9%) and the London average (71% 12% 11%).
- 4.6.5 Qualification levels are very low, with one third of the population having no qualifications at all and only 26% being qualified to Level 4/5 (compared to the one kilometre and London averages of 31%).
- 4.6.6 The Economic Activity rate in the twenty regeneration areas averages 57%, compared to 65% for the one kilometre average and 68% for the London average. The unemployment rate is also very high; at 12% it is nearly double the London average.
- 4.6.7 Approximated social grades are also lower than the one kilometre and London averages; with 44% classified in the bottom two social grades (semi-skilled and unskilled manual workers; on state benefit, unemployed, lowest grade workers) compared to 32% for the route as a whole.

## Regeneration areas within a 2km radius of Crossrail stations

- 4.6.8 Twenty-nine Crossrail stations have regeneration areas located within a two kilometre radius. These areas have a combined population of approximately 540,000. The overall demographic and socio-economic characteristics of the people living in these areas are very similar to those living in deprived areas within a one kilometre radius of Crossrail stations. A detailed listing of these characteristics is set out in the Appendices E and F.
- 4.6.9 The 2km regeneration areas have a younger than average age structure and a great degree of ethnic diversity. Approximately 41% of the population is aged less than 26 years old, while white residents account for only 52% of the population with the Asian and Black communities accounting for 27% and 14% respectively.
- 4.6.10 Similar to the one kilometre deprivation areas, more than a third of the residents in the two kilometres deprivation areas have no qualifications and less than a quarter is qualified to level 4/5.
- 4.6.11 The economic activity rate is 58% and the unemployment rate is 11%; both indicators are significantly worse than the London averages and reflect the great degree of employment deprivation in these areas.
- 4.6.12 Approximated social grades are also lower than the London average; 44% of residents are classified in the bottom two social grades (semi-skilled and unskilled manual workers; on state benefit, unemployed, lowest grade workers) compared with 32% for the route as a whole.



## 4.7 Detailed overview of each location served

4.7.1 This section provides a more detailed overview of each location directly served by Crossrail in terms of their socio-economic characteristics and future prospects with and without Crossrail. This information comes from analysis of official statistics as well as discussion with the relevant local authorities and other key stakeholders. Property and development assessment is provided by Drivers Jonas.

#### Maidenhead

- 4.7.2 Maidenhead is an important retail centre which has also attracted hi-tech and pharmaceutical companies. Expansion is restricted by the Green Belt which surrounds most of the town. There are good transport links with a regular rail service to Reading and London Paddington, and easy access to the M4, M40 and M25 motorways and Heathrow Airport. It is a prosperous town with good quality residential areas and there are no regeneration areas within the station's catchment area. Residents have higher than average social grades, qualification levels and economic activity rates and lower than average unemployment rates. Around 8,500 live within one kilometre of the station with a much higher than average age profile (17% over 65 compared to 10% on average for the route).
- 4.7.3 Recent office developments remain vacant due to the slow-down in the Thames Valley office occupier market, although it is likely that these will be let in the short to medium term as the market improves. The biggest constraints to development are the availability of development sites, restrictive planning policies and the physical constraints of the Green Belt. The local authority has, however, identified a number of town centre sites that will become available in the future. The principal ones include;

Site	Capacity m <sup>2</sup>	Use
Nicholas Centre MSCP	2,900	Retail
Land North of West Street	8,000	Retail
J. Sainsbury's	7,500	Planning permission for Sainsbury's
Grove Road Car Park	2,500	Mixed
St Ives Road/Park Street	5,000	Mixed
St Ives Road	2,500	Mixed
Cinema Site	800	Retail
Football Club/Bowling Alley	6,000	Retail
Stafferton Way	3,500	Retail – DIY store
Station Redevelopment	15,000	Office led mixed
Total	53,700	



# **Taplow**

4.7.4 Taplow's catchment area is a very prosperous area which is sparsely populated with fewer than 2,000 people living within it. Unemployment is low and economic activity rates are very high. There are no regeneration areas within the station catchment area.

### **Burnham**

4.7.5 Over 15,000 people live within the one kilometre catchment area of Burnham station. Unemployment is low and economic activity rates are very high. There are no regeneration areas within the station catchment area.

## Slough

- 4.7.6 Slough is a major employment centre in the "M4 Silicon Valley" and is dominated by retail and office uses. It is well connected by road and rail, with direct rail services to Paddington and Reading and close to the M4, M25 and Heathrow.
- 4.7.7 The town combines both areas of prosperity and some deprivation although the latter are some distance from the station and there are no regeneration areas within the station's one kilometre catchment area. Of the 15,000 people who live within a kilometre of the station over 40% are from the Asian community.
- 4.7.8 Slough currently has 115,000m<sup>2</sup> of vacant office space, 30% of the total office stock. A number of the vacant offices have consent for conversion to residential use, although to date no residential conversions have been completed. Currently, property owners and developers are holding back schemes whilst they assess the viability of residential or office use. As no significant residential conversions have been completed to date, the property market is waiting to see how the first major residential town-centre conversion will perform. It is likely that once one residential scheme in the centre is proven, others will quickly follow.
- 4.7.9 There are many development sites in the town centre, both cleared land sites and economically and functionally obsolete buildings that are proposed for demolition to make way for new development. The largest redevelopment site is the Heart of Slough scheme, which is being promoted by the local authority, English Partnerships and Development Securities. The Heart of Slough design includes 70,000m² of new commercial space and 1,000 new homes and is predicted to generate 4,000 jobs. This scheme has been proposed for several years without materialising, as has the Slough Central site to the north of the station. Lack of investor confidence affected by the image of the town is a key factor in holding back development.



4.7.10 The UDP recognises the strong pressure on housing, with demand for many more houses but a shortage of sites. Slough BC have recently gained consent to build affordable houses in a Green Belt area. Commercial uses are also strongly supported by the local authority which recognises Slough's role as a regional centre of employment. New leisure and evening economy uses are being encouraged to improve the town centre vitality and environment in the evenings.

## Langley

4.7.11 Langley is a commuter town with half its population falling within the C1 and C2 social groupings. It has a very high economic activity rate and unemployment is half the route average. Just over 9,000 people live within one kilometre of the station. There are no regeneration areas within the station's catchment area.

#### Iver

4.7.12 Iver is a small prosperous village with just 1,300 people living within the station's catchment area. It has a very high economic activity rate and low unemployment. There are no regeneration areas within the station's catchment area.

## **West Drayton**

4.7.13 Over 11,000 people live within one kilometre of the station; 700 of these in regeneration areas. Qualifications in the whole area are lower than average but economic activity rates are high and unemployment low. A third of those living in the regeneration area are under 16. Despite almost 40% of residents of regeneration areas having no qualifications economic activity rates are still high and unemployment is below the route average.

## **Hayes and Harlington**

- 4.7.14 Hayes is an established town with an industrial and distribution heritage. Employers include Nestles and many printing related businesses. Hayes High Street is geared towards local convenience shopping. The town centre is surrounded by established residential areas characterised by good quality, pre and post war, detached and semi-detached housing.
- 4.7.15 Despite its closeness to Heathrow airport and the associated support jobs in the area Hayes suffers from pockets of deprivation. Of the 13,000 people who live within one kilometre of the station 1,500 live within regeneration areas. There is a large Asian community making up a third of the population, qualification levels are low and economic activity is average.
- 4.7.16 Old industrial sites are in plentiful supply and a number of development schemes are planned but supply currently outstrips



demand for both office and industrial space. London Gate is a major 50,000m² office development, the first phase of which was completed in 2002, but is yet to be let. The lack of success to date is due in part to the general slow down in the office leasing market, but also because Hayes town centre has a low profile as a contemporary office location. Heathrow 360, meanwhile, is a large industrial site that is being marketed on a pre-let and design and build basis. Following the acquisition of Safeway by WM Morrison, the former Safeway's headquarters in Hayes, which covers 4.1ha and includes 26,000m² of office accommodation, has been put on the market. In addition, Prologis is planning a 57,000m² scheme at Stockley Road with industrial and office space and 150 homes.

4.7.17 The London Borough of Hillingdon is keen to preserve many of the sites in Hayes town centre as employment sites, particularly for logistics and manufacturing/engineering uses connected with the aviation industry at Heathrow.

#### Southall

- 4.7.18 Southall is a retail centre principally serving West London's Asian communities. There is a preponderance of local and specialist retailers with few multiples. The retail centre is surrounded by a mix of residential areas with industrial land immediately to the north and south of the railway line. Traffic congestion in the town is severe and a potential barrier to large scale development.
- 4.7.19 Southall is the home of a large Asian community, which makes up over 70% of the 24,000 population within the station's catchment area. Economic activity rates and qualification levels are low and unemployment is high. Over 11,000 people in the catchment area live in designated regeneration areas although the socio-economic characteristics of both the regeneration and non-regeneration areas are similar.
- 4.7.20 Availability of sites is not a constraint on development in Southall. There are a number of redundant buildings and sites in the town centre. The largest is the former Southall Gas Works site, a 38 ha (gross) development site to the west of Southall station. SecondSite Property and Castlemore Securities submitted an outline masterplan for the Gas Works in July 2004 that provides for 4,000 homes and 4,300 jobs in a mixed use development covering retail, offices and manufacturing.
- 4.7.21 In addition to being one of the London Plan's Opportunity Areas in recognition of its potential to accommodate significant employment growth and new homes, Southall is part of the Heathrow City scheme within the City Growth Strategies initiative. The LDA has made Heathrow City a priority location for strategic intervention and intends to invest £12 million in the region. The



Ealing Community Plan sites the development of Southall as an "Economically Successful Place" as a priority.

#### Hanwell

4.7.22 Hanwell is a very mixed location including areas of great prosperity but also of deprivation. Just over 19,000 people live within one kilometre of the station of whom nearly two thirds are in social groups ABC1 and nearly 40% are educated to a degree level and above. However, over 5,000 people live in regeneration areas of whom over 50% come from non-white communities. Unemployment in the regeneration area is twice the route average although qualification levels are higher than in other areas with much lower unemployment rates.

## **West Ealing**

4.7.23 West Ealing is a prosperous and very densely populated area with over 25,000 people living within the one kilometre catchment area. Nearly half the residents are qualified to degree level and above and almost three quarters of the population are in social groups ABC1. There are some small pockets of deprivation and some 1,300 people live within regeneration areas. However, economic activity rates in these regeneration areas are high, unemployment is low and qualification levels are far higher than average.

## **Ealing Broadway**

- 4.7.24 Ealing is a popular residential area with green open spaces, a busy high street and shopping centre. There are a number of large offices in the town, let to longstanding occupiers. To the south of the town centre is the extensive Ealing Studios site which provides accommodation for media industries. Almost 60% of Ealing Broadway's 17,000 catchment population are educated to degree level and above, which is twice the London average. Economic activity rate is high and almost half the population is in social groups AB. There are no regeneration areas within the one kilometre catchment area.
- 4.7.25 Current developments include a new 7,800m² office to replace a poor condition 1960s office building on Uxbridge Road. More significant and indicative of future development is the conversion of Cavalier House, the former Kodak HQ office building, to 130 residential apartments.
- 4.7.26 Further town centre residential development in Ealing is predicted. Planned commercial developments that will take place in the near future include a 12,000m<sup>2</sup> extension to Ealing Studios.
- 4.7.27 The London Plan identifies Ealing as being one of London's Metropolitan Centres. The Ealing UDP (adopted in 2004) seeks to



achieve a pattern of land use and transport which emphasises environmental protection, and effective use of energy and resource conservation. Local authority policies seek to ensure that existing town centres serve as the main focus for shopping, commercial and community activities. The majority of new development at Ealing is likely to take place in the centre and comprise mixed use redevelopment of existing buildings.

#### **Acton Main Line**

4.7.28 Acton has some pockets of deprivation and almost 2,000 of the 19,000 population within the one kilometre catchment area live within regeneration areas. Overall around a third of the population is non-white, rising to almost 50% in the regeneration areas. There are limited development opportunities in the area.

#### Heathrow

4.7.29 Only a small number of people, less than 1,000, live within the catchment area of Heathrow's stations.

## **Paddington**

- 4.7.30 Paddington station is a key transport hub served by national rail (including a direct link to Heathrow Airport), London Underground and London Buses. The surrounding areas include substantial residential uses, hotels, commercial and health facilities.
- 4.7.31 Paddington is the second most densely populated area served by Crossrail with over 38,000 people living within its catchment area. The area is dominated by young professionals with over half the population educated to at least degree level and a quarter aged between 26-35. The area has a diverse ethnic mix with 30% non-whites. It also has a large regeneration area within its catchment area with a population of over 14,000 people. The regeneration area has a very skilled workforce and around average economic activity and unemployment rates.
- 4.7.32 A number of developments have already taken advantage of the capacity and planning policy framework for high density mixed use development in Paddington. The Heathrow Express has undoubtedly been a major factor in the redevelopment of major sites around Paddington. Large scale developments underway include the mixed use Paddington Central and Paddington Basin schemes. The latter scheme has attracted Marks & Spencer as a major office occupier.
- 4.7.33 There is a further 100,000m² of office space to be completed at Paddington Central as office demand increases. Future development sites identified by Westminster City Council include the sites currently occupied by St Mary's Hospital and Travis Perkins, together with sites at Dudley House, North Wharf Road,



Paddington Basin and Hermitage Street. Demand for residential accommodation is strong in Paddington and prices are correspondingly high.

4.7.34 The London Plan identifies Paddington as a Central London Opportunity Area with potential for 23,200 jobs and 3,000 homes by 2016. Regeneration initiatives include 'New life for Paddington' an SRB project to promote training and capacity building and to encourage business start ups.

## **Bond Street**

4.7.35 Bond Street is a prosperous area with a high proportion of young professionals; 55% of the area's 18,000 residents are educated to degree level and above. There are no regeneration areas within the station's catchment area.

### **Tottenham Court Road**

- 4.7.36 Over 20,000 people live within one kilometre of the station with a significantly higher number of young people. The area has a higher proportion, almost a third, of residents from social groups D and E, than other central areas. Regeneration areas cover almost 6,000 people in the station's catchment area. However, the socio-economic characteristics of both the regeneration and non-regeneration areas are similar.
- 4.7.37 The London Plan identifies Tottenham Court Road as an Area for Intensification, which subject to public transport improvements could accommodate 2,000 new jobs and 200 new homes by 2016.

# **Farringdon**

- 4.7.38 Farringdon is characterised by a mix of offices, residential and small manufacturing operations. The area has attracted creative, media and IT occupiers and business start ups in particular. However, the small scale of many of the buildings, Conservation Area status and St. Paul's viewing corridors restricts development potential.
- 4.7.39 Nearly 24,000 people live with the station's catchment area of whom over half live within regeneration areas. The socio-economic characteristics of both the regeneration and non-regeneration areas are broadly similar. As with other central areas, it has a highly skilled and relatively young workforce.
- 4.7.40 In recent years residential demand has grown rapidly and many business premises are now under pressure from residential developers. Islington Council is, however, keen to avoid the loss of business space to residential accommodation. Thornhill Properties are currently seeking consent for a 56,000m<sup>2</sup> mixed-



use scheme centred on the Smithfield Market Annex at 25 Snow Hill. Although close to the core London office markets of the City and Mid-town, Farringdon has lagged behind in terms of office rents and hence development activity, despite its apparent accessibility. This lag is due to the perception amongst occupiers and investors of there being not only distance between Farringdon and the core City Square Mile, but less consistent occupier demand at Farringdon.

4.7.41 The London Plan identifies Farringdon as an Area for Intensification, which subject to public transport improvements could accommodate 2,000 new jobs and 100 new homes by 2016.

## **Liverpool Street**

4.7.42 Whilst Liverpool Street is on the edge of the City it serves a very mixed area. Some 17,000 people live within the station catchment area of whom 12,000 live within designated regeneration areas. Over half the population is non-white, economic activity rates are low and unemployment is high. Almost 40% of residents have no qualifications.

## Whitechapel

- 4.7.43 Whitechapel is a mainly residential area with predominantly low quality housing, high unemployment and a low-skill base. The main road through the area, Whitechapel Road leading into Mile End Road, is characterised by linear retail development including a major street market with residential accommodation above. To the south of Whitechapel Road is the 900-bed Royal London Hospital which occupies a major site and is currently seeking planning permission to redevelop the existing site with a new hospital and health campus.
- 4.7.44 This is most densely populated area served by Crossrail with almost 44,000 people living within one kilometre of the station. Over 60% of the population is non-white, nearly 40% have no qualifications, unemployment is twice the route average and the economic activity rate is very low. A quarter of the population is under 16. The majority of the locality is a regeneration area encompassing 35,000 residents. However, the socio-economic characteristics of both the regeneration and non-regeneration areas are broadly similar.
- 4.7.45 The majority of new development in Whitechapel, particularly the employment use development, will take place in the City Fringe/Aldgate area. The redevelopment of the existing Royal London Hospital site will see 70% of the existing buildings demolished and replaced with modern equivalents under a PFI contract. The London Plan identifies Whitechapel as an



Opportunity Area with potential for 14,000 jobs and 700 new homes by 2016.



## Stratford

- 4.7.46 Stratford is an established major town centre in the Lea Valley, with a mix of high street and shopping centre retailing. Current residential stock is characterised by Victorian streetscapes with private sector terraced houses, interspersed with high density local authority housing developments, many of which are high rise from the 1960s and 1970s.
- 4.7.47 Given the large amount of brownfield land, the station's catchment area is not very densely populated with less than 13,000 living within it. Over half the population is non-white with both large black and Asian communities. There is a very high unemployment rate (almost double the route average) and a low economic activity rate. A third of the population has no qualifications. Over 10,000 of the population live within regeneration areas although the socio-economic characteristics of both the regeneration and non-regeneration areas are broadly similar.
- 4.7.48 Due to its proximity to central London, good (albeit heavily capacity constrained) transport links and availability of development sites, Stratford is emerging as a significant growth area. The Jubilee Line Extension and the construction of the Channel Tunnel Rail Link with its new station at Stratford have been the catalyst to recent activity, not least the proposed development of "Stratford City" by property developers Chelsfield, Stanhope and London & Continental Railways.
- 4.7.49 The development pipeline is dominated by Stratford City on the 100 ha Stratford Rail Lands. LB Newham resolved to grant planning consent in 2004 for 2,000 hotel rooms, 4,850 homes, 464,500m² of office space and 185,800m² of retail space. In total it is estimated the development will provide capacity for 38,000 jobs.
- 4.7.50 In addition, plans for enhanced retailing and high-density residential development are evolving for the town centre and other surrounding sites. LDA's London Thames Gateway Development & Investment Framework predicts 7,300 homes to beyond 2012. The London Plan identifies Stratford as an Opportunity Area with potential for 30,000 jobs and 4,500 homes by 2016. Stratford is part of the Lea Valley and Thames Gateway regeneration corridors and is eligible for European Regional Development Funding (ERDF) under Objective Two. LDA objectives for Stratford include major infrastructure work, land assembly and remediation and education programmes.
- 4.7.51 Being part of London Thames Gateway, the area falls under the Thames Gateway Planning Framework (RPG9a), 1995. The LDA, The Regional Planning Bodies, Government Office London and



the Thames Gateway London Partnership<sup>7</sup> are also influential in the planning of the area. Through its UDP, the London Borough of Newham has designated the area as the northern part of the Arc of Opportunity masterplan. Over time, developments are expected to turn Stratford into a mixed-use "European Business Quarter" and enable Stratford's transition from its Major Town Centre designation to a Metropolitan Town Centre.

#### **Forest Gate**

- 4.7.52 Forest Gate is a residential area with a variety of housing types and qualities. It has a busy local retail pitch with national and local retailers. There are several multi-storey 1960s offices on Romford Road, some in sole occupancy (e.g. Barclays and local authority) and some multi-let on flexible terms.
- 4.7.53 Forest Gate is one of the most ethnically mixed areas with the population almost split three ways between white, black and Asian. It is a densely populated area with 33,000 people, 23,000 of whom live in regeneration areas with correspondingly low economic activity rates and high unemployment. Qualification levels are low and over a quarter of the population is under 16 years of age. The socio-economic characteristics of both the regeneration and non-regeneration areas are broadly similar.
- 4.7.54 There are many sites in the area that are either ready for development or will come forward in the future, the largest of which include the former Upton football club and the existing Hovis bakery. However, the majority of sites are much smaller. It is unlikely that any further large offices will be constructed in Forest Gate as major East London office centres such as Royal Docks, Stratford City and Isle of Dogs will dominate and are likely to attract the majority of occupiers.
- 4.7.55 Future development is, therefore, anticipated to be residential led. As the number of new homes in Forest Gate increases, small-scale commercial developments will come forward to service the demand for convenience shopping and leisure created by the increasing population. Through consideration of the available development sites and potential sites for redevelopment in Forest Gate, it is believed that in the period to 2021, around 1,650 new homes will be completed and 1,900 jobs accommodated in the commercial developments that will take place over the same period.
- 4.7.56 Forest Gate is identified as a District Centre in the London Plan and is within the London Borough of Newham. Newham UDP was adopted in 2001 and seeks to encourage regeneration and quality

<sup>&</sup>lt;sup>7</sup> See TGLP's Going East, Thames Gateway: the future of London and the South East

See Growth and Regeneration in the Gateway, ODPM August 2004.



design. Forest Gate Station Square and Town Centre is within an Area of Townscape Value. Within these areas the local authority requires development proposals to have regard for the townscape value area.

#### **Manor Park**

- 4.7.57 Manor Park is a residential area with reasonable quality stock and open space (Wanstead Flats to the north). Romford Road provides retail facilities, but the larger retail centres of Ilford and Forest Gate dominate. The area has seen little new development in recent years, one of the exceptions being the Lumiere Building, a 15 storey residential tower completed in 2000.
- 4.7.58 The Asian community accounts for half the area's 25,000 residents. The population is young with over a quarter being under 16. Unemployment is twice the route average and the economic activity rate is low. Over 15,000 residents live within regeneration areas with similar socio-economic characteristics of both the regeneration and non-regeneration areas.
- 4.7.59 Possible development sites in Manor Park are largely limited to the tertiary motor-trade retail premises situated on Romford Road. Many of these may come forward as development sites within the next 20 years. Possible redevelopments would be mixed schemes with local convenience retail or community uses at ground floor and residential on the upper floors. These sites are typically 500-1,000m². No significant development is currently taking place and it is not anticipated that any commercial development will take place beyond that associated directly with residential development. The larger commercial centres of Ilford and Forest Gate will dominate.
- 4.7.60 Manor Park is within the London Borough of Newham. The LB Newham UDP was adopted in 2001 and seeks to encourage regeneration and quality design. The local authority does not envisage any large scale developments coming forward in Manor Park in the medium term.

#### llford

- 4.7.61 One of London's metropolitan areas, Ilford is a busy suburban centre surrounded by established residential areas. The town centre is one of the largest retail centres in London with 107,000m² of comparison goods floorspace, a 13,000m² leisure development at Clements Road and a major Sainsbury's supermarket. The main retail areas in the town centre of High Road and The Exchange shopping centre are well supported, lively retail pitches characterised by low vacancy rates.
- 4.7.62 There are a number of large office buildings in Ilford (mainly clustered around Ilford Hill) that date from the 1960 to the early



1990s that have traditionally housed major employers such as BT and Britannia Music. The office sector has declined in recent years – in 2003 there was 18,000m² of available office space in Redbridge, the majority of which was in Ilford. A number of the major offices on Ilford Hill are part or fully vacant including Valentine House, Mill House and Becketts House.

- 4.7.63 The town has good transport links, the most significant being the heavily used train service to Liverpool Street station and the A406 North Circular Road, which provides access to the M11 corridor. However, both road and rail capacity is heavily utilised, significantly limiting the potential for future development. Ilford station is currently over-crowded at peak times, as is the train service to Liverpool Street. Studies by Redbridge BC have shown that at peak times it is not uncommon for commuters to have to queue to get onto the platforms and wait for a number of trains to leave the station before it is possible to board a Liverpool Street train.
- 4.7.64 Ilford is a densely populated area with a diverse ethnic make up. Almost half the catchment area's 24,000 people are Asian. A third of the population has no qualifications, the economic activity rate is low and unemployment is around twice the route average. A third of the population live within regeneration areas although the socio-economic characteristics of both the regeneration and non-regeneration areas are broadly similar.
- 4.7.65 Ilford is a popular residential location with increasing demand and house prices. The majority of development underway or planned in the town centre is residential led. Since 2002, 1,500 residential units have been granted planning consent which will add 140,000m² of residential space by 2006. These new units are being constructed in the town centre with schemes such as Spectrum 67 (a 12 storey tower with 103 units) and Centreway (a 16 storey mixed use scheme with 239 units). A number of existing office block owners have applied for (and are likely to receive) consent for residential conversion, including BT's Mill House.
- 4.7.66 Retail space in the town centre is expected to grow by 9,000m<sup>2</sup> by 2006, largely due to expansion of the existing Sainsbury's food store, whilst leisure space is forecast to grow by 5,000m<sup>2</sup> in the same period. As a result of the decline of Ilford as an office location, only 4,500m<sup>2</sup> in office space is forecast by 2006.
- 4.7.67 The London Plan identifies Ilford as an Opportunity Area with potential to accommodate 5,500 new homes by 2016.
- 4.7.68 The London Borough of Redbridge has produced a 30 year vision for Ilford "Progressive Ilford". This outlines the local authority's vision for Ilford as a thriving metropolitan centre in the Thames Gateway. Over the next 30 years the forecasts are for land uses



to grow by the following amounts: residential 509,000m<sup>2</sup>, retail 55,500m<sup>2</sup>, offices 78,000m<sup>2</sup> and other uses by 66,500m<sup>2</sup>.

## **Seven Kings**

4.7.69 Some 24,000 people live within Seven Kings' catchment area. The area contains over 60% non-whites with economic activity and unemployment rates similar to the London average. There are no regeneration areas within the station's catchment area.

## Goodmayes

4.7.70 Goodmayes is effectively a border area between densely populated inner London (with its wide ethnic make up) and the more affluent outer suburbs (which are predominantly white). In Goodmayes, over half the 21,500 population are white. While skill levels are not particularly high, economic activity and unemployment levels are average. There are no regeneration areas within the station's catchment area.

#### **Chadwell Heath**

4.7.71 While almost a third of its 19,000 residents have no qualifications Chadwell Heath has a high economic activity rate and below average unemployment. Approximately, 7,500 residents live within regeneration areas but the socio-economic characteristics of both the regeneration and non-regeneration areas are broadly similar although over 40% of residents of the regeneration areas have no qualifications.

### Romford

- 4.7.72 The town is an important office and retail centre for north-east London and Essex. Romford's 13,000 population is over 90% white with a very high economic activity rate and a more balanced age distribution. Just 10% of residents live within regeneration areas. While unemployment is higher than average in the regeneration areas so is the economic activity rate.
- 4.7.73 The Brewery development, a mixed use 10 Ha scheme opened in 2004 accommodating 1,500 jobs. Along with shops, cinema and restaurants, the development included a new bus station. Other mixed use development schemes include sites north of Market Place and the former Dolphin site. London Borough of Havering's strategy for Romford station is to sustain the town centre's competitive position and encourage residential development, particularly in a new waterfront area adjacent to the River Rom.

## Gidea Park

4.7.74 Around 50% of Gidea Park's approximately 14,000 population is classified as belonging in social groups C1 and C2. An average



proportion of the population has no qualifications but there is a below average presence of degree qualified residents. There are no regeneration areas within the station's catchment area.

#### **Harold Wood**

4.7.75 Harold Wood's 9,000 population has broadly the same characteristics as those of Gidea Park. There are no regeneration areas within the station's catchment area.

## **Brentwood**

- 4.7.76 Brentwood is a well established prosperous town with good quality residential stock. It has good rail and road communications with easy access to the national road network via the M25 and A12.
- 4.7.77 The town has a very high economic activity rate and almost a third of the 10,000 people living within the station's catchment area are qualified to at least degree level. There are no regeneration areas within the station's catchment area.
- 4.7.78 Brentwood is seen by many occupiers as the most desirable office location in the North-East sector of the M25, largely due to the excellent schools in the town, the good road links and the attractive working and residential environment. Vacant office space in Brentwood has fallen from 30,000m² at the end of 2003 to 22,500m² in June 2004. There has been some recent office development (BT and Oce owner-occupier schemes), but residential development currently predominates (e.g. Warley Hospital, south of the High Street and the former gas works). A redevelopment of the town's shopping centre on the High Street is also underway, which will extend the retail space by 2,300m² on completion in 2006.
- 4.7.79 There are two sites in the town suitable for office development. The NV Tools former industrial site has consent for a 5,600m² office building but the developer is currently seeking planning consent for residential use. The local authority owns a former depot site at Warley Hill which will probably come forward as an office development site when the office market in the South-East improves. In general it is most likely that future office developments in Brentwood will be redevelopments of existing office buildings, due to the shortage of suitable sites.
- 4.7.80 The majority of development taking place in Brentwood in the foreseeable future will centre on small to medium scale residential led schemes in and around the town centre. The local authority envisages 2,000 new units being constructed by 2011 and believes a further 2,500 residential units will be constructed in the town between 2011 and 2021.



4.7.81 Brentwood is bordered by extensive areas of Green Belt which greatly restrict development potential around the town. Brentwood Borough Council planning and land use policies aim to preserve the high quality of the environment in and around Brentwood whilst ensuring the town continues to be sustainable and prosperous.

### **Shenfield**

4.7.82 Shenfield has the highest retired population across the Crossrail route with over 20% of its 6,500 residents aged over 65.

Unemployment is half the route average although economic activity rates are low reflecting the age profile of the area. There are no regeneration areas within the station's catchment area.

# Isle of Dogs

- 4.7.83 The Isle of Dogs is characterised by the well-established office towers and increasingly mixed-use development of Canary Wharf to the north of the peninsula. It is physically separated from the low-key Poplar area of Tower Hamlets by the elevated sections of the Docklands Light Railway and A1261 West India Dock Road/Aspen Way. Poplar itself is dissected by the A13, East India Dock Road. Canary Wharf already accounts for over 1.25 million m² of office development and 46,000m² of retail employing over 60,000 people. The underground shopping centre has become a retail destination in its own right, supported by direct access to the Jubilee Line. The rest of the Isle of Dogs, to the south of Canary Wharf, comprises a mix of modern high density residential flats, principally along the River, lower density post-war housing of a mix of ages, local shops and industrial sites.
- 4.7.84 The Isle of Dogs covers both areas of prosperity and deprivation. Around a third of the area's 20,000 population has no qualifications while another third is educated to degree level. Amongst the nearly 14,000 people that live within regeneration areas economic activity rates are low and unemployment rates are double the route average.
- 4.7.85 Canary Wharf and the surrounding developments were hugely assisted by the Jubilee Line Extension. Further significant development potential exists but is constrained by public transport capacity and lack of alternative routes. The development pipeline over the next 10-15 years is dominated by a small number of large sites:

Site	Office Space Net Internal Area m <sup>2</sup>
Wood Wharf	610,000
Millennium Quarter	460,000
Canary Wharf	430,000
Total	1,500,000



- 4.7.86 The main Canary Wharf sites are: North Quay, Riverside South and sites known as DS3, BP2, and BP3/4. Heron Quay is a longer-term site, currently in low density office/industrial use. British Waterway's four-phase Wood Wharf site will also provide 1,500 residential units, a new canal bisecting the site between Blackwall Basin and South Dock, public open space and leisure activities around the waterfront. The Millennium Quarter has a number of landowners. As with some of the Canary Wharf sites, the final balance of development between residential and commercial will depend on the market. The above figures reflect the Millennium Quarter masterplan aspiration.
- 4.7.87 The London Plan identifies the Isle of Dogs as an Opportunity Area with potential for 100,000 jobs and 3,500 homes by 2016. The area contains wards which fall within the top 20% most deprived wards in the national Index of Multiple Deprivation. Isle of Dogs is part of the Lea Valley and Thames Gateway regeneration corridors. The area is also eligible for European Regional Development Funding (ERDF) under Objective Two.
- 4.7.88 Being part of London Thames Gateway, the area falls under the Thames Gateway Planning Framework (RPG9a), 1995. The LDA, The Regional Planning Bodies, Government Office London and the Thames Gateway London Partnership<sup>9</sup> are also influential in the planning of the area. The London Borough of Tower Hamlets sets out its planning policies in its UDP. One of the key areas is the Millennium Quarter to the south of Canary Wharf, for which Tower Hamlets have produced a mixed-use masterplan.

## **Custom House/Royal Docks**

- 4.7.89 The Royal Docks, currently served by the Docklands Light Railway, is part of the Thames Gateway regeneration corridor. As well as London City Airport, it is characterised by the clearance of former port-related industrial sites, which are in the process of being redeveloped for residential, commercial, leisure and educational uses. The economy of the Royals is shifting towards finance and business services as the area is seen as the natural next centre of development in Docklands after Canary Wharf.
- 4.7.90 Custom House is similar to the Isle of Dogs with areas of both prosperity and deprivation. Some 8,000 of its 11,500 residents live within regeneration areas, economic activity rates are average but unemployment is high and skill levels are lower than the Isle of Dogs with fewer people holding degree level qualifications.

<sup>&</sup>lt;sup>9</sup> See TGLP's Going East, Thames Gateway: The Future of London and the South East.

<sup>&</sup>lt;sup>10</sup> See Growth and Regeneration in the Gateway, ODPM August 2004.



- 4.7.91 The developments of the ExCel exhibition centre, West Silvertown, City Airport and University of East London have already begun the transformation of this area of Docklands. Thames Gateway Bridge and DLR extensions from Canning Town to London City Airport and to North Woolwich will support further growth but the heart of the Royal Docks lacks good public transport accessibility into Central London.
- 4.7.92 The LDA suggest that 10,300 housing units could potentially be completed in the Royals by 2016; 2,030 of these after 2012. This is more than twice the number suggested in the London Plan and reflects the very strong residential market over the past few years. Residential development predominates towards the eastern end of the area at Silverton Dock, Peruvian Wharf and Albert Basin South.
- 4.7.93 The future of the Royals, however, is principally shaped by its employment sites, which are more sensitive to accessibility by public transport. Significant developments at Royal Albert Dock include University of East London (Docklands Campus), the 270,000m² Excel exhibition centre and the 440,000m² Royals Business Park (the 66,000m² first phase of which is under construction).
- 4.7.94 The 50ha Royal Docks area is identified in the London Plan as an Opportunity Area with potential for 11,000 jobs and 5,500 homes by 2016. The area is eligible for European Regional Development Funding (ERDF) under Objective Two. Being part of London Thames Gateway, it falls under the Thames Gateway Planning Framework (RPG9a), 1995. The LDA, The Regional Planning Bodies, Government Office London and the Thames Gateway London Partnership<sup>11</sup> are also influential in the planning of the area. Through its UDP, the London Borough of Newham has designated it the southern part of the Arc of Opportunity masterplan area, which is scheduled for major redevelopment.

## **Abbey Wood**

- 4.7.95 Abbey Wood is a residential area with a small retail pitch close to the station. The residential stock is mixed, with Victorian terraced houses, 1960s local authority schemes and recently constructed private flats. The local workforce is, on average, poorly qualified although its economic activity rate is reasonably high. Over 10,000 of its 19,000 population live within regeneration areas where unemployment is almost twice the route average.
- 4.7.96 There are few sites close to the station that are cleared for development. However, there are extensive areas of 1960s

<sup>&</sup>lt;sup>11</sup> See TGLP's Going East, Thames Gateway: the future of London and the South East

<sup>&</sup>lt;sup>12</sup> See Growth and Regeneration in the Gateway, ODPM August 2004.



housing that have uncertain life expectancy. The local and regional authorities envisage that future development in Abbey Wood will be led by the replacement of poor quality, deck-access housing. It is not envisaged that any commercial development will take place at Abbey Wood beyond small scale convenience shops and community centres.

4.7.97 The area is identified as a Zone of Change by the Thames Gateway Strategic Executive within the Thames Gateway regeneration corridor. It is also eligible for European Regional Development Funding (ERDF) under Objective Two.