MAYOR OF LONDON

London Plan evidence: Central Activities Zone (functions and capacity)

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Executive Summary

Purpose and content

This report provides high level, strategic evidence to inform policies in the new draft London Plan for the Central Activities Zone (CAZ) and Northern Isle of Dogs (NIOD). It is prepared in the wider policy context of the Government's National Planning Policy Framework (NPPF).

Key findings

Employment

- In 2024 there were around **2.5 million jobs in the CAZ** and a further **136,000 in the NIOD**, a combined total of more than **2.6 million jobs**, about **41 per cent** of the London total.
- Compared to London as a whole, the CAZ and the NIOD have much higher proportions of employment in **Financial and insurance**, **Professional and property**, and **Information and Communication** sectors.
- Employment in the CAZ is **projected to grow** from 2.5 million in 2024 to almost 2.9 million by 2050, an increase of **405,000** or **16 per cent**. In the NIOD, employment is projected to grow by **42,000** jobs over the same period, an increase of **31 per cent**.

Uses and functions

- **Office floorspace** in the CAZ and NIOD combined increased from 15.0 million square metres (sq.m) in 2001 to a pre-pandemic peak of 17.6 million sq.m in 2019 before falling back to 16.2 million sq.m in 2023[1].
- In 2023, the CAZ and NIOD **office stock** was **67 per cent of the London total** and **20 per cent of England and Wales**[1].
- **Comparison goods retail floorspace** in the CAZ increased by 0.3 per cent per annum (CAGR)[2] over the period 2014 to 2024 with strongest growth in Wandsworth, Southwark and Islington.
- **Convenience goods retail floorspace** increased by 1.7 per cent per annum over the period 2014 to 2024 with strongest growth in Lambeth, Southwark, Hackney and Wandsworth.
- **Leisure floorspace** increased by 1.5 per cent in the CAZ, with strongest growth in Westminster, Southwark, Camden and the City of London.
- **Vacancy rates for retail, leisure and service floorspace** in the CAZ were 11 per cent in 2021 and 2024. The NIOD's vacancy rate was 8 per cent in 2021 and around 7 per cent in 2024.
- In 2023, 49 per cent of London's **cultural consumption infrastructure** and 19 per cent of **cultural production infrastructure** was located in the CAZ.

[1] Estimate is based upon VOA (2023) commercial floorspace data.
[2] Compound Annual Growth Rate

- **Hotel room** supply in the CAZ increased from around 69,000 in 2014 to over 88,000 in 2025, with an average occupancy rate of 82 per cent.

Development trends

- **Office** use accounted for 1.6 million sq.m of net floorspace gains in completed developments over the period 2014 to 2024. **Retail** use recorded net gains of around 165,000 sq.m, **food and drink** use 125,000 sq.m and **leisure** and **sui generis cultural uses** a further 540,000 sq.m.
- Net losses of floorspace in completed developments in the CAZ over the same period were recorded for **storage or distribution** uses (155,000 sq.m), **light industrial** uses (11,000 sq.m) and Class E(c) **financial and professional service** uses (5,000 sq.m).
- **Housing completions** in the CAZ totalled 58,221 units over the period 2004/5 to 2023/24, an average of 2,900 units per annum and 10 per cent of the London total.

Future employment capacity

- Drawing on sites identified in the London Employment Sites Database (LESD) 2024, the CAZ had an **estimated employment capacity of more than 617,000 jobs** for the period 2024 to 2050, accounting for 54 per cent of the London total.
- The **NIOD** provided a further 88,000 jobs capacity, taking the combined CAZ and NIOD total capacity to over 705,000 jobs.
- Most of the employment capacity in the CAZ and NIOD is associated with the City of London (41 per cent), followed by the NIOD (12 per cent), Southwark (11 per cent), Lambeth (10 per cent) and Camden (9 per cent).
- **Office use** accounts for 94 per cent of the employment capacity in the CAZ and NIOD combined.

Components of the strategic (London Plan) CAZ Diagram

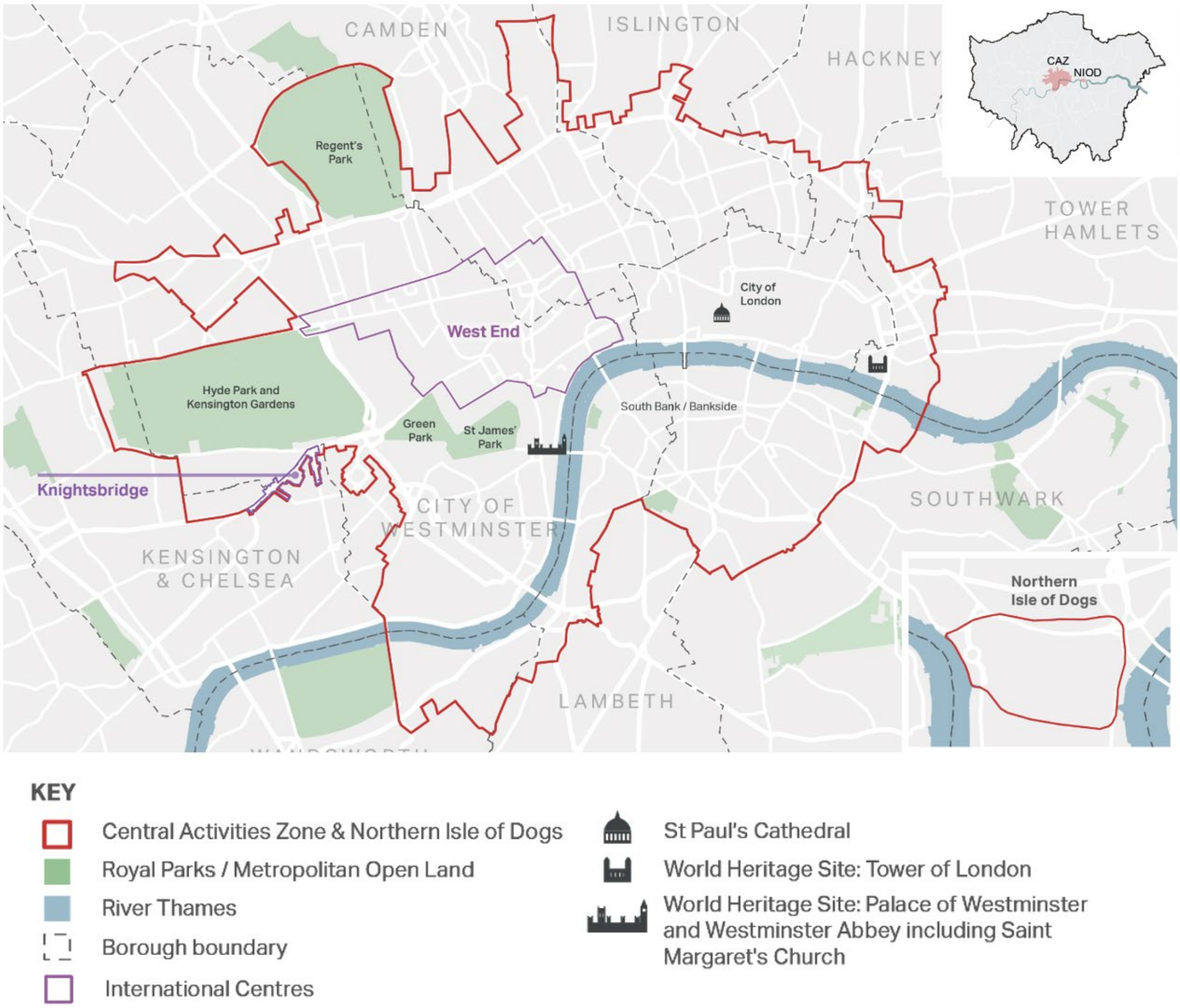
- **The strategic boundaries for the CAZ and the NIOD remain unchanged** from that presented in the 2021 London Plan. These continue to reflect the density, scale and mix of business functions, employment, culture, heritage, tourism and other activities in the CAZ and the NIOD which are underpinned by unparalleled connectivity provided by public transport, walking and cycling networks.
- The **West End** is recognised as an internationally significant commercial, cultural and experience destination characterised by a diverse mix of uses and activities, and a vibrant night-time economy and public realm.
- The **City of London** is recognised as an internationally important location for financial, professional, business and technology services.
- The **South Bank** and **Bankside** areas are recognised for their internationally significant roles in culture, the night-time economy and tourism with several iconic assets.
- The **Northern Isle of Dogs**, whilst being geographically separate from the CAZ, is recommended to remain in planning policy terms as part of the CAZ.
- The CAZ and NIOD contain a diverse range of **strategic functions and activities**.

- Several of these strategic functions are associated with key growth sectors identified in the **London Growth Plan**, and most notably financial, professional and business services and technologies, creative industries and technologies, international education, the experience economy and frontier innovation.
- In the 2021 London Plan there are 12 **Opportunity Areas** that fall totally or partially within the CAZ and NIOD areas. In the new draft London Plan it is recommended that five of these locations are retained as Opportunity Areas (City Fringe/Tech City, Elephant and Castle, Isle of Dogs/South Poplar, Old Kent Road and Vauxhall, Nine Elms, Battersea).
- Five locations (Euston, Liverpool Street, Paddington, Victoria and Waterloo) are recommended for designation as **CAZ Transformational Gateways** in recognition of their association with national rail termini (re)development opportunities.
- Drawing on a range of evidence and considerations, the report distinguishes between two types of areas within the Central Activities Zone and Northern Isle of Dogs which are referred to as **Core CAZ and Mixed CAZ**.
- In **Core CAZ** areas it is recommended that the CAZ strategic functions should be prioritised relative to new residential development. This is to ensure that the contributions to the London and UK economy of the agglomerations of CAZ strategic functions and associated clusters are sustained, enhanced and not compromised by new residential development.
- **Mixed CAZ** areas are recommended to include those that are typically more mixed-use in character and where there might be more potential to accommodate greater amounts of housing alongside the CAZ strategic functions compared to Core CAZ areas.

1. Introduction

1.0.1 This report provides high level, strategic evidence to inform policies in the new draft London Plan for the Central Activities Zone (CAZ) and Northern Isle of Dogs (NIOD). The CAZ and NIOD are planning designations for the vibrant heart and globally iconic core of London (see Figure 1 below). The CAZ includes iconic places like the West End, Knightsbridge, the whole of the City of London, the South Bank and Bankside. The Northern Isle of Dogs, located in the borough of Tower Hamlets, is an area focused on Canary Wharf and its fringes.

Figure 1 The Central Activities Zone and Northern Isle of Dogs



1.0.2 The density, scale and mix of business functions and activities in the CAZ and the NIOD are unique and are underpinned by unparalleled connectivity provided by public transport, walking and cycling networks and further enhanced by the recent opening of the Elizabeth Line. Its agglomerations of activity are nationally and internationally significant, resulting in exceptional levels of productivity and economic output, providing London-wide and national benefits, as recognised in the London Growth Plan.

In 2023, the annual gross value added (GVA) of the CAZ and NIOD was £315bn[3], accounting for 11 per cent of the UK total.

1.0.3 This report is structured as follows. Section 2 looks at past trends and future projections for employment drawing on data from GLA Economics. Section 3 explores trends across a range of uses, including development approvals and completions. Section 4 presents data on identified capacity to accommodate non-residential development.

1.0.4 Section 5 explores the key components of the London Plan CAZ policy map, known as the CAZ Diagram. This includes the spatial distribution of clusters of the various strategic functions of the CAZ, its Opportunity Areas, transformational national rail termini redevelopment opportunities and areas where the Core CAZ and Mixed CAZ policy approaches being proposed in the new draft London Plan might apply.

1.0.5 Please note that this paper does not include evidence on the future demand for economic uses in the CAZ and NIOD which is considered in the London economic uses supply and demand study (2026)[4].

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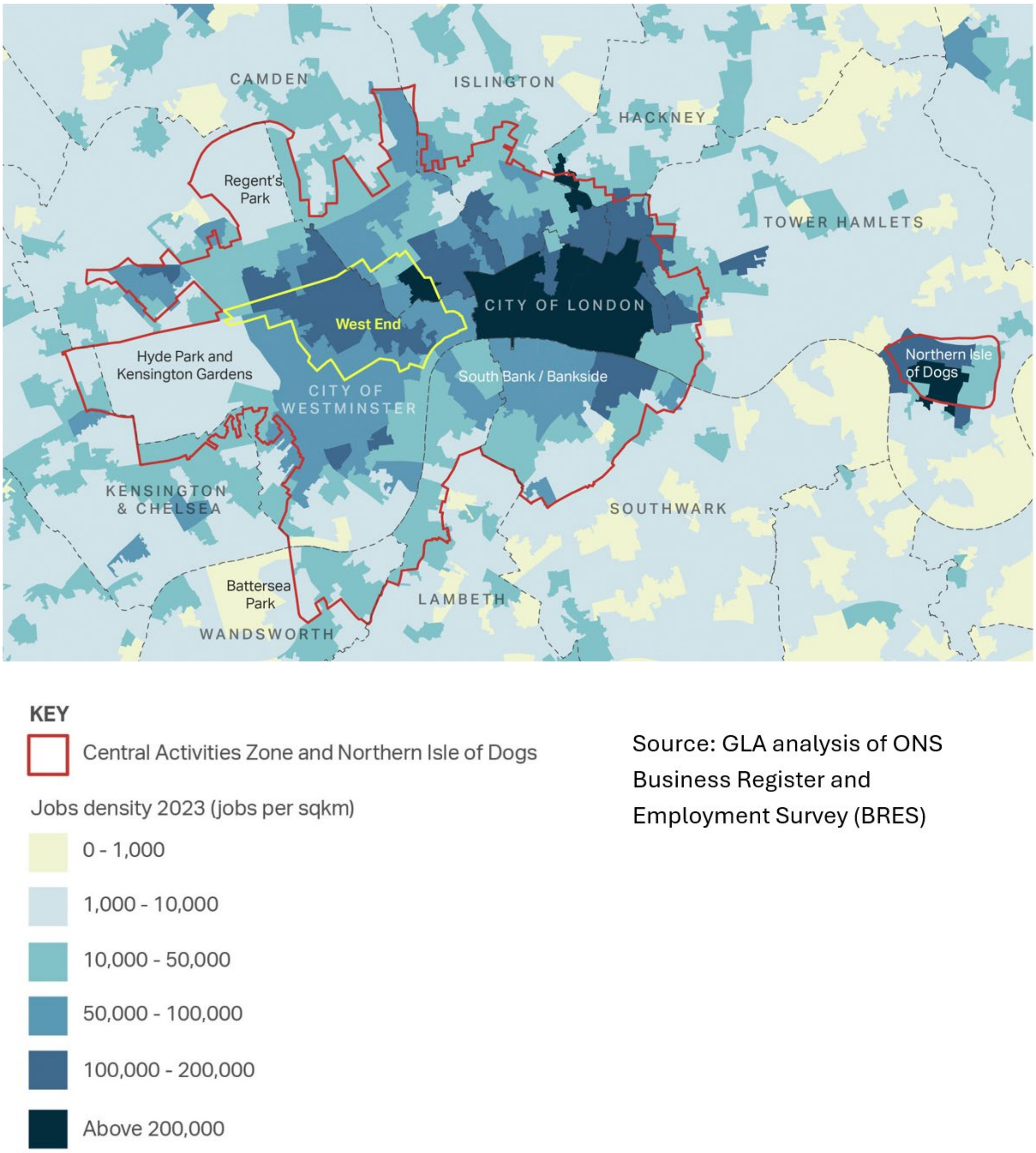
[3] Mayor of London/London Councils - London Growth Plan, 2025
[4] Arup. London economic and infrastructure uses supply and demand study (2026).

2. Employment in the CAZ and NIOD

2.0.1 In 2024 there were around 2.5 million jobs in the CAZ and a further 136,000 in the NIOD, a combined total of more than 2.6 million jobs, about 41 per cent of the London total[5]. The spatial distribution of the density of these jobs, measured in jobs per square kilometre is illustrated in Figure 2.1 below.

Figure 2.1 CAZ and NIOD jobs densities per square kilometre, 2023



Source: GLA analysis of ONS Business Register and Employment Survey (BRES)

[5] GLA Economics. London labour market projections – 2024-based update (2026)

2.0.2 Figure 2.1 shows that jobs densities in the CAZ are substantially higher than locations outside of the CAZ with the highest agglomerations of total employment being in the City of London, the Northern Isle of Dogs and parts of the West End. Other significant agglomerations of employment within the CAZ include London Bridge, Westminster, Victoria, other parts of the West End, parts of Bloomsbury, midtown, Clerkenwell, the City Fringe, parts of the South Bank/Bankside and Paddington.

2.0.3 The composition of employment in the CAZ and NIOD in 2024 by economic sector is illustrated in Figure 2.2 below, including a comparison with the London average. Compared to London as a whole, the CAZ and the NIOD have much higher proportions of employment in Financial and insurance, Professional and property, and Information and Communication sectors. In the Financial and insurance sector, the CAZ had around 332,000 jobs in 2024 and the NIOD a further 29,000 and together the CAZ and NIOD accounted for almost 80 per cent of London's total jobs in this sector. In the Professional and property sector, there were around 615,000 jobs in CAZ in 2024, and 29,000 in the NIOD, representing 57 per cent of London's total jobs in this sector.

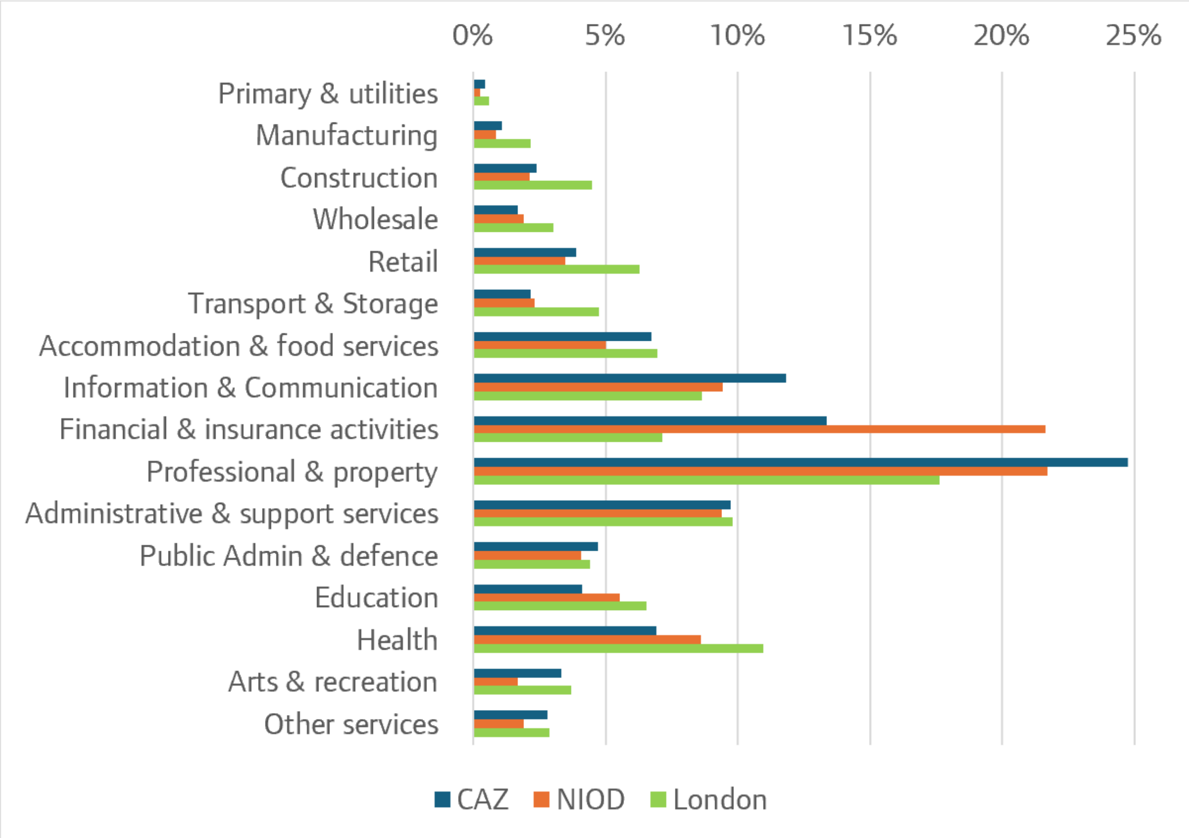
2.0.4 By contrast, Figure 2.2 shows that the proportion of total employment in sectors such as Manufacturing, Construction, Wholesale, Retail, Transport and storage, Education and Health are lower in the CAZ and NIOD compared to the London average.

2.0.5 The CAZ has a broadly similar proportion of employment compared to London as a whole in Accommodation and food services, Administrative and support services, Public administration and defence, Arts and recreation and Other services. The NIOD has slightly lower proportions of total employment in these sectors compared to the London average.

2.0.6 Employment in the CAZ is projected to grow from 2.5 million in 2024 to almost 2.9 million by 2050, an increase of 405,000 or 16 per cent. In the NIOD, employment is projected to grow by 42,000 jobs over the same period, an increase of 31 per cent[6] (see Figure 2.3 below) taking the total CAZ plus NIOD projection to almost 3.1 million jobs by 2050. The rate of projected employment growth in the CAZ is marginally higher than the average for London as a whole (14 per cent), and the projected growth rate in the NIOD is substantially higher (see Figure 2.4).

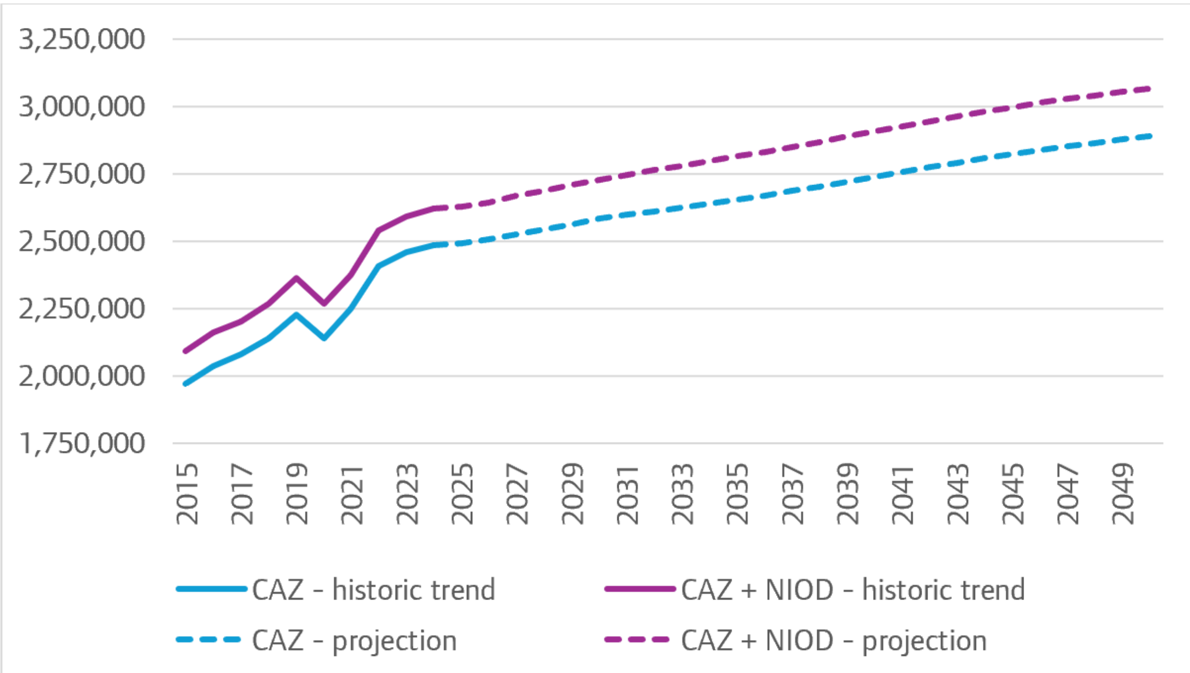
[6] GLA Economics. London labour market projections - 2024-based update (2026)

Figure 2.2 Proportion of jobs in CAZ, NIOD and London by economic sector, 2024



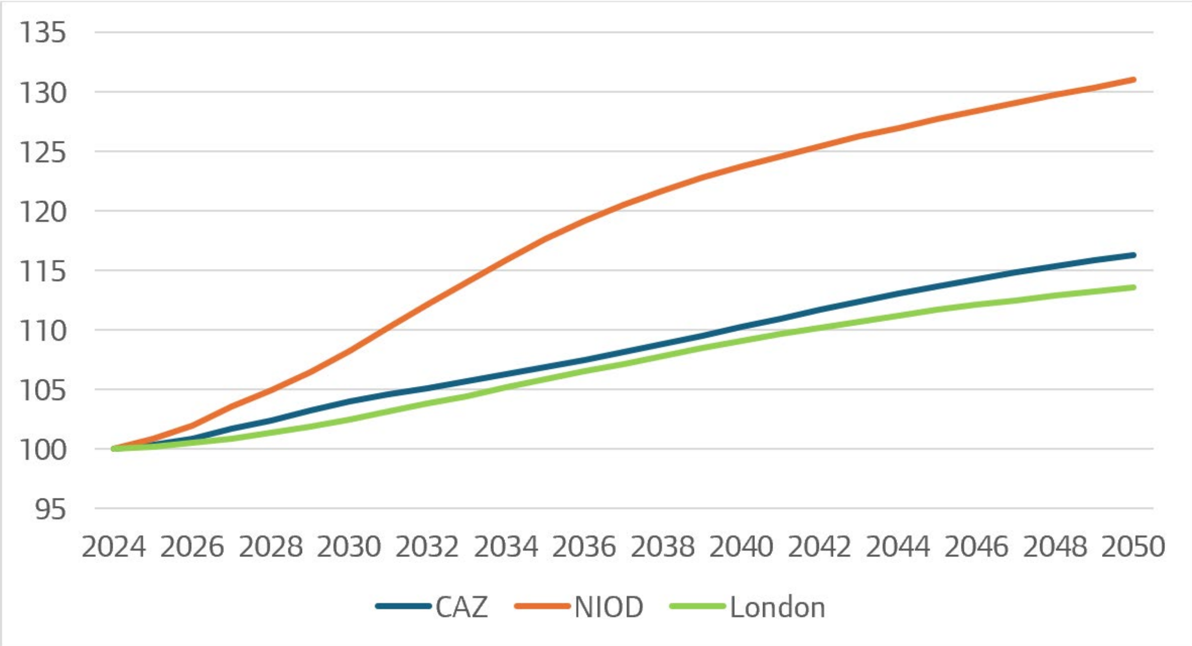
Source: GLA Economics / GLA analysis

Figure 2.3 CAZ and NIOD employment (workforce jobs) historic trends 2015 to 2024 and projections 2024 to 2050



Source: GLA Economics

Figure 2.4 Projected rate of growth in employment (workforce jobs) 2024 to 2050 in London, CAZ and NIOD (Indexed 2024 = 100)



Source: GLA Economics

3. Use and development trends in the CAZ and NIOD

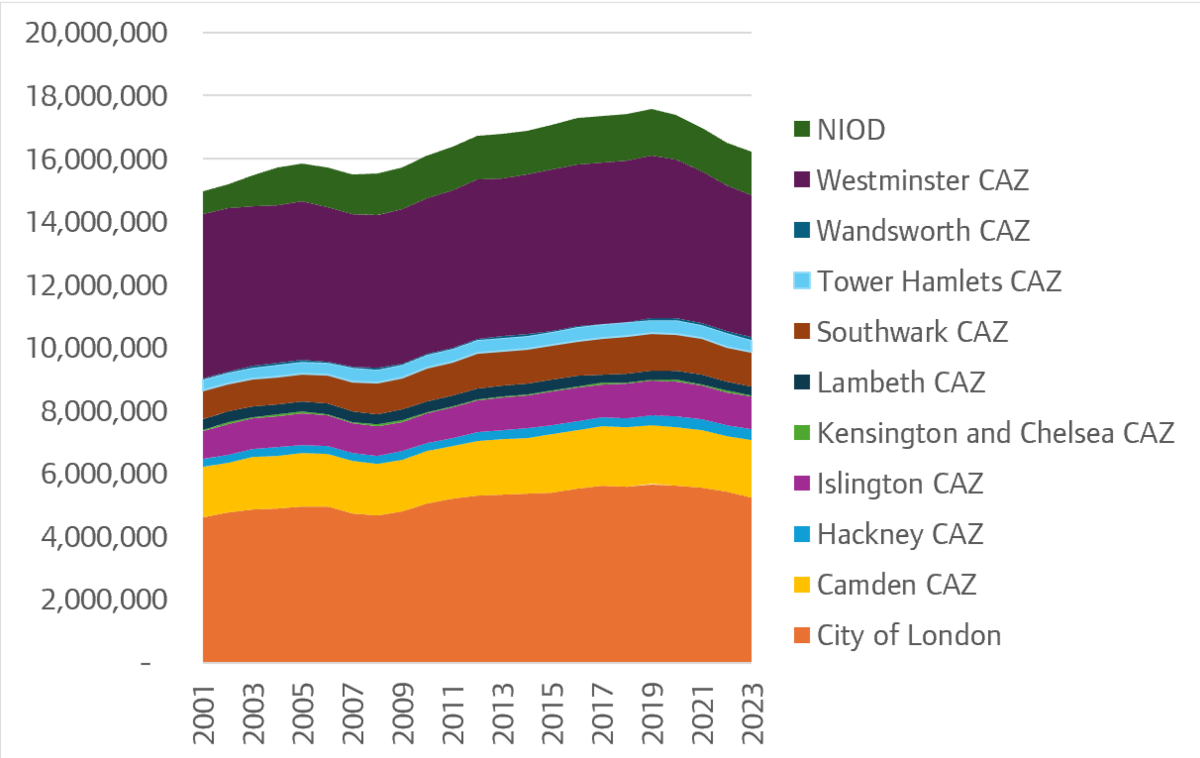
3.0.1 This section of the report looks at trends in selected uses in the CAZ and NIOD, including offices, retail, leisure and service uses, cultural infrastructure and hotels. It then explores development trends associated with commercial and residential uses.

3.1 Offices

3.1.1 Trends in office floorspace in the CAZ and NIOD associated with its component boroughs are illustrated in Figure 3.1.1 below drawing on VOA (2023) LSOA data matched to the CAZ and NIOD boundaries[7]. In overall terms, office floorspace in the CAZ and NIOD combined increased from 15.0 million sq.m in 2001 to an intermediate peak of 15.8 million sq.m in 2005, before falling back to 15.5 million sq.m in the wake of the financial crisis in 2008. It then grew strongly reaching a pre-pandemic peak of 17.6 million sq.m in 2019 before falling back to 16.2 million sq.m in 2023.

3.1.2 In 2001, the office stock of the CAZ and NIOD combined accounted for 61 per cent of the London total and 19 per cent of England and Wales. By 2023, the CAZ and NIOD office stock was 67 per cent of the London total and 20 per cent of England and Wales.

Figure 3.1.1 CAZ and NIOD office floorspace (sq.m) 2001-2023



Source: Valuation Office Agency (2023) / GLA analysis

[7] Please note: In December 2025, the VOA published updated commercial floorspace estimates at local authority level. At the time of the assessment Lower Super Output Area (LSOA) data was not available to enable these office floorspace estimates for the CAZ and NIOD areas to be updated. The VOA (2025) office floorspace estimates for London are lower than the corresponding estimates in the VOA (2023).

3.1.3 Across the whole 2001 to 2023 period, office floorspace in the CAZ increased by 607,000 sq.m and in the NIOD by 637,000 sq.m. There is much variation in the CAZ however, with significant gains to the office stock recorded over this period in the City of London (+634,000 sq.m), Camden CAZ (+220,000 sq.m), Southwark CAZ (+196,000 sq.m) and Islington CAZ (+153,000 sq.m). In contrast, Westminster CAZ witnessed a loss of almost 700,000 sq.m of office space over the same period.

3.1.4 Figure 3.1.1 also shows that the highest amounts of office floorspace in the CAZ in 2023 were the City of London (5.3 million sq.m) and Westminster CAZ (4.5 million sq.m) accounting for 32 per cent and 28 per cent respectively of the total CAZ and NIOD office stock combined).

3.1.5 **Office floorspace vacancy rates** in the CAZ (excluding the NIOD) and selected CAZ sub-markets[8] over the period 2003 to 2026 (year to date)[9] is illustrated in Figure 3.1.2. The chart shows that average office vacancy rates fluctuate, quite significantly at times, at different points in the business cycle and also following economic shocks.

3.1.6 According to the data sourced from CoStar property database, the average office vacancy rate in the CAZ has typically been in the 4 to 10 per cent range, with notable peaks in the aftermath of the dot com economic crisis in the early noughties, the 2008 financial crisis and more recently the 2020/21 global pandemic, peaking at 10 per cent in 2026 (year to date). The CoStar data in Figure 3.1.2 suggests that the average office vacancy rates in the CAZ were broadly similar to the London average over the period 2005 to 2026.

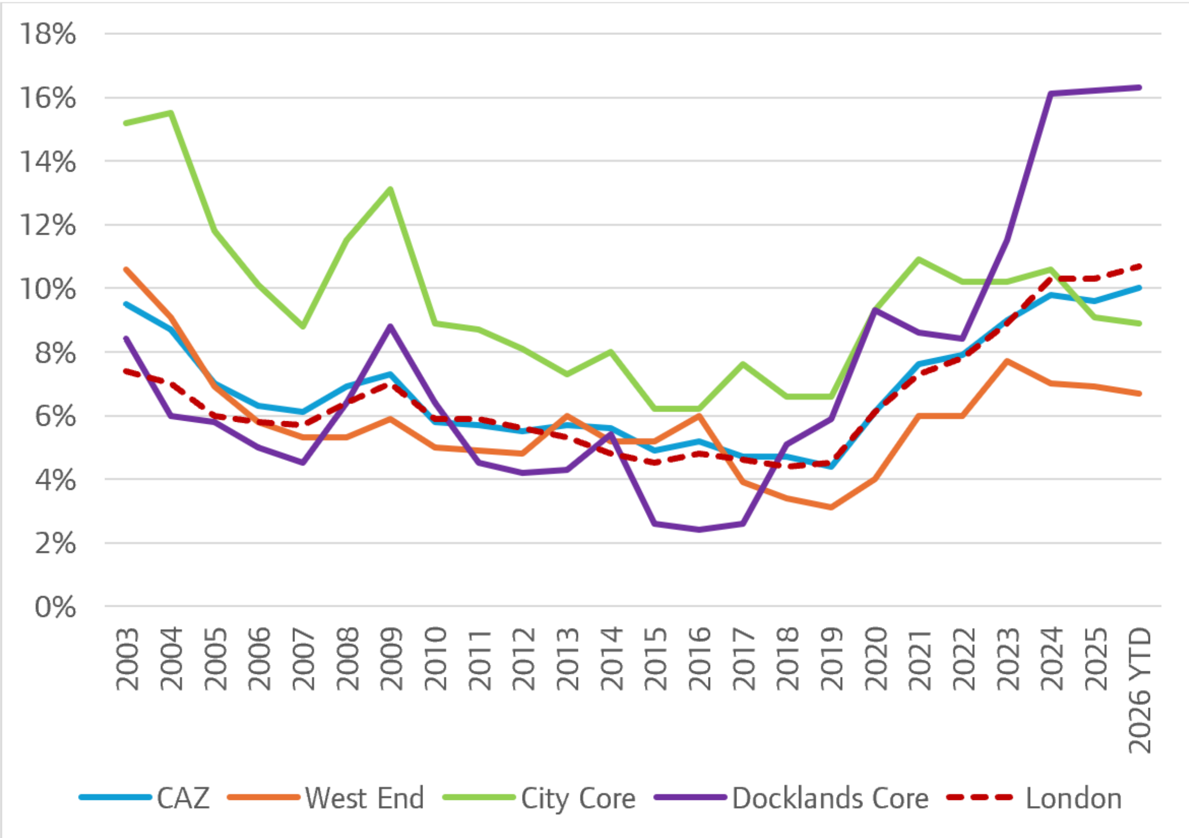
3.1.7 Looking at the three selected office sub-markets in the CAZ, the **West End** market has typically witnessed the lowest average office vacancy rates which were 3.1 per cent in 2019 reflecting the demand-supply balance in this sub-market with typically the highest average office rents. Following the pandemic, West End average office vacancy rates peaked at 7.7 per cent in 2023 before falling back to 6.7 per cent in 2026 (year to date).

3.1.8 The **City Core** sub-market (City of London) typically witnessed vacancy rates above those in the West End sub-market across the period 2003 to 2026, which may be a reflection of large amounts of new stock coming to market awaiting occupation in the City alongside older stock awaiting redevelopment opportunities or refurbishment. City Core market office vacancy rates were at their lowest in 2015 and 2016 (6.2 per cent) before rising during the pandemic to 10.9 per cent in 2021, and then falling back to 8.9 per cent in 2026 (year to date).

[8] The West End here includes the CoStar sub-markets of Mayfair, St James's, Soho and Covent Garden; the City Core includes City Core East, North and West; and Docklands Core is focused on the Northern Isle of Dogs including Canary Wharf.
[9] CoStar data was extracted on 23 June 2026.

3.1.9 The **Docklands Core** sub-market (akin to the NIOD) has perhaps seen the greatest volatility in average office vacancy rates compared to the West End and City Core sub-markets. It experienced peak office vacancy rates in 2009 (8.8 per cent) and in 2026 (year to date) (16.3 per cent). This can be contrasted with significantly lower office vacancy rates in 2015 to 2017 (between 2.4 and 2.6 per cent).

Figure 3.1.2 Average office vacancy rates in London, CAZ and selected sub-markets 2003 to 2024



Source: CoStar / GLA analysis. YTD = year to date

3.1.10 The preceding analysis is based on the total stock of offices recorded in the CoStar database in June 2026. It does not reflect variations in vacancy rates in the CAZ associated with different grades of offices ranging from the highest quality prime and Grade A stock to older second-hand secondary offices. Analysis of the CAZ office market across different grades can be found in recent research by Knight Frank for the London Property Alliance[10].

[10] Knight Frank. Space for Change office space dynamics in central-London

3.2 Retail, leisure and service uses

3.2.1 This sub-section examines floorspace trends in the CAZ for broad categories of town centre-related uses including retail (split by comparison goods[11] and convenience goods[12]), leisure[13], service[14] and miscellaneous/non-retail[15] uses. It also includes data on vacant floorspace. The analysis draws on data sourced from the Local Data Company/ Green Street via the GLA's High Streets Data Service.

3.2.2 Figure 3.2.1 illustrates retail, leisure and service floorspace trends in the CAZ (excluding the NIOD) over the period 2014 to 2024. In 2024, leisure and comparison goods retail comprise a significant proportion of total retail, leisure and service use floorspace in the CAZ (45 per cent and 36 per cent respectively), with lower proportions in service retail and convenience retail uses (11 per cent and 6 per cent respectively).

3.2.3 **Comparison goods** retail floorspace in the CAZ increased during the pre-pandemic period 2014 to 2019 with a compound annual average growth rate (CAGR)[16] of 1.3 per cent, reaching a peak of almost 1.6 million sq.m in 2019. It diminished during the pandemic period (2020/21) but has grown since to 1.5 million in 2024, albeit still below the 2019 peak. The overall growth rate for comparison goods retail in the CAZ for the period 2014 to 2024 is 0.3 per cent per annum (CAGR).

3.2.4 **Convenience goods** retail floorspace in the CAZ increased strongly during the pre-pandemic period 2014 to 2019 (+3.3 per cent CAGR), but more mode modestly in the period 2019 to 2024 (+0.2 per cent CAGR) reaching 242,000 sq.m in 2024.

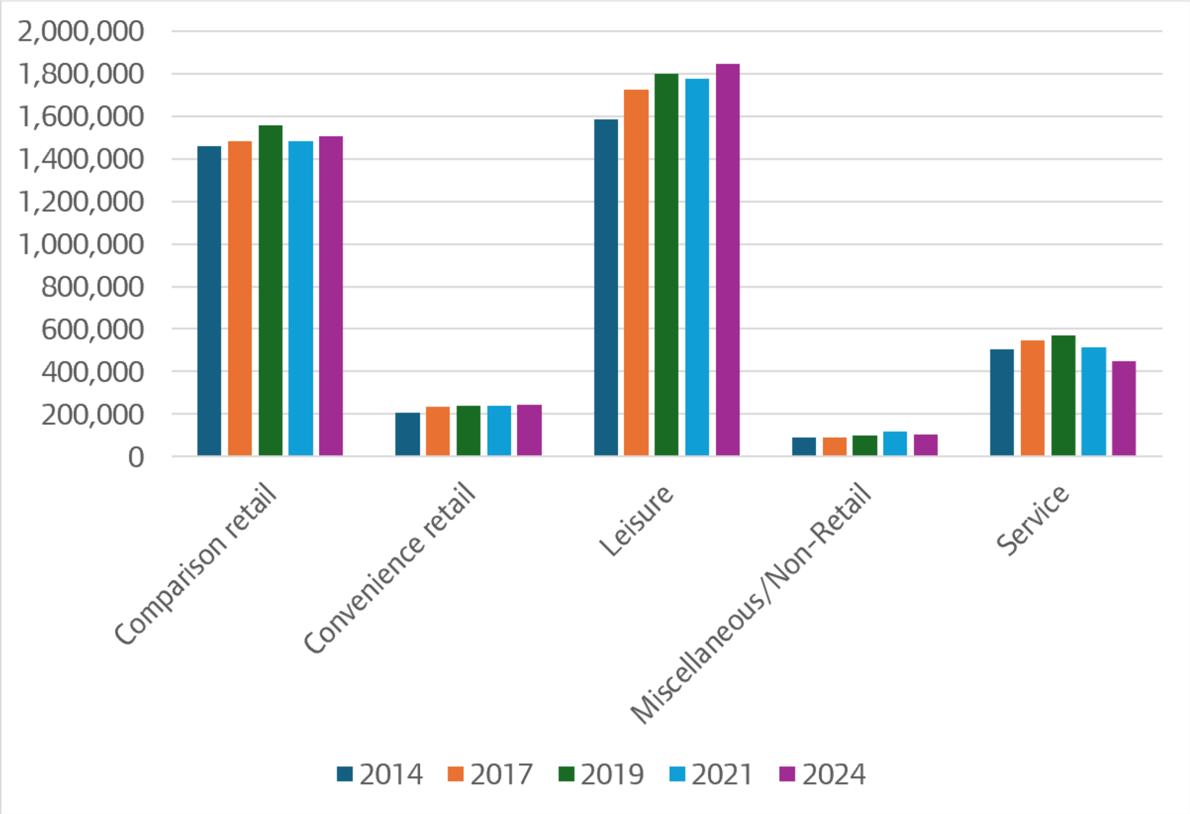
3.2.5 **Leisure** uses floorspace in the CAZ also grew strongly over the period 2014 to 2019 (+2.6 per cent CAGR), before dipping slightly in 2021 and then recovering a growth trend to 2024 and reaching a peak of more than 1.8 million sq.m (+0.5 per cent CAGR, 2019 to 2024).

3.2.6 **Miscellaneous and non-retail services** comprise only 2 per cent of total retail, leisure and service use floorspace in the CAZ in 2024 and increased modestly over the period 2014 to 2024 (+1.5 per cent CAGR).

[11] **Comparison goods** include items like clothes, electrical items, household and leisure goods which are bought relatively infrequently, so consumers usually evaluate prices, features and quality before making a purchase.
[12] **Convenience goods** include everyday essential items like food, drink, newspapers and confectionery
[13] **Leisure uses** here include cafes, restaurants, takeaways, pubs and bars, sports facilities, museums, art galleries, night clubs, other entertainment and serviced visitor accommodation.
[14] **Service uses** include banks and building societies, employment and postal services, automobile services, estate agents and auctioneers, hairdressing, health and beauty, household and home, laundrettes and dry cleaners, locksmiths, clothing and shoe repairs, travel agents and other miscellaneous services.
[15] **Miscellaneous/non-retail uses** include various civic, social and community infrastructure uses, hospitals, emergency services, various public and private transport uses and delivery hubs. It does not include offices.
[16] **Compound annual growth rate (CAGR)** calculates the smoothed annual growth rate of a variable over time.

3.2.7 **Service retail** floorspace in the CAZ increased strongly during the pre-pandemic period 2014 to 2019 (+2.5 per cent CAGR) but declined by 4.6 per cent (CAGR) over the period 2019 to 2024.

Figure 3.2.1 CAZ occupied retail, leisure and service floorspace (sq.m) 2014-2024



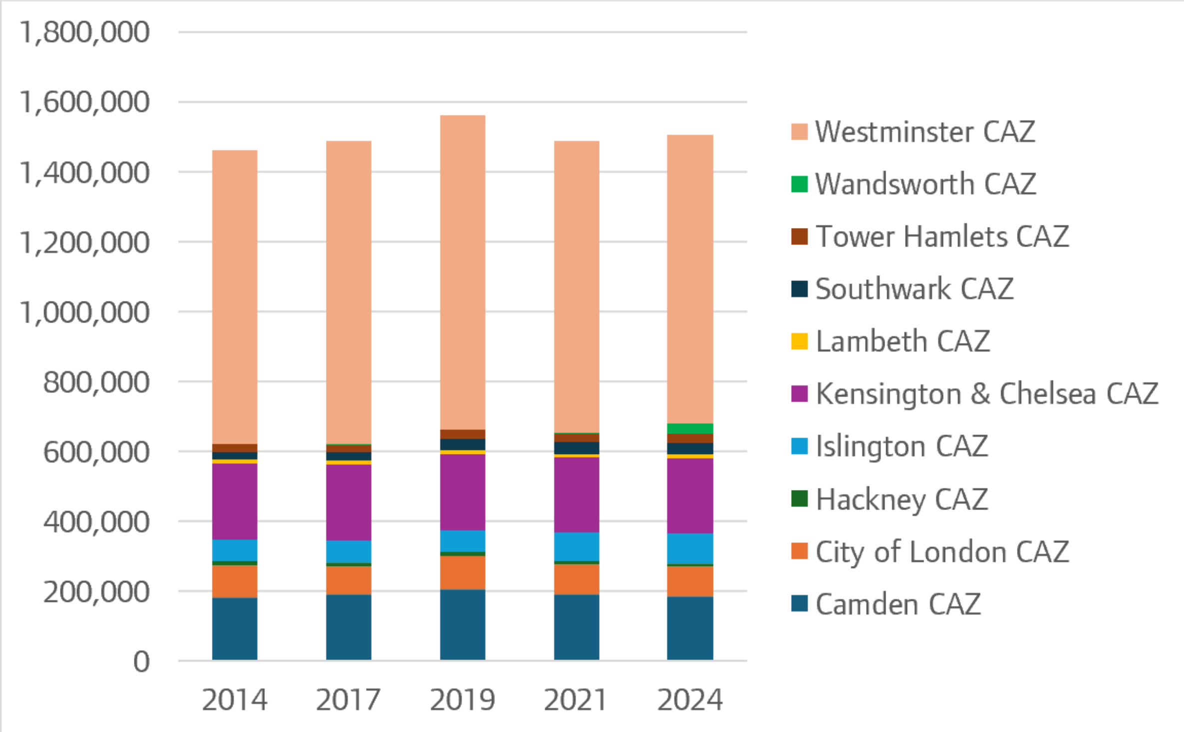
Source: Local Data Company/HSDS/GLA analysis

3.2.10 The following charts in this sub-section look at the CAZ borough components of the trends in the sub-categories of comparison retail, convenience retail, leisure, service retail and vacant floorspace.

3.2.11 Starting with **comparison goods retail**, Figure 3.2.2 below shows that within the CAZ in 2024, the boroughs of Westminster, Kensington and Chelsea and Camden contain the highest amounts of floorspace associated with this use (55 per cent, 14 per cent and 12 per cent respectively). This reflects the presence of the two International centres in these boroughs (the West End and Knightsbridge), where comparison goods retail is a significant component of total retail floorspace.

3.2.12 Among the CAZ boroughs, the largest percentage increase in comparison goods retail over the period 2014 to 2024 was witnessed in the Wandsworth CAZ (+47 per cent CAGR) following the delivery of the Battersea Power Station development. Southwark and Islington CAZ also grew strongly (+5 and +3 per cent CAGR respectively) whereas in contrast, other areas experienced small declines including the City of London (-0.7 per cent) and Westminster and Kensington and Chelsea CAZ (both -0.2 per cent).

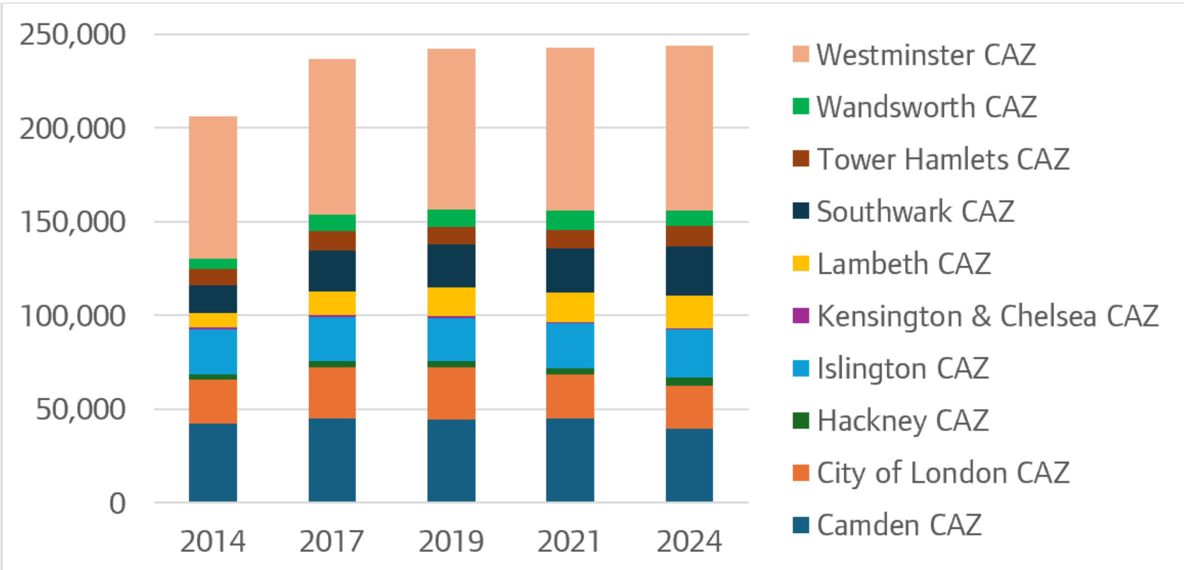
Figure 3.2.2 CAZ comparison goods retail floorspace (sq.m) 2014-2024



Source: Local Data Company/HSDS/GLA analysis

3.2.13 **Convenience goods retail** is more evenly distributed across the component CAZ boroughs relative to their geographical size, with Westminster CAZ accounting for 36 per cent of floorspace (see Figure 3.2.3 below). Several of the CAZ boroughs witnessed strong growth in convenience goods retail in their respective parts of CAZ over the period 2014 to 2024 and most notably Lambeth (8.2 per cent CAGR), Southwark (5.9 per cent), Hackney (5.0 per cent) and Wandsworth (3.8 per cent).

Figure 3.2.3 CAZ convenience goods retail floorspace (sq.m) 2014-2024

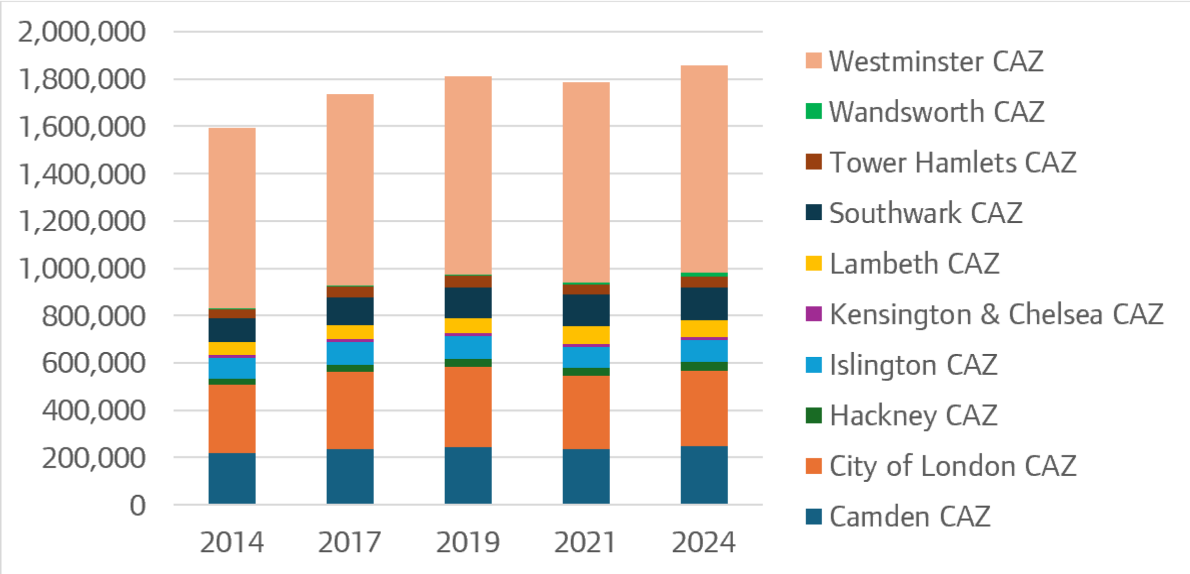


Source: Local Data Company/HSDS/GLA analysis

3.2.14 **Leisure** floorspace trends in the CAZ are illustrated in Figure 3.2.4. According to Local Data Company data, Westminster CAZ contains almost half of all leisure floorspace in the CAZ, reflecting the presence of the West End and its internationally significant roles in culture and the experience economy.

3.2.15 Over the period 2014 to 2024, leisure floorspace grew strongest in the Westminster CAZ (by over 100,000 sq.m) and in Southwark CAZ (+34,000 sq.m), Camden's CAZ (+31,000 sq.m, which includes parts of the West End and the recent King's Cross development) and the City of London (+27,000 sq.m). In percentage terms, leisure floorspace grew strongly in Wandsworth CAZ (+23.5 per cent CAGR), a reflection of the Battersea Power Station development, and Hackney CAZ (+4.9 per cent) which contains Shoreditch.

Figure 3.2.4 CAZ leisure floorspace (sq.m) 2014-2024

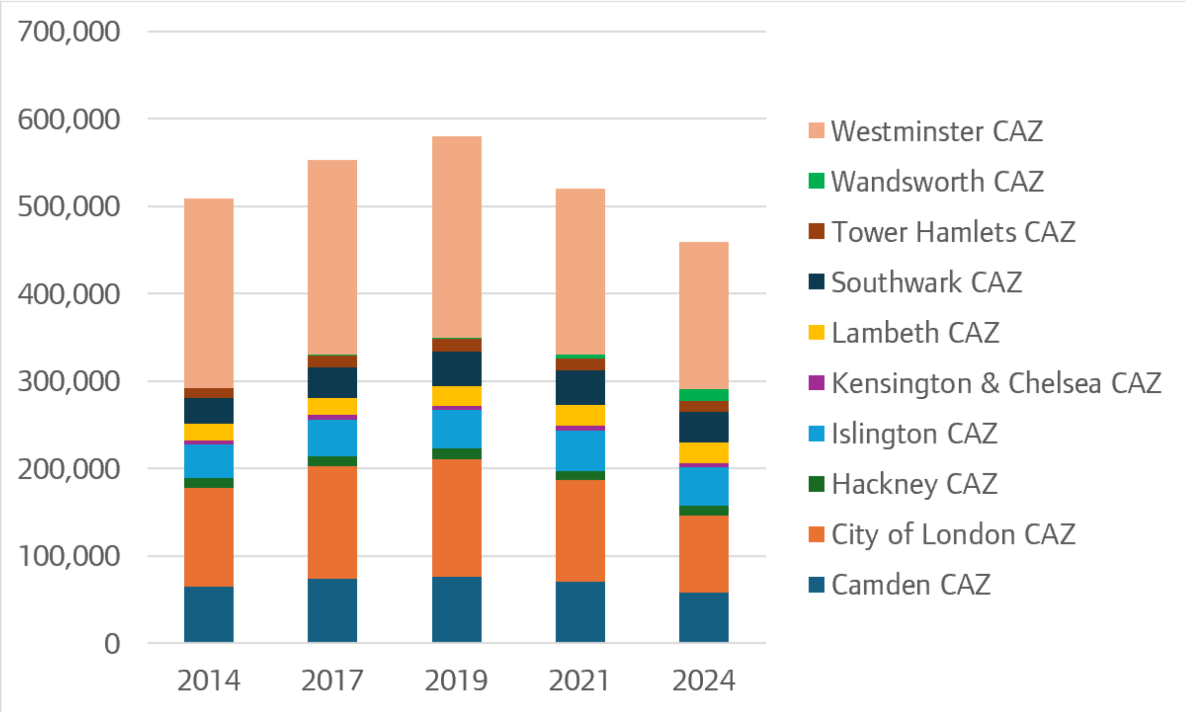


Source: Local Data Company/HSDS/GLA analysis

3.2.15 **Service retail** floorspace trends over the period 2014 to 2024 are shown in Figure 3.2.5 below. Westminster CAZ contained the highest amount of floorspace in such uses in 2024 (almost 170,000 sq.m and 38 per cent of the CAZ total), followed by the City of London (20 per cent of the CAZ total) and Camden CAZ (13 per cent).

3.2.16 Strongest growth in service retail floorspace over the period 2014 to 2024 occurred in Wandsworth CAZ (+12,500 sq.m) whereas in contrast, some boroughs witnessed a decline, notably in Westminster CAZ (-47,000 sq.m), the City of London (-24,000 sq.m) and Camden CAZ (-7,000 sq.m).

Figure 3.2.5 CAZ service retail floorspace (sq.m) 2014-2024

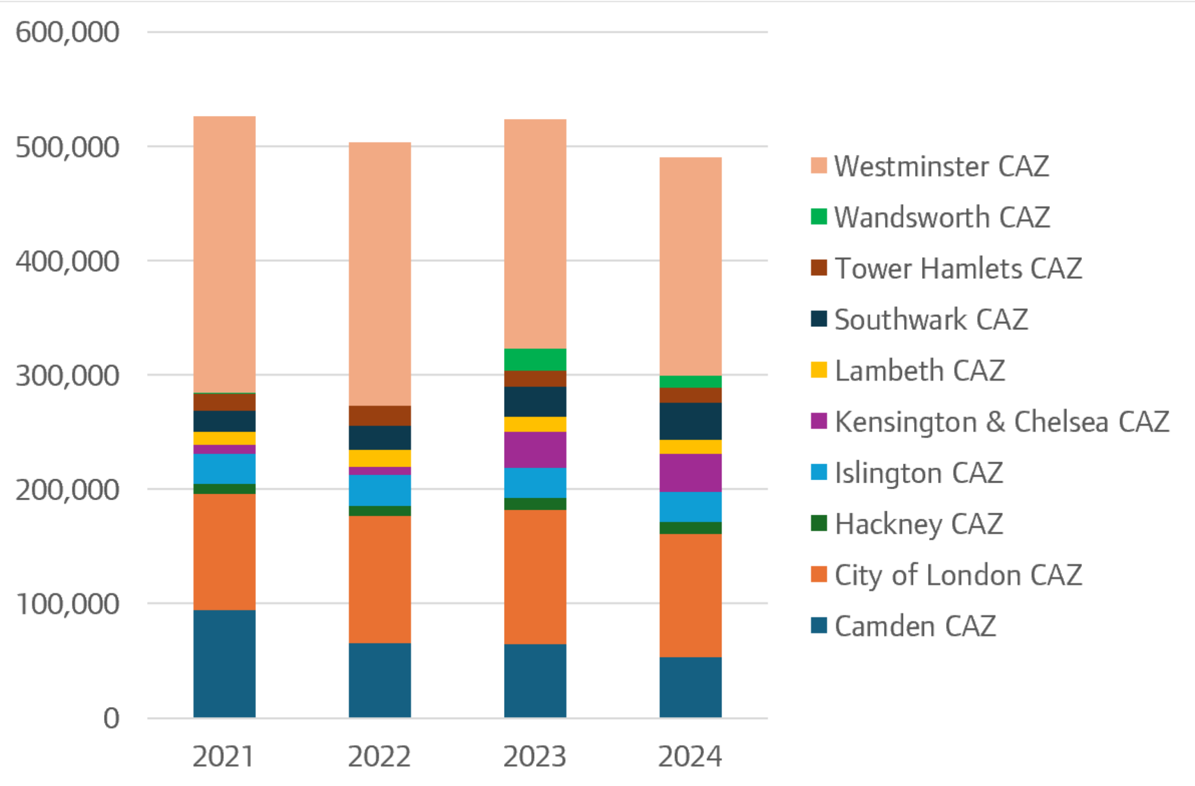


Source: Local Data Company/HSDS/GLA analysis

3.2.17 The pandemic had a significant impact on the CAZ, as it did for many global city centres. The amount of **vacant retail, leisure and service floorspace** in the CAZ reached 526,000 sq.m in 2021[17], but then decreased to 490,000 sq.m in 2024 (see Figure 3.2.6). These totals correspond to a vacancy rate of 11 per cent in 2021 and 2024. Between 2021 and 2024, total amounts of vacant space decreased in the Westminster and Camden CAZ (down 51,000 sq.m and 41,000 sq.m respectively) but increased to various degrees in some CAZ borough areas including Kensington and Chelsea, Southwark and Wandsworth.

[17] There was uncertainty about vacant floorspace data in the premises dataset for the period 2014 to 2019 and so data is only presented here for the period 2021 to 2024.

Figure 3.2.6 CAZ vacant retail, leisure and service use floorspace (sq.m) 2021-2024



Source: Local Data Company/HSDS/GLA analysis

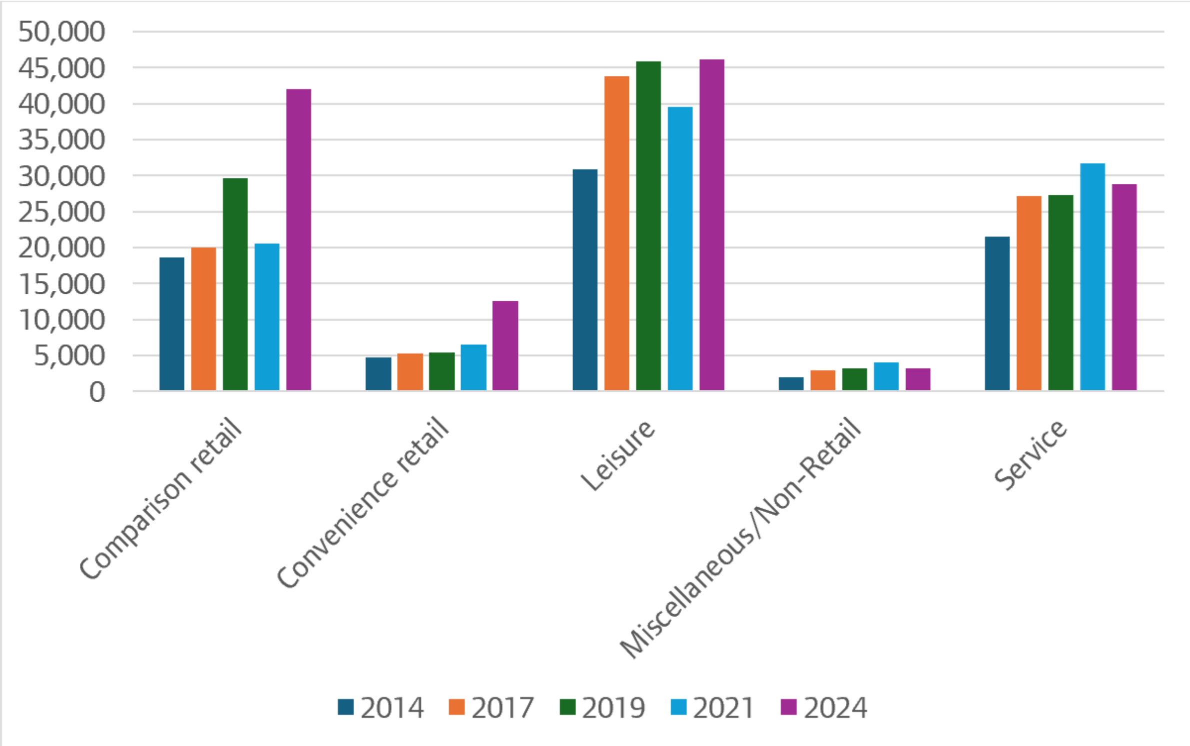
3.2.18 Figure 3.2.7 below illustrates retail, leisure and service floorspace trends for the **NIOD** over the period 2014 to 2024. It shows that comparison goods retail floorspace increased significantly over the whole period (apart from a dip in the pandemic period) growing by more than 23,400 sq.m or 8.5 per cent CAGR. Canary Wharf Metropolitan town centre accounted for 96 per cent of this growth within the NIOD.

3.2.19 Convenience goods retail floorspace in the NIOD also increased strongly (from a lower base compared to comparison goods) by almost 8,000 sq.m or 10.2 per cent CAGR, of which 99 per cent was in Canary Wharf town centre. Unlike comparison retail floorspace, convenience retail floorspace did not experience a dip during the pandemic period.

3.2.20 Leisure use floorspace in the NIOD increased by more than 15,000 sq.m over the 2014 to 2024 period (4.1 per cent CAGR), despite a dip during the pandemic period. Compared to comparison and convenience retail, a much lower proportion of the growth in leisure floorspace in the NIOD (71 per cent) was in Canary Wharf town centre.

3.2.21 Service retail floorspace in the NIOD grew by more than 7,000 sq.m between 2014 and 2024 (3.0 per cent CAGR) peaking in 2021.

Figure 3.2.7 NIOD retail, leisure and service floorspace (sq.m) 2014-2024

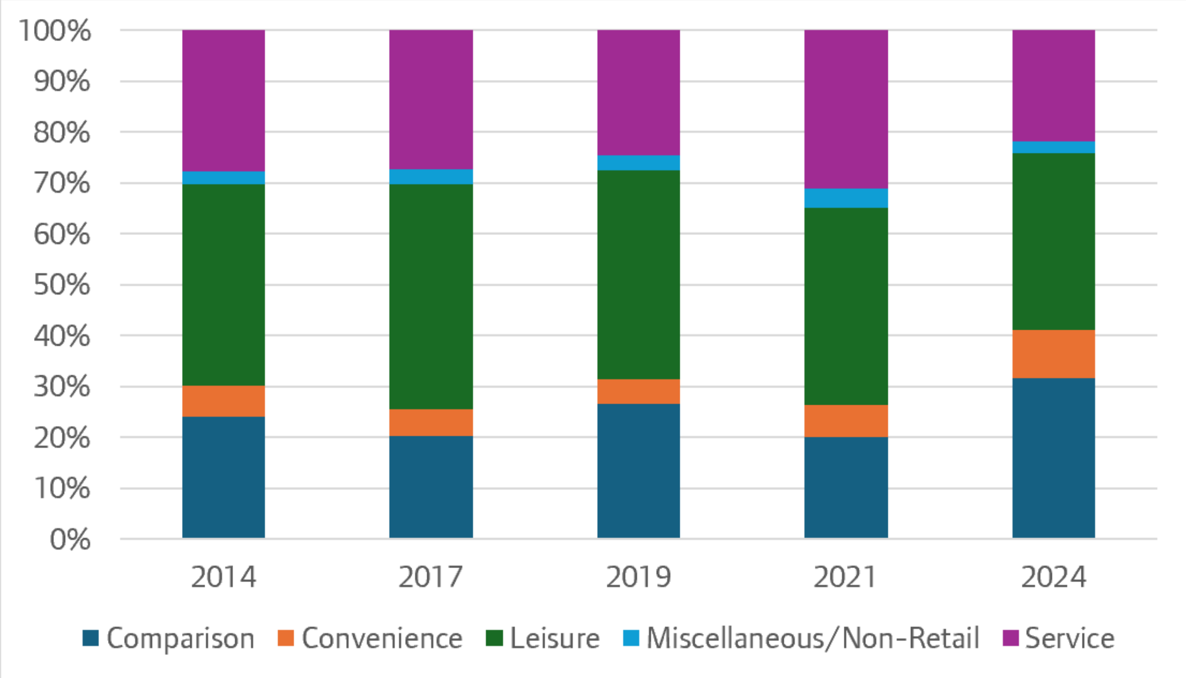


Source: Local Data Company/HSDS/GLA analysis

3.2.22 **Vacant retail, leisure and service use floorspace** in the NIOD was 9,400 sq.m in 2021 (8 per cent rate) rising to 9,800 sq.m by 2024 a vacancy rate of around 7 per cent, and notably much lower than that for the CAZ (11 per cent).

3.2.23 Finally in this sub-section, Figure 3.2.8 shows the **changing composition of occupied retail, leisure and service floorspace** in the NIOD over the period 2014 to 2024. It shows that there has been a shift in the balance towards comparison retail, increasing from a 24 per cent share in 2014 to 32 per cent in 2024, and convenience goods retail, increasing from 6 per cent in 2014 to 9 per cent in 2024. The share of leisure use floorspace reduced slightly from 40 per cent to 35 per cent, and service retail uses reduced from 28 to 22 per cent.

Figure 3.2.8 Proportions of occupied retail, leisure and service floorspace in the NIOD, 2014-2024



Source: Local Data Company/HSDS/GLA analysis

3.3 Cultural infrastructure

3.3.1 In 2023, 49 per cent of London's cultural consumption infrastructure[18] and 19 per cent of cultural production infrastructure[19] was located in the Central Activities Zone.

3.3.2 The West End alone accounts for 30 per cent of the **cultural consumption infrastructure** in the CAZ, most notably in archives, dance and music rehearsal, fashion and textile design and creative workspace (see Figure 3.3.1). The CAZ retail

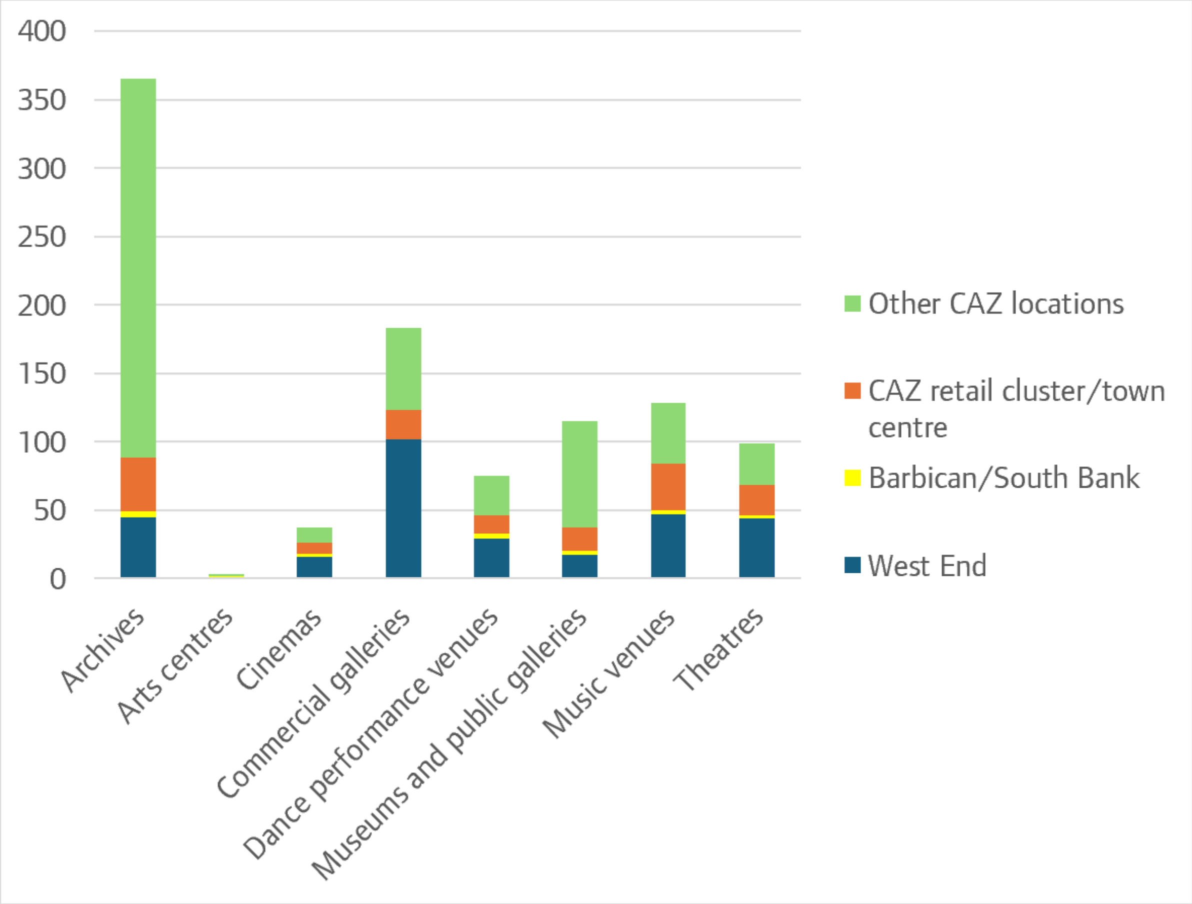
[18] Source: Cultural Infrastructure Map | London City Hall (2023). Note: measured as counts of infrastructure assets. **Cultural consumption infrastructure** categories in this report include Archives, Arts centres, Cinemas, Commercial galleries, Dance performance venues, Museums and public galleries, Music venues (includes all music venues, nightclubs, LGBT venues and grassroot music venues) and Theatres.

[19] **Cultural production infrastructure** categories in this report include Artist workspaces, Creative workspace (including creative co-working space and makerspace), Dance rehearsal studios, Design, making and manufacturing (including making and manufacturing, prop and costume making, set and exhibition building), Fashion, jewellery and textile design/finishing (including Fashion and design, Jewellery design and Textile design), Large scale media production, Music production/ rehearsal (including Music recording studios and Music rehearsal studios) and Theatre rehearsal studios. Data for 2025/26 for cultural production infrastructure has been published recently at Cultural Infrastructure Map 2025 | London Datastore.

clusters/town centres[20] account for a further 15 per cent, the night-time economy clusters (Barbican and South Bank) 2 per cent[21] and other parts of the CAZ 53 per cent.

3.3.3 The CAZ accounts for 61 per cent of London's commercial galleries, 45 per cent of its museums and public galleries, 38 per cent of its dance performance venues, 37 per cent of its theatres and 34 per cent of its music venues[22].

Figure 3.3.1 Number of cultural consumption infrastructure assets in the CAZ, by category and location type, 2023



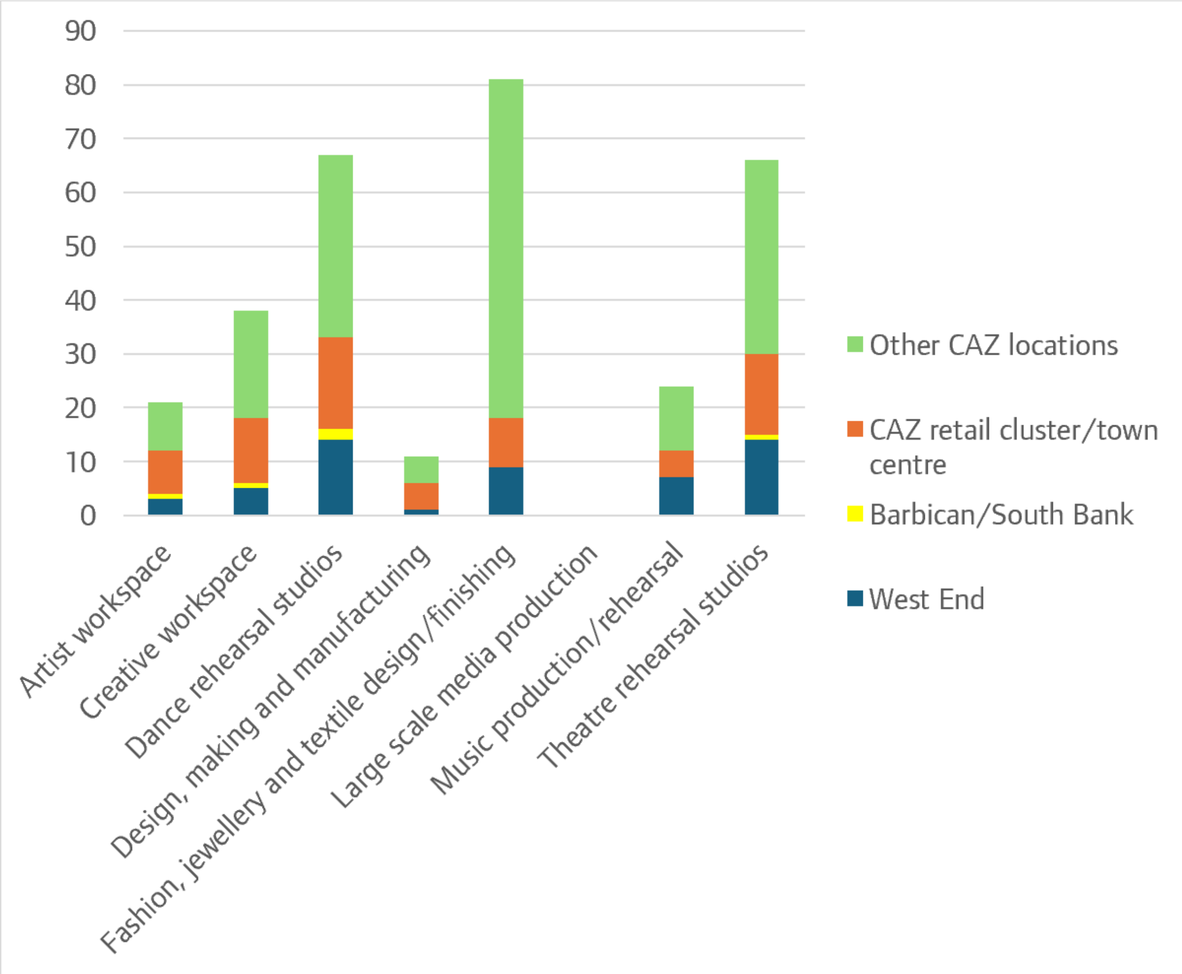
Source: GLA Cultural Infrastructure Map (2023) / GLA analysis

3.3.4 The CAZ accounts for 35 per cent of London's **cultural production infrastructure** associated with fashion, jewellery and textile design/finishing, 31 per cent of its theatre rehearsal studios and 27 per cent of its dance rehearsal studios.

[20] Note that Angel, Edgware Road/Church Street, Elephant and Castle/Walworth Road and Whitechapel town centres partly overlap the CAZ boundary.
[21] Note that the measure is counts of infrastructure, not floorspace nor significance, which explains the relatively low proportion in the Barbican and South Bank/Bankside using this measure.
[22] Note that cultural consumption (and production) assets can perform one of more of the functions or 'categories.

3.3.5 The West End accounts for 17 per cent of the **cultural production infrastructure** in the CAZ (see Figure 3.3.2), the CAZ retail clusters/town centres a further 23 per cent, the night-time economy clusters (Barbican and South Bank) 2 per cent and other parts of the CAZ 58 per cent.

Figure 3.3.2 Number of cultural production infrastructure assets in the CAZ, by category and location type, 2023



Source: GLA Cultural Infrastructure Map (2023) / GLA analysis

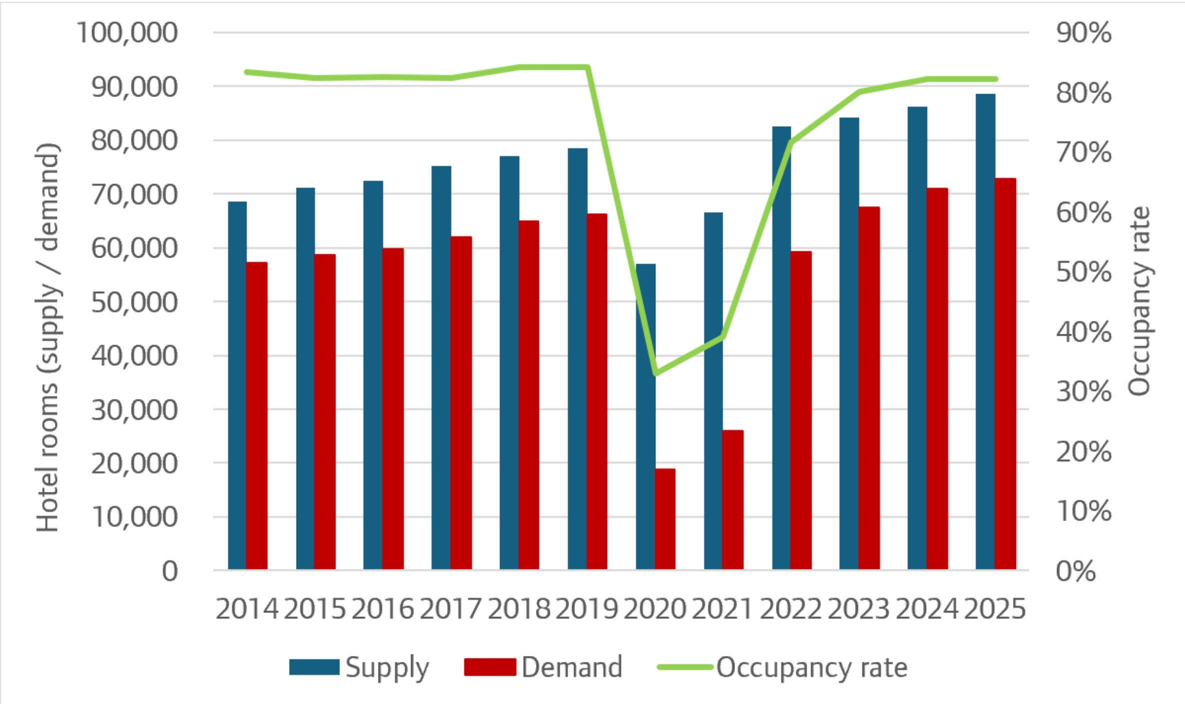
3.4 Hotels

3.4.1 Figure 3.4.1 below illustrates the trends in the average supply and demand of hotel rooms in the CAZ over the period 2014 to 2025. The supply refers to the total stock of hotel rooms and demand refers to the average number of rooms that are occupied in each calendar year. The occupancy rate is the average hotel room demand figure as a percentage of the hotel supply figure.

3.4.2 Prior to the pandemic, the supply of hotel rooms in the CAZ increased from around 69,000 in 2014 to 79,000 in 2019. There was also a corresponding increase in demand over this period from 57,000 rooms (equivalent)[23] in 2014 to 66,000 in 2019. The average occupancy rate remained steady during this period in the range 82 to 84 per cent.

3.4.3 The global pandemic (2020/21) had a significant impact on hotel room supply, demand and occupancy rates associated with periods of lockdown and travel restrictions. By 2022, the available supply of hotels rooms in the CAZ bounced back to 82,000 rooms in 2022, increasing further to reach over 88,000 rooms by 2025. Demand for hotel rooms also increased, exceeding pre-pandemic levels by 2023, with a further increase to 73,000 rooms (equivalent) by 2025. Post-pandemic average occupancy rates in the CAZ however took time to recover, increasing from 33 per cent during the pandemic to 72 per cent in 2022 and reaching 82 per cent in 2024 and 2025.

Figure 3.4.1 CAZ hotel rooms supply, demand and occupancy rate (%) 2014 to 2025



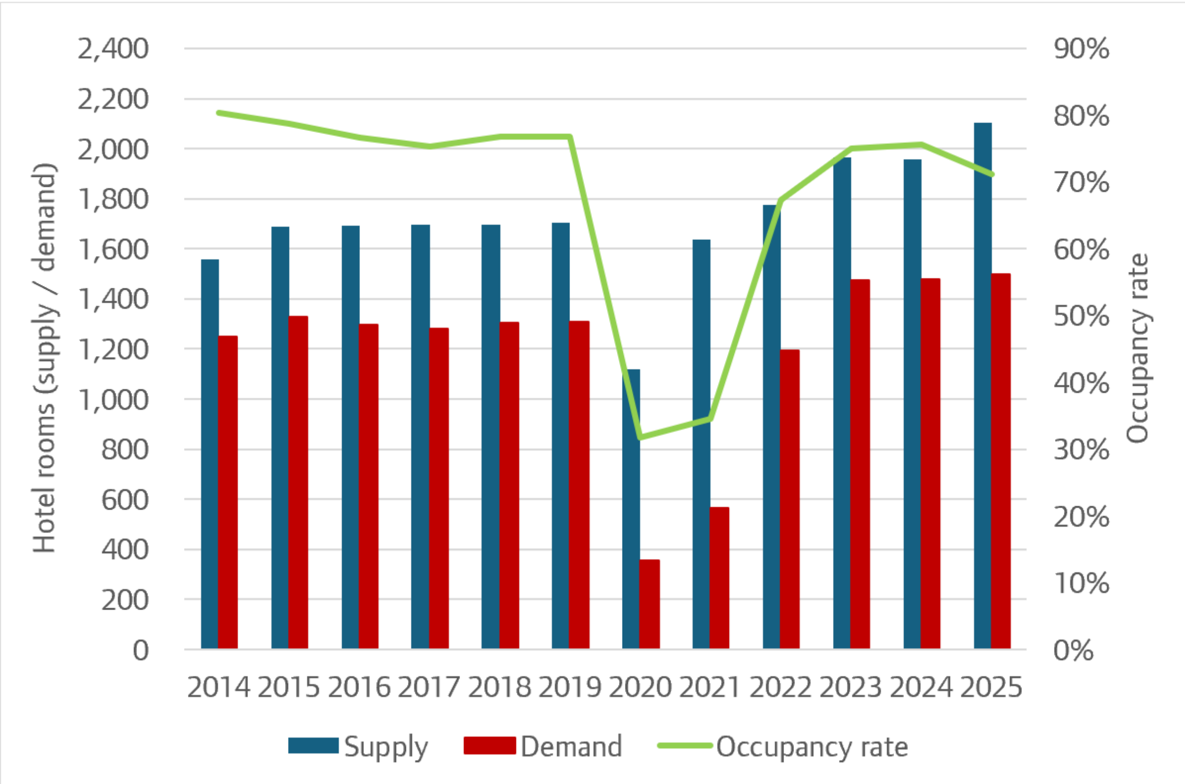
Source: CoStar / GLA analysis

3.4.4 Figure 3.4.2 below illustrates the trends in the average supply and demand of hotel rooms in the NIOD over the period 2014 to 2025. In the period before the pandemic, the supply of hotel rooms in the NIOD increased from 1,600 in 2014 to 1,700 in 2019, with average demand typically around 1,300 rooms (equivalent), and an average occupancy rate of between 75 and 80 per cent.

[23] Rooms demanded are typically expressed in terms of the number of room nights. Here we have adjusted room nights to rooms equivalent by dividing monthly room nights by the number of days in each month of the year, providing a rooms equivalent measure which can be compared with rooms supply.

3.4.5 The pandemic (2020/21) had an impact on hotel room supply in the NIOD and a significant impact on demand (as in the CAZ and London as a whole). The available supply of hotels rooms in the NIOD then increased strongly, exceeding pre-pandemic levels by 2022 and increasing further to over 2,100 in 2025. Demand also bounced back to reach almost 1,500 rooms (equivalent) in 2023, 2024 and 2025. Post-pandemic average occupancy rates in the NIOD returned to 75 per cent in 2023, just a small margin below the pre-pandemic NIOD average occupancy rate of 77 per cent. By 2025 the NIOD average occupancy rate was 71 per cent, 11 percentage points lower than the corresponding average occupancy rate in the CAZ.

Figure 3.4.2 NIOD hotel rooms supply, demand and occupancy rate (%) 2014 to 2025



Source: CoStar / GLA analysis

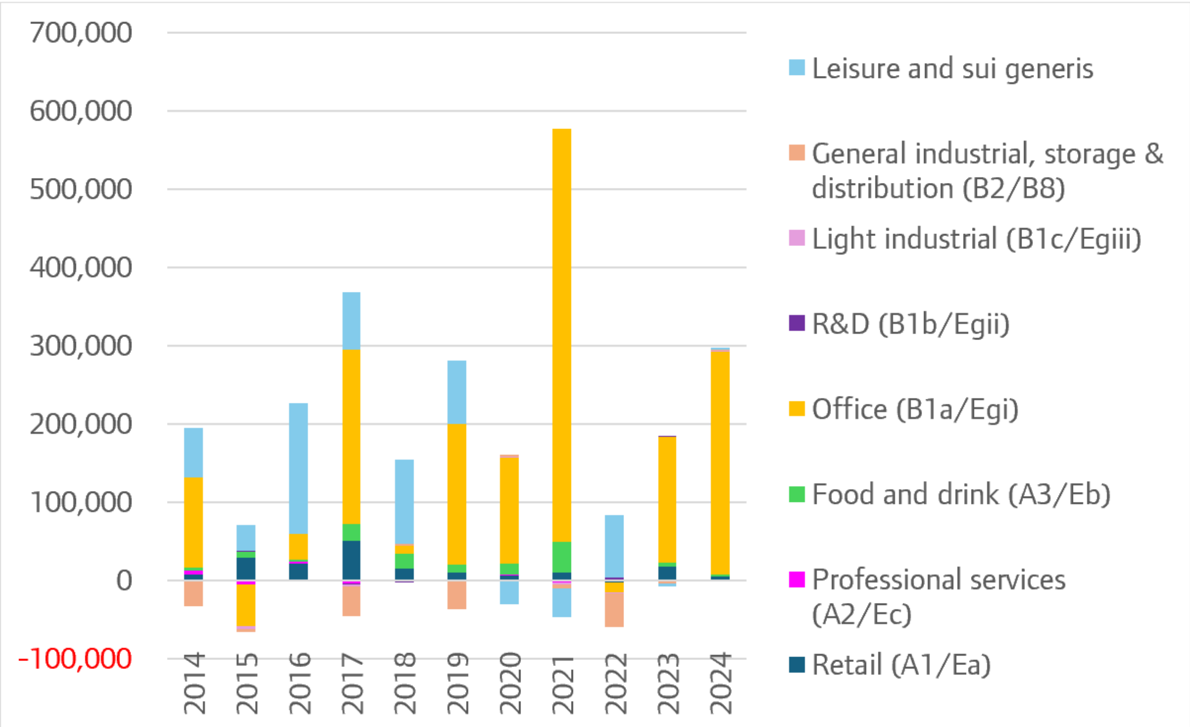
3.5 Non-residential development trends

3.5.1 Net change in floorspace in completed developments associated with non-residential uses in the CAZ over the period 2014 to 2024 is illustrated in Figure 3.5.1 below. In overall terms after balancing net gains and losses, the CAZ recorded a net gain of around 2.3 million sq.m of non-residential floorspace (excluding hotels) in completed developments over this period.

3.5.2 Office use accounted for the highest proportion of net floorspace gains and a total of 1.6 million sq.m. Retail use recorded net gains of around 165,000 sq.m, food and drink use 125,000 sq.m and leisure, sui generis cultural uses a further 540,000 sq.m.

3.5.3 Some non-residential uses recorded net losses of floorspace in completed developments in CAZ over the same period, including storage or distribution uses (155,000 sq.m), light industrial uses (11,000 sq.m) and Class E(c) financial and professional services (5,000 sq.m).

Figure 3.5.1 CAZ net floorspace (sq.m) in development completions, non-residential uses 2014 to 2024



Source: Planning London Datahub (extract October 2025) / GLA analysis

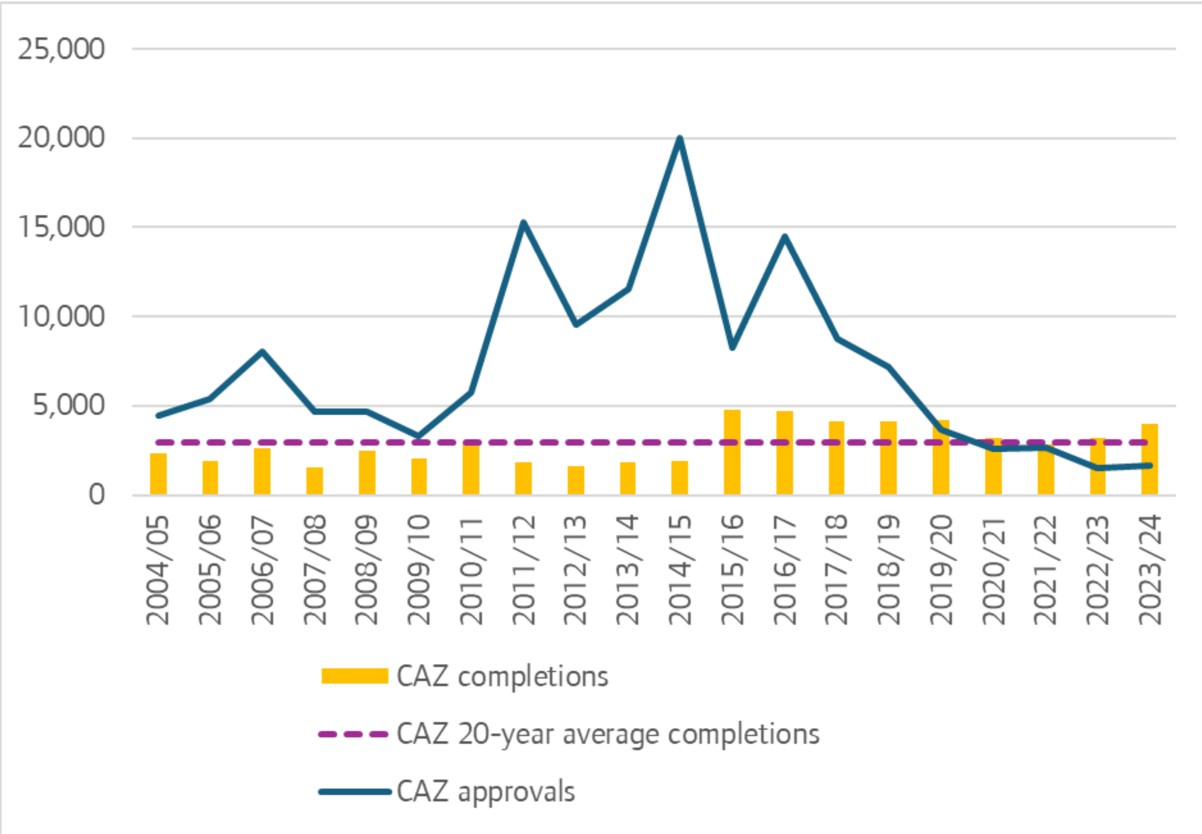
3.6 Residential development trends

3.6.1 This sub-section explores trends in residential development approvals and completions in the CAZ and NIOD over the period from 2004/5 to 2023/24.

3.6.2 The number of housing units in development approvals (i.e. planning permissions) in the CAZ (excluding the NIOD) is shown in Figure 3.6.1 below. These ranged from 3,000 to 8,000 per annum during the early period 2004/5 to 2010/11 and then increased substantially to a range of 8,000 to 20,000 per annum between 2011/12 to 2017/18, peaking in 2014/15. The number of housing units in development approvals in the CAZ then reduced to around 1,500 to 3,600 per annum between 2019/20 and 2023/24.

3.6.3 Figure 3.6.1 shows however, that the number of housing units in development completions in the CAZ reflected a different trend to approvals. In the period 2004/5 to 2014/15, housing completions were typically in the range of 1,500 to 2,800 units per annum. From 2015/16 onwards, annual housing completions in the CAZ ranged from 2,800 to 4,700 units. Across the whole period 2004/5 to 2023/24, housing completions in the CAZ totalled 58,221, an average of 2,900 units per annum.

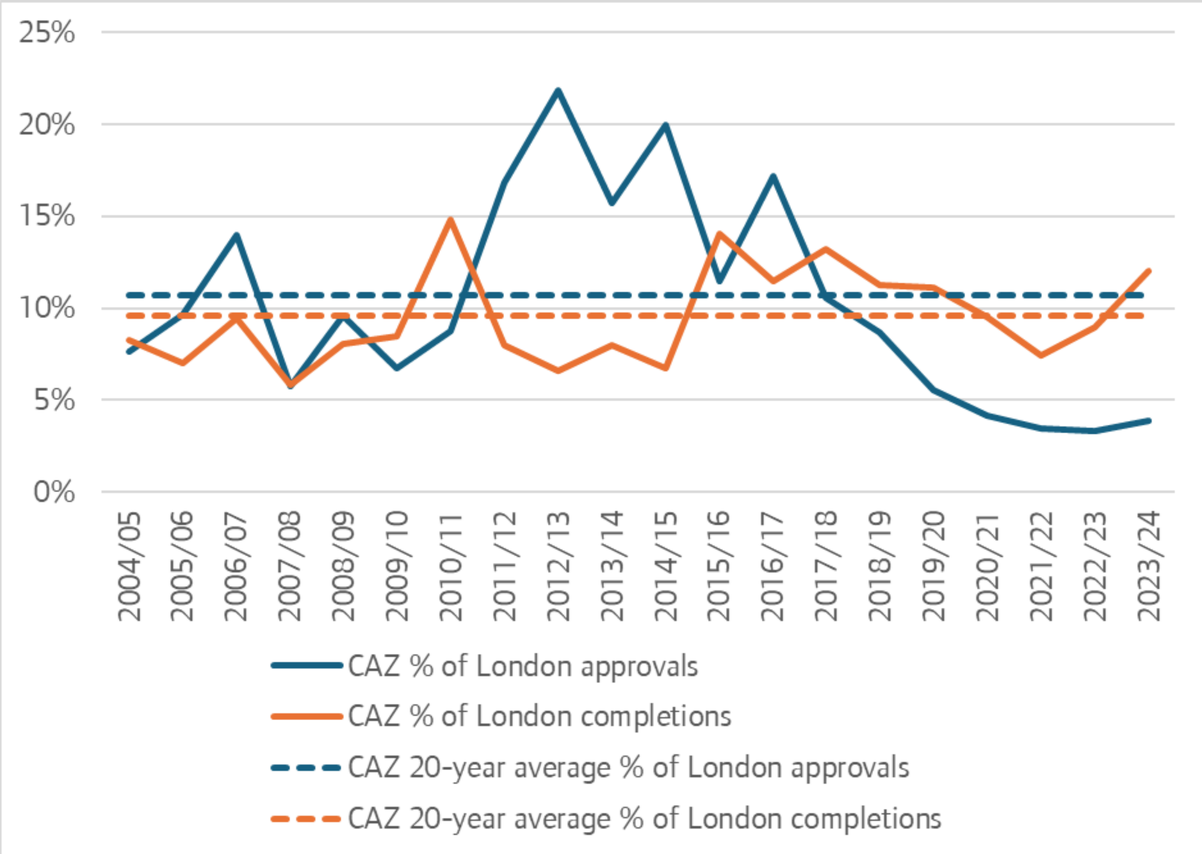
Figure 3.6.1 Net housing completions and approvals (units) in CAZ 2004/5 to 2023/24



Source: Planning London Datahub (extract 11 August 2025) / GLA analysis

3.6.4 Figure 3.6.2 shows the annual number of housing unit approvals and completions in the CAZ as a proportion of the London totals. Over the period 2004/5 to 2023/24, housing unit approvals in the CAZ averaged 11 per cent of the London total and housing unit completions averaged 10 per cent.

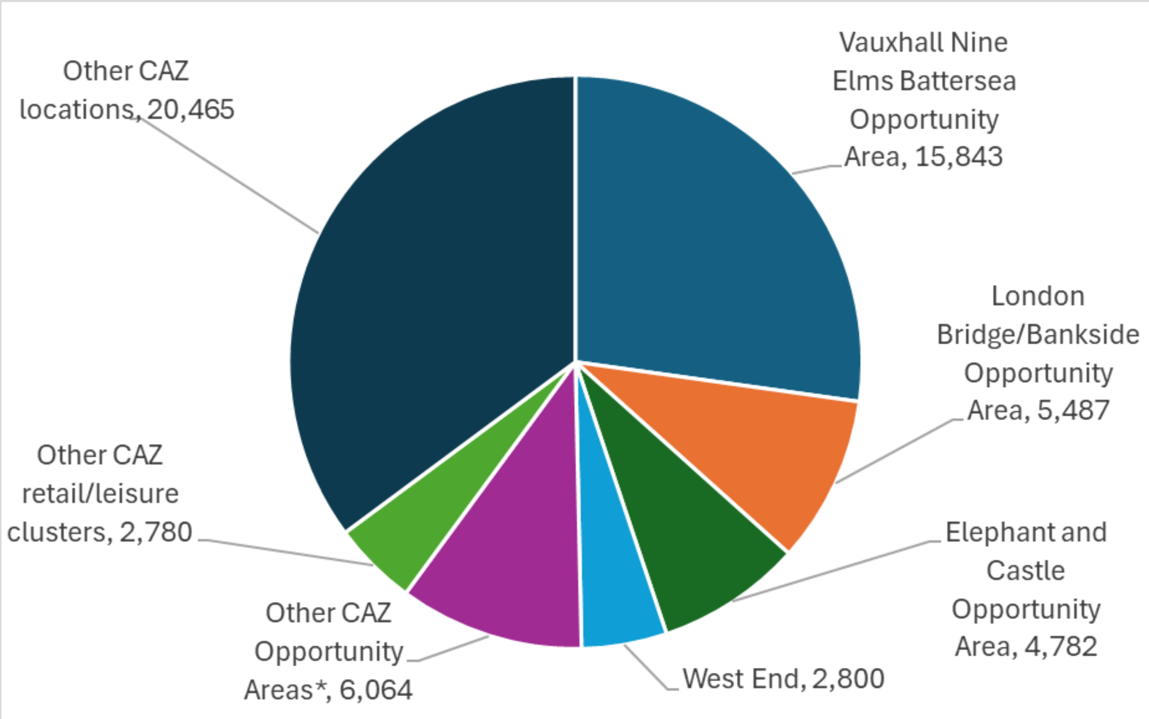
Figure 3.6.2 Net housing completions and approvals in CAZ as a percentage of London totals 2004/5 to 2023/24



Source: Planning London Datahub (extract 11 August 2025) / GLA analysis

3.6.5 Figure 3.6.3 below illustrates the contributions of different areas within the CAZ towards the 58,221 net completed housing units over the period 2004/5 to 2023/24. The Vauxhall, Nine Elms, Battersea (VNEB) Opportunity Area made the largest contribution of any area within the CAZ, delivering over 15,800 units (27 per cent of the CAZ total). The London Bridge/Bankside Opportunity Area delivered a further 5,487 units (9 per cent of the CAZ total) and the Elephant & Castle Opportunity Area 4,782 units (8 per cent).

Figure 3.6.3 Net housing completions (units) in CAZ 2004/5 to 2023/24, by location

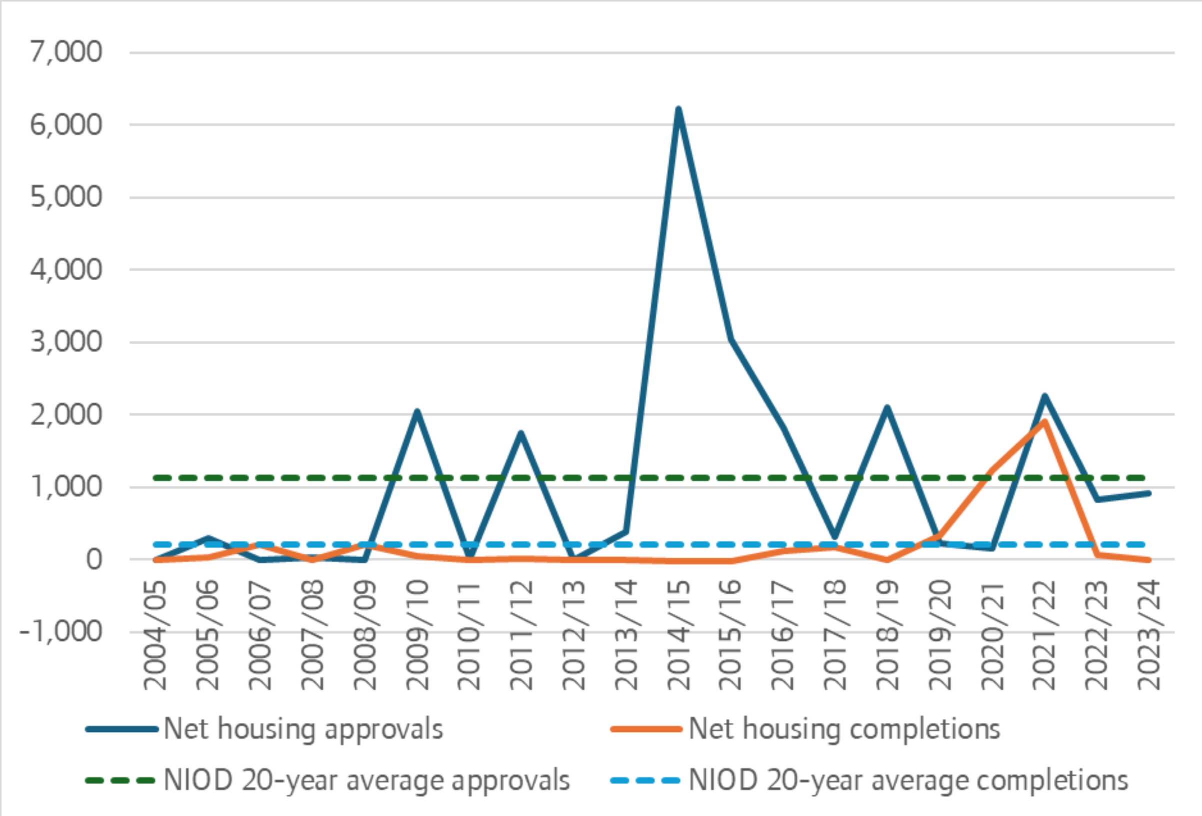


Source: Planning London Datahub (extract 11 August 2025) / GLA analysis

* includes Euston, King's Cross, Paddington, Victoria and Waterloo Opportunity Areas. Tottenham Court Road is not included as it overlaps with the West End. City Fringe/Tech City is not included as a significant part of this area is outside of the CAZ.

3.6.6 Figure 3.6.4 below illustrates net housing unit approvals and completions in the NIOD over the period 2004/5 to 2023/24. The number of net housing units in planning approvals averaged just over 1,100 units per annum over this period, with a peak of more than 6,000 in 2014/15. Just over 4,300 net housing units were completed in the NIOD over this period with around 3,500 of those (80 per cent of the total) delivered between the years 2019/2020 and 2021/22.

Figure 3.6.4 NIOD net housing approvals and completions 2004/5-2023/24



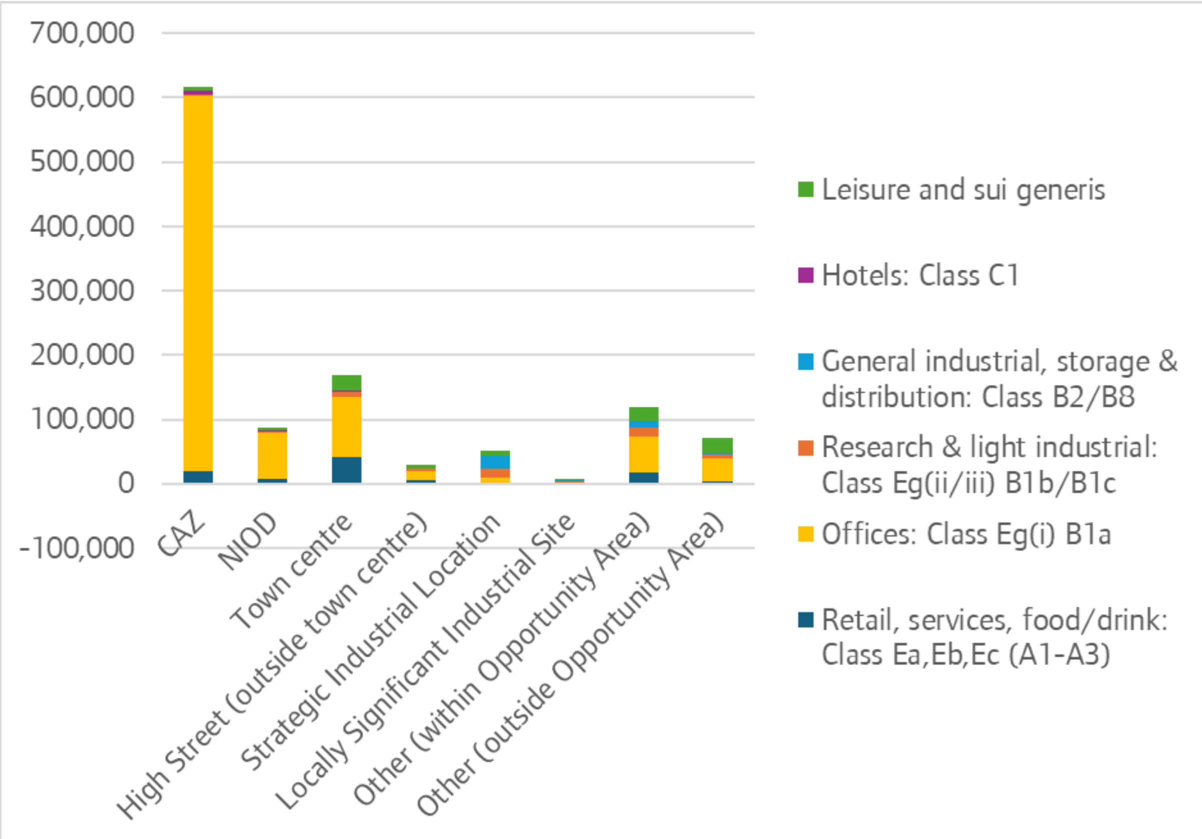
Source: Planning London Datahub (extract 11 August 2025) / GLA analysis

4. Non-residential development capacity

4.0.1 The analysis presented in this section is drawn from the London Employment Sites Database (LESD) 2024[24] which is based on an October 2024 baseline. The LESD is a comprehensive database of sites (land and floorspace) with identified capacity to accommodate employment generating development. It records recently completed employment developments, those in the planning pipeline and future capacity identified by local planning authorities in their local plans. It provides a snapshot of employment capacity for the period 2024 to 2050 at the time of the assessment.

4.0.2 According to the LESD 2024, the CAZ had an estimated employment capacity of more than 617,000 jobs for the period 2024 to 2050, accounting for 54 per cent of the London total (see Figure 4.1). The NIOD provides a further 88,000 jobs capacity, taking the combined CAZ and NIOD total to over 705,000 jobs. The CAZ contains a significantly higher identified employment capacity compared to all other London Plan related geographies including town centres, high streets and industrial areas. Most of the employment capacity in CAZ and NIOD combined (94 per cent) is associated with offices, followed by Class E retail, services and food/drink uses (3 per cent).

Figure 4.1 London employment capacity 2024-2050 by use class and location



Source: GLA London Employment Sites Database (2024)

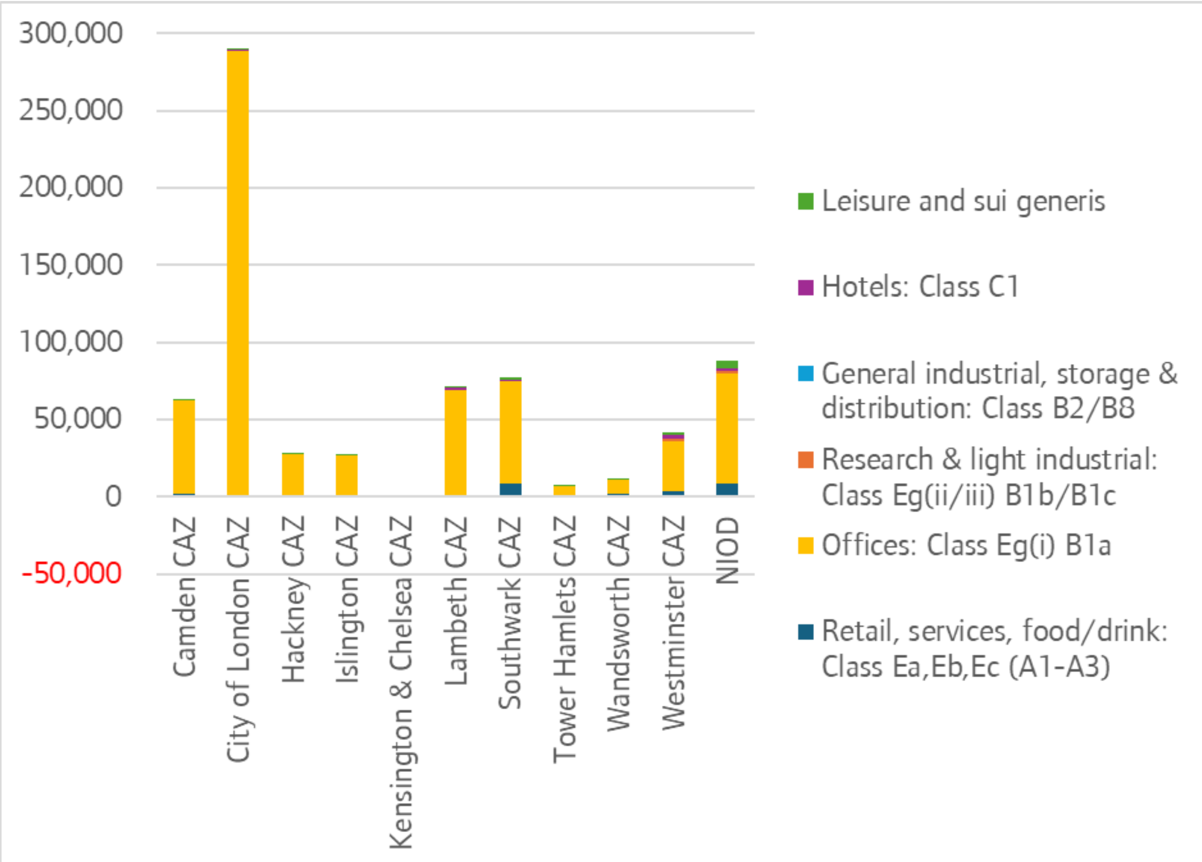
[24] Mayor of London. London Employment Sites Database 2024 (2026)

4.0.3 Figure 4.2 shows employment capacity by Use Class in the CAZ and NIOD with a breakdown of the CAZ total by borough. Most of the employment capacity in the CAZ and NIOD is associated with the City of London (41 per cent), followed by the NIOD (12 per cent), Southwark (11 per cent), Lambeth (10 per cent) and Camden (9 per cent). Kensington & Chelsea has only a small part of its area within the CAZ, which accounts for the relatively small capacity estimate for this borough.

4.0.4 Offices account for most of the employment capacity in each of the boroughs within CAZ, except for the Kensington and Chelsea CAZ where Retail, services, food and drink uses account for more than 60 per cent of capacity. In the NIOD and the parts of CAZ within Southwark, Tower Hamlets and Wandsworth, retail, services, food and drink uses account for more than 10 per cent of capacity, and in Westminster's CAZ it is 8 per cent.

4.0.5 Leisure and other uses account for 8 per cent of total employment capacity in the Tower Hamlets CAZ, 5 per cent in Westminster CAZ and the NIOD and 4 per cent in Wandsworth CAZ.

Figure 4.2 CAZ borough and NIOD employment capacity 2024-2050 by use class

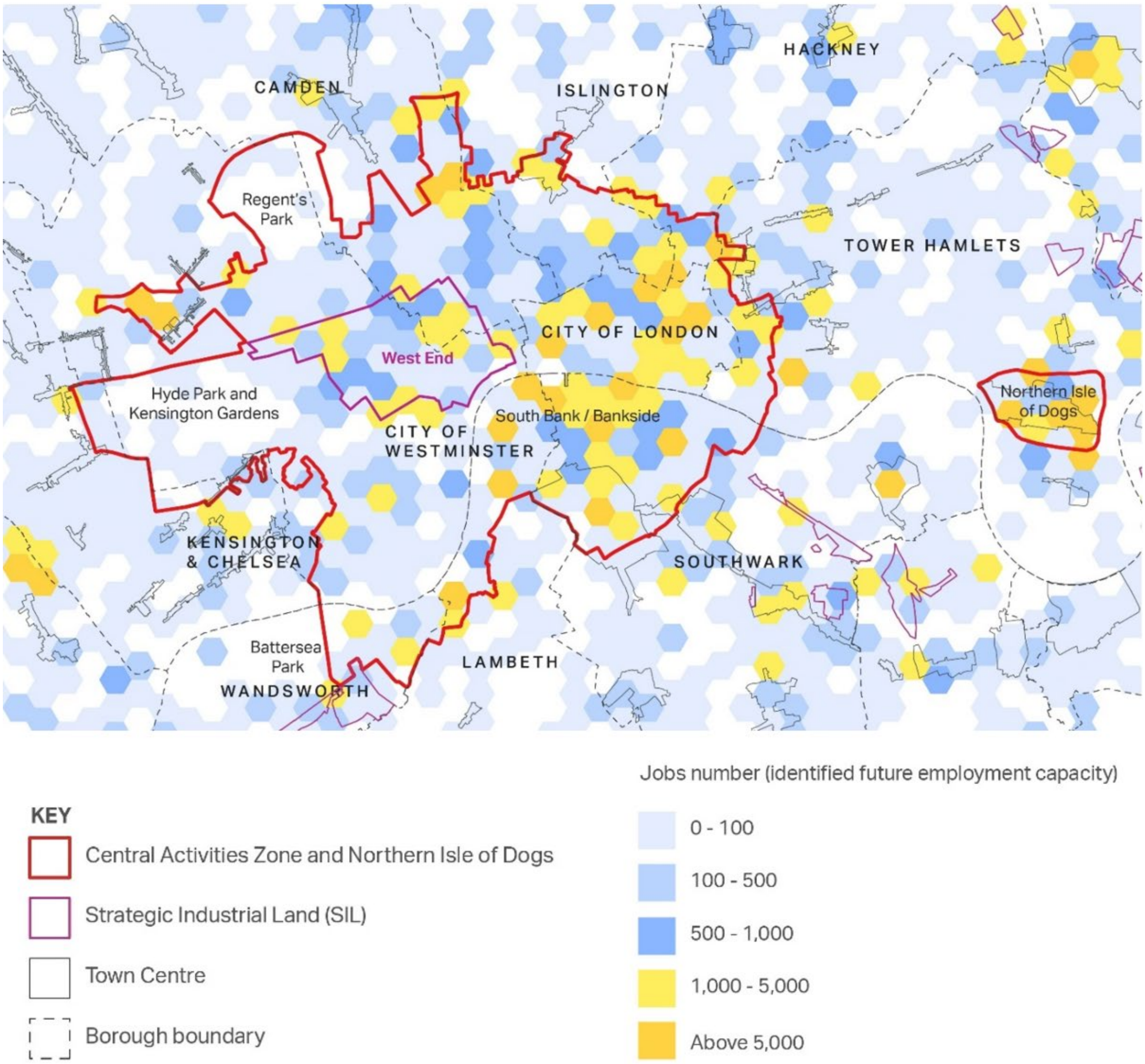


Source: GLA London Employment Sites Database (2024)

4.0.6 Figure 4.3 illustrates the broad spatial distribution of identified total employment capacity (2024-2050) in the LESD 2024 within the CAZ and NIOD. It shows that the highest concentrations of capacity are in the City of London, the NIOD, the South Bank, Waterloo, Bankside and London Bridge areas, Clerkenwell and the City Fringe, parts of the West End in both Westminster and Camden, and other parts of Camden around Euston station and the Euston Road. Other high concentrations of capacity are apparent in parts of Vauxhall and Battersea, Paddington and Victoria.

4.0.7 It is important to note that the LESD 2024 records employment capacity identified in planning permissions, site allocations and other capacity estimates at the time of the assessment. Not all the planning permissions and site allocations in the LESD will necessarily be implemented, and for those that are implemented, the actual employment totals and uses may vary from the assumptions used in the LESD. Furthermore, new employment capacity will arise through proactive strategic and local policies, site allocations and new planning permissions in the future. The distribution of capacity identified in Figure 4.3 will therefore change over time.

Figure 4.3 Employment capacity 2024-2050 in the CAZ and NIOD



Source: GLA London Employment Sites Database (2024)/GLA analysis

5. Components of the Strategic CAZ Diagram

5.0.1 This section of the report provides high-level evidence on proposed key elements that make up the strategic policy map for the CAZ (known as the **Strategic CAZ Diagram**) in the draft London Plan. It begins with an overview of selected CAZ places and then looks at clusters of CAZ strategic functions and activities, followed by Opportunity Areas and 'transformational' national rail termini station redevelopment opportunities.

5.0.2 Finally, the sub-section looks at areas which are considered to be **Core CAZ**, where the CAZ strategic functions would be prioritised relative to new residential development, and **Mixed CAZ** areas which are more mixed commercial and residential in character and where new residential development might be promoted alongside CAZ strategic function uses. All these elements are brought together in the draft Strategic CAZ Diagram presented at the end of the Section.

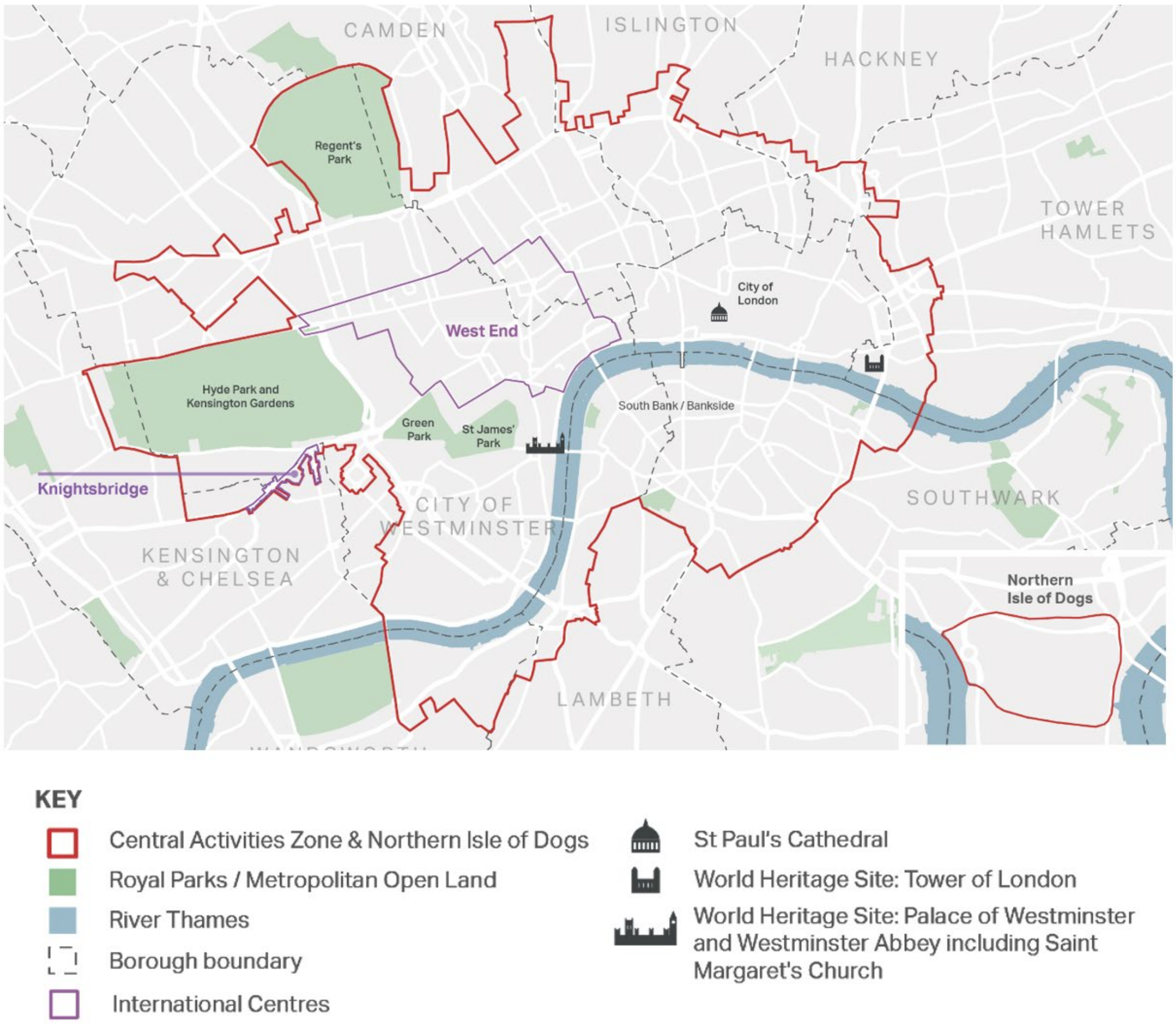
5.1 CAZ boundary and places (selected)

5.1.1 This sub-section looks first at the CAZ and NIOD boundaries and then the definition of selected places within the CAZ, including the two International centres (the West End and Knightsbridge), the City of London, the South Bank / Bankside and the Northern Isle of Dogs.

5.1.2 The strategic boundaries for the CAZ and NIOD along with selected CAZ places that form the structure of the London Plan strategic CAZ Diagram are illustrated in Figure 5.1.1. Defining the detailed boundary of the CAZ and NIOD in local plans is the responsibility of the ten local planning authorities plus the Oxford Street Development Corporation that each contain parts of the CAZ (and the London Borough of Tower Hamlets for the NIOD).

5.1.3 The strategic boundaries for the CAZ and the NIOD as defined in Figure 5.1.1 remain unchanged from that presented in the 2021 London Plan. The areas defined reflect the density, scale and mix of business functions, employment, culture, heritage, tourism and other activities in the CAZ and the NIOD which are underpinned by unparalleled connectivity provided by public transport (including the recent opening of the Elizabeth Line) alongside walking and cycling networks. These functions and activities, recognised in the London Growth Plan, are nationally and internationally significant and unique in a London and UK context. The strategic CAZ boundary also reflects the nature and diverse mix of places that make the CAZ attractive to businesses, workers, visitors and residents, including more local uses and neighbourhoods.

Figure 5.1.1 CAZ and NIOD boundaries and selected other geographies



5.1.4 Within the CAZ, the **West End** is an internationally significant commercial, cultural and experience destination characterised by a diverse mix of uses and activities, and a vibrant night-time economy and public realm. It is identified in the 2021 London Plan as an International centre in London's town centre network, a designation which is confirmed in the GLA's latest London Plan town centres research[25]. In 2024, the West End contained in the region of 1.4 million sq.m of retail, leisure and service use floorspace, of which night-time economy uses comprise almost 0.5 million sq.m, plus more than 2 million sq.m of office floorspace. It is estimated that international visitors comprise around 24 per cent of total visitors to the West End.

5.1.5 Since the publication of the 2021 London Plan (which includes an indicative definition of the West End area in the strategic CAZ Diagram[26]), Westminster City Council have undertaken further work to refine the extent of the West End in their area (in terms of

[25] Further analysis of the West End International Centre is contained within Mayor of London, London Plan Town centres research (roles and functions) (2026)
[26] Mayor of London. The London Plan 2021. Policy SD4 Central Activities Zone - Figure 2.16

its retail, cultural and leisure functions) in their adopted City Plan[27] and it is recommended that this area is adopted for the Westminster part of the West End in the new London Plan (see Figure 5.1.2 below).

5.1.6 Within the borough of Camden, the extent of the West End is still to be formally defined. Having regard to the West End's mix of commercial, cultural and experience economy functions and vibrant street scene, is considered that it would include areas in Camden such as Seven Dials, parts of Covent Garden, parts of Tottenham Court Road and the British Museum (see Figure 5.1.2).

5.1.7 On 1 January 2026, the Oxford Street Development Corporation (OSDC)[28] was established which will lead the transformation of Oxford Street and drive economic growth in Oxford Street. The whole of this area falls within the wider West End.

Figure 5.1.2 West End

5.1.8 **Knightsbridge**, like the West End, is also identified in the 2021 London Plan as an International centre in London's town centre network, a designation which is confirmed in the GLA's latest London Plan town centres research[29]. The area (see Figure 5.1.1) is defined by the boundary contained in the local plan policies maps of the Royal Borough of Kensington and Chelsea and Westminster City Council. It is not as large as the West End, but still contains a significant amount of retail, leisure and service use floorspace

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[27] Westminster City Plan 2019-2040-adoption-policies-map-january-2026
[28] Home - Oxford Street Development Corporation
[29] Mayor of London, London Plan Town centres research (roles and functions) (2026)

(more than 230,000 sq.m). Comparison goods retail uses account for 98 per cent of its occupied retail floorspace and it has the highest number of international visitors as a proportion of total visitors (29 cent) of all London's town centres.

5.1.9 The **City of London** is an internationally important location for financial, professional, business and technology services. Analysis in Section 3 above shows that the City had 5.3 million sq.m of office floorspace in 2023 according to VOA estimates[30], more than 22 per cent of the London total. It also contains a diverse mix of other strategic functions and activities including cultural activities (including notably at the Barbican and Smithfield), legal activities (notably at and around Temple) and a range of experience economy clusters (such as Moorgate/Liverpool Street, Fleet Street, Cheapside and Leadenhall Market). The area is defined by the boundary of the City Corporation of London (see Figure 5.1.1).

5.1.10 The **South Bank** and **Bankside** areas (see Figure 5.1.1) occupy a significant part of the CAZ on the southern bank of the River Thames. They are known especially for their internationally significant roles in culture, the night-time economy and tourism with several iconic assets including for example the National Theatre, Royal Festival Hall, Southbank Centre, the London Eye, Tate Modern, Shakespeare's Globe Theatre and Borough Market. These areas also contain a mix of other strategic functions in the wider experience economy, creative industries and technologies.

5.1.11 There are two **World Heritage Sites** in the CAZ (see Figure 5.1.1), namely the Palace of Westminster and Westminster Abbey including Saint Margaret's Church[31] which continue in their original functions and play important roles in society and government, and the Tower of London[32] recognised as an internationally famous monument and one of England's most iconic structures. St Paul's Cathedral, along with the two World Heritage Sites, are identified as Strategically Important Landmarks in the London Plan.

5.1.12 The **River Thames** and the **Royal Parks** (including The Green Park, Hyde Park, Kensington Gardens, The Regent's Park, St James's Park and Victoria Tower Gardens) are an integral part of the CAZ. They provide access to central London's most significant natural and historic blue and green spaces for residents, workers and visitors and support a wide range of biodiversity.

5.1.13 The **Northern Isle of Dogs**, whilst being geographically separate from the CAZ, is considered in planning policy terms to be part of the CAZ. It is highly accessible from the CAZ which has been further enhanced by the recent opening of the Elizabeth Line. The NIOD is characterised by an agglomeration of CAZ strategic functions and notably those associated with financial, professional and business services, but also emerging

[30] VOA 2023 data is used for the CAZ as VOA 2025 LSOA data was not available at the time of the assessment.
[31] Palace of Westminster and Westminster Abbey including Saint Margaret's Church - UNESCO
[32] Tower of London - UNESCO

functions associated with innovation, life sciences, culture, the experience economy and education.

5.2 CAZ strategic functions and clusters

5.2.1 The CAZ and NIOD contain a diverse range of strategic functions and activities including those set out in Figure 5.2.1 below. Several of these strategic functions are associated with key growth sectors identified in the London Growth Plan[33], most notably financial, professional and business services and technologies, creative industries and technologies, international education, the experience economy and frontier innovation.

Figure 5.2.1 CAZ strategic functions

Functions or uses associated with:
• State, Government and Monarchy • diplomatic organisations (such as embassies and high commissions) • financial, professional and business services and technology • creative industries and technologies • frontier innovation (including life sciences, digital and climate technologies) • higher, further and international education • law and health • the experience economy (including culture, leisure, hospitality, nightlife, retail and events) and 24-hour uses • tourism facilities including visitor attractions, hotels and conference centres • specialist creative uses including for example clothing, fashion, jewellery, printing, music and antiques • places of worship and places of assembly • public transport facilities.

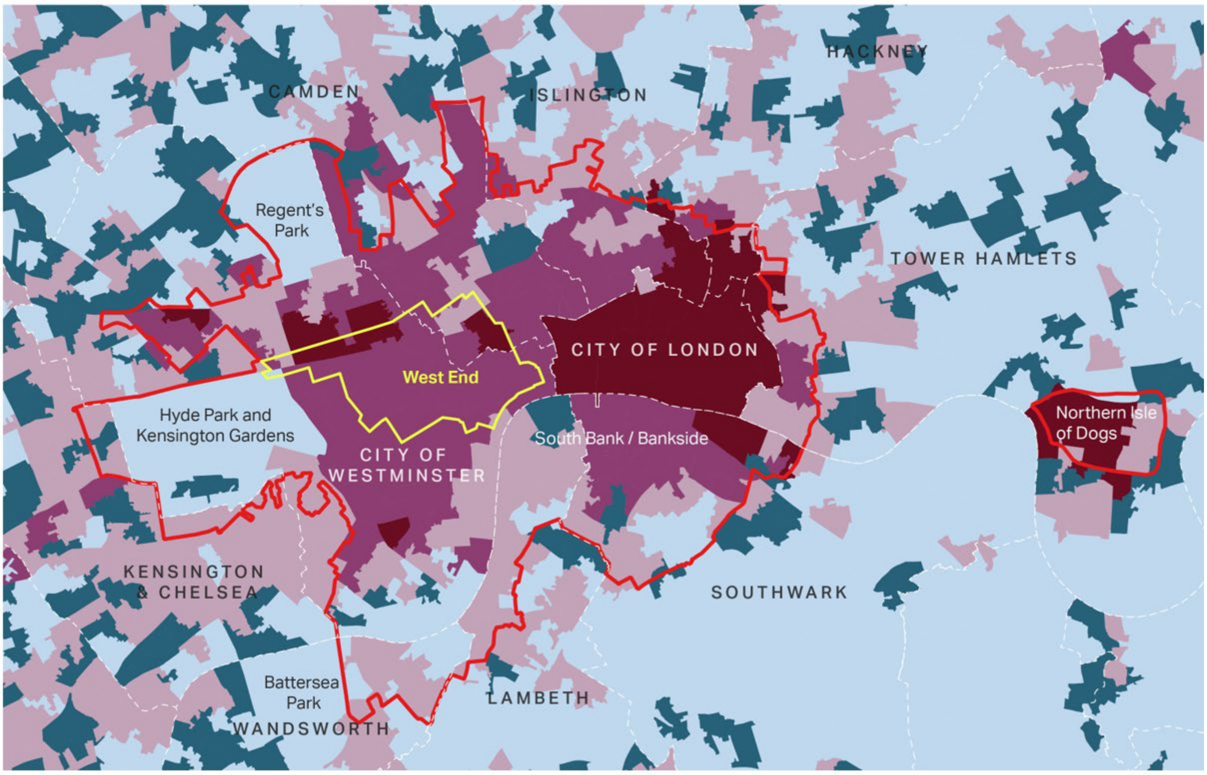
5.2.2 Some of the strategic functions and activities are dispersed widely across the CAZ and several are geographically focused on certain areas or locations. This sub-section considers these geographically focused clusters.

5.2.3 **Financial, insurance, professional, scientific, technical and real estate** jobs are highly concentrated within the CAZ and NIOD (see Figure 5.2.2 below). There are significantly high agglomerations of jobs in these sectors in the City of London as a whole, including the City Cluster within it, the Northern Isle of Dogs including Canary Wharf, and the West End. Other agglomerations can be found in Westminster, Victoria,

[33] Mayor of London/London Councils - London Growth Plan, 2025

Paddington, Bloomsbury, King's Cross, Midtown, Clerkenwell, the City Fringe and South Bank, Waterloo, Bankside and London Bridge.

Figure 5.2.2 Financial, insurance, professional, scientific, technical and real estate jobs densities in CAZ and NIOD, 2023



KEY

Central Activities Zone and Northern Isle of Dogs

Jobs density by LSOA in K : Financial and insurance activities LM: Professional, scientific, technical and real estate activities (2023)

- 0 - 500
- 500 - 1,000
- 1,000 - 10,000
- 10,000 - 50,000
- above 50,000

Source: GLA analysis of ONS Business Register and Employment Survey (BRES)

5.2.4 **Creative industries and technologies** are identified as another key growth sector in the London Growth Plan with leading global exporters of film, TV, gaming, music, marketing, fashion and architecture[34]. Within the CAZ, the London Growth Plan

[34] The creative industries contain a diverse range of sub-sectors with significant impact on London as a city. See full list at [National Statistics on the Creative Industries - Creative Industries Policy and Evidence Centre]

underlined London's well-established, globally significant clusters including the West End, South Bank and Clerkenwell (see Figure 5.2.3). Emerging clusters are identified at Smithfield, a historic site in the Square Mile which is proposed to be redeveloped as a new international cultural and commercial destination, to complement the relocated London Museum, and at Battersea, home to Apple's UK Headquarters.

5.2.5 In addition to these creative industries and technologies clusters, the CAZ contains some other notable **specialist creative clusters** (see Figure 5.2.3), including for example Hatton Garden (jewellery), Denmark Street (which contains music recording/rehearsal studios, venues, musical instrument and record shops), Savile Row (bespoke tailoring) and Mayfair and St James's (art and antiques).

5.2.6 **International education** is highlighted in the London Growth Plan as a productive export sector with London being the biggest international student city in the world. The CAZ is home to several internationally important academic institutions (see Figure 5.2.3) including for example, the University of London, University College London, King's College London, Imperial College London, London School of Economics and London South Bank University. Many of these universities are linked with other CAZ specialist clusters associated with innovation, life sciences and health (see below).

5.2.7 **Frontier innovation** includes a range of highly productive sectors in which London excels[35]. It includes sectors such as life sciences, tech and climate technologies and the CAZ contains several clusters (see Figure 5.2.3) including the Knowledge Quarter, SC1 (including St Thomas's, King's College Guy's, South London and Maudsley hospitals), Paddington life sciences, Tech City, University College Hospital (Bloomsbury), the City of London and Canary Wharf.

5.2.8 **Health** uses are widely present in the CAZ (see Figure 5.2.3) with notable clusters associated with practitioners with leading expertise in their field, such as at Harley Street and hospitals including for example St Mary's Hospital, University College Hospital, Great Ormand Street, St Thomas's Hospital, King's College Guy's Hospital Campus and the Francis Crick Institute. Several of these hospitals are linked to London's frontier innovation and life sciences clusters referenced in paragraph 5.2.7 above.

5.2.9 The CAZ contains uses associated with **law** and many of these are clustered in the area around Temple, the Royal Courts of Justice and the Inns of Court. There are also several functions associated with the **State**, including the Royal Palaces, the Palace of Westminster and Whitehall.

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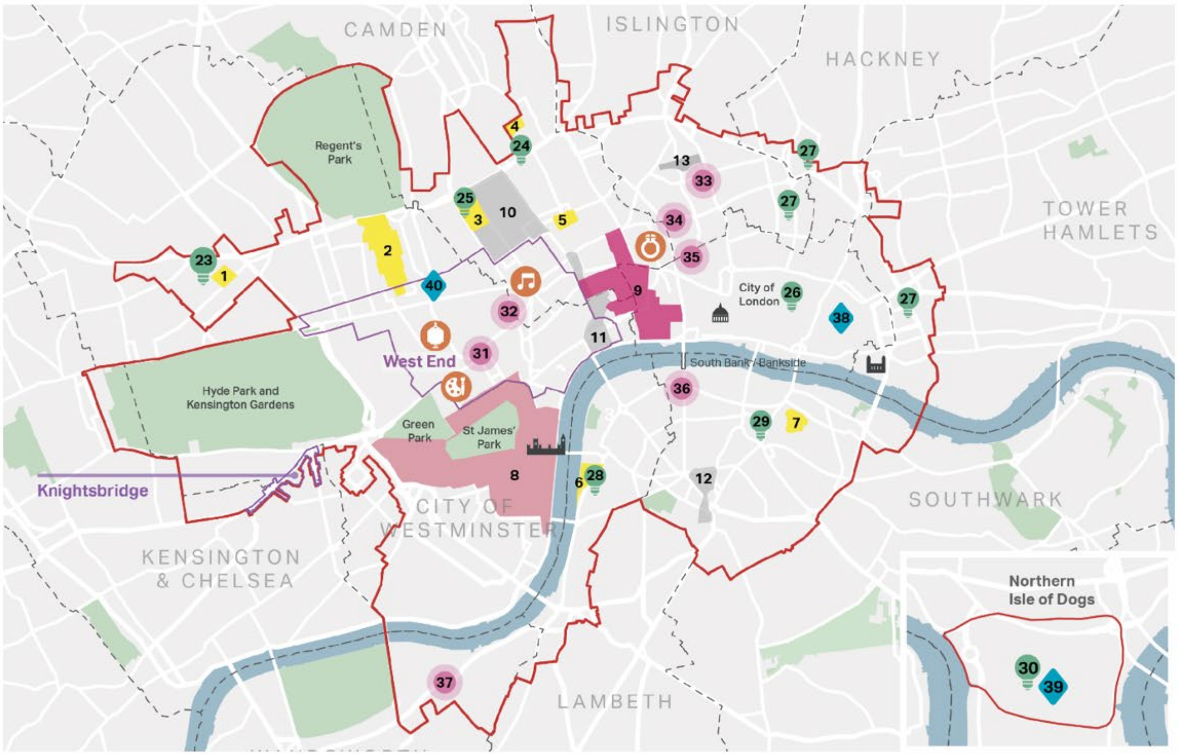
[35] Mayor of London/London Councils - London Growth Plan, 2025

Figure 5.2.3 CAZ specialist clusters associated with financial, professional and business services, creative industries and technologies, international education, innovation and life sciences, health, law and the state



KEY

- Central Activities Zone & Northern Isle of Dogs
- Royal Parks / Metropolitan Open Land
- River Thames
- Borough boundary
- International Centres
- St Paul's Cathedral
- World Heritage Site: Tower of London
- World Heritage Site: Palace of Westminster and Westminster Abbey including Saint Margaret's Church

Health, State, Legal and International Education

- Health
- State
- Legal
- International Education

1 St Mary's Hospital cluster
2 Harley Street
3 University College Hospital
4 Francis Crick Institute
5 Great Ormond Street Hospital
6 St Thomas' Hospital
7 King's College London Guy's Campus
8 Royal Palaces, Palace of Westminster and Whitehall
9 Temple, Royal Courts of Justice, Inns of Court
10 University College London / University of London
11 LSE / King's College London
12 London South Bank University
13 City St George's/ University of London

Innovation And Life Sciences Clusters

23 Paddington Life Sciences
24 Knowledge Quarter
25 University College Hospital
26 City of London (Technology)
27 Tech City
28 SC1: St Thomas' Hospital
29 SC1: King's College Guy's Hospital / South London / Maudsley Hospital
30 Canary Wharf

Creative Industries and Technologies Clusters

31 West End
32 Soho
33 Clerkenwell
34 Farringdon
35 Smithfield
36 South Bank/Bankside
37 Battersea

Financial, Professional And Business Service Clusters

38 City of London/ City Cluster
39 Northern Isle of Dogs / Canary Wharf
40 West End

Other Specialist Clusters

- Hatton Garden (Jewellery)
- Denmark Street (Music)
- Savile Row (Tailoring)
- Mayfair and St James's (Art and Antique)

5.2.10 **Culture and night-time economy** uses within the CAZ are of international scale and significance (see Section 3.3). There are internationally significant clusters of culture and night-time economy activities in the West End (incorporating places such as Soho, Theatreland, Leicester Square, Covent Garden and the British Museum), the South Bank, Waterloo, Bankside and London Bridge, the Barbican, Smithfield, Shoreditch, the Royal Albert Hall and South Kensington Museums (see Figure 5.2.4). King's Cross and Angel (incorporating Sadlers Wells) are also globally important culture and night-time economy clusters, and Tate Britain in Westminster is also of international significance for culture.

5.2.11 **The experience economy**, which includes culture, events, sports, attractions, retail and hospitality that are tradeable, is a key growth sector in the London Growth Plan. Oxford Street, Regent Street and Bond Street (located in the wider West End International centre, see Figure 5.2.4) are internationally significant destinations for retail, leisure, culture and events.

5.2.12 Recent estimates suggest that Oxford Street, Regent Street and Bond Street contain more than 520,000 sq.m of retail, leisure and service use floorspace, of which night-time economy uses comprise around 47,000 sq.m, plus around 400,000 sq.m of office floorspace[36]. The Oxford Street Development Corporation is working to transform Oxford Street into a coherent, well-designed space that is recognised globally as a leading retail and leisure destination.

5.2.13 The CAZ also contains a range of other clusters with a predominant experience economy function whilst also providing essential convenience retail and other local services for CAZ residents, workers and visitors. In the 2021 London Plan these were referred to as CAZ Retail Clusters. However, many of the ground floor uses within these clusters fall within the new commercial, business and service Use Class E[37] introduced in 2020 alongside cultural and experience economy related uses. It is therefore recommended that in the next London Plan, CAZ Retail Clusters should be referenced as **CAZ Class E/experience economy clusters** in recognition of these wider roles. Analysis of these clusters was undertaken by the GLA in the London Plan town centres research report[38] and they are presented below in Figure 5.2.4.

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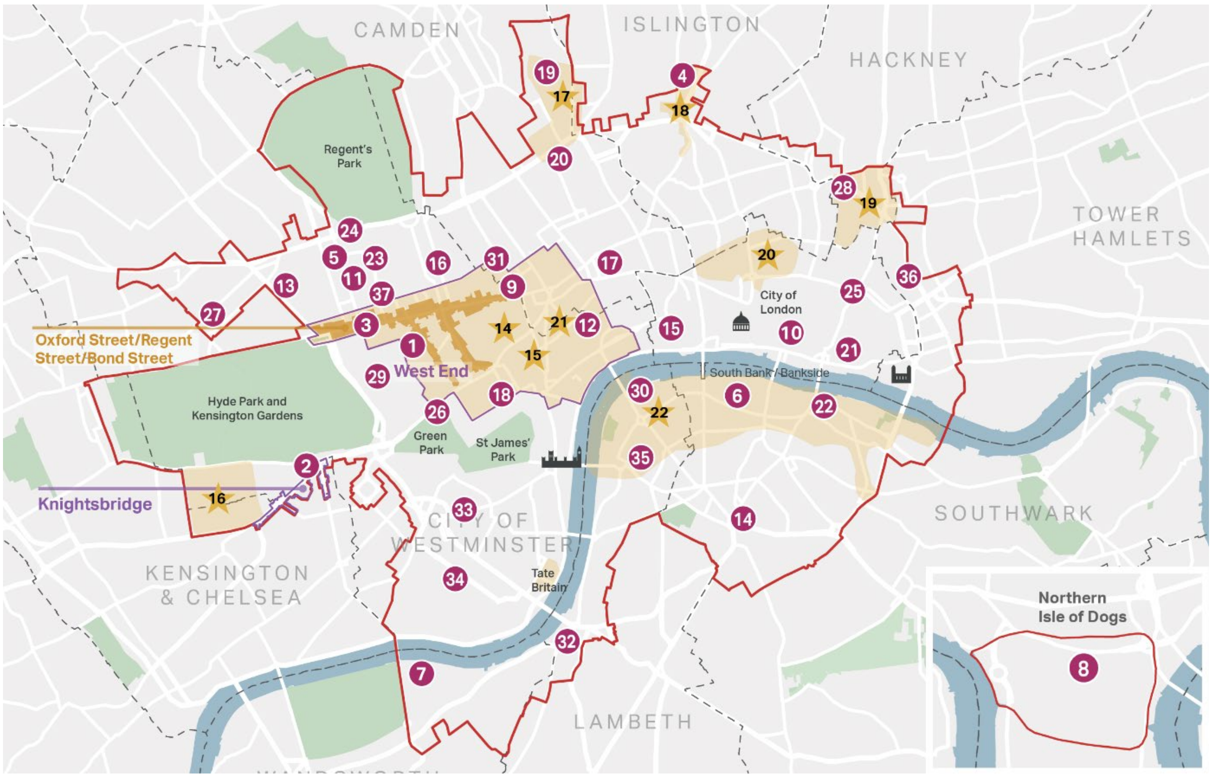
[36] Source: Mayor of London, London Plan Town centres research (roles and functions) (2026)
[37] Planning Use Class E (Commercial, Business and Service) see: Use Classes - Change of use - Planning Portal
[38] Mayor of London. London Plan Town Centres Research (roles and functions) (2026)

Figure 5.2.4 CAZ specialist clusters associated with culture, night-time economy and the wider experience economy.



Key: please see overleaf

KEY

- Central Activities Zone & Northern Isle of Dogs
- Royal Parks / Metropolitan Open Land
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- World Heritage Site: Palace of Westminster and Westminster Abbey including Saint Margaret's Church

Internationally Significant Culture and Night-time Economy Clusters

- Internationally significant culture
- Oxford Street/ Regent Street/ Bond Street
- Internationally significant night-time economy

14 Soho
15 Theatreland / Leicester Square / Piccadilly Circus
16 Royal Albert Hall/ South Kensington Museums
17 King's Cross
18 Angel/Sadler's Wells
19 Shoreditch
20 Barbican/ Smithfield
21 Covent Garden
22 South Bank/ Waterloo/ Bankside and London Bridge

Class E / Experience Economy Clusters

1 West End International Centre
2 Knightsbridge International Centre
3 Oxford Street/Regent Street/Bond Street
4 Angel (also part town centre)
5 Baker Street (South)
6 Bankside and the Borough
7 Battersea Power Station
8 Canary Wharf Metropolitan Town Centre
9 Charing Cross Road
10 Cheapside
11 Chiltern Street
12 Covent Garden/Strand
13 Edgware Road (South)
14 Elephant and Castle/Walworth Road (also part town centre)
15 Fleet Street
16 Great Portland Street
17 Holborn (High Holborn/Holborn/Kingsway)
18 Jermyn Street
19 King's Cross Boulevard and Coal Drops Yard
20 King's Cross/Euston Road
21 Leadenhall Market
22 London Bridge
23 Marylebone High Street
24 Marylebone Road
25 Moorgate/Liverpool Street
26 Piccadilly
27 Praed Street/Paddington
28 Shoreditch
29 South Audley / Mount Street
30 South Bank
31 Tottenham Court Road/Charing Cross Road /New Oxford Street
32 Vauxhall
33 Victoria Street
34 Warwick Way/ Tachbrook Street
35 Waterloo
36 Wentworth Street
37 Wigmore Street

5.3 CAZ Opportunity Areas and Transformational Gateways

5.3.1 In the 2021 London Plan there are 12 Opportunity Areas[39] that fall totally or partially within the CAZ and NIOD areas (listed in Table 5.3.1 below). In the new draft London Plan proactive policies will be in place to support economic growth across the whole of the CAZ but Opportunity Area designations are appropriate for areas that still contain significant development capacity for new homes and jobs, including within areas that fall outside of the CAZ and NIOD areas, and which require pro-active co-ordination and support to overcome barriers to delivery. On this basis it is recommended that five locations are **retained as Opportunity Areas** including City Fringe/Tech City, Elephant and Castle, Isle of Dogs/South Poplar, Old Kent Road and Vauxhall, Nine Elms, Battersea.

5.3.2 Three of the 2021 CAZ Opportunity Areas (King's Cross, London Bridge/Bankside and Tottenham Court Road) are deemed to have **matured** (that is much of the originally identified development capacity has been built out) and any additional development capacity can be driven by CAZ related growth policies.

5.3.3 Four of the 2021 CAZ Opportunity Areas (Euston, Paddington, Victoria and Waterloo) still have substantial growth opportunities for CAZ strategic functions associated principally with planned/potential national rail termini redevelopments. Liverpool Street station (not currently an Opportunity Area) also has growth potential associated with planned station redevelopment. To distinguish these locations from Opportunity Areas it is recommended that they are identified in the new London Plan as **CAZ Transformational Gateways** in recognition of their association with national rail termini (re)development opportunities. It is envisaged that planning for these locations would be led by the relevant local planning authority, in collaboration with the GLA, Transport for London, Network Rail and other stakeholders.

5.3.4 Commentaries on each area and recommendations for the new draft London Plan are set out in Table 5.3.1 below[40]. The recommended Opportunity Areas and Transformational Gateways are illustrated in Figure 5.3.1 below.

[39] Significant locations with development capacity to accommodate new housing, commercial development and infrastructure (of all types), linked to existing or potential improvements in public transport connectivity and capacity.
[40] Strategic growth visions for each Opportunity Area will be set out the in the draft London Plan.

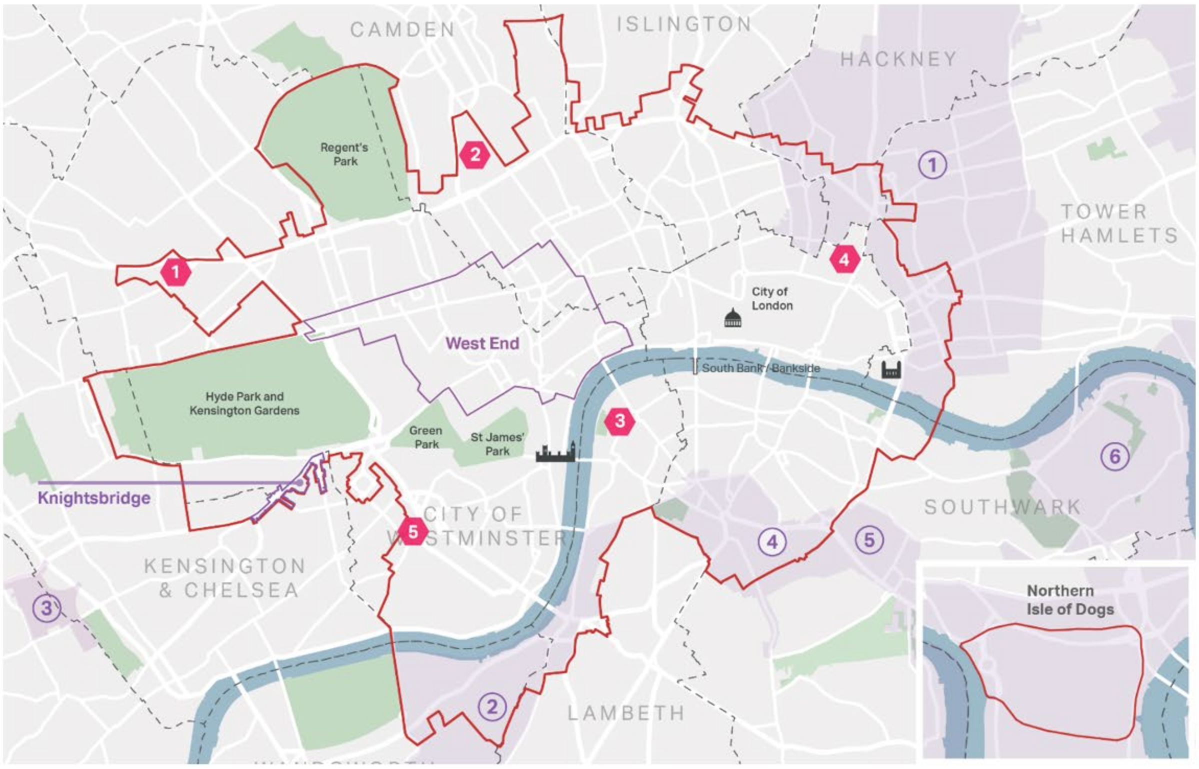
Table 5.3.1 Opportunity Areas and Transformational Gateways

2021 London Plan Opportunity Area	Commentary	Draft new London Plan recommendation
City Fringe/ Tech City	Opportunity Area is entering a new phase of growth. The OA boundary is proposed to be reviewed to exclude parts of CAZ where growth can be driven by CAZ related policies.	**Retain as Opportunity Area** but review boundary to exclude parts within CAZ
Elephant and Castle	Key growth node partly within CAZ benefitting from strong transport connectivity via the Bakerloo Line, Thameslink, and nearby Elizabeth Line interchanges. Several allocated sites remain undeveloped.	**Retain as Opportunity Area**
Euston	Significant regeneration potential including a new and upgraded Euston station, HS2 terminus and above station development with new affordable and social housing, access to jobs, community facilities, new green spaces and reconnected neighbourhoods.	Move from Opportunity Area designation to a new **Transformational gateway** designation
Isle of Dogs	One of London's most active growth zones with transport infrastructure, including the Jubilee Line, DLR, and the Elizabeth Line, offering excellent strategic connections. Area also includes South Poplar.	**Retain as Opportunity Area** (Isle of Dogs and South Poplar)
King's Cross	Opportunity Area has matured, and any additional development capacity can be driven by CAZ related policies.	**Remove** Opportunity Area designation
Liverpool Street*	Development capacity associated with potential station redevelopment.	New **Transformational gateway** designation
London Bridge/Bankside	Opportunity Area has matured, and any additional development capacity can be driven by CAZ related policies.	**Remove** Opportunity Area designation
Old Kent Road	Opportunity Area benefits from strong bus provision and strategic Underground and Thameslink connections. The proposed Bakerloo Line Upgrade and Extension, including new stations at Burgess Park and Old Kent Road, could unlock further development potential, with the Bakerloop	**Retain as Opportunity Area**

2021 London Plan Opportunity Area	Commentary	Draft new London Plan recommendation
	BL1 express electric bus providing additional transport capacity in the interim.	
Paddington	Opportunity Area is maturing. Additional development capacity associated with potential station redevelopment.	Move from Opportunity Area designation to a new **Transformational gateway** designation
Tottenham Court Road	Opportunity Area has matured, and any additional development capacity can be driven by CAZ related policies.	**Remove** Opportunity Area designation
Victoria	Opportunity Area is maturing. Additional development capacity associated with potential station redevelopment.	Move from Opportunity Area designation to a new **Transformational gateway** designation
Vauxhall, Nine Elms, Battersea (VNEB)	A maturing Opportunity Area on the fringe of the CAZ with major housing developments and the Battersea Power Station Masterplan at the core of its growth. The London Underground Northern Line Extension to Nine Elms and the new Battersea Power Underground Station which opened in 2021, have enhanced the OA's connectivity and support the delivery of new homes and jobs.	**Retain as Opportunity Area**
Waterloo	Opportunity Area is maturing. Additional development capacity associated with potential station redevelopment.	Move from Opportunity Area designation to a new **Transformational gateway** designation

* Not a 2021 London Plan Opportunity Area

Figure 5.3.1 Opportunity Areas and Transformational Gateways



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- Borough boundary
- Opportunity Areas
- International Centres
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- World Heritage Site: Palace of Westminster and Westminster Abbey including Saint Margaret's Church

Transformational Gateways

1. Paddington
2. Euston
3. Waterloo
4. Liverpool Street
5. Victoria

Opportunity Areas (OAs)

1. City Fringe /Tech City
2. Vauxhall, Nine Elms and Battersea (VNEB)
3. Earl's Court/West Kensington
4. Elephant and Castle
5. Old Kent Road
6. Canada Water

5.4 Core CAZ and Mixed CAZ

5.4.1 In the new draft London Plan it is intended to distinguish between two types of areas within the Central Activities Zone and Northern Isle of Dogs which are referred to as Core CAZ and Mixed CAZ.

5.4.2 In **Core CAZ areas** the CAZ strategic functions (see Figure 5.2.1 above) would be prioritised relative to new residential development. This is to ensure that the agglomerations of CAZ strategic functions and associated clusters (highlighted in sub-sections 5.1 and 5.2 above) and their contributions to the London and UK economy are sustained, enhanced and not compromised by new residential development.

5.4.3 **Mixed CAZ areas** would include those that are typically more mixed-use in character and where there might be more potential to accommodate greater amounts of housing alongside CAZ strategic functions compared to Core CAZ areas. To inform local plan policy making, it is intended that the London Plan strategic CAZ Diagram illustrates indicative Mixed CAZ areas, which local planning authorities can then refine in local plans as appropriate.

5.4.4 To inform the delineation of Core CAZ and indicative Mixed CAZ areas, regard has been given to the following key principles:

(1) Core CAZ would be the default CAZ designation unless an area is identified as Mixed CAZ.

(2) Core CAZ would include several of the key CAZ places (identified in Section 5.1 above) including the whole of the West End, the City of London, Knightsbridge and the South Bank / Bankside.

(3) The internationally significant cultural and night-time economy clusters (identified in Section 5.2 above) would all be Core CAZ.

(4) Other strategically important agglomerations/clusters of CAZ strategic functions (identified in Section 5.2 above) would typically be Core CAZ, subject to refinements by local planning authorities.

(5) Transformational Gateway national rail termini would be Core CAZ

(6) Business Improvement District areas would typically be Core CAZ, subject to refinements.

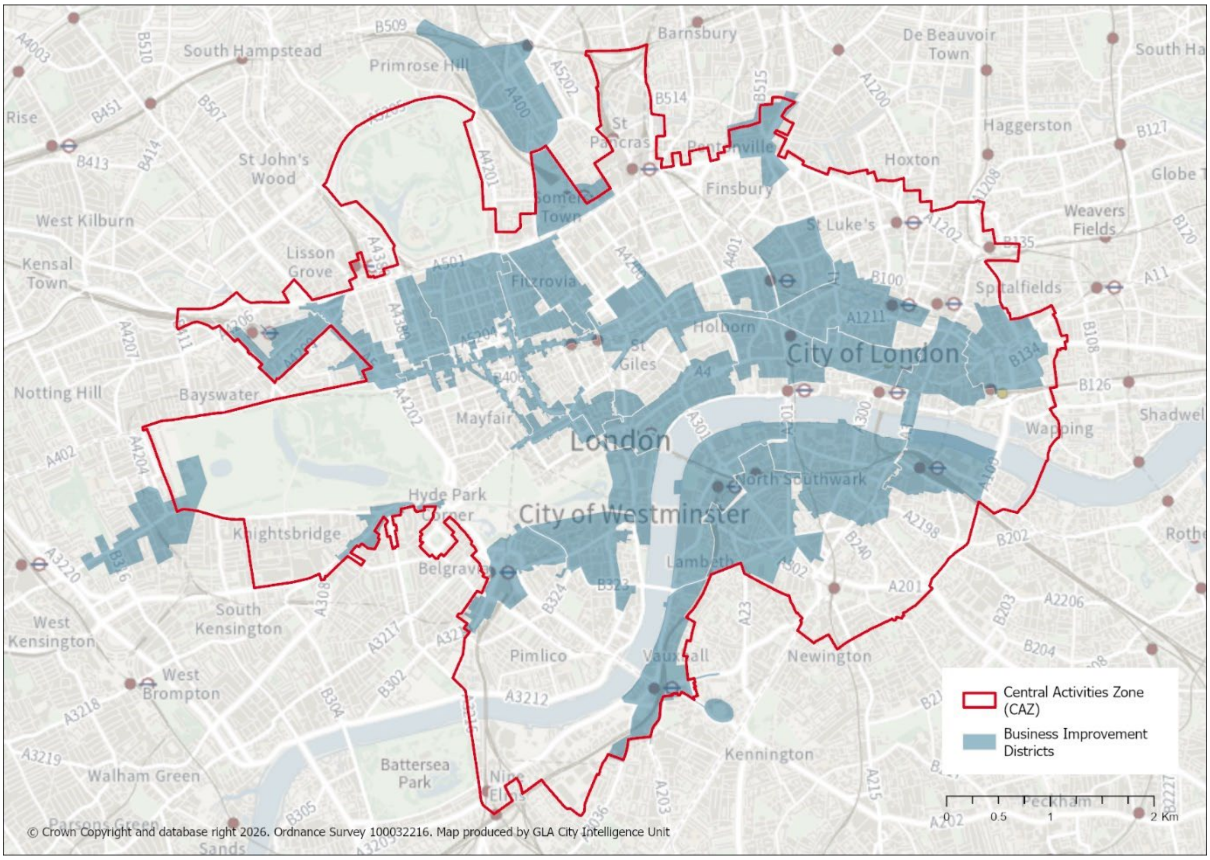
(7) For Mixed CAZ areas regard is given to the existing general balance of commercial and residential uses in the CAZ.

(8) For Core CAZ and Mixed CAZ areas, regard is given to existing local plans.

5.4.5 Principle (1) above is a general principle that applies across the whole of the CAZ and NIOD. Principles (2) to (5) above have been covered in Sections 5.1, 5.2 and 5.3 above.

5.4.6 Principle (6) relates to the existence of a Business Improvement District[41] (BID) in an area. Figure 5.4.1 below shows the areas currently covered by BIDs in central London. Given their remit, BID areas would typically be considered Core CAZ areas. There may however be some exceptions to this, such as parts of Fitzrovia in Camden, and Vauxhall in Lambeth for example, which could be considered as more Mixed CAZ in character. This is explored further below under principles (7) and (8).

Figure 5.4.1 Business Improvement Districts (central London)

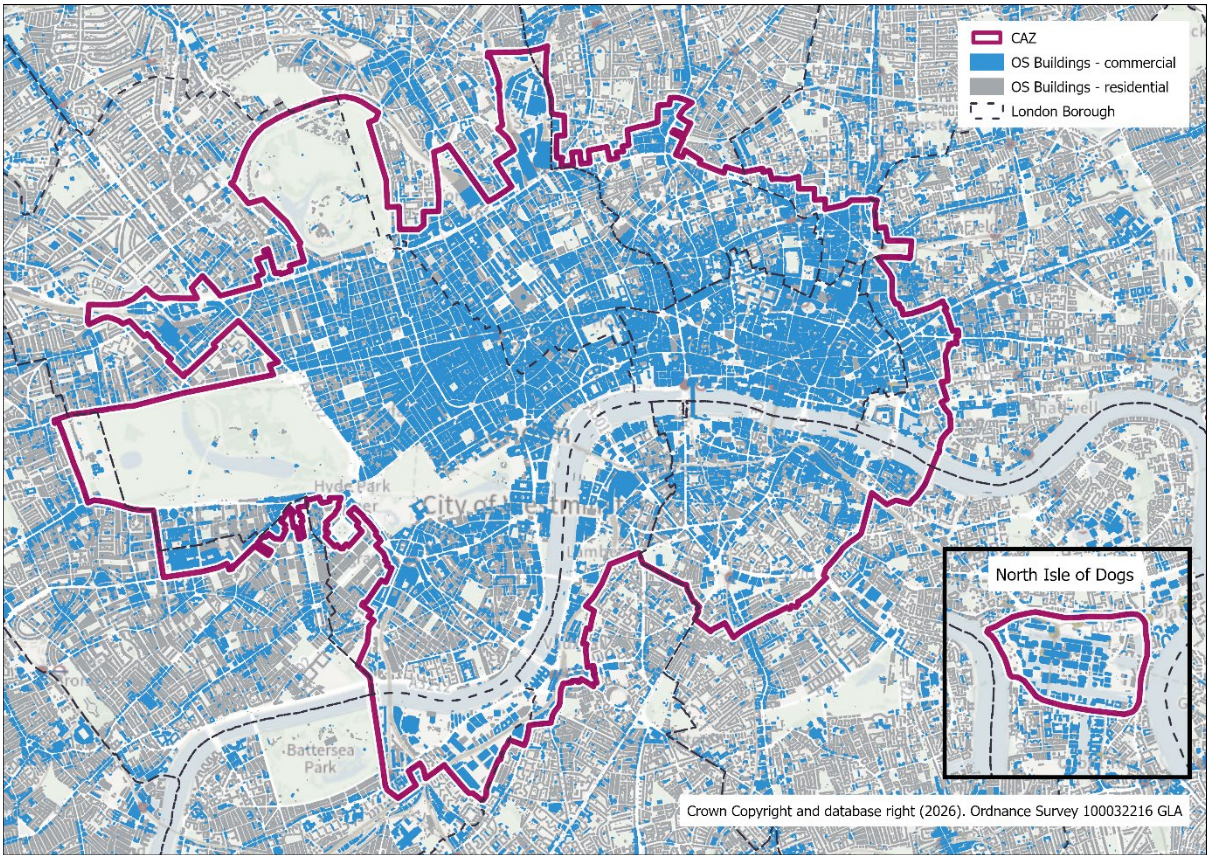


5.4.7 Principle (7) considers the existing balance of commercial and residential uses in the CAZ. Figure 5.4.2 below illustrates the general distribution of commercial buildings and residential in the CAZ and NIOD in 2025 drawing on data from the Ordnance Survey. It shows the notable concentrations of commercial buildings in the West End, the City of London, much of the City Fringe, South Bank, Waterloo, Bankside and London Bridge, and other locations such as Victoria, Paddington, King's Cross, Angel and parts of Vauxhall, Nine Elms and Battersea.

[41] Business Improvement Districts are business led partnerships which are created through a ballot process to deliver additional services to local businesses. They include a defined area in which a levy is charged on all eligible business rate payers in addition to the business rates bill. This levy is used to develop projects which will benefit businesses in the local area. For details see: Business Improvement Districts - GOV.UK

5.4.8 Figure 5.4.2 also shows parts of the CAZ that are more mixed commercial and residential in character, including much of Pimlico, parts of the Portman Estate, parts of Fitzrovia, Bloomsbury, Finsbury and Bermondsey and the fringes of the Elephant and Castle.

Figure 5.4.2 Commercial and residential buildings in CAZ and NIOD (2025)



Source: Ordnance Survey/GLA analysis.

5.4.9 Consideration of Principle (8) involved a general overview of relevant local plans that apply in the CAZ and NIOD and included a short period of informal engagement with local planning authorities.

5.4.10 Taking all the principles together, observations are provided below for each local planning authority area and suggested indicative Mixed CAZ areas are illustrated in Figure 5.4.3. It is recommended that these areas could be considered and refined by the relevant local planning authorities in their local plan policies and policy maps having regard to more specific local evidence.

5.4.11 **Camden**: The West End International centre and the University College London, University of London and London School of Economics international education clusters are Core CAZ. The Euston station Transformational Gateway, The Knowledge Quarter, the King's Cross international centre and night-time economy cluster and parts of the Euston Road are also Core CAZ, as are the health clusters at University College Hospital, Francis Crick Institute and the Great Ormand Street Hospital, and the Hatton Garden specialist jewellery cluster. Mixed CAZ areas in Camden could potentially include parts of Bloomsbury and Fitzrovia outside of these areas, as could the northern end of King's Cross outside of the internationally significant cultural cluster.

5.4.12 **City of London**: The whole of the City of London is identified as Core CAZ in recognition of its globally important financial, professional, business services and technology clusters along with the Liverpool Street station Transformational Gateway and its specialist legal and international education clusters. The City of London contains a substantial proportion (41 per cent) of the currently identified future employment capacity in the CAZ (see Section 4 for details), which further underscores its Core CAZ function.

5.4.13 **Hackney**: All parts of Hackney within the CAZ are identified as Core CAZ including the internationally significant culture and night-time economy cluster at Shoreditch and the Tech City innovation cluster.

5.4.14 **Islington:** The internationally significant culture and night-time economy cluster of Angel is identified as Core CAZ and the Bunhill, Farringdon and Clerkenwell areas are all considered to be Core CAZ due to the presence of the creative industries and innovation (tech) clusters associated with these areas. Two areas might be considered as Mixed CAZ, including the predominantly residential cluster around Finsbury and the area to the north of the King's Cross internationally significant cultural cluster.

5.4.15 **Kensington and Chelsea**: All parts of Kensington and Chelsea within the CAZ are identified as Core CAZ including Knightsbridge International centre and the internationally significant cultural cluster at South Kensington Museums.

5.4.16 **Lambeth**: A substantial part of the Lambeth's CAZ is Core CAZ, including the internationally significant culture, night-time economy and creative industries clusters at South Bank and Waterloo (including the rail termini Transformational Gateway) and the health, innovation and life science cluster at SC1 St Thomas's Hospital. Some parts of the borough to the south of Lambeth Road might have potential for a Mixed CAZ approach including parts of Vauxhall.

5.4.17 **Southwark**: The internationally significant culture, night-time economy and creative industries clusters at Bankside and London Bridge are Core CAZ, as would be the health, innovation and life sciences clusters at SC1 King's College Guy's Hospital and South London/Maudsley Hospital. Much of this area is also covered by Business Improvement Districts. The Elephant and Castle cultural, night-time economy and international education clusters would also be considered as Core CAZ. Elsewhere in Southwark's CAZ including parts of Bermondsey, the northern end of the Old Kent Road and areas of the Elephant and Castle outside the cultural, night-time economy and international education clusters could be considered for a Mixed CAZ approach.

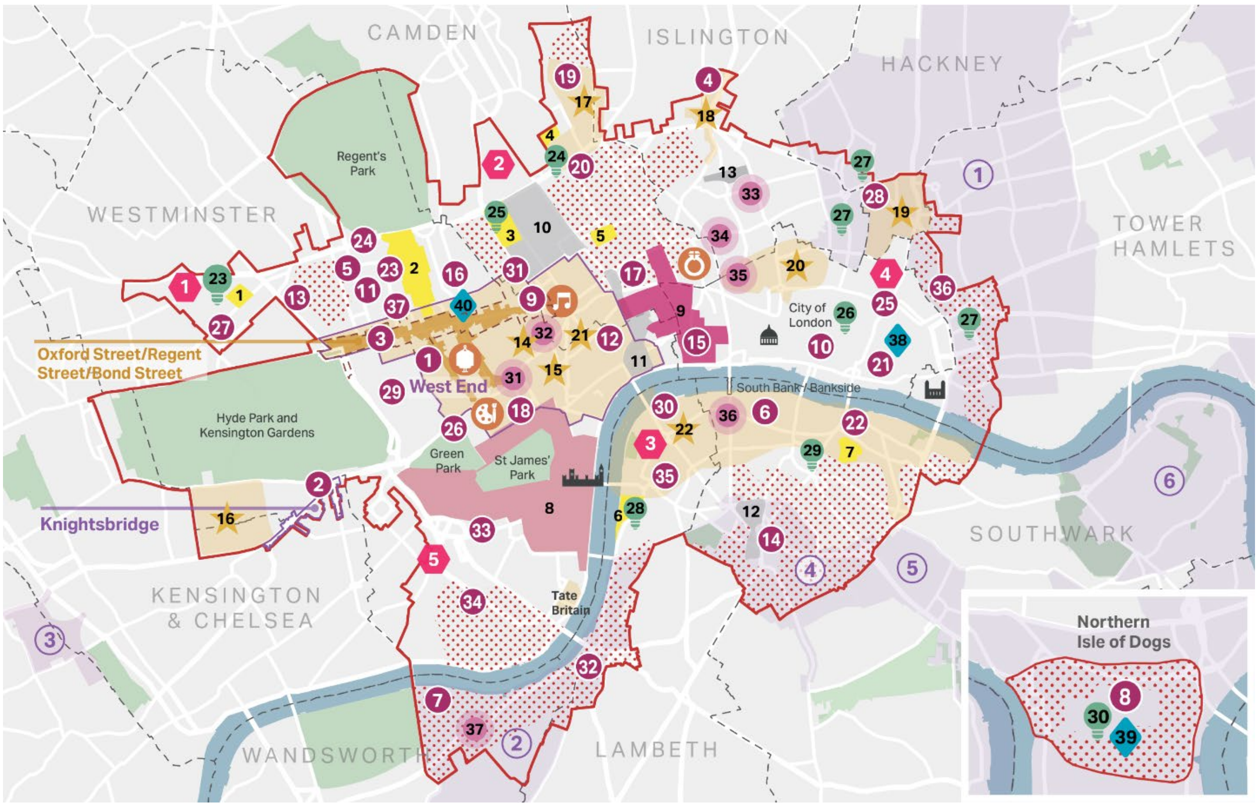
5.4.18 **Tower Hamlets**: The City Fringe in the borough's CAZ contains parts of the Tech City innovation and technology cluster including some preferred office locations, which are considered to be Core CAZ. Other parts of Tower Hamlet's City Fringe outside of these areas could have potential for a Mixed CAZ approach. The core of the Northern Isle of Dogs including the Canary Wharf Metropolitan centre would be Core CAZ, with more peripheral areas having potential to be Mixed CAZ.

5.4.19 **Wandsworth**: Substantial parts of the Vauxhall, Nine Elms, Battersea Opportunity Area to the north of the South West railway lines may have potential for a Mixed CAZ approach subject to local refinements, whereas the New Covent Garden Market to the south of the railway lines is anticipated to be Core CAZ.

5.4.20 **Westminster**: The West End and Knightsbridge International centres, the State clusters including the Royal Palaces, Palace of Westminster and Whitehall, and the King's College London international education cluster are all Core CAZ locations. The Transformational Gateways at Victoria and Paddington stations would also be Core CAZ, as would be the Paddington health and life sciences cluster, the Harley Street health cluster and the international cultural and night-time economy cluster at the Royal Albert Hall and the international cultural cluster at Tate Britain. Selected areas within Westminster could be considered for Mixed CAZ, including large parts of Pimlico and parts of the Portman Estate.

5.4.21 **Oxford Street Development Corporation**: The area stretches from one block east of Tottenham Court Road along Oxford Street and includes Marble Arch in the west and some surrounding streets around Oxford Street. The whole of the area would be Core CAZ as Oxford Street is a globally significant destination for the experience economy and is located within the wider West End International centre.

Figure 5.4.3 CAZ Diagram showing indicative Mixed CAZ areas



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2 Euston
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4 Liverpool Street
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- Health
- State
- Legal
- International Education

1 St Mary's Hospital cluster
2 Harley Street
3 University College Hospital
4 Francis Crick Institute
5 Great Ormond Street Hospital
6 St Thomas' Hospital
7 King's College London Guy's Campus
8 Royal Palaces, Palace of Westminster and Whitehall
9 Temple, Royal Courts of Justice, Inns of Court
10 University College London / University of London
11 LSE / King's College London
12 London South Bank University
13 City St George's/ University of London

Internationally Significant Culture and Night-time Economy Clusters

- Internationally significant culture
- Oxford Street/ Regent Street/ Bond Street
- Internationally significant night-time economy

14 Soho
15 Theatreland / Leicester Square / Piccadilly Circus
16 Royal Albert Hall/ South Kensington Museums
17 King's Cross
18 Angel/Sadler's Wells
19 Shoreditch
20 Barbican/ Smithfield
21 Covent Garden
22 South Bank/ Waterloo/ Bankside and London Bridge

Innovation And Life Sciences Clusters

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24 Knowledge Quarter
25 University College Hospital
26 City of London (Technology)
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29 SC1: King's College Guy's Hospital / South London / Maudsley Hospital
30 Canary Wharf

Creative Industries and Technologies Clusters

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32 Soho
33 Clerkenwell
34 Farringdon
35 Smithfield
36 South Bank/Bankside
37 Battersea

Financial, Professional And Business Service Clusters

38 City of London/ City Cluster
39 Northern Isle of Dogs / Canary Wharf
40 West End

Other Specialist Clusters

- Hatton Garden (Jewellery)
- Denmark Street (Music)
- Savile Row (Tailoring)
- Mayfair and St James's (Art and Antique)

Class E / Experience Economy Clusters

1 West End International Centre
2 Knightsbridge International Centre
3 Oxford Street/Regent Street/Bond Street
4 Angel (also part town centre)
5 Baker Street (South)
6 Bankside and the Borough
7 Battersea Power Station
8 Canary Wharf Metropolitan Town Centre
9 Charing Cross Road
10 Cheapside
11 Chiltern Street
12 Covent Garden/Strand
13 Edgware Road (South)
14 Elephant and Castle/Walworth Road (also part town centre)
15 Fleet Street
16 Great Portland Street
17 Holborn (High Holborn/Holborn/Kingsway)
18 Jermyn Street
19 King's Cross Boulevard and Coal Drops Yard
20 King's Cross/Euston Road
21 Leadenhall Market
22 London Bridge
23 Marylebone High Street
24 Marylebone Road
25 Moorgate/Liverpool Street
26 Piccadilly
27 Praed Street/Paddington
28 Shoreditch
29 South Audley / Mount Street
30 South Bank
31 Tottenham Court Road/Charing Cross Road /New Oxford Street
32 Vauxhall
33 Victoria Street
34 Warwick Way/ Tachbrook Street
35 Waterloo
36 Wentworth Street
37 Wigmore Street

Opportunity Areas (OAs)

1 City Fringe /Tech City
2 Vauxhall, Nine Elms and Battersea (VNEB)
3 Earl's Court/West Kensington
4 Elephant and Castle
5 Old Kent Road
6 Canada Water