CAMDEN RETAIL & LEISURE STUDY

VOLUME C
HEALTH CHECK ASSESSMENTS

Prepared on behalf of:

London Borough of Camden

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VOLUME C: HEALTH CHECK ASSESSMENTS

VOLUME C1: CENTRAL LONDON FRONTAGES

CAMDEN RETAIL STUDY – TOWN CENTRE HEALTH CHECKS

HIGH HOLBORN / KINGSWAY

Description

Current Designation: Central London Frontage (CLF) as defined in the Camden Local Plan 2017 and Central Activity Zone (CAZ) retail cluster in The London Plan.

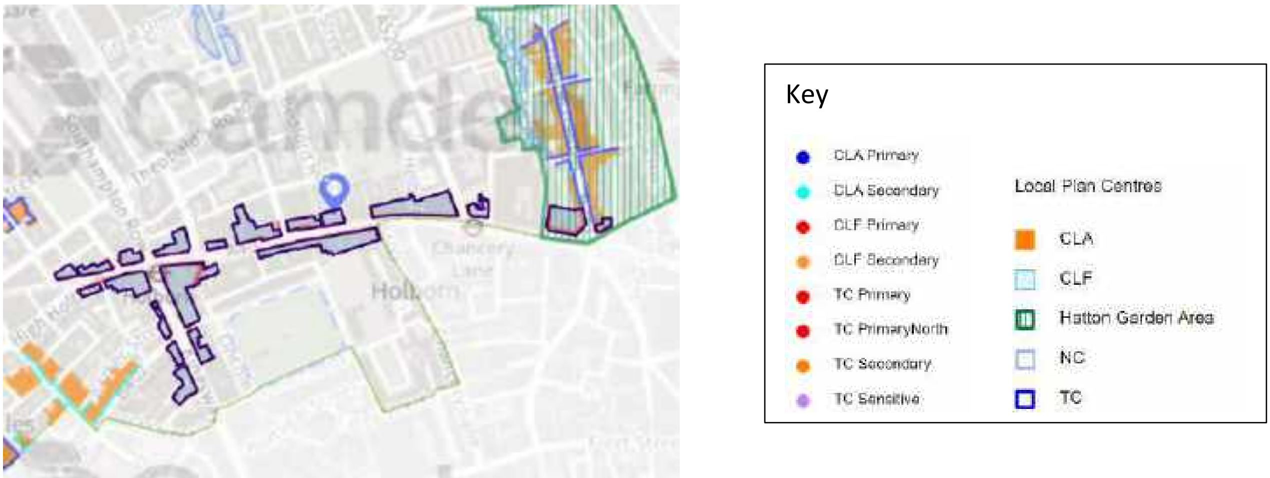
Description of Centre:

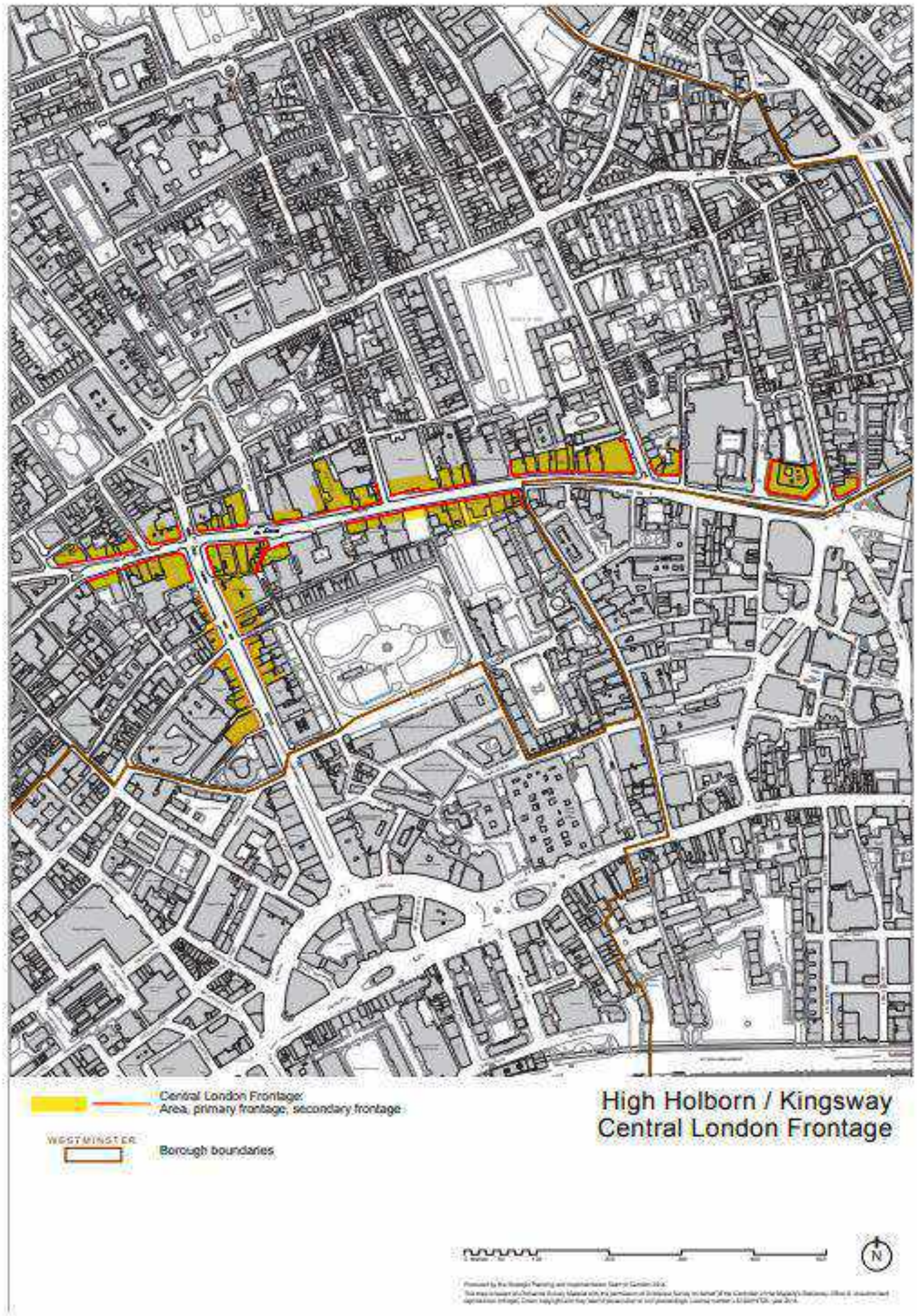
Holborn Central London Frontage is centred around the High Holborn underground station and extends along High Holborn, Kingsway, and part of New Oxford Street, with primary frontages along the whole length of High Holborn and at the northern end of Kingsway. Further south along Kingsway, the frontages are defined as secondary.

Retail uses are characterised by High Street multiple outlets and convenience stores with food, drink office and entertainment uses interspersed. There is a concentration of F&B uses close to Holborn Station, with restaurants dominating the southern part of the secondary frontages on Kingsway. These include a mixture of High Street multiples and independents and are aimed at serving the high numbers of people working and visiting the area.

In Camden's Planning Guidance 2021 the centre is described as follows:

The area has a concentration of office development and the centre principally services a weekday office workforce. The entrances to offices often break up the continuity of shop premises.





Current Planning Policies / Designations:

- As Central London Frontage (CLF)/Central Activity Zone (CAZ), the following policies of the Camden Local Plan apply to the centre:
    - Policy E3 (Tourism);
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden's centres and other shopping areas);
    - Policy TC4 (Town centre uses); and
    - Policy TC5 (Small and independent shops).

- The Holborn CLF is within the Bloomsbury and Kingsway Conservation Areas.
- High Holborn / Kingsway is designated as a CAZ Retail Cluster in the London Plan 2021 with high potential for commercial growth and potential for incremental residential growth.
- It is within a Strategic Area for Regeneration as defined in Policy SD10 of the London Plan (Annex 1, Table A1.1).

Footfall:

The figure below illustrates the pedestrian heat map for High Holborn and Kingsway and shows a particular concentration of footfall focused around the Southampton Row/ Kingsway/ A40 junction.

High Holborn and Kingsway Footfall Heat Map

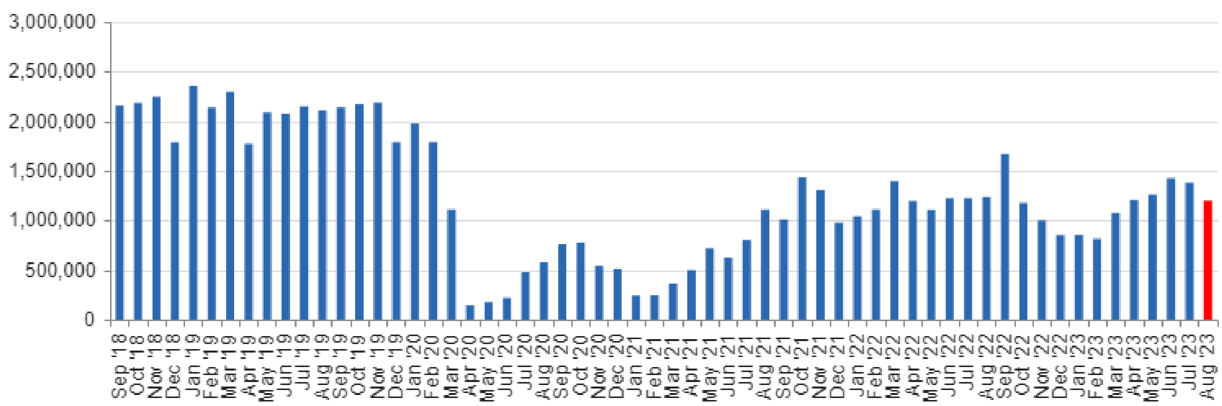
Source: Datscha

A busy section located along the A40 was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall levels dropped drastically at the beginning of the pandemic period with some gradual growth as 2020 progressed, but then dropping back again in early 2021. From late 2021 onwards, footfall seems to have stabilised, but it is considerably lower than pre-pandemic.

When comparing the 12-month period from September 2018 (pre-pandemic) to the 12-month period from September 2022 (post-pandemic), pedestrian activity has fallen by 38% (monthly average from 2.1m down to 1.3m). The prevalence of hybrid working is likely a major factor behind the reason why post-pandemic figures are showing no signs of matching what was seen in late 2018, 2019 and early 2020.

Footfall on the A40, High Holborn and Kingsway (September 2018 – August 2023)



Source: Datscha

Catchment Area:

High Holborn/Kingsway has a relatively limited retail turnover but draws the majority of its trade for both convenience and comparison sales from the wider London area and the rest of the UK. Trade from Camden residents only represents about 15% of total sales.

Use of Centre:

Food and beverage sales represent the main spend within the High Holborn/Kingsway area, with both convenience and comparison spend appearing to be ancillary to this and the employment uses in the area.

Previous Retail Study Findings

Conclusions from Retail Town Centre Study 2013:

Key strengths identified for High Holborn CLF include:

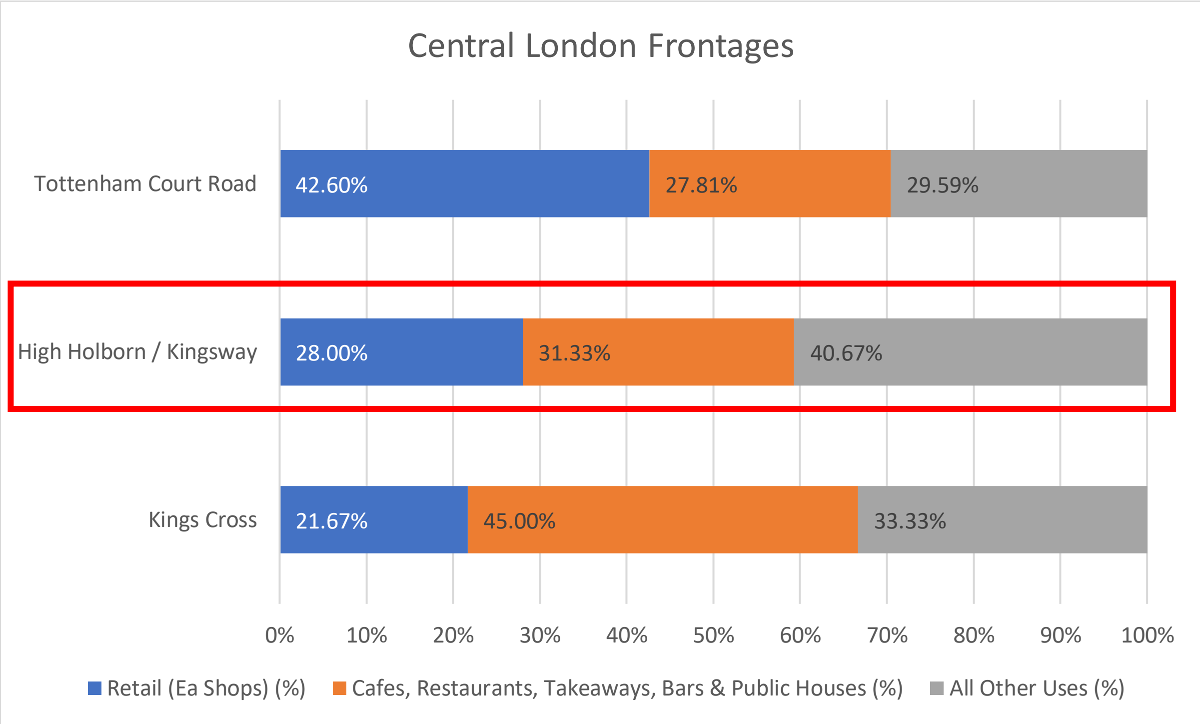
- The centre is performing relatively well against a number of key health check indicators given it is predominantly a commercial area, with an extensive workforce population and a small residential community;
- There are a number of small and medium sized convenience units and a high proportion of service operators in Holborn. The service operators are predominantly leisure services, i.e. cafes, coffee shops and sandwich shops.
- Holborn has a particularly low vacancy rate and high levels of retailer requirements which reflects the desirability of this central London location for multiple retailers to operate.

Key weaknesses identified for High Holborn CLF include:

- The centre has a significant deficiency in comparison retail units.
- The centre lacks a specialist retail function

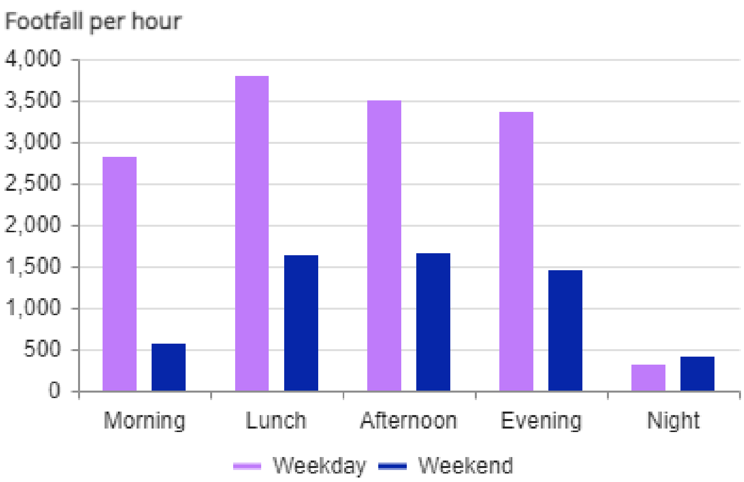
Diversity of Uses 2023

High Holborn / Kingsway	Number	%	Camden Average (%)
Retail (Ea Shops)	42	28.0	37.4
Food & Beverage	47	31.3	23.3
All Other Uses	61	40.7	39.4
Total	150	100.0	100.0



EVENING / NIGHT TIME ECONOMY

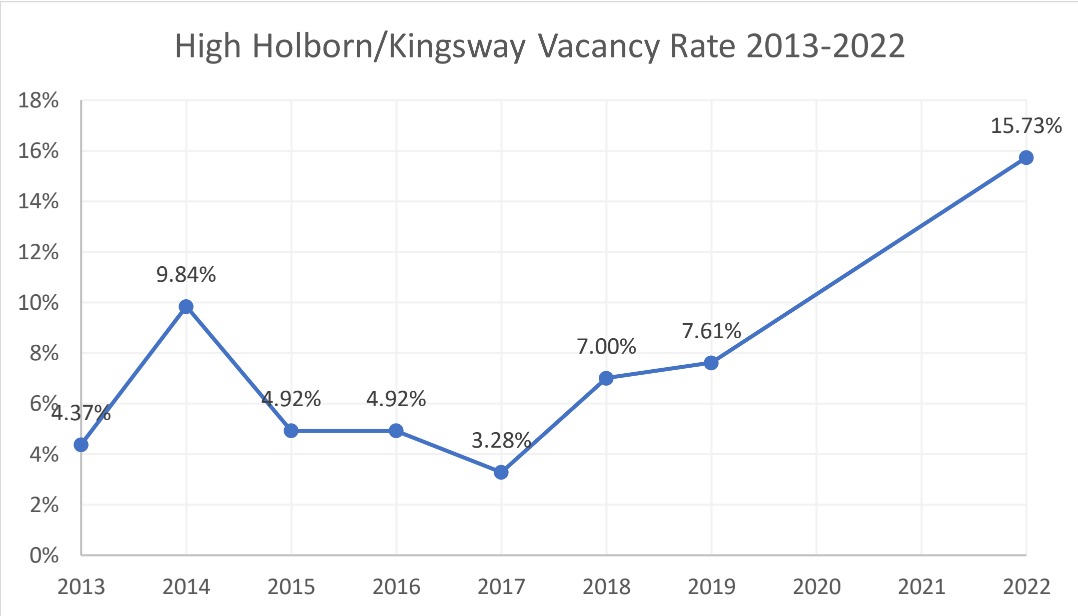
High Holborn / Kingsway	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	11	7.4	3.9%



Conclusions on Diversity of Uses:

The High Holborn/Kingsway CLF has a primary function of servicing the retail and F&B requirements of the working population in the area. This is reflected in a lower than average retail offer and a considerable F&B offer including bars and public houses which support the night time economy. However, reliance on the working population means the area experiences significantly reduced footfall at weekends.

Vacancies 2013 - 2022



Vacancy rates in the area have risen sharply since 2019, although they were already increasing prior to the pandemic. This is likely to reflect the direct impact of the pandemic restrictions and the on-going Working from Home arrangements for many employees.

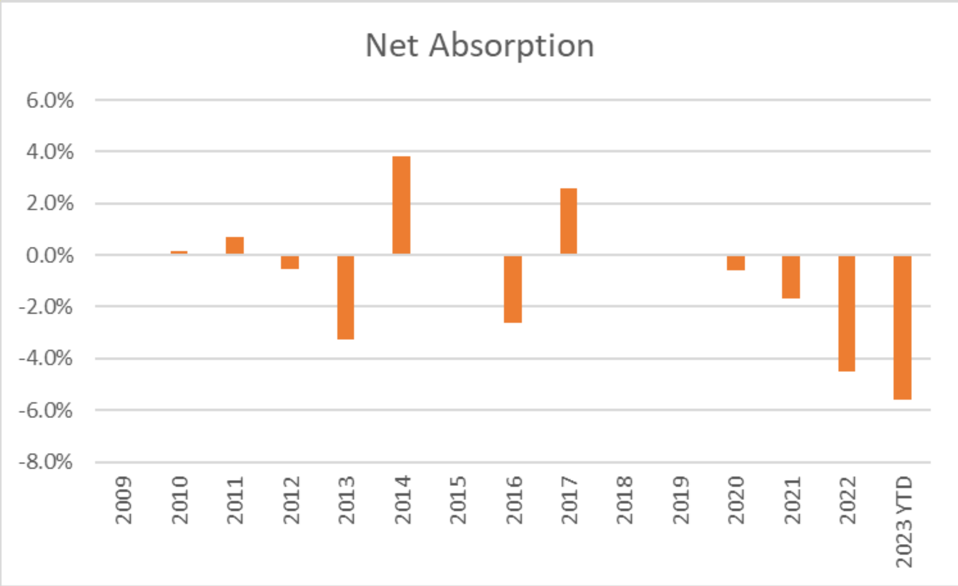
Changes in Representation and Market Demand

Market demand can be assessed by looking at net absorption of retail floorspace in the area.

> ***Net absorption*** = *additional floorspace occupied (move-ins) – floorspace vacated (move-outs)*

The net absorption rates in High Holborn / Kingsway are characterised by a mitigated performance between 2009 and 2018 before reporting several years of decline.

This area is the second worst performing major retail centre in Camden in terms of net absorption and it should be noted that vacancy in the area has dramatically increased since 2017 to reach 15.73% in 2022. This suggests a decline of the area as a retail destination and a lack of demand from potential occupiers.



Commercial Rents and Yields

Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

The following rental levels are therefore broad estimates of prime Zone A rental tone within each location.

Location	Estimated Zone A rate
High Holborn/Kingsway	£190-210
King’s Cross	£90-100
Tottenham Court Road	£90-100
Camden Town	£200-220
Finchley Road	£65 -70
Hampstead	£150-160
Kentish Town	£50-55
Kilburn High Road	£80-90
West Hampstead	£80-90
Seven Dials	£160-180
Fitzrovia	£85-95
Hatton Garden	£125-135
Museum Street	£70-80
Denmark Street	£80-90

Most Central and Inner London investments are mixed use by nature which impacts on the yield analysis for the individual constituent parts. Certain retail locations such as Bond Street attract the highest pricing driven by overseas investors and premium brands acquiring flagship stores but there is still good sentiment for other Central London locations including Covent Garden, Fitzrovia, Camden, Tottenham Court Road etc.

Whilst there has been a softening in retail value the lack of transactional volumes has meant comparable evidence within the Borough is limited so in the broadest of terms we would set out the following:

- Prime retail yields – 4.5% – 6.0%
- Good secondary retail yields – 6.0% – 7.0%

Accessibility

Transport for London's Public Transport Accessibility Levels (PTAL) ranking assesses connectivity across London, with a grading system indicating the strength of the public transport in any given area. The grading goes from 0 which indicates very poor access to public transport through to 6b which indicates excellent access to public transport. The measures include walk time to public transport, the reliability of the public transport services and the number of services within the area.

A central point for High Holborn and Kingsway provides a PTAL output of 6b, indicating that public transport accessibility in the area is excellent.

Holborn underground station can be accessed by the A40/ A4200/ Southampton Row Junction. Holborn is located along the Piccadilly and Central lines, meaning regular services can be joined which lead in all directions to places such as King's Cross, Finsbury Park, Stratford, Shepherd's Bush and Heathrow. Chancery Lane underground station can be found to the east and is also part of the Central line.

Bus services run regularly through the heart of the area, providing great connectivity to places in all directions including Bow, Streatham and Tottenham Court Road. Bus lanes are present in parts of the area.

As with many roads in central London, there can be heavy traffic in the area at various times in the day. The A40 runs through the area, has multiple lanes and one-way systems in parts. With up to four lanes of traffic along the A40, crossings can be challenging for pedestrians. There are several traffic light crossings, some with pedestrian islands to support with navigating the busy roads and junctions. Wide pavements are present to accommodate high levels of footfall in peak areas. Bike storage facilities are available for cyclists to safely store their bikes.

Perception of Safety and Occurrence of Crime

Between June 2022 and May 2023, crime data from the MET Police referenced 2,443 crimes in High Holborn / Kingsway, representing 5.4% of all crimes committed in the London Borough of Camden over this period.

The following table present a breakdown of crimes committed in High Holborn / Kingsway by crime type.

The area has a particularly high concentration of "other" thefts (28.7% of all crimes committed in the area).

High Holborn / Kingsway	# Crimes	As % of all crimes in area	As % of similar crime type in LB Camden
ALL Crimes	**2,443**	**100.0%**	5.4%
Anti-social behaviour	446	18.3%	4.6%
Bicycle theft	41	1.7%	3.8%

Burglary	80	3.3%	4.1%
Criminal damage and arson	63	2.6%	3.9%
Drugs	16	0.7%	1.3%
Other crime	10	0.4%	4.3%
Other theft	700	28.7%	8.6%
Possession of weapons	4	0.2%	3.1%
Public order	93	3.8%	4.2%
Robbery	57	2.3%	3.9%
Shoplifting	37	1.5%	2.4%
Theft from the person	419	17.2%	7.5%
Vehicle crime	226	9.3%	6.6%
Violence and sexual offences	251	10.3%	3.4%

Environmental Quality

Parts of High Holborn/ Kingsway have historic and architectural importance and have therefore been designated as the Kingsway and Bloomsbury Conservation Areas. This designation recognises the importance of the two areas and their qualities and looks to preserve this going forward.

Large trees line both sides of Kingsway providing an attractively symmetrical presence of greenery. Trees can also be found along the A40, albeit in much fewer numbers.

Tall, grand buildings with traditional and intricate details and features are kept in good condition and add to the environmental quality of the area. Modern buildings such as Mid City Place with its predominantly glass exterior are tastefully blended in to create a mix of old and new.

Bins are located around the area, allowing visitors to dispose of their rubbish and minimising the likelihood of litter on the streets and pavements. There is a good provision of cycle parking to assist with those with wish to cycle into the area and store their bike safely.

Investment Plans and Development Opportunities

Work has still to start on the redevelopment of the former Central St Martins College site, but this is included as a Site Allocation in the draft Site Allocations Plan.

There has also been redevelopment just beyond the western boundary of the defined CLF, at the former Sorting Office site, 21-31 New Oxford Street. This has seen recent proposals to allow the proposed flexible retail/restaurant units to be used for an immersive virtual reality experience (Application ref: 2022/0757/). This follows difficulties in attracting occupier interest for the approved uses. This is consistent with national trends for the retail and F&B sectors. Whilst the Sorting Office site is peripheral to the main High Holborn/Kingsway CLF and the experience there may not be replicated in the busier CLF area, the demand for more flexible uses should be monitored.

The Council has also prepared a draft Vison and Urban Strategy for the Area, which was originally published for consultation in 2018, with the intention that a finalised version will be adopted as Supplementary Planning Guidance. This proposes significant improvements to the public realm, the removal of the gyratory, a new tube entrance at Procter Street and capacity upgrades to Holborn Station. This includes proposals to widen, declutter and repave pavements using high quality materials, introduce raised crossings at key intersections and a diagonal crossing at Holborn station. Widened pavements are also proposed along Kingsway.

Some of these transport related proposals are now being brought forward through the ‘Liveable Neighbourhoods’ project including a range of cycling, pedestrian, road safety changes and public realm improvements to the High Holborn, Drake Street, Procter Street, Red Lion Square and Southampton Row areas. These include:

- Reducing Drake Street and Procter Street to one traffic lane and one bus lane (permitting cycles and taxis), to allow space for a segregated cycle track. Bus stops and bus stands will be relocated and consolidated;
- Introducing cycle improvements on Procter Street at the junction with High Holborn and at the junction of High Holborn and Southampton Row; and
- Improvements to public realm in the area by adding planting including rain gardens.

Stakeholder Feedback

Stakeholder engagement has included the public consultation responses to the Vision and Urban Strategy for the area. These responses generally supported the Vision and Urban Strategy for the area as a whole and supported urban greening.

There were more mixed responses in relation to the Holborn Gateway area (High Holborn/Kingsway). Respondents:

- wanted to retain vehicular access through the area;
- supported the removal of the gyratory; and
- wanted safe cycle lanes.

Other stakeholder feedback includes:

- Developer / landowner No. 2:
  - Camden's town centres tend to have a very dense populus and have been and continue to be very popular.
  - They are resilient in the context of new occupiers coming in, people want to be there.
  - More present in a '7-day cycle' compared to historically when the busy periods were only from Friday-Sunday. Issues of quiet periods elevated.
  - Any of the central areas where there isn't an overarching landlord, where the mix can be evolved or played to a strength of an area, the weight of demand can have a detrimental effect on the area.
  - Rent is a major player in terms of health of an area but those that can afford rent do not necessarily add vitality to an area. What is right for the area isn't always what is coming through development proposals.
  - In the Camden centres of this nature, levels of trade are not as good as the leasing activity suggests. There is a question regarding the viability of some.

SWOT Analysis

Strengths

- Major employment area
- Very high levels of footfall (compared with elsewhere in Camden)
- Strong F&B offer including evening and night time activity responding to demand from office workers
- Good accessibility
- Recent improvements to the public realm benefiting pedestrians and cyclists

Weaknesses

- Reliance on working population
- Lower activity at weekends
- Relatively high vacancy levels
- Limited provision of retail offer other than food and beverage

Opportunities

- Proximity to West End (Covent Garden, Charing Cross, Soho)
- Increase in tourist activity
- Space available for new businesses
- The area is located between and connect two major employment hubs (the West End and the City of London)

Threats

- Continued / increasing Working from Home and declining footfall
- Long term vacancies and perceived decline of the area as a retail destination

Conclusions

High Holborn / Kingsway CLF has experienced a major adverse impact as a result of the Covid-19 pandemic and continued WfH is likely to result in current lower footfall becoming the norm. The area benefits from good proximity and accessibility to many Central London tourist areas but securing sufficient footfall at weekends to support existing businesses and encourage further investment may take time and requires an expansion of the offer to attract visitors.

However, we consider that the centre boundary remains appropriate given the composition and distribution of existing uses.

CAMDEN RETAIL STUDY – TOWN CENTRE HEALTH CHECKS

KING'S CROSS

Description

Current Designation: Central London Frontage (CLF) as defined in the Camden Local Plan 2017 and Central Activity Zone (CAZ) retail cluster in The London Plan.

Description of Centre:

This Central London Frontage for King's Cross covers the main commercial area to the south of the A501 Euston Road / Pentonville Road, together with a small area to the north of Euston Road at the western end of the defined area. It is not a continuous frontage and there are gaps excluding large uses such as Camden Town Hall.

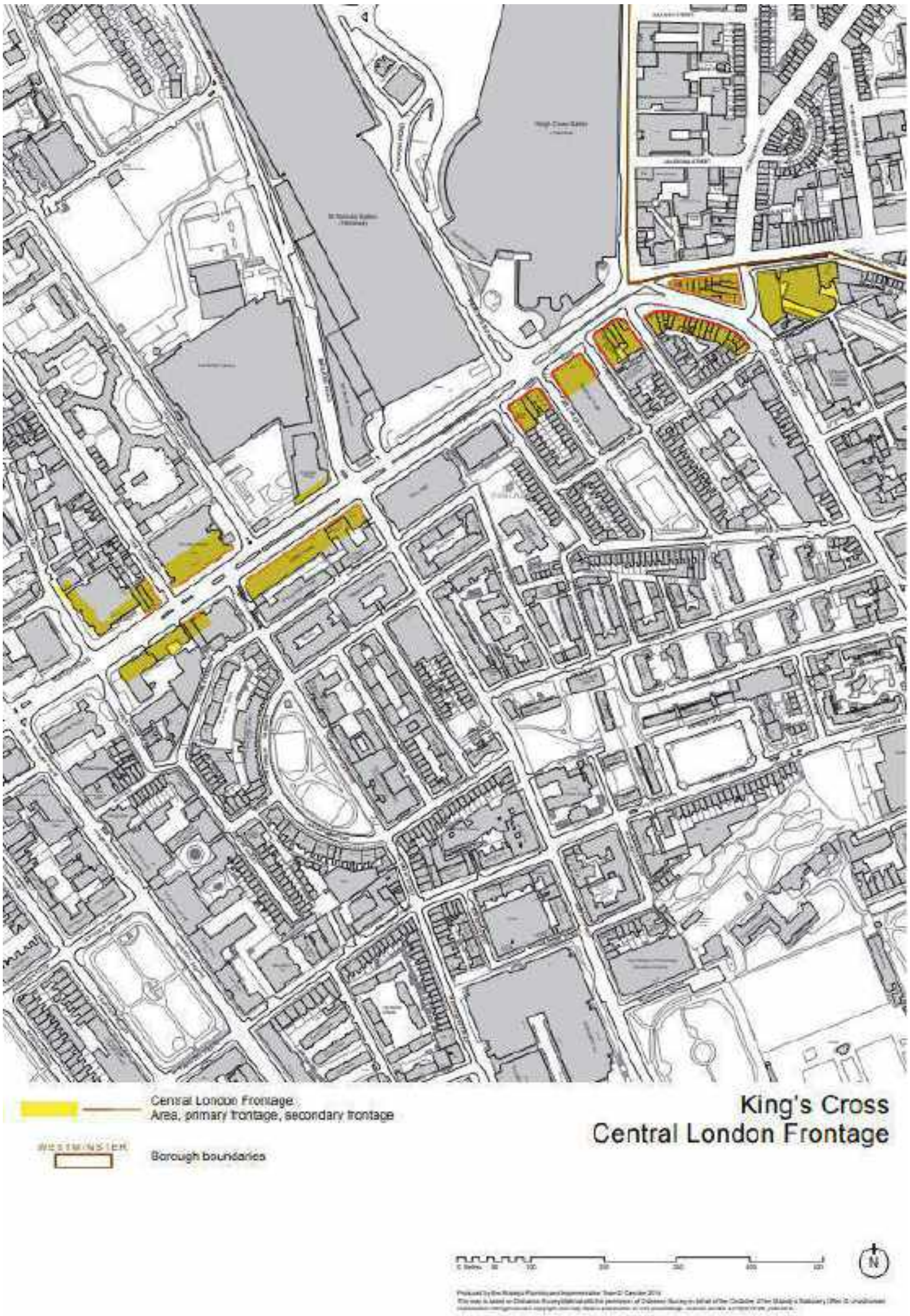
The primary frontages are located to the south of Euston Road opposite King's Cross station and run from Gray's Inn Road to Argyle Street. This area is characterised by small or medium scale buildings accommodating a mix of commercial uses on the ground floor with residential, hotel and office accommodation above. These commercial uses serve local residents, workers, visitors, and travellers using the mainline stations.

The secondary frontages are mainly located to the west of the Central London Frontage, but also includes the Lighthouse block at the far eastern extent. The area from Euston Road from Judd Street to Dukes Road consists of large-scale buildings, providing predominantly hotel and office accommodation.

This area has a high proportion of food, drink, and entertainment uses and includes residential accommodation located above commercial facilities.

In Camden's Planning Guidance 2021 the centre is described as follows:

This Central London Frontage covers the main commercial area around King's Cross, including parts of Euston Road. It is not continuous and there are gaps where large uses such as King's Cross and St Pancras Stations, the British Library and Camden Town Hall have been excluded. The wider King's Cross area is undergoing transformation, with development of the extensive King's Cross Opportunity Area and other nearby developments. This may lead to the redevelopment of parts of the Central London Frontage and general improvements to the area. Parts of the area are covered by the King's Cross Conservation Area and by parts the Bloomsbury Conservation Area.



Current Planning Policies / Designations:

- As Central London Frontage (CLF)/Central Activity Zone (CAZ), the following policies of the Camden Local Plan apply to the centre:
  - Policy E3 (Tourism);
  - Policy TC1 (Quality and location of retail development);
  - Policy TC2 (Camden's centres and other shopping areas);
  - Policy TC4 (Town centre uses); and
  - Policy TC5 (Small and independent shops).

- The King’s Cross CLF is partly within the Bloomsbury and King’s Cross St Pancras Conservation Areas.
- King’s Cross CLF is designated as a CAZ Retail Cluster in the London Plan 2021 with medium potential for commercial growth and potential for incremental residential growth.
- It is within a Strategic Area for Regeneration as defined in Policy SD10 of the London Plan (Annex 1, Table A1.1).
- It abuts the King’s Cross Local Growth Area

Footfall:

The figure below illustrates the pedestrian heat map for King’s Cross and shows a very high level of footfall across the main areas of King’s Cross.

King’s Cross Footfall Heat Map

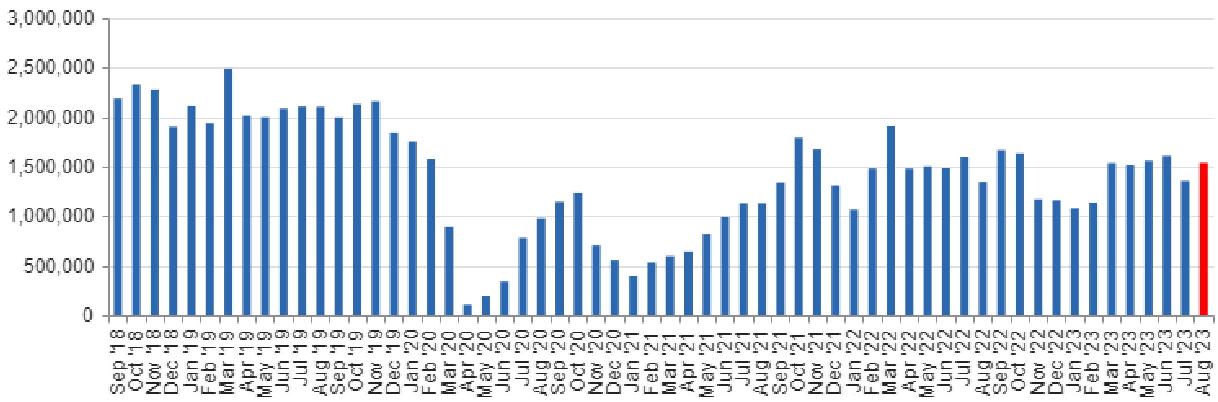
Source: Datscha

A busy section along Euston Road, to the front of King’s Cross station, was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall dropped significantly from March 2020 through to the middle of 2021 as a result of the COVID-19 guidance, restricting people’s movement and ability to travel. Figures from late 2021 through to August 2023 are relatively stable but have not returned to what can be seen in late 2018 and throughout 2019.

When comparing the 12-month period from September 2018 (pre-pandemic) to the 12-month period from September 2022 (post-pandemic), pedestrian activity has fallen by 31% (monthly average from 2.13m down to 1.46m).

Footfall of Euston Road, King's Cross (September 2018 – August 2023)



Source: Datscha

Catchment Area:

The turnover of the King's Cross CLF as currently defined includes a relatively small number of properties and spend on retail and F&B is therefore limited.

However, the expenditure that is being made indicates that the area is currently being used both by local residents and visitors to the area, with around 40% of convenience spend coming from Camden (mainly Zone 1), 25% from Zones 5-7 and the rest from further afield. For comparison spend the draw is wider with just 20% of spend coming from the Camden area.

Use of Centre:

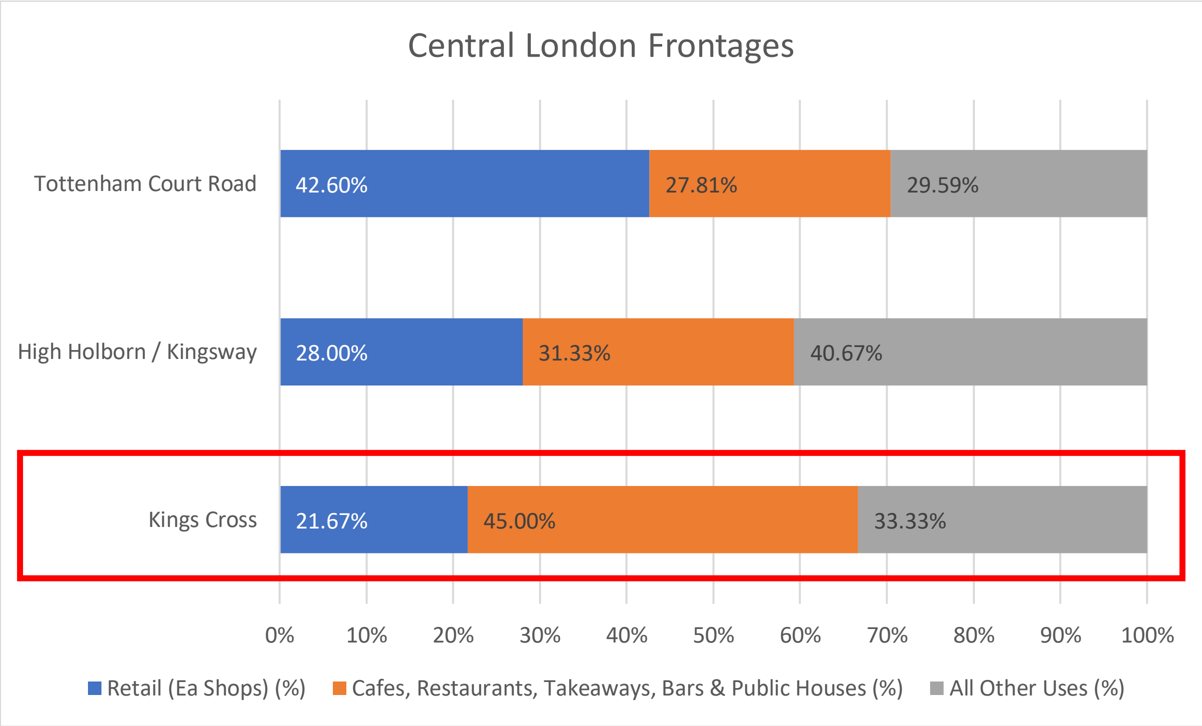
The area has a limited retail spend, with F&B expenditure being greater, reflecting the current mix of uses in the area. Convenience spend is particularly low given the very limited convenience provision within the defined centre.

Previous Retail Study Findings

This area was not covered by the Retail Town Centre Study 2013. Therefore, no findings are available for this area specifically.

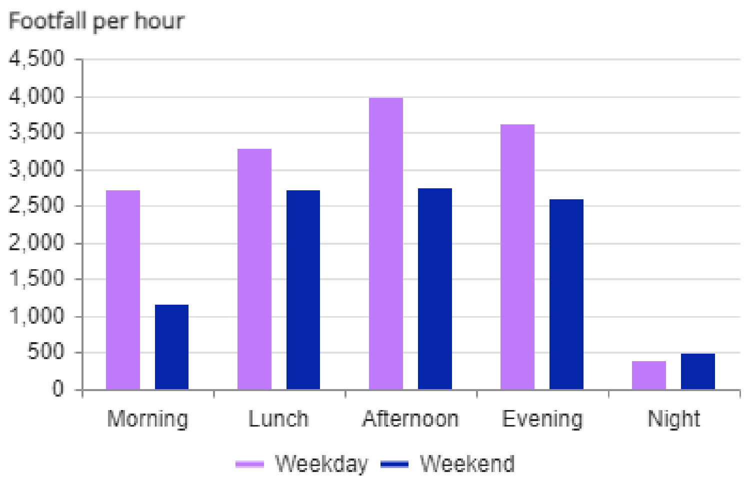
Diversity of Uses 2023

King's Cross	Number	%	Camden Average (%)
Retail (Ea Shops)	13	21.7	37.4
Food & Beverage	27	45.0	23.3
All Other Uses	20	33.3	39.4
Total	60	100.0	100.0



EVENING / NIGHT TIME ECONOMY

King's Cross	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	6	9.0	3.9%

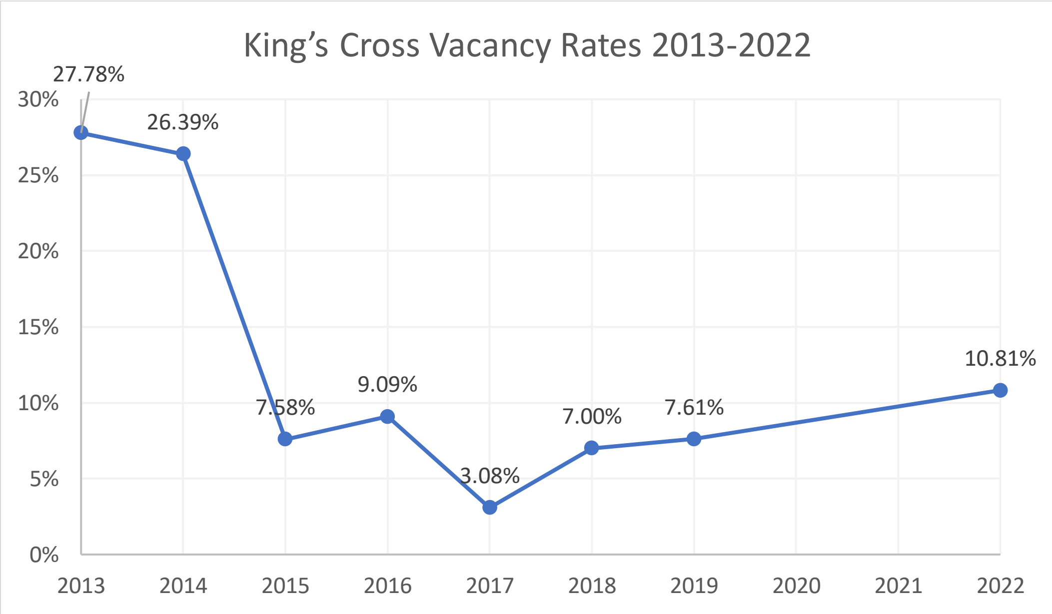


Conclusions on Diversity of Uses:

The King's Cross CLF contains a very high proportion of F&B uses, almost double the Camden average, with a consequential reduction in the retail and 'other' uses.

The provision of bars and public houses to support the evening economy is also high and this is reflected in high levels of footfall in the evening period, which are similar to those seen during the day.

Vacancies 2013 - 2022



Vacancy rates in the CLF have declined since 2013 when redevelopment was proceeding in the area. The rate is now slightly below the UK average but this represents a significant increase on 2017. This is likely to reflect the decreased commuter footfall in the area following the pandemic.

Changes in Representation and Market Demand

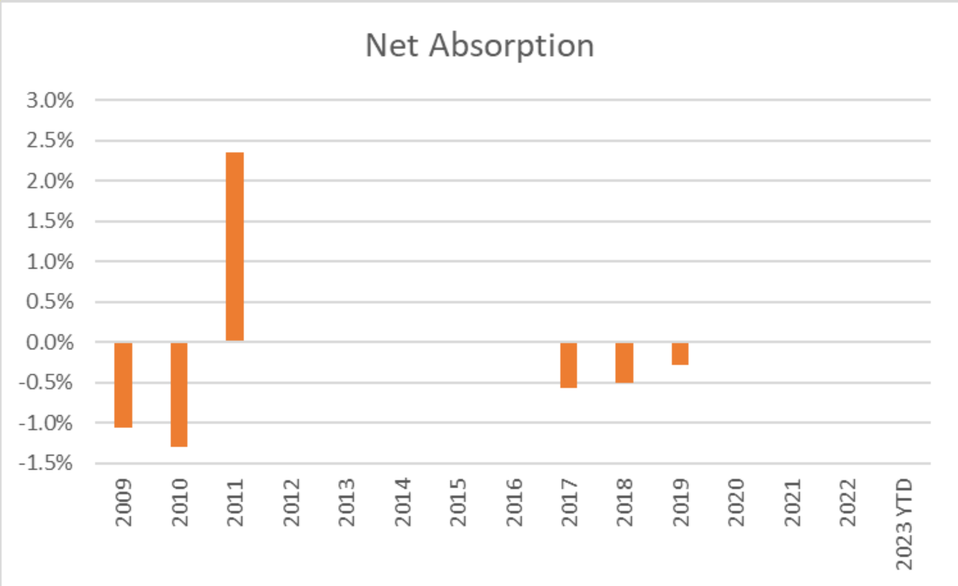
Market demand can be assessed by looking at net absorption of retail floorspace in the area.

> ***Net absorption*** *= additional floorspace occupied (move-ins) – floorspace vacated (move-outs)*

The net absorption rate in King's Cross has been relatively limited since 2009, due to the limited size of this market.

It can be noted the negative net absorption in 2009 and 2010, possibly due to the negative impact of the construction activities at King's Cross (redevelopment of the station and regeneration of the area), followed by a positive net absorption in 2011 (retailers returning to the retail centre following the regeneration of the area).

It can also be noted that some retail floorspace has been lost in this area (-1.2% of the stock since 2009), contributing positively to the net absorption rate.



Commercial Rents

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In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

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- Good secondary retail yields – 6.0% – 7.0%

Accessibility

Transport for London's Public Transport Accessibility Levels (PTAL) ranking assesses connectivity across London, with a grading system indicating the strength of the public transport in any given area. The grading goes from 0 which indicates very poor access to public transport through to 6b which indicates excellent access to public transport. The measures include walk time to public transport, the reliability of the public transport services and the number of services within the area.

A central point for King's Cross provides a PTAL output of 6b, indicating that public transport accessibility in the area is excellent.

King's Cross is one of London's main transport hubs, providing multiple transport options connecting to a wide range of locations. Rail services connect passengers to areas of Hertfordshire, Yorkshire, Tyne and Wear, Scotland and more. London's underground network can be accessed with the Circle, Hammersmith & City, Metropolitan, Northern, Piccadilly and Victoria lines all serving King's Cross station.

Euston Station and St Pancras International provide further links to other UK locations, with the latter also providing direct train links to Europe.

Several bus services run along Euston Road, with routes connecting passengers to nearby and further afield places such as Angel, Moorgate, Marble Arch and Victoria. Taxis can be picked up from the dedicated taxi area along Pancras Road.

Euston Road has up to 5 lanes in parts and can often become severely congested. Euston Fire Station is located c.600m to the west which can often cause further challenges when travelling within the area due to the emergency response vehicles moving at speed.

As a result of the above, navigating the area by foot or bike can become dangerous and challenging. Cycle lanes/ areas are in place to support with accessibility as well as a good provision of bike storage facilities. Traffic light crossings and pedestrian islands can be used to support those navigating the area by foot.

Perception of Safety and Occurrence of Crime

Between June 2022 and May 2023, crime data from the MET Police referenced 1,416 crimes in King's Cross, representing 3.1% of all crimes committed in the London Borough of Camden over this period.

The following table present a breakdown of crimes committed in King's Cross by crime type.

The area is particularly impacted by anti-social behaviour crimes (25.6% of all crimes committed in the area), "other thefts (19.2%) and violence and sexual offences (15.5%).

King’s Cross	# Crimes	As % of all crimes in area	As % of similar crime type in LB Camden
ALL Crimes	**1,416**	**100.0%**	3.1%
Anti-social behaviour	362	25.6%	3.7%
Bicycle theft	28	2.0%	2.6%
Burglary	40	2.8%	2.1%
Criminal damage and arson	46	3.2%	2.8%
Drugs	58	4.1%	4.9%
Other crime	8	0.6%	3.4%
Other theft	272	19.2%	3.3%
Possession of weapons	8	0.6%	6.3%
Public order	62	4.4%	2.8%
Robbery	54	3.8%	3.7%
Shoplifting	13	0.9%	0.8%
Theft from the person	179	12.6%	3.2%
Vehicle crime	67	4.7%	2.0%
Violence and sexual offences	219	15.5%	3.0%

Environmental Quality

There is a relative lack of greenery within King’s Cross, with most of the area hard landscaped to accommodate the very high levels of pedestrian movement seen through the area. However, the quality of the space is high and activity levels are high given footfall and the ability to host markets and other events in a popular, prominent and easily accessible location.

Within this area to the front of King’s Cross station, there is a good provision of seating which is well utilised by people commuting and travelling. Bollards also line the border of this area to improve pedestrian safety when moving around this space.

King’s Cross station itself along with the grand St Pancras station and hotel building and its impressive clock provide the area with some quite beautiful architectural features.

Bins are located around the area, allowing people to dispose of their rubbish and in turn minimising the likelihood of litter on the streets and pavements. A good provision of cycle parking is available for those who may wish to cycle to and from the station to connect to train and underground services.

Investment Plans and Development Opportunities

As an Opportunity Area and Area of Growth, King’s Cross has seen considerable development over the last 10-20 years. Much of this major development is now either complete or reaching completion, but the Google European HQ building and the associated ground floor retail/F&B units have still to be occupied. It will also take some time for business occupiers to establish themselves and for trading patterns to settle down.

Redevelopment of the former Thameslink Station at Pentonville Road (Draft Site Allocations Policy IDS17) would also be expected to support the eastern part of the CLF.

At the Euston end of the CLF, the negative impacts of construction works for HS2 are currently being felt and the delays/uncertainties regarding the longer term plans will be affecting development and investment decisions.

Stakeholder Feedback

Stakeholder engagement identified the following points of relevance to the King's Cross CLF:

- Developer / Landowner No. 2:
  - Camden's town centres tend to have very dense populus and have been and continue to be very popular.
  - They are resilient in the context of new occupiers coming in, people want to be there.
  - More present in a '7-day cycle' compared to historically when the busy periods were only from Friday-Sunday. Issues of quiet periods elevated.
  - Any of the central areas where there isn't an overarching landlord, where the mix can be evolved or played to a strength of an area, the weight of demand can have a detrimental affect on the area.
  - Rent is a major player in terms of health of an area but those that can afford rent do not necessarily add vitality to an area. What is right for the area isn't always what is coming through the development.
  - In Euston seeing massive disruption to existing occupiers. The elements that you need a retail centre to work are being removed e.g the detriment to footfall is causing major issues - traffic, dust, aesthetic, pedestrian experience. Not just one or two elements.
- Developer / Landowner No. 3:
  - At King's Cross, the 15 minute city is a big focus, seeing more localism and people want to support this.
  - King's Cross is getting strong as it has a mixed use offering of offices and residential. One of the big things here coming more into focus is office numbers.
  - Competition from online changed before 2019. Now starting to see that you can't have a relationship with a laptop and whilst online is still a threat, this is starting to drop off in key locations.
  - People always want to be in King's Cross, range of spaces and can be flexible that can respond to market requirements.
  - The retail market will continue to change but King's Cross will remain strong whatever the competition.
  - Have not seen any major changes as a result of the introduction of Class E but there has been a ripple effect around King's Cross from wider areas.
  - Investing in public realm is so important and plays into greatest successes such as outdoor seating which really was taken well after Covid. The European approach allowing spill out onto the streets is required with space managed to champion the public realm and pedestrian focus, rather than having to compete with public transport and vehicles.
- Consultation Feedback
  - In the Camden centres of this nature, levels of trade are not as good as the leasing activity suggests. There is a question regarding the viability of some.
  - The long term trends for Euston are complex due to HS2
  - Footfall in Euston is worse as it has been hit by two large hotels being taken for HS2 and associated construction. People are avoiding the area as it is a construction site and depressing.
  - King's Cross is a good example of where non-retail attractors are important. People will always want to go out. It has lots of cultural aspects, leisure centre, library and public services.
  - Leisure attractors currently there are good quality but it remains to be seen whether they are sustainable.

SWOT Analysis

Strengths

- CLF focused on major public transport hub with access to St Pancras International station, King's Cross station, and the London Underground.
- High footfall during the day and evening due to its location and its proximity to popular tourist attractions (eg British Library, Harry Potter Platform 9 ¾) and transport hub.
- Considerable new employment opportunities being provided in the immediate vicinity.
- King's Cross and surrounding area is seeing the benefit of large scale, long term investment.

Weaknesses

- Lack of focus to area and competition from King's Cross Central, where much of the activity is now focused.
- Mixed reputation of the area, with some parts of King's Cross being perceived as unsafe or unattractive contributes to the negative image of the area.
- High concentration of fast-food and low end food and beverage offer in existing frontage areas.
- High level of motorised vehicle traffic making accessibility to shops from the stations difficult (A501)
- Small size of the retail area, constraining its potential to become a significant retail destination capable to compete with adjacent areas.

Opportunities

- On-going development in the adjoining areas and opportunity to benefit from the considerable draw of the new offer.
- The redevelopment of King's Cross and Granary Square is bringing new office-based businesses to the area, significantly increasing office workers based in the area.
- The redevelopment is also helping to improve the reputation of the area.

Threats

- Declining footfall due to change in WfH
- Competition between the existing and new retail areas.
- Continued increase in vacancy levels.

Conclusions

The wider King's Cross / St Pancras area has seen significant investment over recent years, increasing worker and visitor footfall in the area. However, there has been limited investment in the existing CLF, with the mix of independent retailers, food & beverage providers and visitor accommodation being retained.

Investment at Euston Station is facing uncertainty regarding HS2 but longer term is likely to strengthen the western end of the CLF. To the east some investment in the centre is already evident and further redevelopment is expected around the former Thameslink Station. However, this area will not compete with the offer provided at King's Cross Central, King's Boulevard or Coal Drops Yard but instead will continue to provide a complementary offer. As a result the current centre boundary is therefore considered appropriate.

CAMDEN RETAIL STUDY – TOWN CENTRE HEALTH CHECKS

TOTTENHAM COURT ROAD

Description

Current Designation: Central London Frontage (CLF) as defined in the Camden Local Plan 2017 and Central Activity Zone (CAZ) retail cluster in The London Plan.

Description of Centre:

Tottenham Court Road is located adjacent to the West End, with the CLF comprising the properties on either side of Tottenham Court Road between New Oxford Street in the south and Beaumont Street / Warren Street in the north. It also includes properties eastwards along New Oxford Street and on the east side of Charing Cross Road between New Oxford Street and Shaftesbury Avenue, as well as the first buildings on that street. It therefore immediately adjoins Denmark Street and Covent Garden / Seven Dials Specialist Shopping Areas in the south and Goodge Street Neighbourhood Centre further north.

Within the CLF, most of the frontages are defined as primary, with secondary frontages limited to those on Charing Cross Road and Shaftesbury Avenue.

In Camden's Planning Guidance 2021 the centre is described as follows:

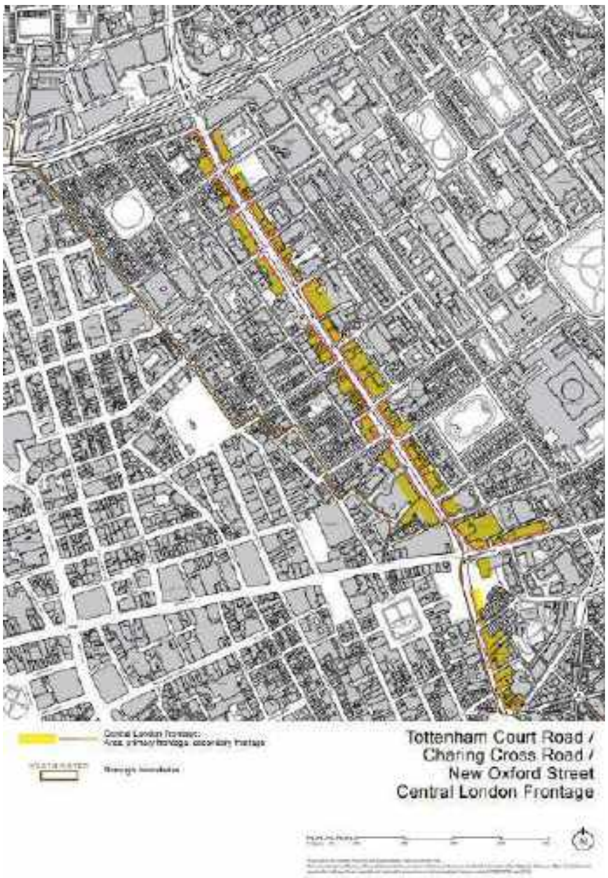
Tottenham Court Road is located adjacent to the West End and has traditionally been renowned for its specialist retail role providing concentrations of furniture and electrical shops; Charing Cross Road is well known for specialist bookshops. This Central London Frontage is also adjacent to a Growth Area with the same name (but different boundaries).

Tottenham Court Road is identified as an Opportunity Area in the London Plan and the frontage also falls within the London Plan West End Special Retail Policy Area which seeks to support the area's retail and leisure provision of national, city-wide and local importance, maximising the benefits arising from the implementation of Crossrail at Tottenham Court Road.

The Council anticipate significant change and improvement of Tottenham Court Road creating a street more akin to the iconic central London shopping streets of Oxford Street and Regent Street. The area will be benefit from increased activity and footfall from the completion of Crossrail and greatly improved spaces and pedestrian environment with the completion of the West End Project.

The southern part of the centre along Charing Cross Road has a very different character to the north, forming part of the West End/Theatre land.


Euston Square
Warren Street
Fitzrovia
Gower Street
Huntley Street
Torrington Place
Malet Street
Tavistock Square
Bedford Way
Goodge Street
Camden
Key
CLA Primary
CLA Secondary
CLF Primary
CLF Secondary
TC Primary
TC PrimaryNorth
TC Secondary
TC Sensitive
Local Plan Centres
CLA
CLF
Hatton Garden Area
NC
TC


Tottenham Court Road /
Charing Cross Road /
New Oxford Street
Central London Frontage

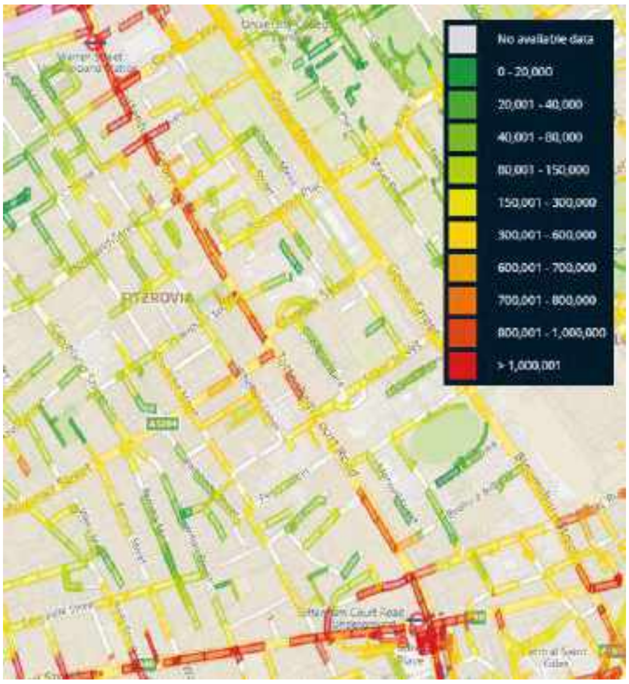
Current Planning Policies / Designations:

- As Central London Frontage (CLF)/Central Activity Zone (CAZ), the following policies of the Camden Local Plan apply to the centre:
    - Policy E3 (Tourism);
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden's centres and other shopping areas);
    - Policy TC4 (Town centre uses); and
    - Policy TC5 (Small and independent shops).
- The majority of the Tottenham Court Road CLF is within a Conservation Area designation – with Bloomsbury, Charlotte Street and Fitzroy Square Cas covering or adjoining the northern part of the CLF and Hanway Street, Denmark Street and Seven Dials (Covent Garden) CA covering or adjoining the CLF in the south.
- It is designated as a CAZ Retail Cluster in the London Plan 2021 with medium potential for commercial growth and potential for incremental residential growth.
- It is within a Strategic Area for Regeneration as defined in Policy SD10 of the London Plan (Annex 1, Table A1.1).
- It is classified as being within the NT1 night time classification in The London Plan
- It is identified as an Opportunity Area in the London Plan.
- The frontage on Tottenham Court Road falls within the London Plan West End Special Retail Policy Area.

Footfall:

The figure below illustrates the pedestrian heat map for Tottenham Court Road and shows a particular concentration of footfall to the northern and southern ends of Tottenham Court Road.

Tottenham Court Road Footfall Heat Map



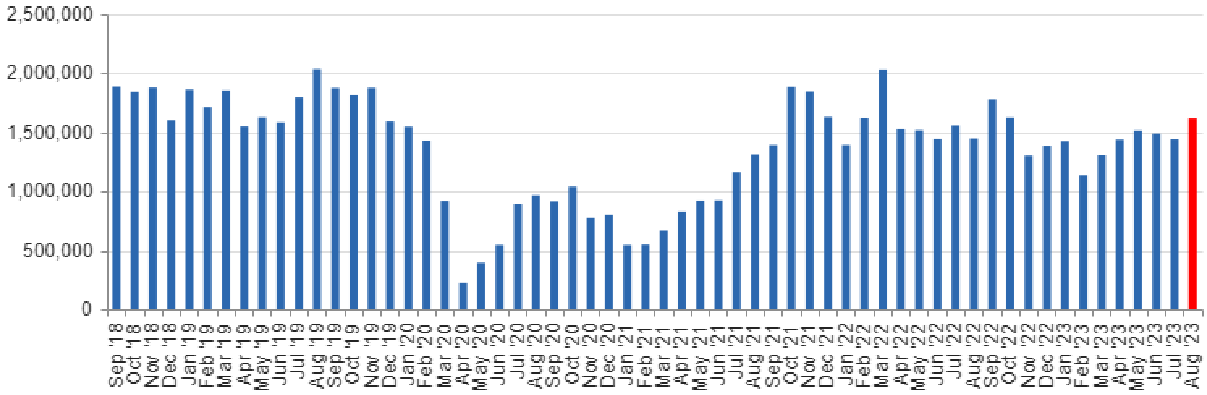
Source: Datscha

A busy section of Tottenham Court Road, nearby to Warren Street underground station, was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall was impacted significantly during the time of the pandemic, but has now recovered, although not quite to pre-pandemic levels.

When comparing the 12-month period from September 2018 (pre-pandemic) to the 12-month period from September 2022 (post-pandemic), pedestrian activity has fallen by 18% (monthly average from 1.77m down to 1.45m).

Footfall on Tottenham Court Road (September 2018 – August 2023)



Source: Datscha

Catchment Area:

The main retail draw in the Tottenham Court Road CLF is for comparison goods. The offer attracts significant volumes of trade from outside Camden with less than a fifth of sales coming from this area. Nearly two-thirds of sales come from other areas of London (including Zones 5-7) with about a quarter from the rest of the UK. Convenience sales are slightly more concentrated but follow a similar pattern.

Use of Centre:

The F&B offer is the key draw in the CLF followed by the comparison offer, with convenience sales being low.

Previous Retail Study Findings

Conclusions from Retail Town Centre Study 2013:

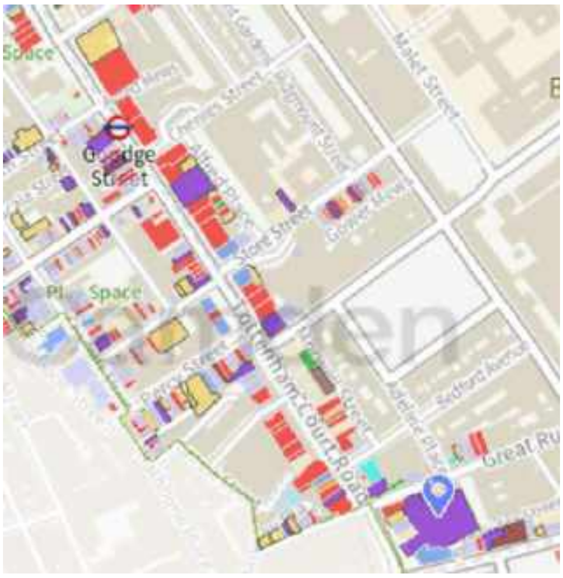
Key strengths identified for Tottenham Court Road include:

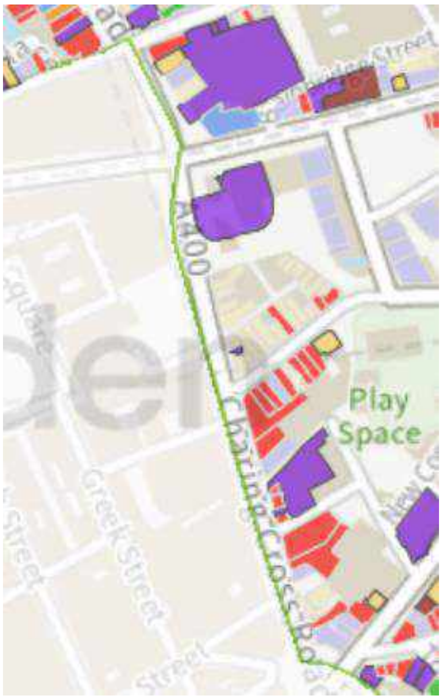
- National trends indicate that homeware, furniture and electronics retailers are increasingly looking for units with larger floorplates to accommodate large showroom type flagship stores which are then supplemented by online sales. Retail units with large floorplates which are suitable for modern retailers should therefore continue to be accommodated throughout the centre to attract retailers to the area.
- Results from the household telephone survey indicate that Tottenham Court Road is the second most popular centre to visit after Camden Town, and it is most popular for non-food shopping.

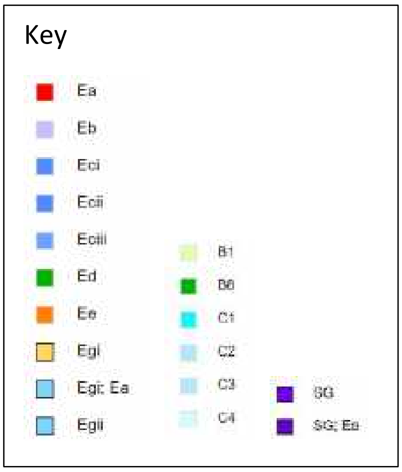
Key weaknesses identified for Tottenham Court Road have been identified as follows:

- Tottenham Court Road attracts less frequent trips than other town centres, reflecting the nature of the specialist homeware and electrical retail offer; products which are generally purchased less often.
- The possible introduction of two-way traffic on Tottenham Court Road could help to improve pedestrian safety and accessibility throughout the centre.

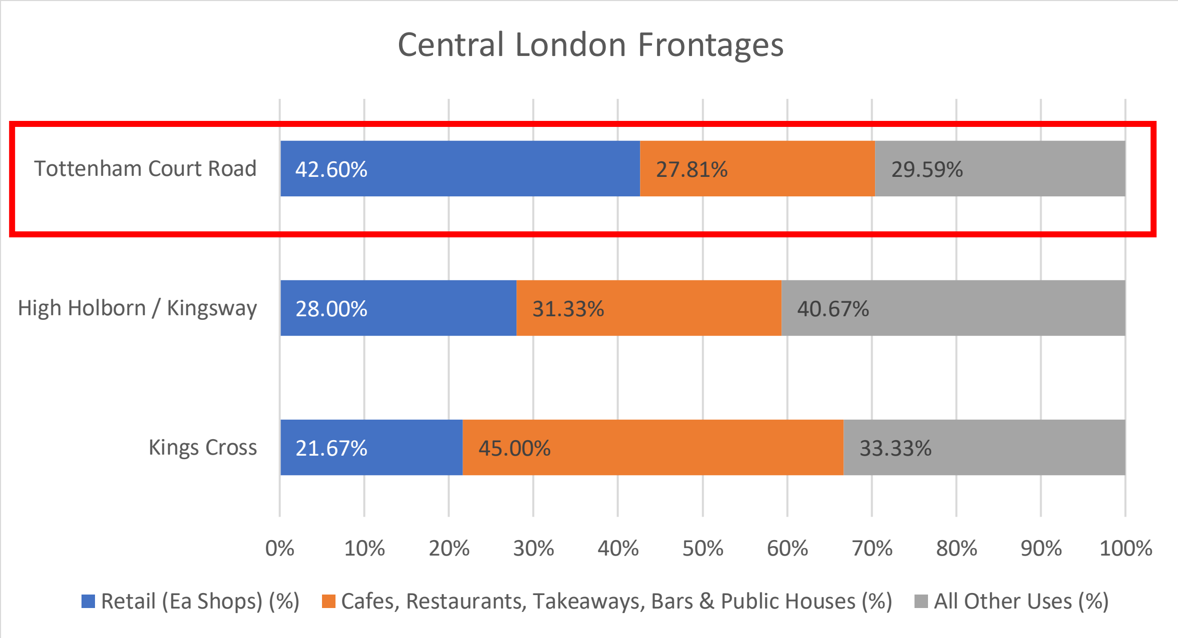
Diversity of Uses 2023





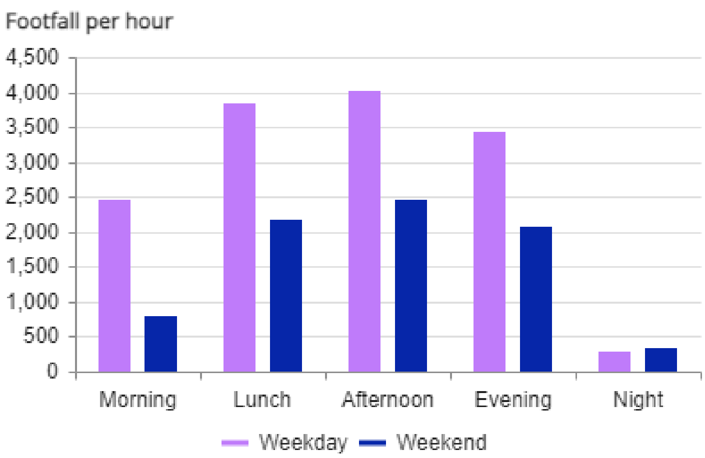


Tottenham Court Road	Number	%	Camden Average (%)
Retail (Ea Shops)	72	42.0	37.4
Food & Beverage	47	27.8	23.3
All Other Uses	50	29.6	39.4
Total	169	100.0	100.0



EVENING / NIGHT TIME ECONOMY

Tottenham Court Road	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	8	4.3	3.9%



Conclusions on Diversity of Uses:

The Tottenham Court Road CLF has a strong retail and F&B offer, with many of the former occupying larger footprint units within the northern part of the area. Occupiers tend to be national multiples and there is a strong representation of furniture retailers, although much of the specialist electrical offer has now gone.

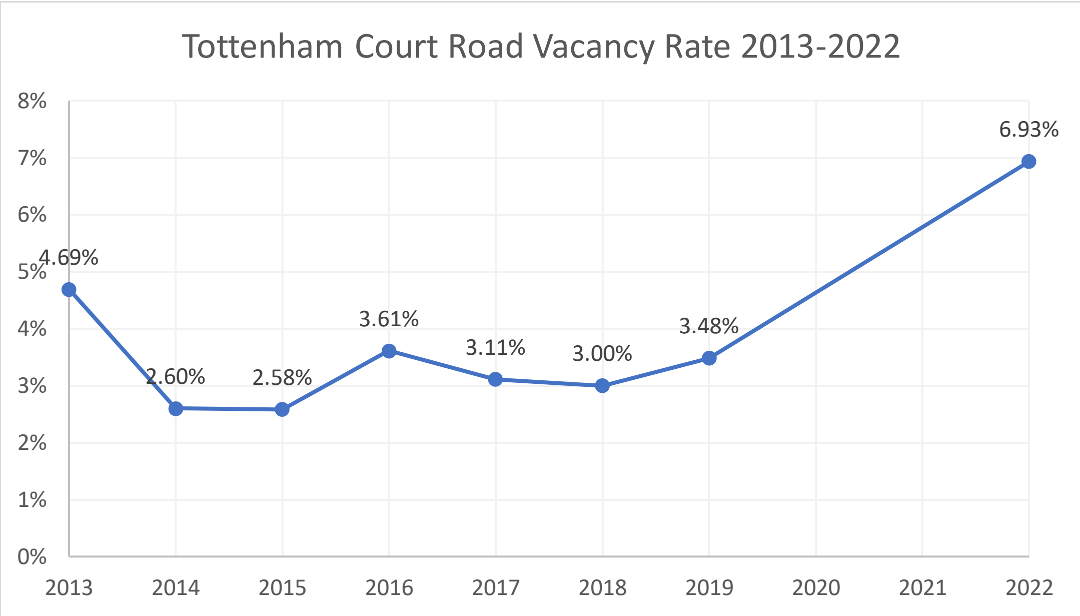
There has also been a change over time away from the largest national multiple chain retailers to more specialist 'high end' retailers, which has resulted in the reconfiguration of some of the larger footprint units. The offer is also changing with the former Paperchase unit now occupied by Monopoly Lifesized providing a new entertainment experience.

To the south of New Oxford Street the uses are more varied with a F&B as well as retail offer. The southern part of the CLF area also includes two theatres and is close to others within the West End.

Convenience turnover in the centre appears to be limited in terms of resident spend despite representation by a number of convenience retailers. This is likely to reflect the importance of visitor and worker expenditure in the area.

The area has a relatively good evening and night time offer and footfall is relatively consistent across the day, although lower at weekends, suggesting some reliance on the working population.

Vacancies 2013 - 2022



Vacancies have risen since 2019 but remain relatively low and below the UK average.

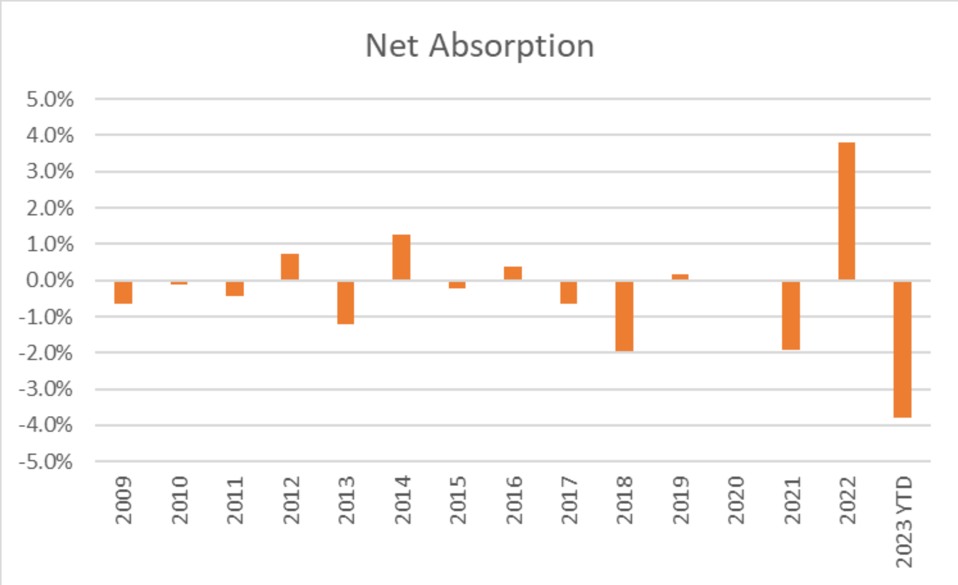
Changes in Representation and Market Demand

Market demand can be assessed by looking at net absorption of retail floorspace in the area.

> ***Net absorption*** = *additional floorspace occupied (move-ins) – floorspace vacated (move-outs)*

Net absorption rate in Tottenham Court Road has fluctuated over the years, swinging between negative and positive rates, since 2009. The average net absorption per annum since 2009 has been -0.3%, suggesting a decline in demand for space in the area, and this despite the loss of retail floorspace (-1.2% of the stock).

The high level of fluctuation demonstrates the dynamism of the area, with a rapid churn of retailers. However, the data would suggest that the area is slowly declining in terms of retail offer.



Commercial Rents

Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

The following rental levels are therefore broad estimates of prime Zone A rental tone within each location.

Location	Estimated Zone A rate
High Holborn/Kingsway	£190-210
King’s Cross	£90 - 100
Tottenham Court Road	£90-100
Camden Town	£200-220
Finchley Road	£65 -70
Hampstead	£150-160
Kentish Town	£50-55
Kilburn High Road	£80-90
West Hampstead	£80-90
Seven Dials	£160-180
Fitzrovia	£85-95
Hatton Garden	£125-135
Museum Street	£70-80
Denmark Street	£80-90

Most Central and Inner London investments are mixed use by nature which impacts on the yield analysis for the individual constituent parts. Certain retail locations such as Bond Street attract the highest pricing driven by overseas investors and premium brands acquiring flagship stores but there is still good sentiment for other Central London locations including Covent Garden, Fitzrovia, Camden, Tottenham Court Road etc.

Whilst there has been a softening in retail value the lack of transactional volumes has meant comparable evidence within the Borough is limited so in the broadest of terms we would set out the following:

- Prime retail yields – 4.5% – 6.0%
- Good secondary retail yields – 6.0% – 7.0%

Accessibility

Transport for London's Public Transport Accessibility Levels (PTAL) ranking assesses connectivity across London, with a grading system indicating the strength of the public transport in any given area. The grading goes from 0 which indicates very poor access to public transport through to 6b which indicates excellent access to public transport. The measures include walk time to public transport, the reliability of the public transport services and the number of services within the area.

A central point for Tottenham Court Road provides a PTAL output of 6b, indicating that public transport accessibility in the area is excellent.

Tottenham Court Road station is served by the Central, Northern, Victoria and Elizabeth lines. The Central line runs east to west and can be used to connect to Shepherd's Bush, Greenford, Liverpool Street and Stratford. The Northern line runs north to Euston, Camden Town and beyond and south to Leicester Square, Waterloo and beyond and the Victoria line links Brixton to Walthamstow via Victoria and Finsbury Park. The Elizabeth line opened in May 2022 and provides regular services to and from Abbey Wood and Shenfield to the east and Reading and Heathrow to the west. Goodge Street underground station and Warren Street underground station can also be accessed along Tottenham Court Road and both operate Northern line services.

Bus services in the area run regularly and provide great connectivity to areas in all directions including Elephant & Castle, Finsbury Park, Hampstead and Putney.

Tottenham Court Road is a typical busy central London road that connects Euston Road to the north and Oxford Street/ New Oxford Street to the south. It is a popular cycle route, although dedicated cycle lanes can only be found along small sections of the road. High levels of footfall throughout the area necessitate the need for the various traffic light crossings and pedestrian islands.

Perception of Safety and Occurrence of Crime

Between June 2022 and May 2023, crime data from the MET Police referenced 2,736 crimes in Tottenham Court Road, representing 6.0% of all crimes committed in the London Borough of Camden over this period.

The following table present a breakdown of crimes committed in Tottenham Court Road by crime type.

This area is particularly impacted by "other" thefts and thefts from the person, which represent together more than 50% of all crimes committed in the area.

Tottenham Court Road	# Crimes	As % of all crimes in area	As % of similar crime type in LB Camden
ALL Crimes	**2,736**	**100.0%**	6.0%
Anti-social behaviour	338	12.4%	3.5%
Bicycle theft	61	2.2%	5.7%
Burglary	61	2.2%	3.1%
Criminal damage and arson	52	1.9%	3.2%
Drugs	55	2.0%	4.6%
Other crime	11	0.4%	4.7%
Other theft	826	30.2%	10.2%
Possession of weapons	4	0.1%	3.1%
Public order	89	3.3%	4.1%
Robbery	118	4.3%	8.1%
Shoplifting	136	5.0%	8.8%
Theft from the person	718	26.2%	12.9%
Vehicle crime	53	1.9%	1.6%
Violence and sexual offences	214	7.8%	2.9%

Environmental Quality

Tottenham Court Road has recently benefitted from environmental improvements as part of the Council's £35m West End Project. This has included changes to traffic arrangements and new restrictions on Tottenham Court Road and Gower Street/Bloomsbury Street, reducing congestion and air pollution and speeding up bus routes. New, safer provisions for cyclists have also been provided as well as new and regenerated public and green spaces.

Although the nature of the area means extensive areas of open space are absent, trees can be found dotted along Tottenham Court Road, particularly on the western side. There are also pockets of spaces with public benches/ seating (by the Tottenham Court Road/ Tottenham Street junction and Tottenham Court Road/ Percy Street junction), both with trees and limited elements of planting that soften the otherwise hard landscaping provided.

It is also of note that a new public park has been provided in the area through the transformation of Alfred Place from an underused road. This is outside of the CLF but runs immediately to the rear of buildings on Tottenham Court Road. As such it provides residents and visitors to the area with convenient access to high quality green space.

Further north there has also been investment in the open space at Whitfield Place to the west of Tottenham Court Road. This was completed in 2020 and included a planting scheme that thrives in shady locations, plus better accessibility and a new square.

Buildings of architectural and historic significance line both sides of the street and are in large part well-kept and maintained.

Whilst there are examples of street art that add to the uniqueness and attractiveness of the area, there are also various instances of graffiti which go some way to detracting from this.

Bins are located along the street, aiding in keeping the area clean and tidy. Cycle parking is also available along Tottenham Court Road, allowing cyclists to safely park up their bikes.

Investment Plans and Development Opportunities

The refurbishment and redevelopment of existing stock is on-going in this area and includes a number of major private sector investments:

- New, larger retail space has been provided at 18-30 Tottenham Court Road as part of the Central Cross redevelopment. The final phase increased retail floorspace on the site by 1,328 sqm providing 10 units. Work was completed in the 2015 and attracted a number of national brands. The wider scheme also improved office space and the public realm and included the conversion of a former basement car park into new lower ground retail space with connection to above;
- Land at 247 Tottenham Court Road / 3 Bayley Street / 1-4 Morwell Street is currently being redeveloped. This includes intensification of the uses previously provide on site, including residential and office accommodation and a small increase in flexible retail uses at ground floor level, replacing traditional A1 retail. The exact quantum of retail, F&B or other uses that will be provided is not currently known; and
- Land at 10 Howland Street is currently being redeveloped and the new Network building which is expected to be completed in 2025 will provide around 12,300 sqm of speculative office space and around 500 sqm of flexible retail space.

Stakeholder Feedback

Stakeholder engagement identified the following points of relevance to the Tottenham Court Road:

- Developer / landowner 2:
  - Camden's town centres tend to have very dense populus and have been and continue to be very popular.
  - They are resilient in the context of new occupiers coming in, people want to be there.
  - More present in a '7-day cycle' compared to historically when the busy periods were only from Friday-Sunday. Issues of quiet periods elevated.
  - Any of the central areas where there isn't an overarching landlord, where the mix can be evolved or played to a strength of an area, the weight of demand can have a detrimental effect on the area.
  - Rent is a major player in terms of health of an area but those that can afford rent do not necessarily add vitality to an area. What is right for the area isn't always what is coming through the development.
- In the Camden centres of this nature, levels of trade are not as good as the leasing activity suggests. There is a question regarding the viability of some.

SWOT Analysis

Strengths

- Large format retail units attracting national multiples and suitable for those providing furniture or 'bulky goods'
- Contrasting retail offer to West End
- Strong footfall post Covid (although still lower than pre-Covid)
- Good F&B offer
- Location in the heart of London
- Excellent accessibility with London Underground, Elizabeth Line and bus services

Weaknesses

- Retail sector rationalising offer and demand for space decreasing nationally
- Loss of retail 'anchors' (eg Habitat)
- Current reliance on a limited type of retail offer
- Mixed perception of the area, particularly exacerbated by the lack of cleanliness and high level of thefts and anti-social behaviour

Opportunities

- Proximity to West End and major tourist attractions
- The area is progressively being regenerated, with a significant amount of new development taking place, following the opening of the Elizabeth Line
- The reputation of the area is improving
- Current or future vacancies may allow the offer in the area to diversify

Threats

- Failure to fully recover to pre-Covid footfall levels
- Continued growth of and competition from online sales, given bulky nature of much of the current retail offer
- Further loss of retail occupiers and increasing vacancies
- Competition for F&B trade from environmentally more attractive areas
- Increased vacancy may lead to a deterioration of the perception of the area
- Direct competition with Oxford Street (part of the London Borough of Westminster)

Conclusions

Tottenham Court Road CLF is an area that has previously relied on a specialist retail offer. It remains an important shopping location for furniture and similar types of comparison goods, but it has lost much of its previous specialist electrical offer. With larger items increasingly being bought online this may make the area vulnerable to further retail closures, resulting in larger format units becoming vacant. Whether the F&B offer on its own is sufficient to maintain footfall is questionable but closures may also allow new investment in the area including redevelopment and/or the opening of more innovative and emerging leisure offers.

As a result we consider that the centre boundary remains appropriate given the composition and distribution of existing uses and the below average vacancy rate.

Lambert Smith Hampton

VOLUME C2: SPECIALIST SHOPPING AREAS

CAMDEN RETAIL STUDY – TOWN CENTRE HEALTH CHECKS

COVENT GARDEN (SEVEN DIALS)

Description

Current Designation: Specialist Shopping Area as defined in the Camden Local Plan 2017.

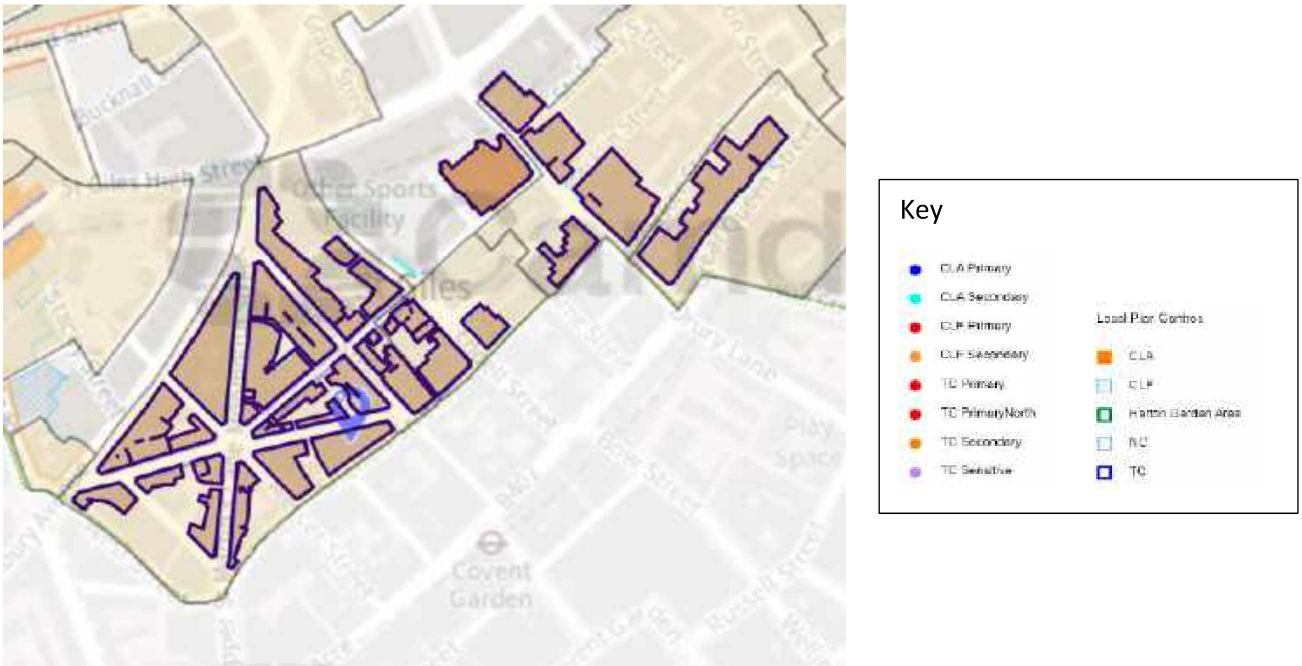
Description of Centre:

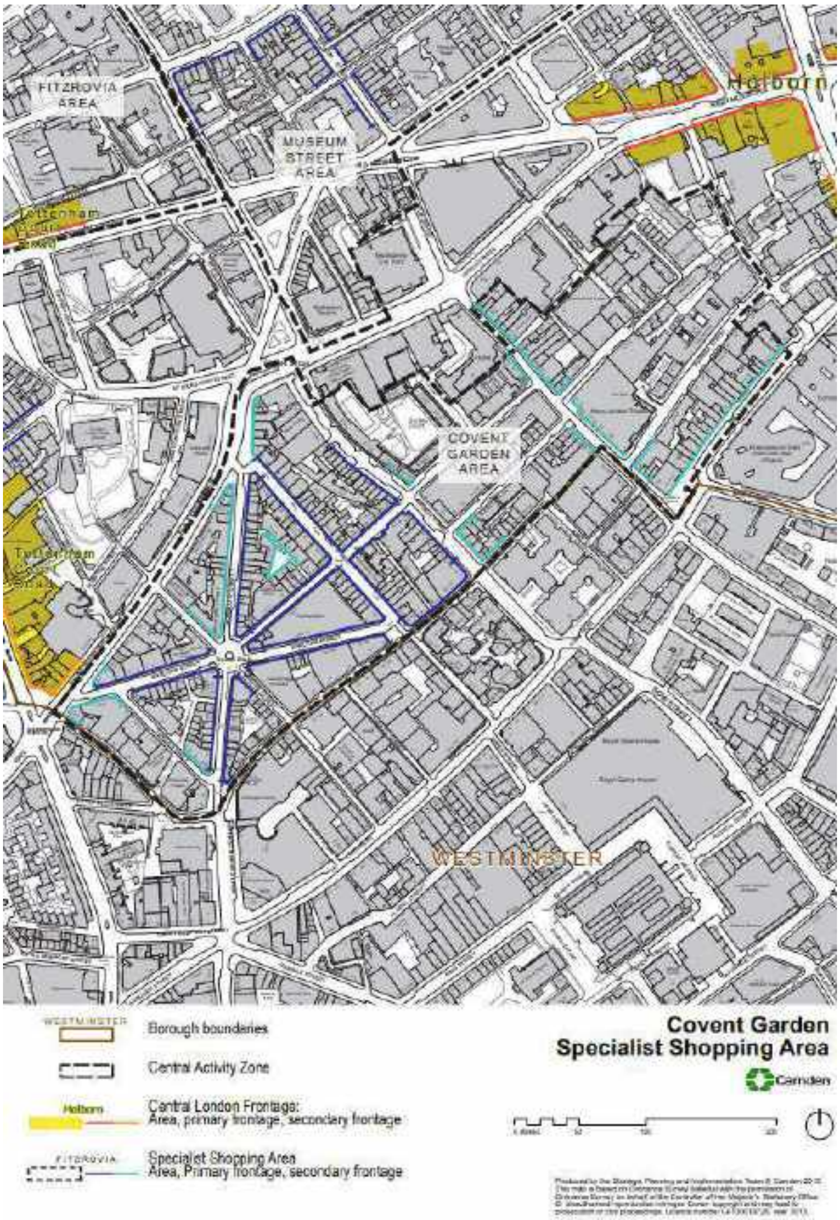
Covent Garden (Seven Dials) is located in the south western corner of the Borough immediately adjoining the London Borough of Westminster, which includes the central Covent Garden area. It comprises two main areas, the relatively compact retail areas located along the seven roads radiating out from Seven Dials and including the area to the east of Neal Street up to Endell Street. Further east there is a second part of the specialist area which centres on Drury Lane, including the properties to the east and west of the street.

In Camden's Planning Guidance 2021 the centre is described as follows:

Seven Dials lies to the east of the West End of London and incorporates part of Covent Garden. Most of Covent Garden, including Jubilee Market, is within the City of Westminster, with the northern extent, including Seven Dials, lying within Camden and within Seven Dials (Covent Garden) Conservation Area.

Seven Dials performs a specialist fashion retailing role with a high proportion of independent retailers. The area has a fine grain of development with mostly smaller sized shop premises. The shopping environment is of a high quality and the retailers tend to occupy the upper end of the market. There is a relatively small proportion of supporting uses, in particular cafes. To the west the mix of uses has a greater emphasis on food, drink and entertainment, with a focus of these uses on Great Queen Street.





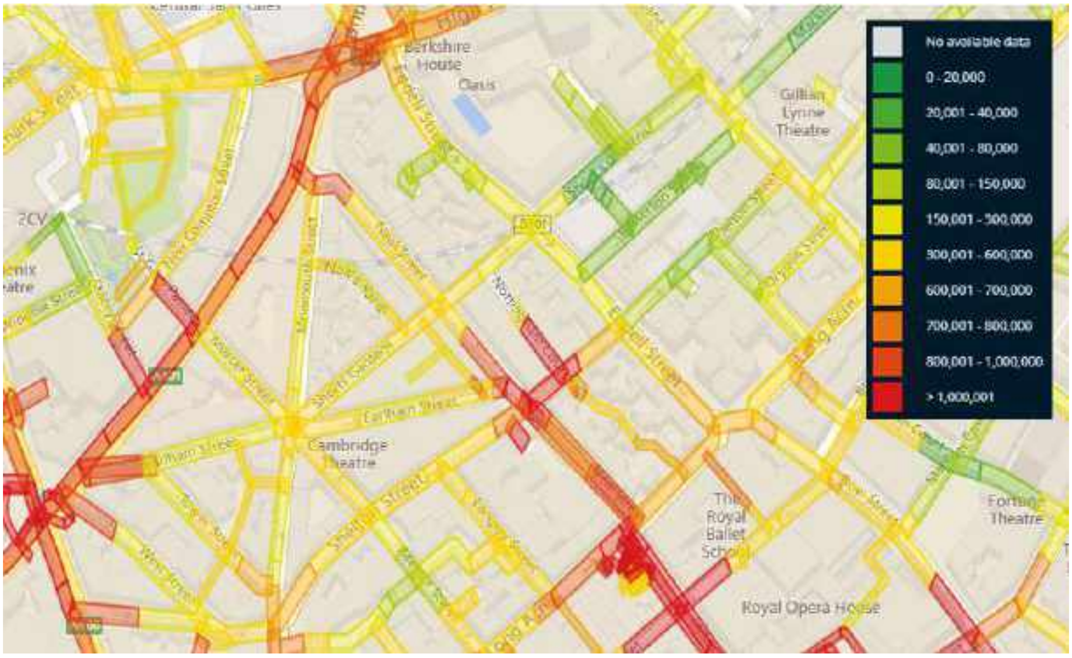
Current Planning Policies / Designations:

- As a Specialist Shopping Area the following policies of the Camden Local Plan apply to the centre:
  - Policy E3 (Tourism);
  - Policy TC1 (Quality and location of retail development);
  - Policy TC2 (Camden's centres and other shopping areas);
  - Policy TC4 (Town centre uses); and
  - Policy TC5 (Small and independent shops).
- The majority of the shopping area is located within the Seven Dials Conservation Area.
- Seven Dials, as part of Covent Garden, is designated in the London Plan as part of the West End (including Soho / Covent Garden) specialist retail cluster and is recognised as a retail destination of national and international significance.

Footfall:

The figure below illustrates the pedestrian heat map for Covent Garden (Seven Dials) and shows a particular concentration of footfall around the outskirts of Seven Dials – along Shaftesbury Avenue, Neal Street and Shelton Street. Pedestrian activity at the central point of Seven Dials is lower, but still in excess of 150,000 movements per month.

Covent Garden (Seven Dials) Footfall Heat Map



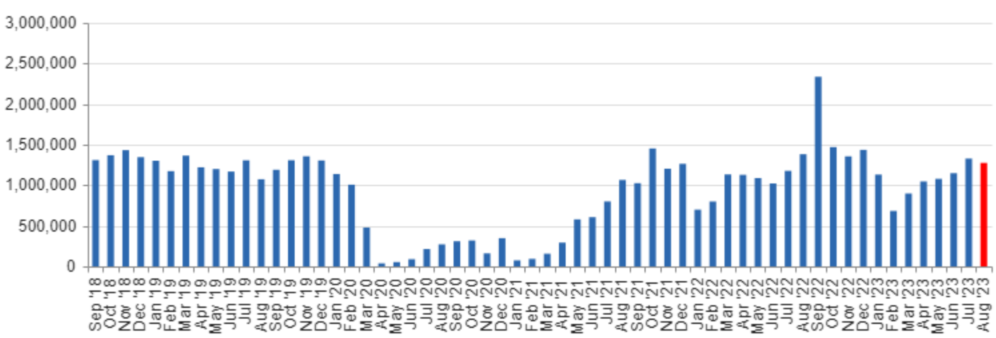
Source: Datscha

A busy section where Mercer Street meets Shaftesbury Avenue was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall has recovered well since the pandemic. Given the impacts of COVID-19 restrictions on retail, leisure and entertainment, it is unsurprising that pedestrian activity dropped to such low levels after March 2020. This low level of footfall continued for approximately 12 months but has since recovered and levels now are similar to those seen before the pandemic although not on a consistent basis.

When comparing the 12-month period from September 2018 (pre-pandemic) to the 12-month period from September 2022 (post-pandemic), pedestrian activity has remained the same (monthly average of 1.27m), suggesting a full recovery from the pandemic.

Footfall of Covent Garden (Shaftesbury Avenue, Seven Dials) (September 2018 – August 2023)



Source: Datscha

Catchment Area:

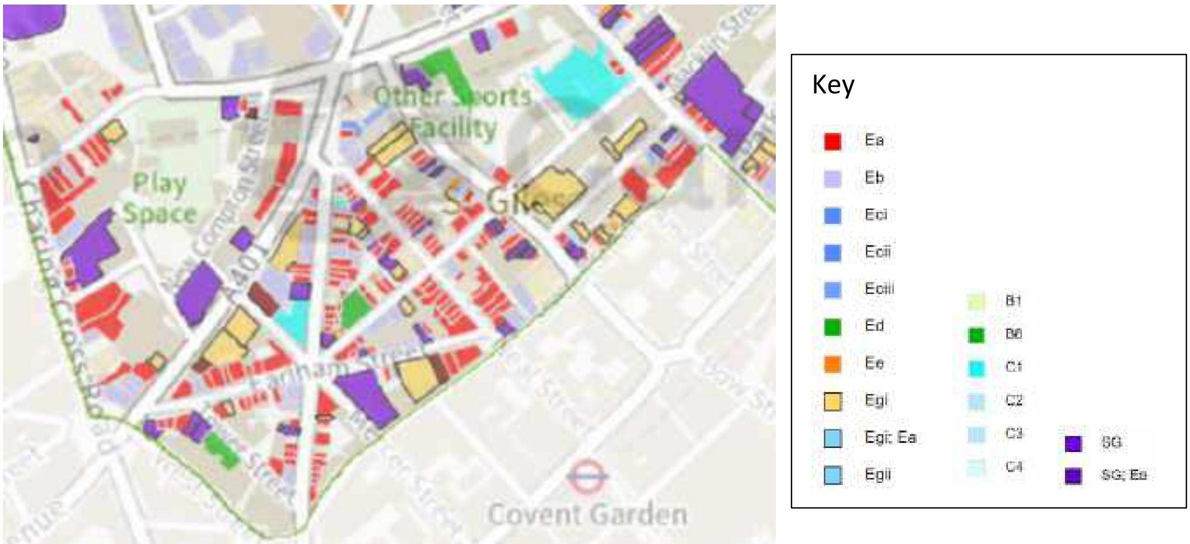
The Covent Garden (Seven Dials) area provides a limited convenience offer which serves both the local (Camden based) residential population and visitors, although the latter account for approximately 80% of turnover.

The more extensive comparison offer is primarily aimed at visitor trade, with only 5% of spend coming from residents of Camden. The F&B offer is also primarily aimed at the visitor sector.

Previous Retail Study Findings

This area was not covered by the Retail Town Centre Study 2013. Therefore, no findings are available for this area specifically.

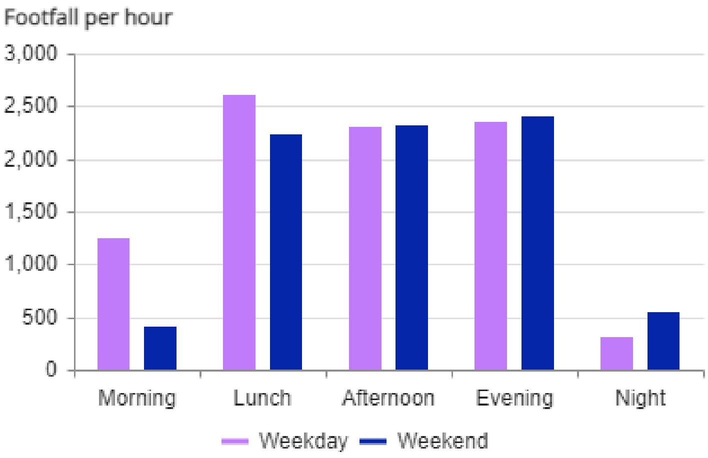
Diversity of Uses 2023



Covent Garden (Seven Dials)	Number	%	Camden Average (%)
Retail (Ea Shops)	135	53.8	37.4
Food & Beverage	66	26.3	23.3
All Other Uses	50	19.9	39.4
Total	251	100.0	100.0

EVENING / NIGHT TIME ECONOMY

Covent Garden (Seven Dials)	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	17	6.9	3.9%



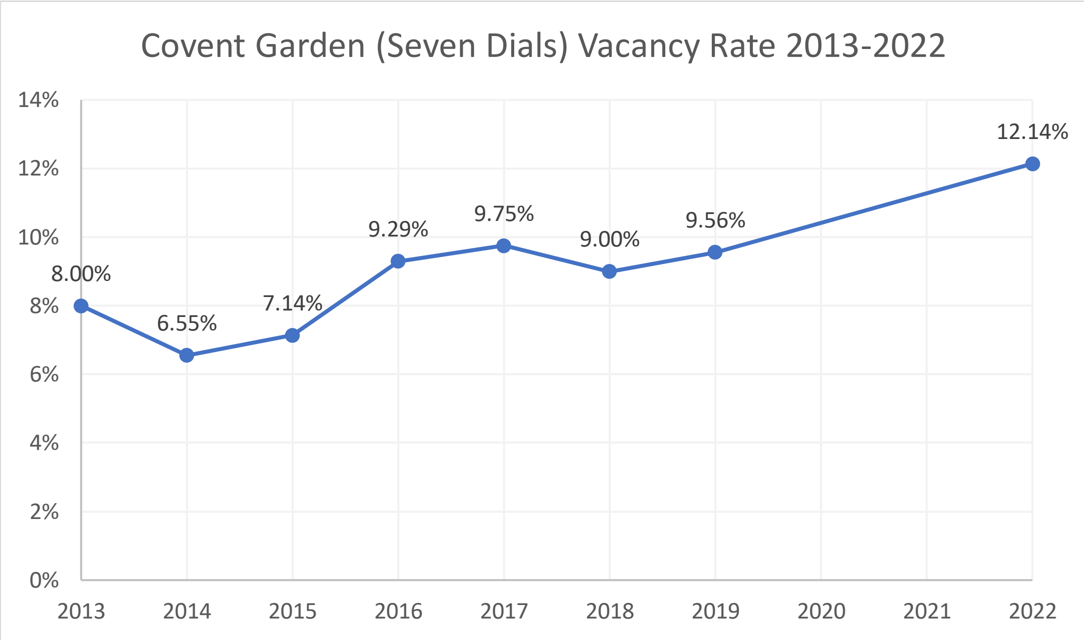
Conclusions on Diversity of Uses:

The Covent Garden (Seven Dials) area provides an extensive retail offer, with over half of the units in retail use, although this represents a slight decline on the number of units in the area in 2014. The offer is comparison orientated with a high number of upmarket / branded retailers represented selling clothing, shoes and fashion accessories. The F&B offer is also above the Camden average, with 'other uses' more limited than seen in other Specialist centres.

The extensive F&B offer is reflected in high footfall levels into the evening period. There is also a reasonable level of footfall in the night time period especially at weekends.

The area also includes various theatres and other evening attractions, including an indoor market at Seven Dials housing independent street food and drinks vendors and an outdoor market at Earlham Street selling food and clothing. The area also includes two major hotels.

Vacancies 2013 - 2022



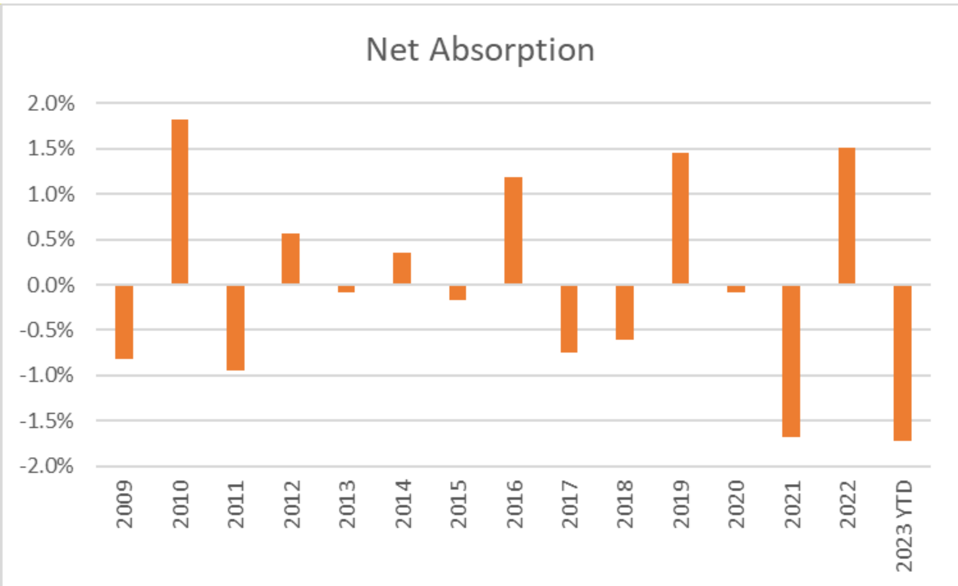
Vacancy levels in this large centre have been higher than in many other Central London areas for much of the last decade, and in 2022 they reached their highest level at over 12%. This is close to the UK average.

Changes in Representation and Market Demand

Market demand can be assessed by looking at net absorption of retail floorspace in the area.

> ***Net absorption*** = *additional floorspace occupied (move-ins) – floorspace vacated (move-outs)*

The net absorption rate in Covent Garden (Seven Dials) has fluctuated year-on-year, switching from positive to negative net absorption. This demonstrates the dynamism of the area, with a constant flow of retailers moving-in and moving-out of the area (renewing the retail offer).



Commercial Rents

Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

The following rental levels are therefore broad estimates of prime Zone A rental tone within each location.

Location	Estimated Zone A rate
High Holborn/Kingsway	£190-210
King's Cross	£90-100
Tottenham Court Road	£90-100
Camden Town	£200-220
Finchley Road	£65 -70
Hampstead	£150-160
Kentish Town	£50-55
Kilburn High Road	£80-90
West Hampstead	£80-90
Covent Garden (Seven Dials)	£160-180
Fitzrovia	£85-95
Hatton Garden	£125-135
Museum Street	£70-80
Denmark Street	£80-90

Most Central and Inner London investments are mixed use by nature which impacts on the yield analysis for the individual constituent parts. Certain retail locations such as Bond Street attract the highest pricing driven by overseas investors and premium brands acquiring flagship stores but there is still good sentiment for other Central London locations including Covent Garden, Fitzrovia, Camden, Tottenham Court Road etc.

Whilst there has been a softening in retail value the lack of transactional volumes has meant comparable evidence within the Borough is limited so in the broadest of terms we would set out the following:

- Prime retail yields – 4.5% – 6.0%
- Good secondary retail yields – 6.0% – 7.0%

Accessibility

Transport for London's Public Transport Accessibility Levels (PTAL) ranking assesses connectivity across London, with a grading system indicating the strength of the public transport in any given area. The grading goes from 0 which indicates very poor access to public transport through to 6b which

indicates excellent access to public transport. The measures include walk time to public transport, the reliability of the public transport services and the number of services within the area.

A central point within Covent Garden (Seven Dials) provides a PTAL output of 6b, indicating that public transport accessibility in the area is excellent.

Covent Garden underground station is the closest point of access to London's tube system from the centre of Seven Dials. It is located c.220m south east and gives access to the Piccadilly line. Tottenham Court Road underground station and Leicester Square underground station are also within close proximity.

Bus services can be joined along Shaftesbury Avenue and Charing Cross Road. Services connect passengers to locations such as Hampstead, Pimlico, Finsbury Park and Battersea.

Narrow roads and one-way systems in much of the area make it difficult to navigate by car, which in turn improves the accessibility for pedestrians and cyclists. Controlled zones are in place to further reduce congestion and vehicle flow, whilst zebra crossings are commonly found in the area to support with pedestrian mobility.

Perception of Safety and Occurrence of Crime

Between June 2022 and May 2023, crime data from the MET Police referenced 1,380 crimes in Covent Garden (Seven Dials), representing 3.0% of all crimes committed in the London Borough of Camden over this period.

The following table present a breakdown of crimes committed in Covent Garden by crime type.

This area has a high proportion of "other" thefts and thefts from the person, which together represent just over 50% of all crimes committed in the area.

Covent Garden (Seven Dials)	# Crimes	As % of all crimes in area	As % of similar crime type in LB Camden
ALL Crimes	**1,380**	**100.0%**	3.0%
Anti-social behaviour	210	15.2%	2.2%
Bicycle theft	20	1.4%	1.9%
Burglary	33	2.4%	1.7%
Criminal damage and arson	26	1.9%	1.6%
Drugs	33	2.4%	2.8%
Other crime	4	0.3%	1.7%
Other theft	411	29.8%	5.1%
Possession of weapons	2	0.1%	1.6%
Public order	39	2.8%	1.8%
Robbery	40	2.9%	2.8%
Shoplifting	49	3.6%	3.2%
Theft from the person	314	22.8%	5.6%
Vehicle crime	74	5.4%	2.2%
Violence and sexual offences	125	9.1%	1.7%

Environmental Quality

Covent Garden (Seven Dials) is largely covered by the Seven Dials Conservation Area. This designation recognises the importance of the area and its qualities and looks to preserve this going forward.

Trees of varying sizes can be found around Seven Dials which aid in bringing colour and vibrancy to the area. Leisure outlets using planted dividers (to mark out their outdoor space), potted plants/ trees and hanging baskets add to this.

Bollards can be found in parts, improving pedestrian safety when navigating the area. Bins are available for disposal of rubbish. There is provision of cycle parking to allow for people to safely lock their bikes whilst in the area.

Features such as the cobbled roads and the centrally located Seven Dials Sundial Pillar monument add character and charm to the central London location.

Investment Plans and Development Opportunities

There are limited investment and development plans in the public domain for Covent Garden (Seven Dials) at the present time but its central location, visitor draw and high rental levels seen in the area are likely to mean that redevelopment or repurposing plans for individual sites are likely to continue to come forward.

Stakeholder Feedback

Stakeholder engagement identified the following points of relevance to Covent Garden (Seven Dials):

- Developer / Landowner No. 1:
    - Pretty healthy.
    - Areas is strong – it is the interesting bit of London with the theatres.
- Developer / landowner No.2:
    - Camden's town centres tend to have very dense populus and have been and continue to be very popular.
    - They are resilient in the context of new occupiers coming in, people want to be there.
    - More present in a '7-day cycle' compared to historically when the busy periods were only from Friday-Sunday. Issues of quiet periods elevated.
    - Any of the central areas where there isn't an overarching landlord, where the mix can be evolved or played to a strength of an area, the weight of demand can have a detrimental affect on the area.
    - Rent is a major player in terms of health of an area but those that can afford rent do not necessarily add vitality to an area. What is right for the area isn't always what is coming through the development.
    - In the Camden centres of this nature, levels of trade are not as good as the leasing activity suggests. There is a question regarding the viability of some.

SWOT Analysis

Strengths

- Historic area of London with a unique character and attractive environment
- Vibrant atmosphere, with street performers, musicians, and other entertainers
- Strong retail offer
- Strong F&B offer
- Good accessibility
- High renewal rate of the retail offer attracting customers back to the area

Weaknesses

- High rents, which can make it difficult for small businesses to operate
- Seven Dials can be congested, especially during peak times
- Limited provision for local residents

Opportunities

- Proximity to the Covent Garden Market area which supports footfall in Seven Dials
- Proximity to Tottenham Court Road and the new Elizabeth Line
- Area often used by retailers to showcase their offer and test new instore experiences and products, making it a destination location for their customers

Threats

- Potential conflict between evening and night time activities and residential
- Restrictions on licensing limiting the demand from new operators
- Proximity to Borough boundary meaning adjoining Covent Garden area is under Westminster control
- Achieving a balanced mix of uses to maximise visitor attraction and dwell time

Conclusions

This large Specialist Shopping Area attracts considerable tourist footfall and trade and increasing F&B provision is being seen in the area to meet the resulting demand. The area is currently seeing higher vacancy rates than previously, but rates remain close to the UK average and do not suggest a major problem in the area. As a result, the current centre boundary remains appropriate.

CAMDEN RETAIL STUDY – TOWN CENTRE HEALTH CHECKS

DENMARK STREET

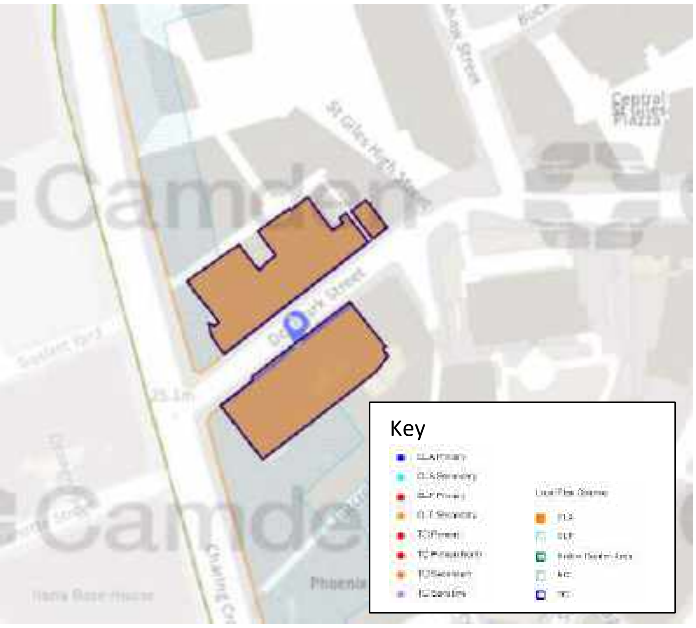
Description

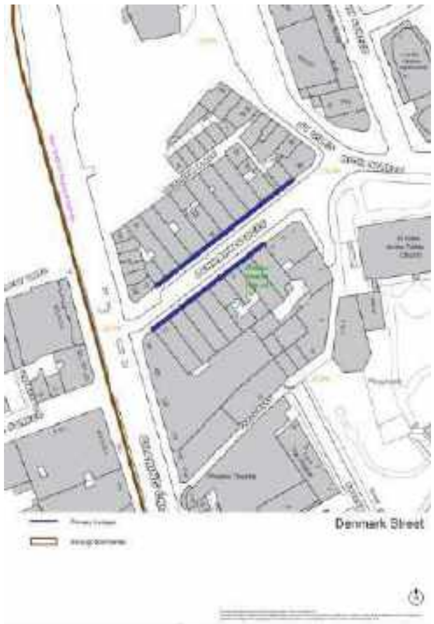
Current Designation: Specialist Shopping Area as defined in the Camden Local Plan 2017.

Centre Description: Denmark Street is located in the south-western part of the Borough, within the Central London Area and approximately 200m north of Seven Dials. It is a small centre of just 18 units located either side of Denmark Street.

In Camden's Planning Guidance 2021, the centre is described as follows:

Denmark Street's famous Tin Pan Alley is an important place for the UK music industry. Many specialist retailers located on the ground floor (and sometimes other floors) are focussed on sale and repair of musical instruments. Other music industry activities, including recording studios, artist management offices, music publishing houses and agents, are located on upper floors. Music industry activities make a fundamental contribution to the special character of Denmark Street and support associated retail provision.





Current Planning Policies / Designations:

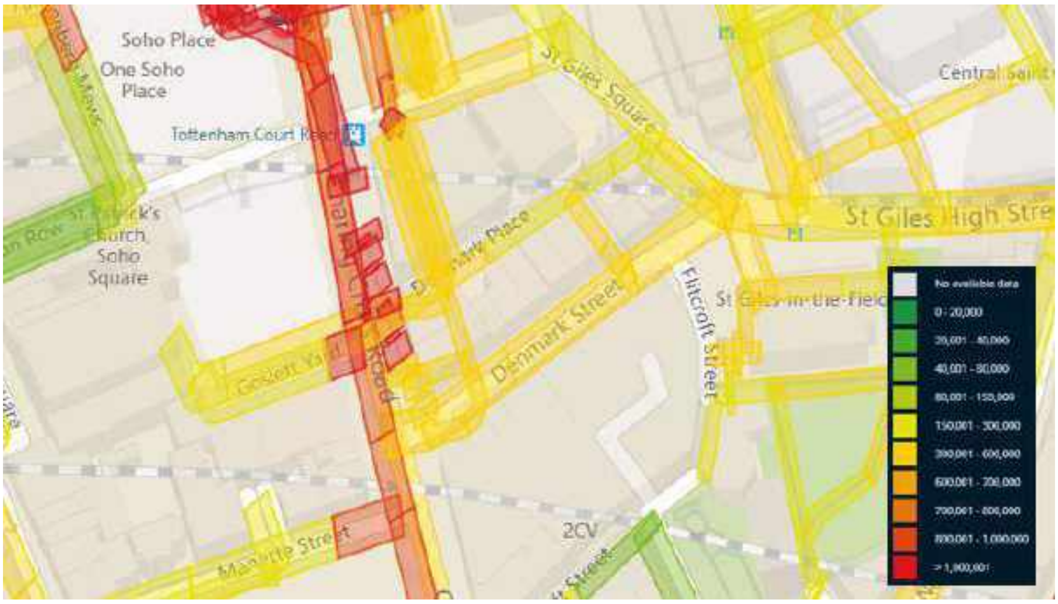
- As a defined Specialist Shopping Area the following policies of the Camden Local Plan apply to the centre:
  - Policy E3 (Tourism);
  - Policy TC1 (Quality and location of retail development);
  - Policy TC2 (Camden's centres and other shopping areas);
  - Policy TC4 (Town centre uses); and
  - Policy TC5 (Small and independent shops).
- The shopping area is located entirely within the Denmark Street Conservation Area;
- To protect the stock of premises suitable for the music industry, the Council will not grant planning permission for development involving the loss of A1 retail uses, either at ground floor

or other levels, or of B1 office and light industrial uses in upper floors in the designated Frontages.

Footfall

The figure below illustrates the pedestrian heat map for Denmark Street. As expected the pedestrian activity is higher along Charing Cross Road, but Denmark Street is recorded as having in excess of 150,000 pedestrian movements a month in August 2023, suggesting that the centre is reasonably well visited.

Denmark Street Footfall Heat Map



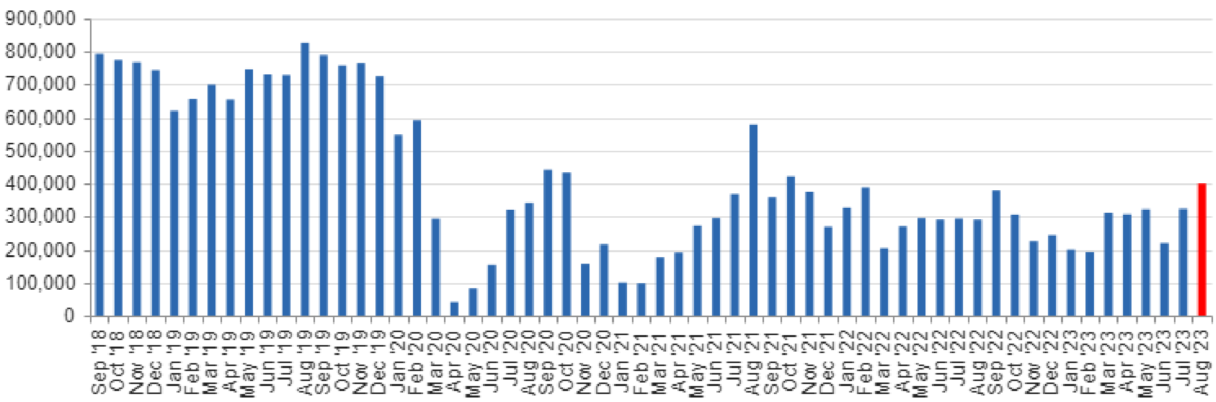
Source: Datscha

A section of Denmark Street was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall dropped significantly in 2020 and 2021 in line with restrictions of movement and travel in response to COVID-19. Whilst some improvement can be seen in recent times, pedestrian activity has not recovered.

When comparing the 12-month period from September 2018 (pre-pandemic) to the 12-month period from September 2022 (post-pandemic), pedestrian activity has fallen by over 60% (monthly average of 730,000 down to 290,000).

Footfall of Denmark Street (September 2018 – August 2023)



Source: Datscha

Catchment Area:

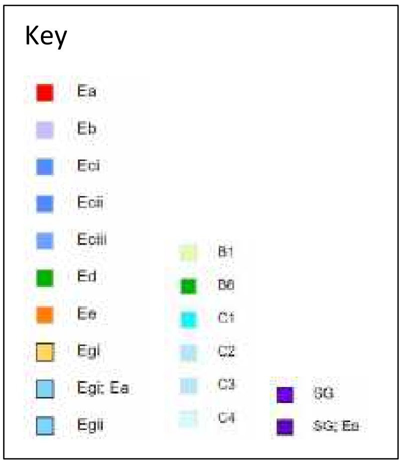
The specialist nature of the retail offer in Denmark Street and temporary impact of the redevelopment of the area means information on spend in the area is not available. However, it would be expected that the specialist nature of the offer would mean that the draw is extensive, with most customers likely to be making a special trip to visit the area.

Use of Centre:

The centre has a well-known specialist music related offer that will make it a destination of choice for a relatively small number of potential shoppers, with others visiting it more as a tourist attraction, given its reputation.

Previous Retail Study Findings

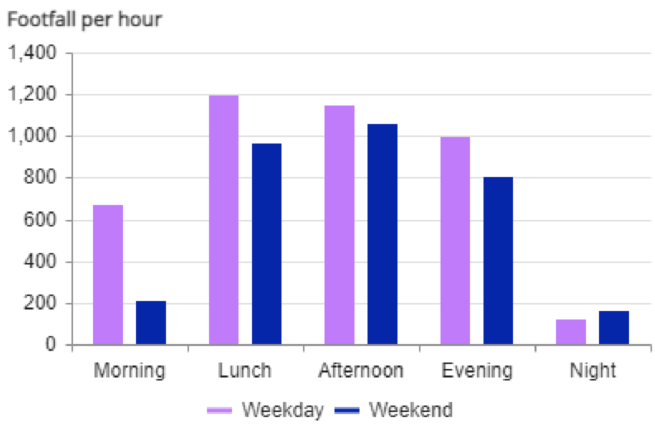
This area was not covered by the Retail Town Centre Study 2013. Therefore, no findings are available for this area specifically.



Denmark Street	Number	%	Camden Average (%)
Retail (Ea Shops)	8	88.9	37.4
Food & Beverage	1	11.1	23.3
All Other Uses	0	0.0	39.4
Total	9	100.0	100.0

EVENING / NIGHT TIME ECONOMY

Centre Name	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	0	0.0	3.9%



Conclusions on Diversity of Uses:

As a very small, specialist shopping area, it is to be expected that the majority of units within Denmark Street are in retail use. Comparisons with previous survey data suggests the number of occupied units on the north side of the street has decreased since 2014 and 2019, which is linked to the major redevelopment proposals for the areas (Application Ref: 2012/6858/P and subsequent submissions) and wider development proposals in the area.

The Denmark Street redevelopment proposals are subject to a section 106 agreement that seeks to preserve the existing uses on the street by requiring the lease of a unit following completion to be offered first to existing tenants. However in Summer 2023 a number of the units remain vacant and it remains to be seen if music-related businesses will move back in, in accordance with the vision for the area, with a mix of venues for live music, shops and offices for the people working in the music industry.

Vacancies 2013 - 2022

Vacancies rates in 2022 were 22.2%, which is an improvement on the 2019 rate of 36.0%. However, little weight can be given to any specific figures as, although the redevelopment of the area is compete, some units have still to be let.

Changes in Representation and Market Demand

The specialist nature of the Denmark Street retail offer means normal lists of retailer requirements will not cover the area. However, the redevelopment plans for St Giles Circus and parts of Denmark Street indicate confidence in the area. The section 106 agreement linked to the permission is intended to ensure that that 'Tin Pan Alley' uses will continue in the future.

Similarly, due to the small size of this area, net absorption rates are generally not representative of the performance of the area.

Commercial Rents

Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

The following rental levels are therefore broad estimates of prime Zone A rental tone within each location.

Location	Estimated Zone A rate
High Holborn/Kingsway	£190-210
King's Cross	£90-100
Tottenham Court Road	£90-100
Camden Town	£200-220
Finchley Road	£65 -70
Hampstead	£150-160
Kentish Town	£50-55
Kilburn High Road	£80-90
West Hampstead	£80-90
Seven Dials	£160-180
Fitzrovia	£85-95
Hatton Garden	£125-135
Museum Street	£70-80
Denmark Street	£80-90

Most Central and Inner London investments are mixed use by nature which impacts on the yield analysis for the individual constituent parts. Certain retail locations such as Bond Street attract the highest pricing driven by overseas investors and premium brands acquiring flagship stores but there is still good sentiment for other Central London locations including Covent Garden, Fitzrovia, Camden, Tottenham Court Road etc.

Whilst there has been a softening in retail value the lack of transactional volumes has meant comparable evidence within the Borough is limited so in the broadest of terms we would set out the following:

- Prime retail yields – 4.5% – 6.0%
- Good secondary retail yields – 6.0% – 7.0%

Accessibility

Public Transport:

Transport for London's Public Transport Accessibility Levels (PTAL) ranking assesses connectivity across London, with a grading system indicating the strength of the public transport in any given area. The grading goes from 0 which indicates very poor access to public transport through to 6b which indicates excellent access to public transport. The measures include walk time to public transport, the reliability of the public transport services and the number of services within the area.

A central point for Denmark Street provides a PTAL output of 6b, indicating that public transport accessibility in the area is excellent.

Denmark Street is within convenient walking distance to Tottenham Court Road (c.100m) and so good public transport links can be easily accessed. Tottenham Court Road station is served by the Central line, Northern line and Elizabeth line. The Central line runs east to west and can be used to connect to Shepherd's Bush, Greenford, Liverpool Street and Stratford. The Northern line runs north to Euston, Camden Town and beyond and south to Leicester Square, Waterloo and beyond. The Elizabeth line opened in May 2022 and provides regular services to and from Abbey Wood and Shenfield to the east and Reading and Heathrow to the west.

Bus services in the area run regularly and provide great connectivity to areas in all directions including Elephant & Castle, Finsbury Park, Hampstead and Putney.

The street operates a one-way system with some on-street parking available. Pedestrian footpaths are available on both sides of the street. With Denmark Street being a side street, pedestrian and traffic flows are lower than neighbouring roads and areas.

Perception of Safety and Occurrence of Crime

Between June 2022 and May 2023, crime data from the MET Police referenced 862 crimes in Denmark Street, representing 1.9% of all crimes committed in the London Borough of Camden over this period.

The following table present a breakdown of crimes committed in Denmark Street by crime type.

This area has a high proportion of "other" thefts and thefts from the person, which together represent almost 60% of all crimes committed in the area.

Denmark Street	# Crimes	As % of all crimes in area	As % of similar crime type in LB Camden
ALL Crimes	**862**	**100.0%**	1.9%
Anti-social behaviour	100	11.6%	1.0%
Bicycle theft	12	1.4%	1.1%
Burglary	20	2.3%	1.0%
Criminal damage and arson	15	1.7%	0.9%
Drugs	28	3.2%	2.4%

Other crime	3	0.3%	1.3%
Other theft	270	31.3%	3.3%
Possession of weapons	1	0.1%	0.8%
Public order	21	2.4%	1.0%
Robbery	30	3.5%	2.1%
Shoplifting	46	5.3%	3.0%
Theft from the person	239	27.7%	4.3%
Vehicle crime	12	1.4%	0.4%
Violence and sexual offences	65	7.5%	0.9%

Environmental Quality

In recognition of the area's historic and architectural significance, Denmark Street has been designated as a conservation area. This establishes the positive contribution that the area makes to Camden as a whole and ensures that this is protected going forward.

Given its size and layout, there is little opportunity for public open space within Denmark Street itself, but the recently developed St Giles Square provides a new public square in very close proximity and it provides clear circulation routes, fixed seating space under trees and flexible space for pop-up events.

Buildings along Denmark Street are largely in excellent condition with establishments such as Flat Iron curating frontages that add a sense of elegance and attractiveness to the area.

Investment Plans and Development Opportunities

The redevelopment plans for the St Giles Circus/ Denmark Street site demonstrates investment interest in the area.

SWOT Analysis

Strengths

- Well-known specialist centre for the music industry
- Redevelopment plans for part of the site include a section 106 agreement that seeks to protect existing businesses and retain a music-related offer in the area
- Much of the area in a single ownership
- Good accessibility

Weaknesses

- Small size of centre

Opportunities

- Potential to expand centre should demand arise given recent redevelopment in the wider area
- Reinvention of the wider area targeting younger demographic, proximity to new music venues, provision of modern, flexible space and recording faciltites
- Limited ownership interests

Threats

- Interest from more general retail or office uses that can afford higher rents
- Businesses relocated during the redevelopment works deciding not to return or unable to afford rents
- Decline in footfall
- Ability for area to change in character without the need for planning permission

Conclusions

Denmark Street is a small, specialist centre that is worthy of its special designation and policy support.

There may be limited measures available to the Council to ensure music related businesses continue to operate in the area in the long term, but recent investment plans confirm landlord support for retaining the unique mix of uses and offer in the area.

Despite the disruption caused during redevelopment work, the centre appears to have retained a critical mass of specialist music-related businesses and occupation of the new buildings should allow both existing and new businesses to operate from the area should they wish. The new development would also allow an expansion of the offer if there was sufficient demand. At the present time however, we consider that the current boundary remains appropriate.

CAMDEN RETAIL STUDY – TOWN CENTRE HEALTH CHECKS

FITZROVIA

Description

Current Designation: Specialist Shopping Area (SSA) as defined in the Camden Local Plan 2017.

Description of Centre:

The Fitzrovia Specialist Shopping Area covers a relatively extensive area on the western boundary of the Borough, to the west of Tottenham Court Road. Parts of Fitzrovia are within the London Borough of Westminster, where they are subject to the policies of the Westminster Local Plan (WLP) and the Fitzrovia West Neighbourhood Plan (NP).

The northern part of the SSA is centred on Warren Street to the north which is defined as primary frontage. Charlotte Street is the main north/south link through the area, and includes areas of primary frontage between Windmill Street and Goodge Street and secondary frontage to the north and south. The Tottenham Court Road Central London Frontage Area covers the area immediately to the east and Goodge Street Neighbourhood Centre is located in the centre of the Charlotte Street frontage area.

In Camden's Planning Guidance 2021, the centre is described as follows:

Fitzrovia has a mix of uses including residential, commercial, and institutional uses and contains a wide range of shops, cafes, restaurants, and pubs. The area also has a large number of specialist shops, such as art dealers and bookshops.

Food, drink, and entertainment uses are an important part of the mixed-use character of the area. These uses add to its viability and vitality and extend activity into the evenings and weekends. However, the fine grain of development with housing throughout the area mean that it is sensitive to negative impacts of food, drink, and entertainment uses, such as noise in the evenings.

Current Planning Policies / Designations:

- As a defined Specialist Shopping Area, the following policies of the Camden Local Plan apply to the centre:
  - Policy E3 (Tourism);
  - Policy TC1 (Quality and location of retail development);
  - Policy TC2 (Camden's centres and other shopping areas);
  - Policy TC4 (Town centre uses); and
  - Policy TC5 (Small and independent shops).
- The area is covered by three Conservation Areas – Fitzroy Square to the north, Charlotte Street to the south and Hanway Street to the south.
- The area is covered by the Fitzrovia Area Action Plan which, inter alia supports independent and specialist shops as an element of Fitzrovia's character and function but guides the development of large A1 shops and food, drink and entertainment uses to the CLF on Tottenham Court Road and New Oxford Street.

The area to the west lies within the LB Westminster, where planning policies, including the adopted neighbourhood plan, are broadly aligned with Camden's development plan.

Footfall:

The figure below illustrates the pedestrian heat map for Fitzrovia.

Fitzrovia Footfall Heat Map

Source: Datscha

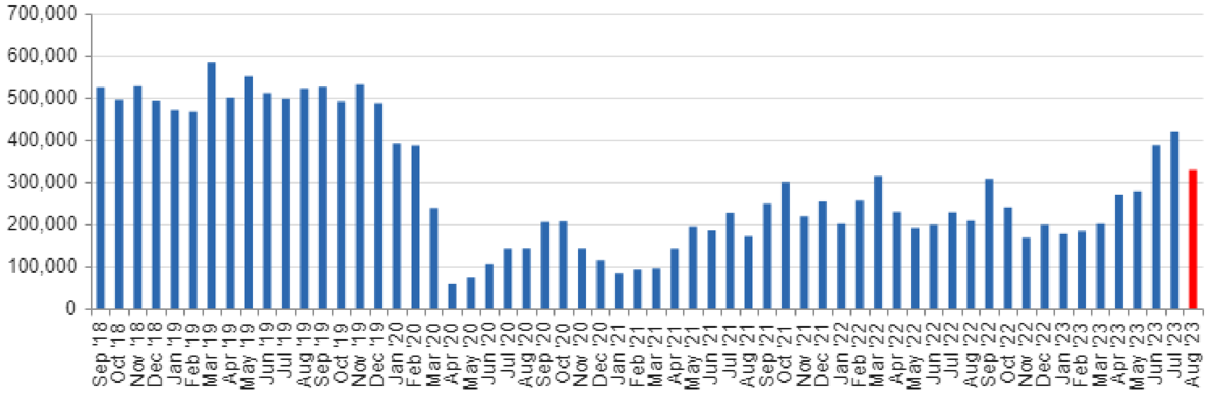
A busy section along Charlotte Street was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall dropped significantly in 2020 and 2021 in line with restrictions of movement and travel in response to COVID-19. Whilst some improvement can be seen in recent times, pedestrian activity has not recovered fully.

When comparing the 12-month period from September 2018 (pre-pandemic) to the 12-month period from September 2022 (post-pandemic), pedestrian activity has fallen by 49% (monthly average from 512,000 down to 263,000). This is likely largely due to the prevalence of hybrid working given the worker population in the area.

The most recent three months do however show a trend that looks as though figures are touching towards pre-pandemic levels, with July 2023 being the first time that monthly footfall has topped 400,000 since December 2019.

Footfall of Charlotte Street, Fitzrovia (September 2018 – August 2023)



Source: Datscha

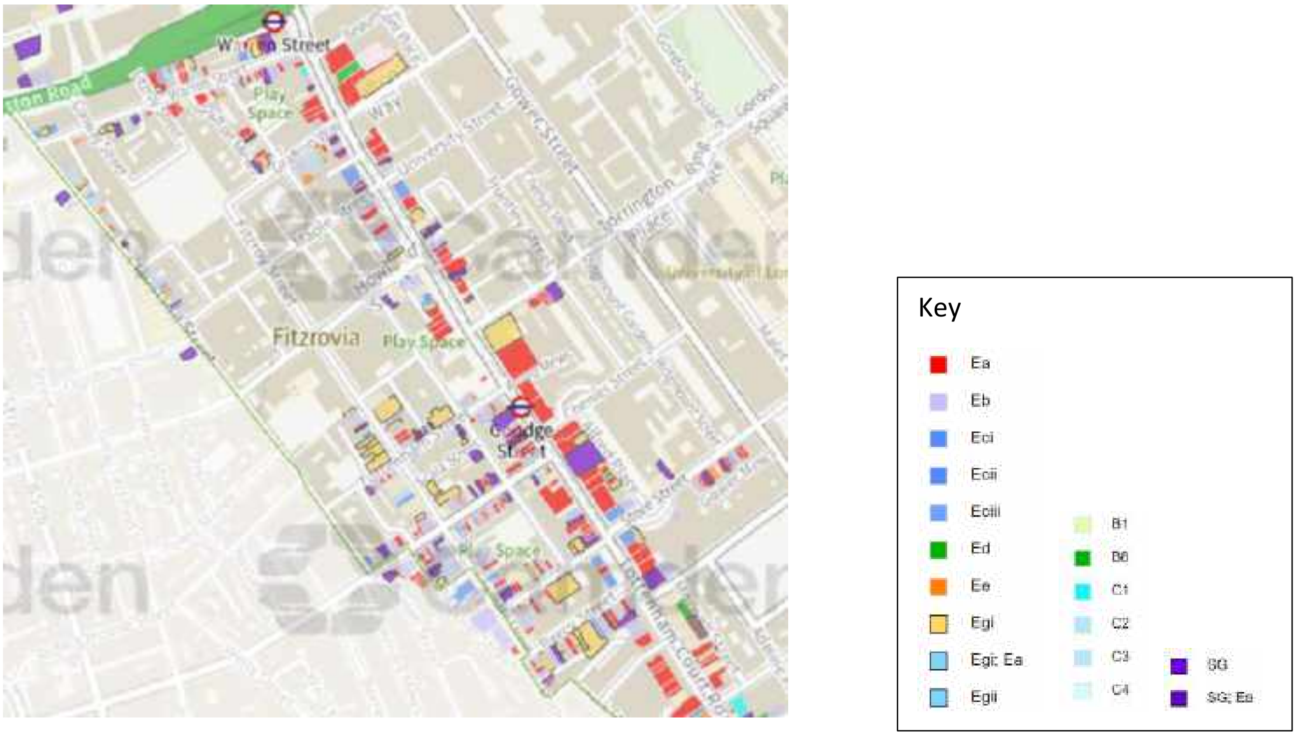
Catchment Area:

The retail offer within Fitzrovia comprises both convenience and comparison uses, with both serving both local residents and visitors to the area. Approximately a third of convenience spend comes from the Camden area, with the rest coming from elsewhere, whilst the Borough accounts for about 10% of comparison spend.

Previous Retail Study Findings

This area was not covered by the Retail Town Centre Study 2013. Therefore, no findings are available for this area specifically.

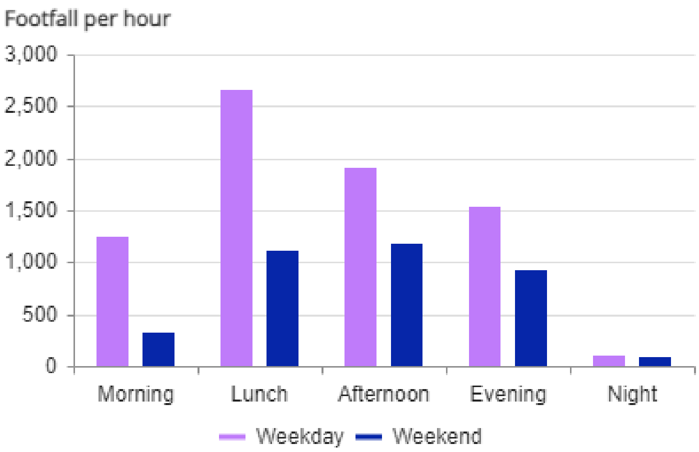
Diversity of Uses 2023



Fitzrovia	Number	%	Camden Average (%)
Retail (Ea Shops)	37	22.8	37.4
Food & Beverage	65	40.1	23.3
All Other Uses	60	37.0	39.4
Total	162	100.0	100.0

EVENING / NIGHT TIME ECONOMY

Centre Name	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	7	4.4	3.9%



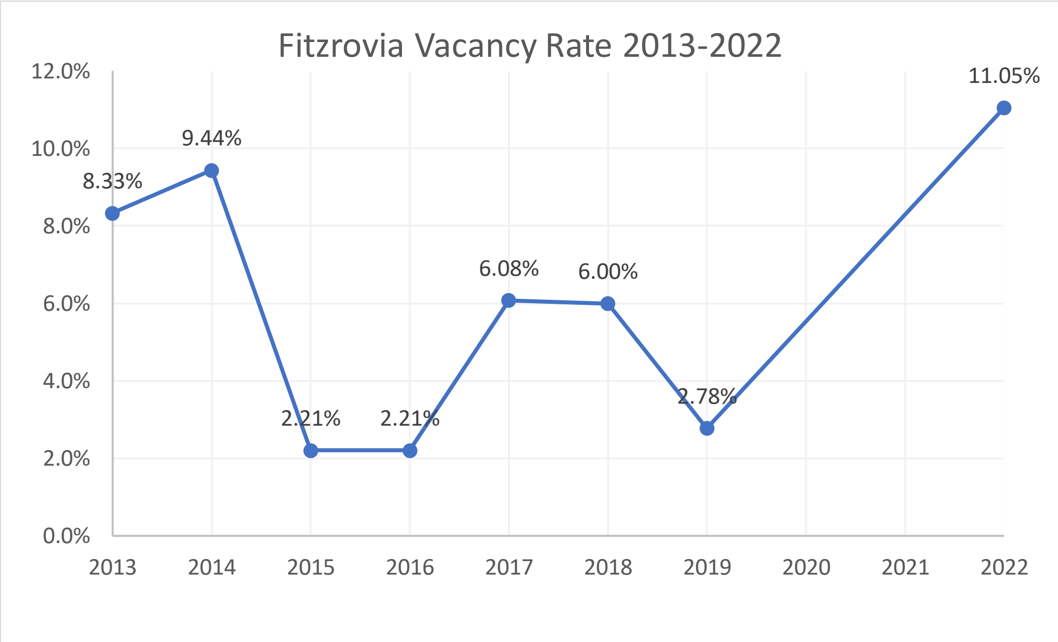
Conclusions on Diversity of Uses:

The Fitzrovia area has the lowest proportion of retail outlets of all the Specialist Shopping Areas, but a correspondingly high percentage of F&B outlets. This pattern of uses was similar in 2014, although the F&B offer has increased during the last decade with a corresponding decline in the proportion of retail units.

However, the number of outlets providing night time activities is not significantly greater than the Borough average and this is reflected in the lower footfall levels during the night-time period.

The evening economy offer appears to be strong and this may be more appropriate in this mixed use area which includes significant areas of residential accommodation. It may also reflect the importance of this area for those working in the wider area, rather than visitors.

Vacancies 2013 - 2022



Vacancy levels in Fitzrovia have shown some variation over time but were low during the period to 2019. The rate in 2022 is the highest seen in the last decade but is not much higher than seen at the beginning of the period.

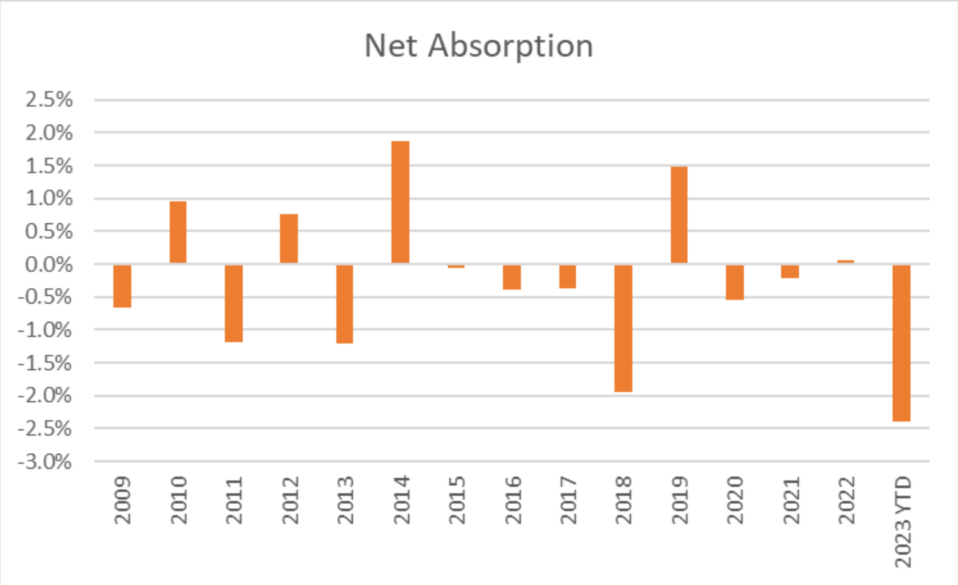
Changes in Representation and Market Demand

Market demand can be assessed by looking at net absorption of retail floorspace in the area, ie the difference between the space occupied by new businesses and that vacated:

> ***Net absorption*** = *additional floorspace occupied (move-ins) – floorspace vacated (move-outs)*

The net absorption rate in the area has been of -0.3% per annum in average since 2009, demonstrating a small decline in demand for retail space in this area.

There has been a cyclical trend, with year of negative take-up followed by year of positive take-up, showing some resilience of the area and its ability to constantly attract new occupiers.



Commercial Rents

Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

The following rental levels are therefore broad estimates of prime Zone A rental tone within each location.

Location	Estimated Zone A rate
High Holborn/Kingsway	£190-210
King’s Cross	£90-100
Tottenham Court Road	£90-100
Camden Town	£200-220
Finchley Road	£65 -70
Hampstead	£150-160
Kentish Town	£50-55
Kilburn High Road	£80-90
West Hampstead	£80-90
Seven Dials	£160-180
Fitzrovia	£85-95
Hatton Garden	£125-135
Museum Street	£70-80

Denmark Street	£80-90

Most Central and Inner London investments are mixed use by nature which impacts on the yield analysis for the individual constituent parts. Certain retail locations such as Bond Street attract the highest pricing driven by overseas investors and premium brands acquiring flagship stores but there is still good sentiment for other Central London locations including Covent Garden, Fitzrovia, Camden, Tottenham Court Road etc.

Whilst there has been a softening in retail value the lack of transactional volumes has meant comparable evidence within the Borough is limited so in the broadest of terms we would set out the following:

- Prime retail yields – 4.5% – 6.0%
- Good secondary retail yields – 6.0% – 7.0%

Accessibility

Public Transport:

Transport for London's Public Transport Accessibility Levels (PTAL) ranking assesses connectivity across London, with a grading system indicating the strength of the public transport in any given area. The grading goes from 0 which indicates very poor access to public transport through to 6b which indicates excellent access to public transport. The measures include walk time to public transport, the reliability of the public transport services and the number of services within the area.

A central point within Fitzrovia provides a PTAL output of 6b, indicating that public transport accessibility in the area is excellent.

The nearest underground station is Goodge Street, which can be accessed along Tottenham Court Road. Goodge Street is a part of the Northern line and provides regular services north to Euston, Camden Town and beyond and south through Leicester Square, Waterloo and terminating at either Battersea Power Station or Morden. The northern end of the area can be accessed from Warren Street tube station which is served by the Northern and Victoria lines.

Tottenham Court Road is also where various bus services can be joined which again, run regularly and connect to various areas across London including Pimlico, Trafalgar Square, Victoria and Hampstead.

Fitzrovia is largely made up of a grid-like network of roads, some one-way. There are designated cycle lanes in parts to support with cyclist accessibility and safety. There are several zebra crossings in the area to support with traffic calming as well as pedestrian mobility.

Perception of Safety and Occurrence of Crime

Between June 2022 and May 2023, crime data from the MET Police referenced 3,051 crimes in Fitzrovia, representing 6.7% of all crimes committed in the London Borough of Camden over this period.

Fitzrovia is the area with the second highest number of crimes reported over a year, following Camden Town (5,053 crimes).

The following table present a breakdown of crimes committed in Fitzrovia by crime type.

This area has a high proportion of “other” thefts and thefts from the person, which together represent almost 60% of all crimes committed in the area.

Fitzrovia	# Crimes	As % of all crimes in area	As % of similar crime type in LB Camden
ALL Crimes	**3,051**	**100.0%**	6.7%
Anti-social behaviour	369	12.1%	3.8%
Bicycle theft	89	2.9%	8.3%
Burglary	94	3.1%	4.8%
Criminal damage and arson	61	2.0%	3.8%
Drugs	36	1.2%	3.0%
Other crime	16	0.5%	6.8%
Other theft	980	32.1%	12.1%
Possession of weapons	4	0.1%	3.1%
Public order	86	2.8%	3.9%
Robbery	134	4.4%	9.3%
Shoplifting	107	3.5%	6.9%
Theft from the person	773	25.3%	13.9%
Vehicle crime	43	1.4%	1.3%
Violence and sexual offences	259	8.5%	3.6%

Environmental Quality

Parts of Fitzrovia have historic and architectural importance and have therefore been designated as conservation areas - Fitzroy Square Conservation Area, Charlotte Street Conservation Area and Hanway Street Conservation Area. This recognises the positive contribution that these areas make to the character and appearance of Fitzrovia and allow for this to be protected going forward.

Fitzroy Square Garden provides a peaceful, green space within the area for people to enjoy nature. Surrounding buildings with potted flowers and plants hanging from balconies add to the space's beauty. Crabtree Fields and the recently refurbished Whitfield Gardens also provide green and open spaces within Fitzrovia for residents and visitors alike.

Restaurants and bars in the area, particularly along Charlotte Street, use greenery to brighten their frontages, as well as to mark out their outdoor space with planted dividers.

Although there can be heavy flows of traffic in parts relative to the size of the roads, one-way systems are in place to manage this and make it a safe and enjoyable place to navigate on foot.

Bins are provided around the area to allow people to dispose of their rubbish, thus minimising the likelihood of litter on the streets and pavements. There is a good provision of cycle parking, allowing cyclists to safely lock their bikes whilst in the area.

Investment Plans and Development Opportunities

There are limited major investment and development plans in the public domain for Fitzrovia at the present time, although a number of larger sites have been the subject of recent redevelopment or are being developed at the present time.

The Fitzrovia AAP adopted in 2014 identified a number of Opportunity Sites for development with retail proposed as part of mixed use schemes at Central Cross (Site 9), 6-17 Tottenham Court Road (Site 10), Network Building (Site 13) and land adjacent to the Odean site (Site 6), all within the Tottenham Court Road CLF.

Stakeholder Feedback

Stakeholder engagement identified the following points of relevance to Fitzrovia:

- Developer / Landowner No. 1:
  - Healthy
  - Has dealt with traffic problems
  - Retail/leisure offer is good
  - Redevelopment and gaps in the high street is a downfall.
- Developer / landowner No. 2:
  - Camden's town centres tend to have very dense populus and have been and continue to be very popular.
  - They are resilient in the context of new occupiers coming in, people want to be there.
  - More present in a '7-day cycle' compared to historically when the busy periods were only from Friday-Sunday. Issues of quiet periods elevated.
  - Any of the central areas where there isn't an overarching landlord, where the mix can be evolved or played to a strength of an area, the weight of demand can have a detrimental affect on the area.
  - Rent is a major player in terms of health of an area but those that can afford rent do not necessarily add vitality to an area. What is right for the area isn't always what is coming through the development.
  - In the Camden centres of this nature, levels of trade are not as good as the leasing activity suggests. There is a question regarding the viability of some.
- BID No. 1
  - Fitzrovia as a quaint village of locals in the middle of a tourist hotspot.
  - TCR has gone through major changes, moved towards being the homeware shopping capital. Fitzrovia is focused on fostering the businesses there, people want to be there not because it's convenient but because it I Fitzrovia.
  - Still suffers huge amounts of challenges. Only a small area of Fitzrovia is residential, mostly a working destination. Leisure and retail most impacted over rental rates, following covid.
  - Homeware retail has evolved, type of customer has changed. Retailers don't want 10 people to spend £1 they want 1 person who will spend £10. There are less people but those few are still spending.
  - Don't get visitors coming up as much, less 'anchors'.
  - Overall numbers in the centre are similar to what they used to be pre Covid but patterns have changed.
  - Rates of employment has changed, harder to employ in hospitality due to Brexit and covid, migration, visas etc. Lots of restaurants not opening due to staffing reasons.
  - WfH has also changed patterns with the number of people coming into Fitzrovia.
  - Fitzrovia doesn't benefit from visitors coming specifically to the area, but because of its proximity to Oxford Street (but numbers there have dropped anyway because of tax increases) which is drawing people away from here as well.
  - Student focus has also declined due to declining disposable incomes.
  - Competition from online shopping **-** Lots of changes, and next day delivery available.
  - It is hard to predict future changes but expect less occupancy for larger companies, other than the huge companies that won't be affected. Short term lets, co-working will increase.
  - The BID wants to make sure planning supports what is already there, don't want late night offerings, to impact residents who may live above.
  - Planning and licensing need a complete overhaul, antique legislation that needs addressing.
  - Needs to be a big concentration on investment for the public realm, lighting, safety, cameras. Maintenance overall is key.

SWOT Analysis

Strengths

- Attractive environment
- Strong F&B offer
- Established independent and specialist retail offer

Weaknesses

- Relatively extensive area lacking a retail focus and overlap with other designations

Opportunities

- Proximity to West End and other high footfall areas

Threats

- Competition from other, higher value uses
- Further loss of retail to other Class E uses
- Loss of retail serving local residents needs

Conclusions

The Fitzrovia designation covers a relatively extensive area that adjoins and overlaps with other retail areas and centre designations, including Goodge Street Neighbourhood Centre and Tottenham Court Road Central London Frontage, as well abutting the London Borough of Westminster and the Oxford Street area.

The area has already seen considerable changes in its offer and this is expected to continue, as both this and the adjoining areas respond to changing demand from residents, businesses and business operators. As costs in one area rise, independent and specialist businesses may start to look elsewhere for more economically viable options including fringe locations to establish new businesses. Changes in the offer in adjoining areas will also directly impact on shopping and leisure patterns within it.

We would therefore suggest that the boundaries for the SSA should be reviewed as we consider the centre lacks the focus of the other specialist areas. The character of the area is also not as homogeneous as that seen elsewhere and it covers an extremely large area.

We would also suggest that the Goodge Street area west of Charlotte Street should be reviewed, as the nature of the retail offer there has changed in recent years and it is currently split between the Fitzrovia SSA and Goodge Street Neighbourhood Centre (NC). We would recommend that the two areas are combined and allocated to the NC.

CAMDEN RETAIL STUDY – TOWN CENTRE HEALTH CHECKS

HATTON GARDEN

Description

Current Designation: Specialist Shopping Area as defined in the Camden Local Plan 2017.

Description of Centre:

Hatton Garden is located in the Holborn area, on the south-eastern edge of the Borough. It is bounded by Leather Lane, Holborn, Farringdon Road, and Clerkenwell Road, with the Local Plan defining both a Hatton Garden Specialist Shopping Area and a Central London Primary Frontage.

The Hatton Garden Area also includes the Leather Lane Neighbourhood Centre.

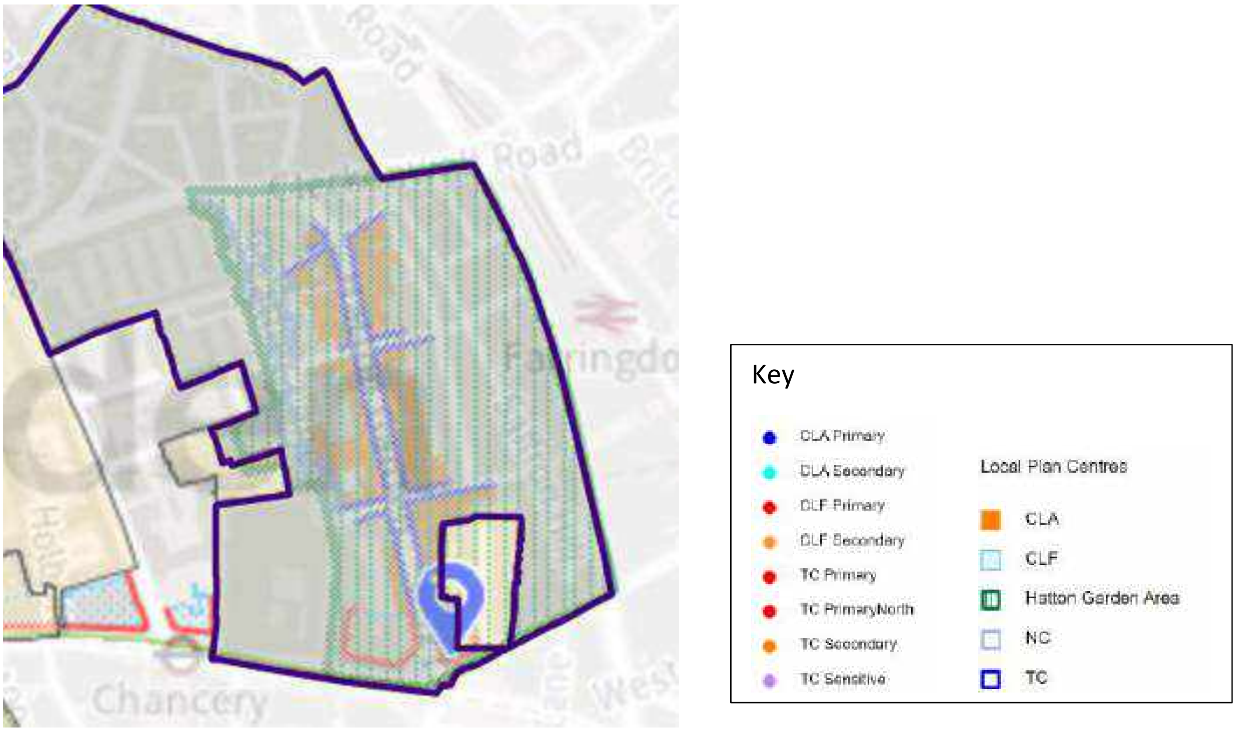
The Primary Frontage extends along Hatton Garden between Holborn in the south and Hatton Wall in the north.

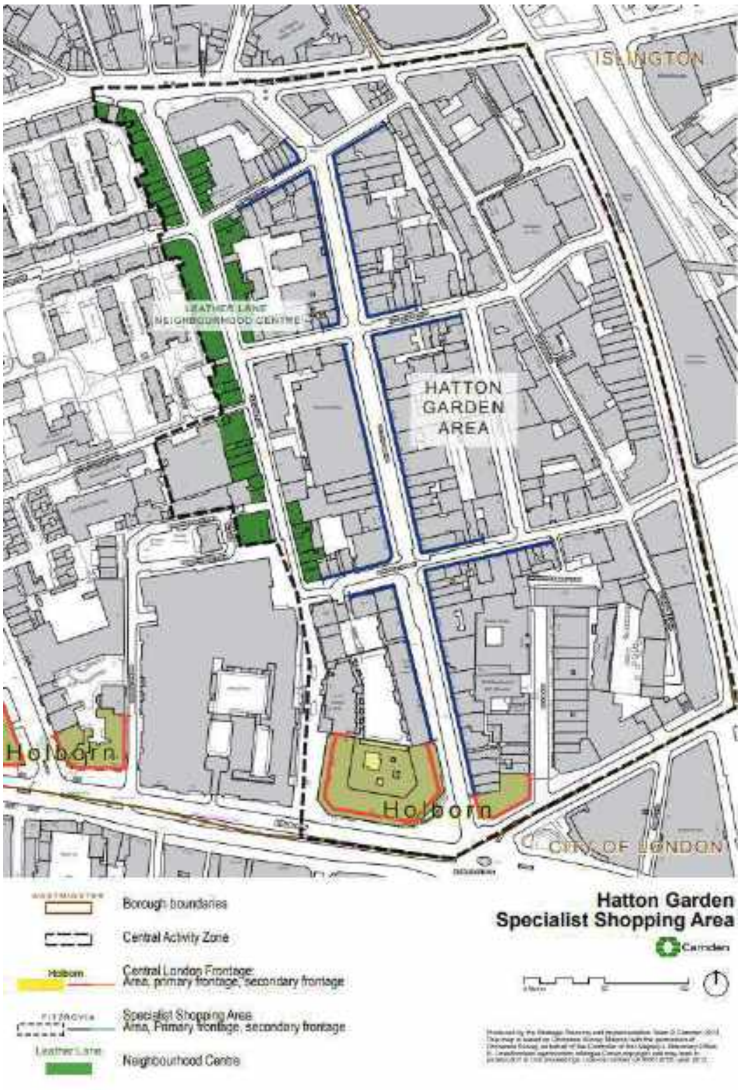
In Camden's Planning Guidance 2021, the centre is described as follows:

The area is London and the UK's largest jewellery district and has been established as a centre for the jewellery and diamond trade since the 19th century. Today the area is home to nearly 500 businesses and over 50 shops related to the industry. Other jewellery-related uses include wholesalers, precious metal traders, precision instruments manufacturers, and the offices of jewellery firms. There is a high degree of interdependency between the different jewellery-related uses that is of benefit to the operation of their activities.

The area also contains other light industrial uses particularly associated with the media, graphics and printing along with a significant amount of the Borough's manufacturing employment.

The main jewellery retail area, which is focused around Hatton Garden (the street) and its immediate cross streets. An area to the east which is characterised by larger-scale office buildings. Leather Lane, a designated Neighbourhood Centre on the western fringe of Hatton Garden, which is characterised by general shopping uses and upper floor jewellery workshops.





Current Planning Policies / Designations:

- As a defined Specialist Shopping Area the following policies of the Camden Local Plan apply to the centre:
    - Policy E3 (Tourism);
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden's centres and other shopping areas);
    - Policy TC4 (Town centre uses); and
    - Policy TC5 (Small and independent shops).
- The area is located entirely within the Hatton Garden Conservation Area
- The Council's priority in the area is to secure and protect a stock of premises for the jewellery sector and support the nationally important cluster of jewellery manufacture and trading that gives the area its special character. Therefore:
    - Policy E1 Economic Development seeks to promote and protect the jewellery industry in the area;
    - Policy E2 Employment seeks to secure and retain premises suitable for use as jewellery workshops and related uses in Hatton Garden. The inclusion of jewellery

workshops is required as part of redevelopment proposals and provision of affordable premises will be required in certain circumstances.

- To protect the concentration of specialist retail jewellery uses in the area, the Council will not grant planning permission for development involving the loss of retail uses (Use Class A1) in designated frontages.

Footfall:

The figure below illustrates the pedestrian heat map for Hatton Garden and surrounding areas. Footfall along Hatton Garden is generally higher at the major road intersections but generally exceed 150,000 movements per month throughout its length.

Hatton Garden Footfall Heat Map

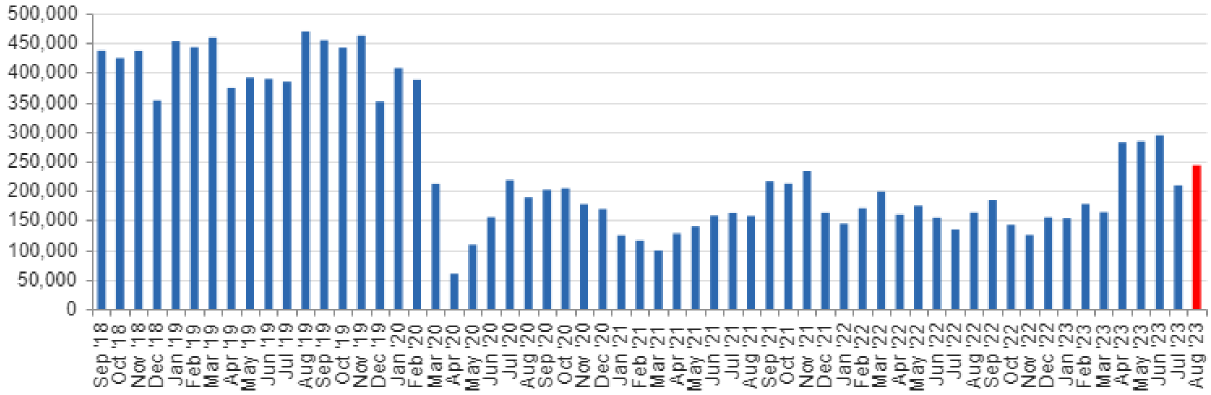
Source: Datscha

A central point along Hatton Garden was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall has struggled to recover since the beginning of the pandemic. Pedestrian activity since March 2020 has been consistently low compared to late 2018, all of 2019 and early 2020. There was some improvement in Spring 2023 and it will be important to monitor whether this is the start of a longer term trend.

When comparing the 12-month period from September 2018 (pre-pandemic) to the 12-month period from September 2022 (post-pandemic), pedestrian activity has fallen by 52% (monthly average from 420,000 down to 200,000).

Footfall of Hatton Garden (September 2018 – August 2023)



Source: Datscha

Catchment Area:

As would be expected for a Specialist Shopping Area, Hatton Garden serves an extensive catchment across the UK, with spend predominantly on comparison goods. There is also a small spend of F&B goods, reflecting the local provision in the area, which would be expected to serve both visitors and workers in the area.

Previous Retail Study Findings

This area was not covered by the Retail Town Centre Study 2013. Therefore, no findings are available for this area specifically.

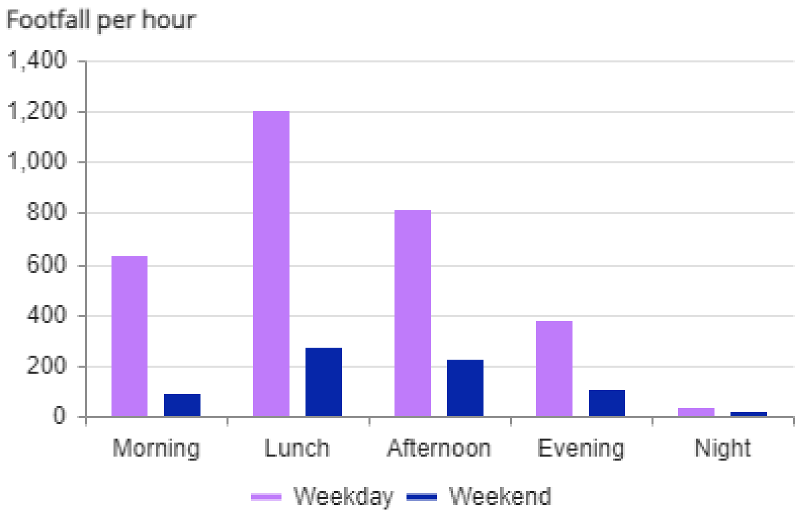
Diversity of Uses 2023

Hatton Garden	Number	%	Camden Average (%)
Retail (Ea Shops)	82	70.1	37.4
Food & Beverage	4	3.4	23.3
All Other Uses	31	26.5	39.4

Total	117	100.0	100.0

EVENING / NIGHT TIME ECONOMY

Hatton Garden	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	1	0.9	3.9%

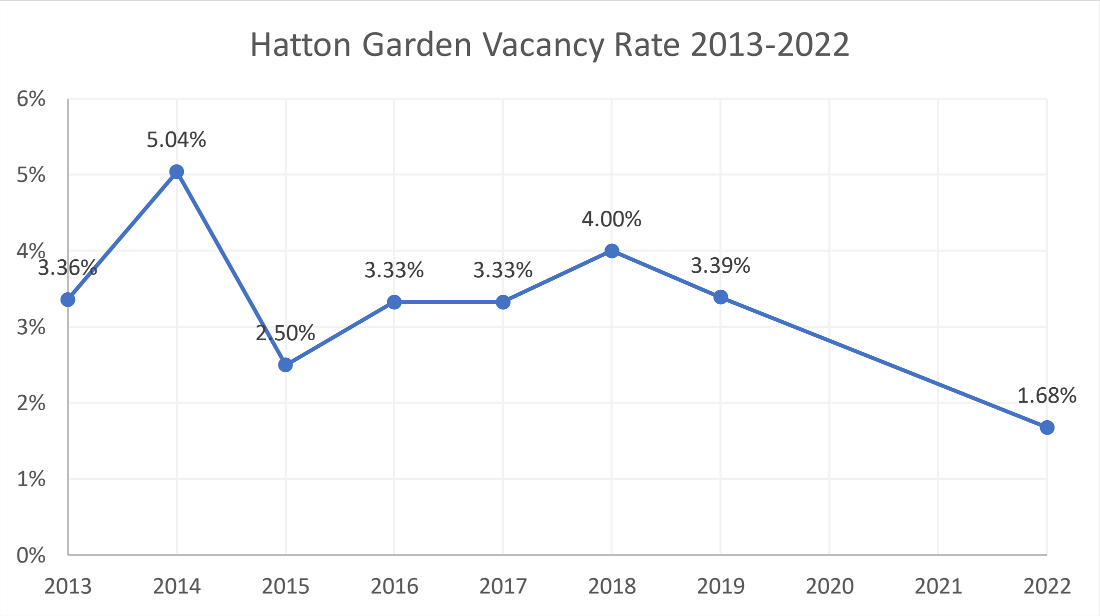


Conclusions on Diversity of Uses:

Hatton Garden is a large centre with a specialist retail offer, reflecting its historical and on-going links with the jewellery trade. The Central London Frontage continues to be dominated by retail shops, almost all of which are occupied by jewellery related businesses and there has been little change in the overall level of provision since 2014. In contrast F&B provision is low.

Footfall in the area is strongly related to standard working hours with highest levels of activity seen during daytime hours on weekdays.

Vacancies 2013 – 2022



Vacancy levels in the Centre are currently at their lowest level since 2013 and equates to just 4 vacant units, of which two were in the process of being refurbished at the time of survey.

Changes in Representation and Market Demand

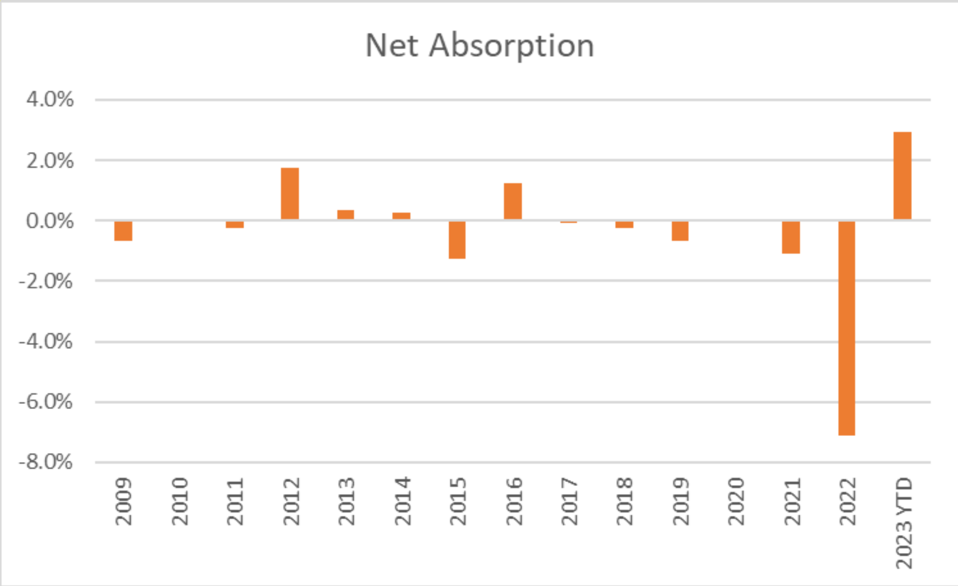
Market demand can be assessed by looking at net absorption of retail floorspace in the area, ie the difference between the space occupied by new businesses and that vacated:

> ***Net absorption*** *= additional floorspace occupied (move-ins) – floorspace vacated (move-outs)*

Change in net absorption in the area has been relatively limited, and overall averaged -0.3% per annum since 2009. This demonstrates a slight decline in demand for retail space in this area.

However, it should be noted that net absorption rate will be limited by the absence of vacancy in the area and the lack of new retail space being delivered, therefore constraining demand for space.

It can also be noted that data suggests the area remains attractive to retailers, with vacant space being taken-up by new occupiers (years of negative net absorption being followed by positive net absorption).



Commercial Rents

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Hatton Garden	£125-135
Museum Street	£70-80
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- Good secondary retail yields – 6.0% – 7.0%

Accessibility

Public Transport:

Transport for London's Public Transport Accessibility Levels (PTAL) ranking assesses connectivity across London, with a grading system indicating the strength of the public transport in any given area. The grading goes from 0 which indicates very poor access to public transport through to 6b which indicates excellent access to public transport. The measures include walk time to public transport, the reliability of the public transport services and the number of services within the area.

A central point for Hatton Garden provides a PTAL output of 6b, indicating that public transport accessibility in the area is excellent.

Farringdon and Chancery Lane are the two nearest underground/ rail stations to Hatton Garden. Farringdon Station is c.250m to the east and provides both national rail and London underground services (Metropolitan, Circle and Hammersmith & City and Elizabeth lines). Chancery Lane underground station is located c.300m to the west and gives access to the Central line.

Bus services in the area (particularly to the south, along Holborn Road) run regularly and provide great connectivity to areas in all directions including Streatham, City of London, Tottenham Court Road and Archway.

Hatton Garden road is wide and allows for on-street parking on both sides. Speed bumps are in place to assist with traffic calming, whilst there are zebra crossings to support with pedestrian mobility. Bike stands can be found on the pavement to provide cyclists a space to securely lock their bikes.

Perception of Safety and Occurrence of Crime

Between June 2022 and May 2023, crime data from the MET Police referenced 853 crimes in Hatton Garden, representing 1.9% of all crimes committed in the London Borough of Camden over this period.

The following table present a breakdown of crimes committed in Hatton Garden by crime type and shows 'anti-social behaviour' and 'other theft' to be the main issues, although 'other crime' is relatively high compared with elsewhere in Camden.

Hatton Garden	# Crimes	As % of all crimes in area	As % of similar crime type in LB Camden
ALL Crimes	**853**	**100.0%**	1.9%
Anti-social behaviour	178	20.9%	1.8%
Bicycle theft	26	3.0%	2.4%
Burglary	65	7.6%	3.3%
Criminal damage and arson	29	3.4%	1.8%

Drugs	17	2.0%	1.4%
Other crime	11	1.3%	4.7%
Other theft	155	18.2%	1.9%
Possession of weapons	4	0.5%	3.1%
Public order	35	4.1%	1.6%
Robbery	13	1.5%	0.9%
Shoplifting	13	1.5%	0.8%
Theft from the person	99	11.6%	1.8%
Vehicle crime	82	9.6%	2.4%
Violence and sexual offences	126	14.8%	1.7%

Environmental Quality

In recognition of the area's historic and architectural significance, Hatton Garden has been designated as a conservation area. This establishes the positive contribution that the area makes to Camden as a whole and ensures that this is protected going forward.

Whilst trees line the western side of the street to the south of Hatton Garden, there is very little greenery beyond that in the area.

Bollards are present at junctions and by crossings to improve the safety of pedestrians. Bins can be found throughout Hatton Garden to ensure its cleanliness. Cycle parking is also present allowing cyclists to safely lock their bikes whilst in the area. Given the wide pavements in parts, some public benches are a welcome addition to Hatton Garden, allowing for people to rest and enjoy the area.

Investment Plans and Development Opportunities

There are no major redevelopment plans for the Hatton Garden area, although it should be noted that an area to the west of Leather Lane is identified as the Holborn Growth Area in the Camden Local Plan.

SWOT Analysis

Strengths

- Internationally renowned centre for the jewellery industry
- Retail offer supports wider industry offer
- Extensive but specialist jewellery- related retail offer
- Low vacancy rates

Weaknesses

- Limited draw outside daytime hours on weekdays

Opportunities

- Proximity of Leather Lane Neighbourhood Centre

Threats

- Lack of premises for new retail businesses and low vacancy rate
- Continued decline in pedestrian footfall
- Reliance on specialist offer
- Introduction of Class E permitting changes in the retail offer.

Conclusions

The retail offer in Hatton Garden has to be seen within the context of the wider jewellery industry presence in the area, and the footfall and trading patterns suggest an area more akin to an employment than a retail area.

The area has an international reputation for high quality jewels and craftsmanship and as such its success has not been affected by the rise of national jewellery brands. With an on-going demand for unique designs and quality work this would not be expected to change in the future.

The potential to diversify the offer is limited by very low vacancy rates but the close proximity of the Leather Lane Neighbourhood Centre offers the opportunity for other retail and town centre uses and services to be provided locally whilst ensuring the continuation of the specialist offer at Hatton Garden. However, we would recommend that the Hatton Garden boundary is reviewed and consideration given to whether it should continue to encompass the Leather Lane NC in the future.

CAMDEN RETAIL STUDY – TOWN CENTRE HEALTH CHECKS

MUSEUM STREET

Description

Current Designation: Specialist Shopping Area as defined in the Camden Local Plan 2017.

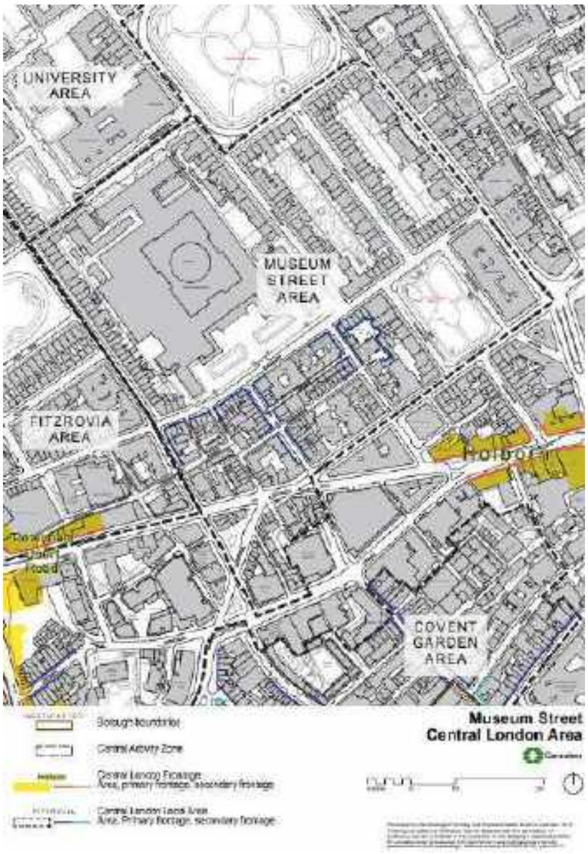
Description of Centre: Museum Street is located in the southern part of the Borough, within the Central London Area and comprises two separate areas of retail use to the south of Great Russell Street and the British Museum.

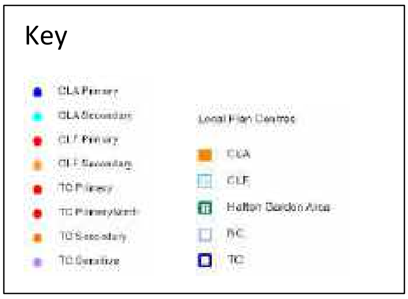
The area offers specialist retail uses dealing in collectible items such as antiquarian books, prints, coins and vintage cameras, which contribute significantly to the character of the Museum Street Area. There are also a number of cafés and restaurants located in the area.

The area west of the Museum is characterised by a high concentration of small hotels and several offices, as well as housing. There is also a significant residential population in the area, with housing being a key component of the mix of land uses.

In Camden's Planning Guidance 2021, the centre is described as follows:

The Museum Street area is within Bloomsbury and comprises of the British Museum and the areas immediately south and east. It is characterised by well-preserved Georgian squares and residences, many of which are now in commercial use and form an important part of the Bloomsbury Conservation Area. The British Museum dominates the area and is one of London's main tourist attractions.





Current Planning Policies / Designations:

- As a defined Specialist Shopping Area, the following policies of the Camden Local Plan apply to the centre:
    - Policy E3 (Tourism);
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden's centres and other shopping areas);
    - Policy TC4 (Town centre uses); and
    - Policy TC5 (Small and independent shops).
- The shopping area is located entirely within the Bloomsbury Conservation Area
- To protect the concentration of specialist retail activity south of the Museum, the Council will not grant planning permission for development involving the loss of retail uses (Use Class A1) or number of retail premises in the designated frontages.

Footfall:

The figure below illustrates the pedestrian heat map for the Museum Street area and shows a particular concentration of footfall along Bloomsbury Way, New Oxford Street and Great Russell Street. The British Museum is clearly the main draw to the shopping area, with the area around Bury Place being noticeably quieter being further from the Museum entrance and the main approach from the Tottenham Court Road direction.

Museum Street Footfall Heat Map

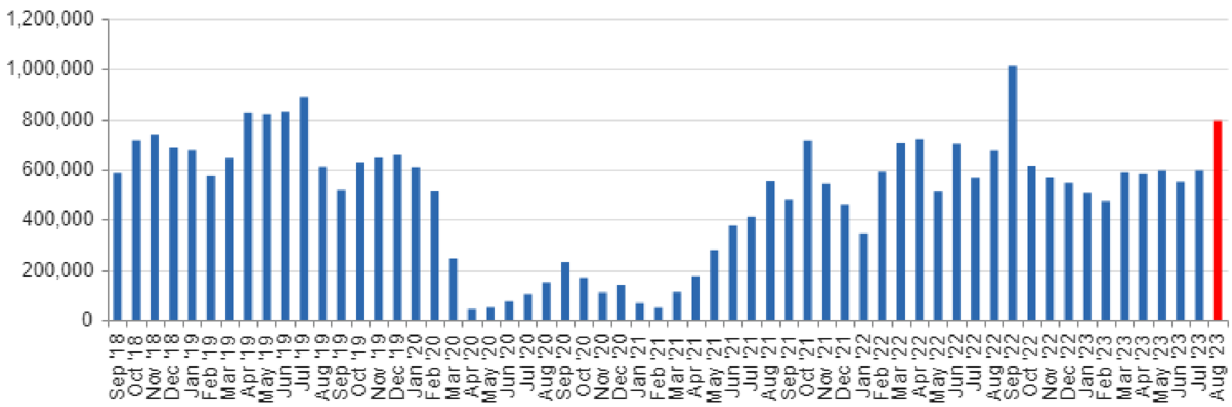
Source: Datscha

A busy section where Museum Street meets Great Russell Street was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall has bounced back moderately well since the period of the pandemic. As expected, 2020 and 2021 saw some extremely low months of pedestrian activity, but from October 2021 onwards, footfall has been much more like pre-pandemic levels, with September 2022 representing a peak for the covered period.

When comparing the 12-month period from September 2018 (pre-pandemic) to the 12-month period from September 2022 (post-pandemic), pedestrian activity has fallen by 14% (monthly average down from 716,000 to 619,000).

Footfall of Museum Street/ Great Russell Street (September 2018 – August 2023)



Source: Datscha

Use of Centre:

The retail offer in the centre is primarily aimed at the tourist trade linked to visitors to the British Museum. Barclaycard data confirms that this is the case for comparison goods, with only about 3% of spend coming from the Camden area.

The limited food & drink offer is also aimed mainly at visitors to the centre, although some local Zone 1 residents do use the outlets.

Previous Retail Study Findings

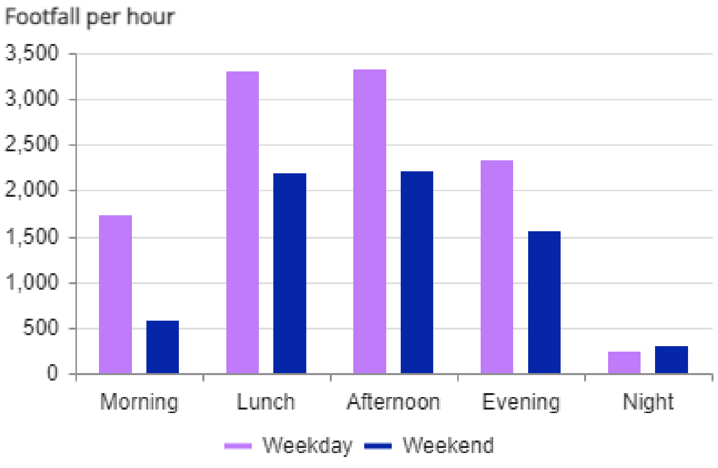
This area was not covered by the Retail Town Centre Study 2013. Therefore, no findings are available for this area specifically.

Diversity of Uses 2023

Museum Street	Number	%	Camden Average (%)
Retail (Ea Shops)	31	45.6	37.4
Food & Beverage	19	27.9	23.3
All Other Uses	18	26.5	39.4
Total	68	100.0	100.0

EVENING / NIGHT TIME ECONOMY

Museum Street	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	2	3.2	3.9%

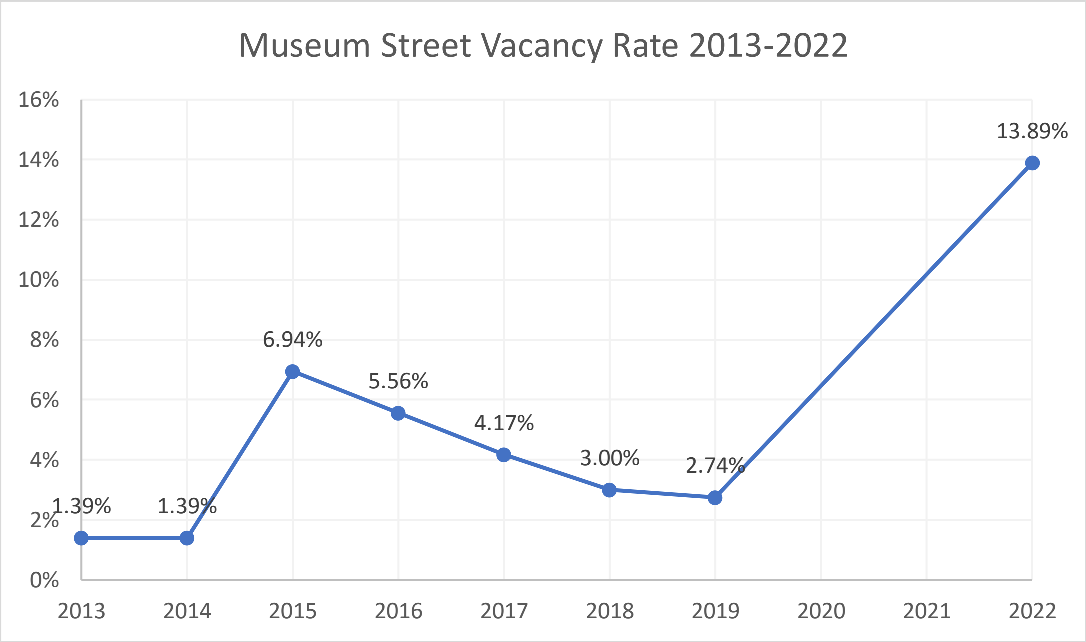


Conclusions on Diversity of Uses:

The retail and leisure offer in Museum Street is primarily geared towards the tourist market and specifically those visiting the British Museum and this is reflected in above average proportions of both retail shops and F&B uses.

This includes two units with potential to support the night-time economy but footfall data suggests this is primarily a location visited during the day and evening, rather than late night.

Vacancies 2013 - 2022



Vacancy rates in the area are currently at the highest level for a decade having increased significantly since 2019. This is likely to reflect the impact of the pandemic on tourist trade in the immediate area.

Changes in Representation and Market Demand

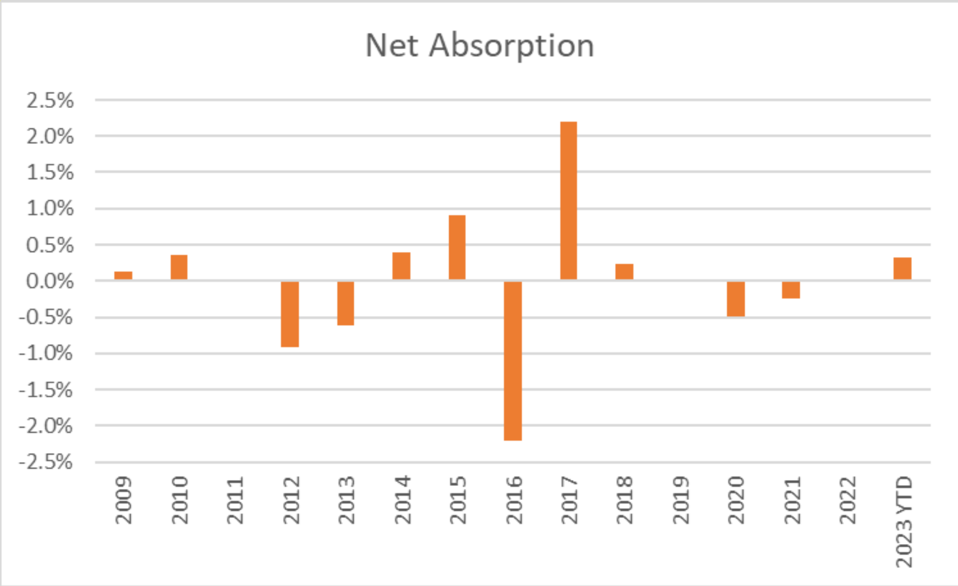
Market demand can be assessed by looking at net absorption of retail floorspace in the area, ie the difference between the space occupied by new businesses and that vacated:

> ***Net absorption*** = *additional floorspace occupied (move-ins) – floorspace vacated (move-outs)*

The average net absorption rate (between 2009 and 2023) in Museum Street has been neutral (0%), with years of negative absorption being compensated by years of positive absorption.

It can be noted that vacancy rate in the area has been extremely low most years and that no new retail space has been delivered in the area since 2009, therefore constraining the potential for positive net absorption of retail space.

Despite the mitigated average absorption rate since 2009, the area seems to remain attractive to retailers and keep on attracting new occupiers as space become available.



Commercial Rents

Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

The following rental levels are therefore broad estimates of prime Zone A rental tone within each location.

Location	Estimated Zone A rate
High Holborn/Kingsway	£190-210
King's Cross	£90-100
Tottenham Court Road	£90-100
Camden Town	£200-220
Finchley Road	£65 -70
Hampstead	£150-160
Kentish Town	£50-55
Kilburn High Road	£80-90
West Hampstead	£80-90
Seven Dials	£160-180
Fitzrovia	£85-95
Hatton Garden	£125-135
Museum Street	£70-80
Denmark Street	£80-90

Most Central and Inner London investments are mixed use by nature which impacts on the yield analysis for the individual constituent parts. Certain retail locations such as Bond Street attract the highest pricing driven by overseas investors and premium brands acquiring flagship stores but there is still good sentiment for other Central London locations including Covent Garden, Fitzrovia, Camden, Tottenham Court Road etc.

Whilst there has been a softening in retail value the lack of transactional volumes has meant comparable evidence within the Borough is limited so in the broadest of terms we would set out the following:

- Prime retail yields – 4.5% – 6.0%
- Good secondary retail yields – 6.0% – 7.0%

Accessibility

Transport for London's Public Transport Accessibility Levels (PTAL) ranking assesses connectivity across London, with a grading system indicating the strength of the public transport in any given area. The grading goes from 0 which indicates very poor access to public transport through to 6b which indicates excellent access to public transport. The measures include walk time to public transport, the reliability of the public transport services and the number of services within the area.

A central point for Museum Street provides a PTAL output of 6b, indicating that public transport accessibility in the area is excellent.

Tottenham Court Road and Holborn underground stations are roughly equidistant from Museum Street. Both stations operate Central line services, whilst Tottenham Court Road also gives access to the Northern Line and Elizabeth line and Holborn is also served by the Piccadilly line. Russell Square underground station is also nearby and is served by the Piccadilly line.

Bus services run along Bloomsbury Way and Great Russell Street, providing regular connections to places such as Putney, Fulham and Victoria.

On-street parking is available in the area, making the roads narrow in parts. Outdoor seating areas that have been created but were once part of the road add to this issue, however with one-way routes in place, measures are in place to manage movement safely.

A section of Museum Street is designated to pedestrian and cycle space, with bollards present, again, improving safety in the area. Bike storage facilities can be found to support those who wish to safely store their bikes whilst visiting.

Perception of Safety and Occurrence of Crime

Between June 2022 and May 2023, crime data from the MET Police referenced 1,278 crimes in Museum Street, representing 2.8% of all crimes committed in the London Borough of Camden over this period.

The following table present a breakdown of crimes committed in Museum Street by crime type.

The area has a high proportion of 'Other theft' and 'theft from the person' and problems with 'anti-social behaviour'.

Museum Street	# Crimes	As % of all crimes in area	As % of similar crime type in LB Camden
ALL Crimes	**1,278**	**100.0%**	2.8%
Anti-social behaviour	240	18.8%	2.5%
Bicycle theft	28	2.2%	2.6%
Burglary	32	2.5%	1.6%

Criminal damage and arson	32	2.5%	2.0%
Drugs	16	1.3%	1.3%
Other crime	3	0.2%	1.3%
Other theft	362	28.3%	4.5%
Possession of weapons	2	0.2%	1.6%
Public order	50	3.9%	2.3%
Robbery	48	3.8%	3.3%
Shoplifting	25	2.0%	1.6%
Theft from the person	236	18.5%	4.2%
Vehicle crime	80	6.3%	2.4%
Violence and sexual offences	124	9.7%	1.7%

Environmental Quality

Museum Street falls within the Bloomsbury Conservation Area. This designation recognises the architectural and historical qualities of the area and ensures that this is protected going forward.

Given the narrow pavements, there is a lack of space for planting along Museum Street itself but this is largely made up for by the fact that several operators along the street such as Museum Tavern and The Plough have potted plants, hanging baskets and planted dividers present. These enhance the look and feel of their own establishments and the street as a whole.

Characterful lampposts line the street and improve safety and visibility in the early mornings and evenings. Bollards are present at either side of the pedestrianised/ cycle zone of Museum Street to enhance the safety of people navigating the area.

The buildings are generally well-kept and in good condition, with some having distinct, traditional features which play a key role in the environmental quality of the area.

Investment Plans and Development Opportunities

There are no major redevelopment plans for the Museum Street area. However, the Council has prepared a draft Vison and Urban Strategy for the Area[1], which was originally published for consultation in 2018, with the intention that a finalised version will be adopted as Supplementary Planning Guidance.

This proposes two specific areas for improvement in the Museum Quarter:

- Re-paving of the streets to south of Great Russell Street with high quality materials and roads top-dressed to infer special character. New pocket plazas are also proposed where streets are closed. Partial road closures of southern Bury Place, Barter Street and Bloomsbury Square are proposed; and
- Exploring the potential to close Great Russell Street to through traffic outside of the British Museum to provide a new pedestrian arrival experience.

Stakeholder Feedback

Stakeholder engagement identified the following points of relevance to the Museum Street:

- Developer / Landowner No. 1:
    - Lower part of the street is not great but it is enhanced by the Post Building and temporary retail
    - Northern end is strong in terms of tourist retail
    - Area is terribly congested.

[1] Holborn Vision and Urban Strategy

- Walking experience from Tottenham Court Road to British Library is not great because of the traffic. This should be improved given the level of footfall.

- Developer / landowner No. 2:
  - Camden's town centres tend to have very dense populus and have been and continue to be very popular.
  - They are resilient in the context of new occupiers coming in, people want to be there.
  - More present in a '7-day cycle' compared to historically when the busy periods were only from Friday-Sunday. Issues of quiet periods elevated.
  - Any of the central areas where there isn't an overarching landlord, where the mix can be evolved or played to a strength of an area, the weight of demand can have a detrimental affect on the area.
  - Rent is a major player in terms of health of an area but those that can afford rent do not necessarily add vitality to an area. What is right for the area isn't always what is coming through the development.
  - In the Camden centres of this nature, levels of trade are not as good as the leasing activity suggests. There is a question regarding the viability of some

SWOT Analysis

Strengths

- Proximity to major tourist attraction (British Museum)
- Specialist retail offer that is likely to appeal directly to the visitors to the museum
- Very attractive environment and Conservation Area location
- Small pedestrianised area

Weaknesses

- Division of retail area into two distinct parts
- Busyness of traffic on Great Russell Street

Opportunities

- Increase footfall towards Bury Place
- Greater evening activity through encouraging longer dwell times into the evenings to support existing businesses

Threats

- Limited size of centre and available properties for new businesses

Conclusions

Museum Street appears to be performing well as a specialist shopping area primarily serving visitors to the British Museum or with related interests. Museum Street and Bury Place provide attractive areas for shopping and using the F&B outlets, but the environment on Great Russell Street is made less attractive by the volumes of traffic.

The separation of the retail offer into two distinct parts will reduce its overall attractiveness and the potential to encourage pedestrians to use the parallel roads connecting the two areas (Gilbert Place and Little Russell Street) may be worth exploring. However, we consider that the centre boundary remains appropriate.

Lambert Smith Hampton

VOLUME C3: TOWN CENTRES

CAMDEN RETAIL STUDY – TOWN CENTRE HEALTH CHECKS

CAMDEN TOWN

Current Designation: Town Centre as defined in the Camden Local Plan 2017 and Major Centre in The London Plan.

Description of Centre:

Camden Town is the borough's biggest centre with the largest range of shops and services and is located centrally within the borough. It is primarily a linear centre extending northwards along the A502 from Mornington Cresent tube station to Camden Town tube and then further north again to the Regent's Canal and then to Chalk Farm tube station.

Primary shopping frontages are identified along Camden High Road to both the north and south of Camden Town tube station and along the north side of Chalk Farm Road. Secondary frontages are identified on the south side of Chalk Farm Road, the side roads, Camden Road, the southern end of Kentish Town Road and the southern part of Camden High Road near Mornington Crescent.

The centre also includes permanent market sites at Camden Lock, Hawley Wharf, The Stables and Buck Street which together provide over 1,000 venues (stalls, shops, bars and cafes). The markets are one of the key draws to Camden Town and it is internationally renowned as a tourist destination.

The centre does not have a single character but can broadly be split into three geographically defined parts:

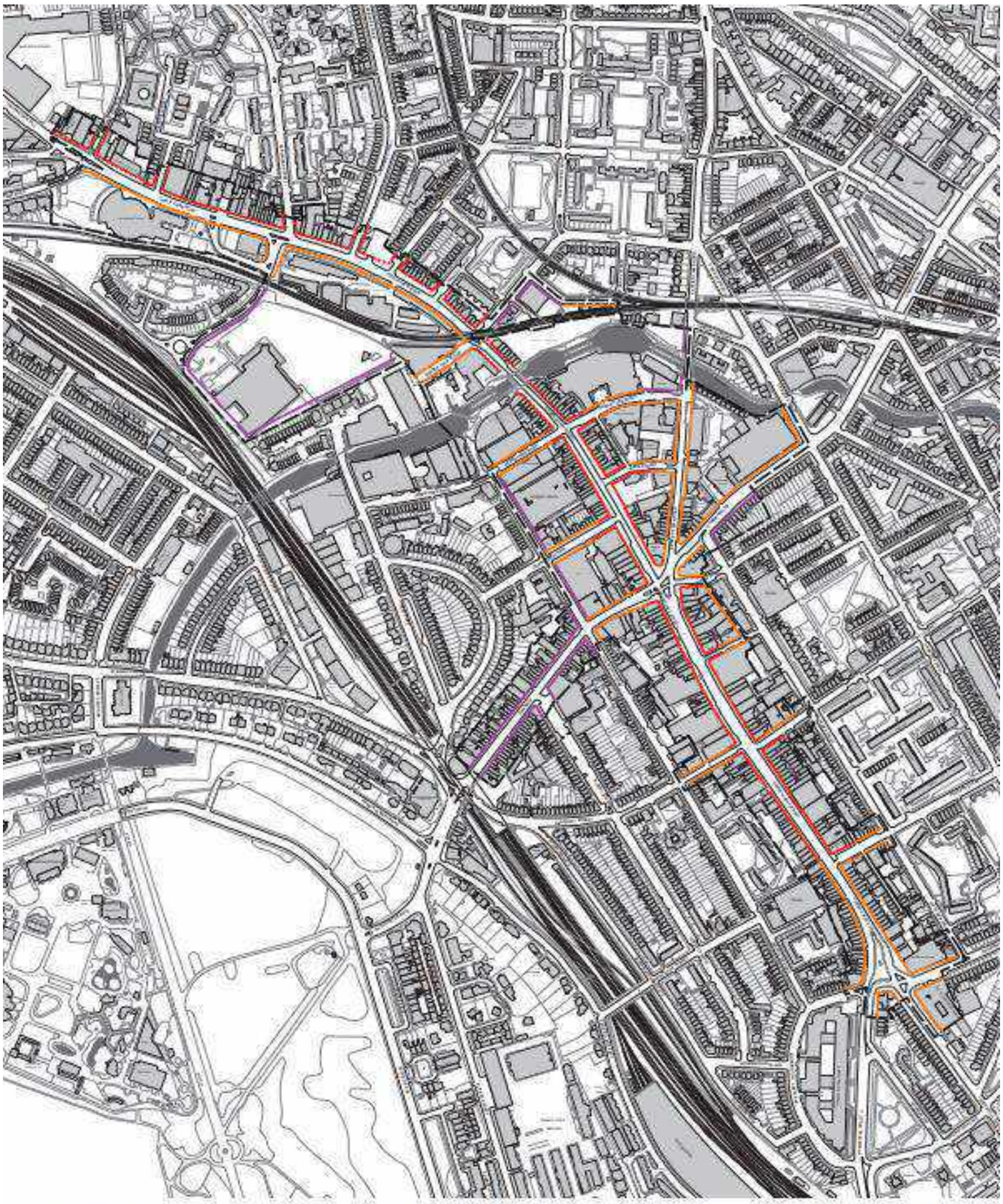
- The commercial heart in the markets and around Camden Town tube station,
- The southern section which provides more traditional 'high street' shopping and serves a more local role, and
- Chalk Farm Road to the north with its mixed street frontage of restaurants, bars and specialist shops.

In Camden's Planning Guidance 2021 the centre is described as follows:

Camden Town is a vibrant centre, internationally renowned as a tourist destination, famous for its extensive range of markets, its wealth of independent retailers and creative industries, as well as legendary music and entertainment venues including the Roundhouse and Koko. It is also home to many residents and to numerous businesses, small and large, notably media, cultural and creative industries, attracted by the area's unique atmosphere.

Camden Town is the borough's biggest centre with the largest range of shops and services, and is designated as a Major Centre in the London Plan. Parts of Camden Town have historic importance and have been designated as the Camden Town Conservation Area.

The town centre provides an extensive range of markets, a wealth of independent retailers and creative industries, as well as legendary music and entertainment venues. It is also home to many residents and to numerous businesses, small and large, notably media, cultural and creative industries, attracted by the area's unique atmosphere. A cluster of creative industries and network of entrepreneurs and learners such as 'The Collective' are based in the areas around Camden High Street also adds to the centre's vibrancy.



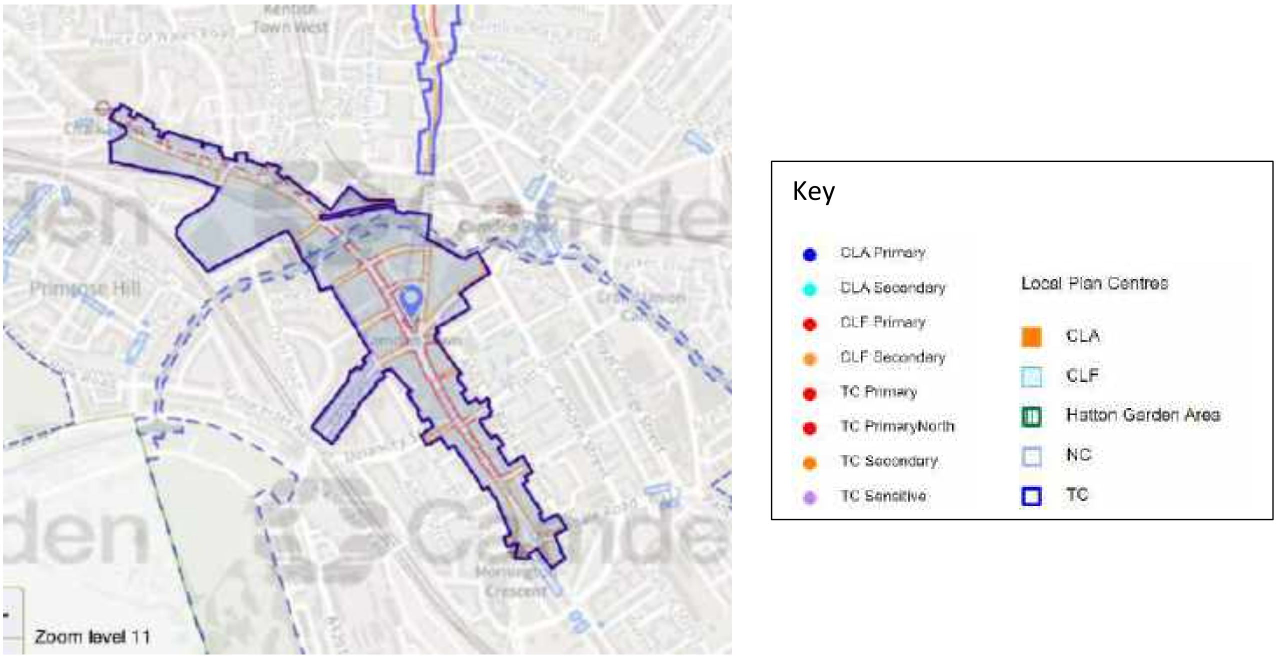
Camden Town Town Centre

Primary Frontage (north), Primary Frontage (south)

Secondary Frontage, Sensitive Frontage

Town Centre Boundary

WESTMINSTER Borough boundary



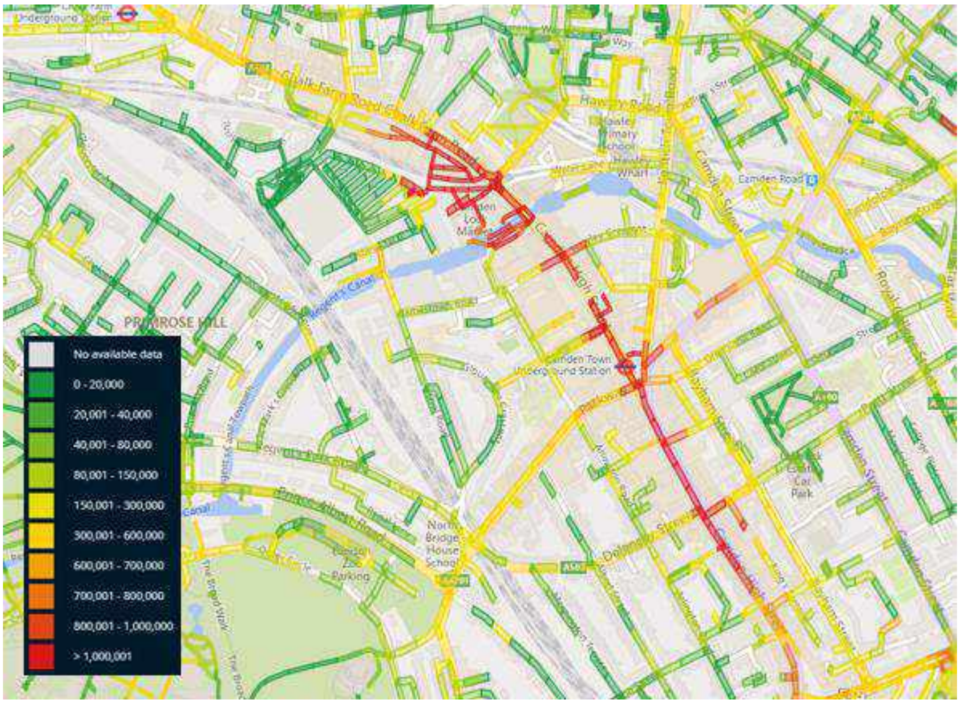
Current Planning Policies / Designations:

- As defined Town Centre, the following policies of the Camden Local Plan apply to the centre:
    - Policy E3 (Tourism);
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden's centres and other shopping areas);
    - Policy TC4 (Town centre uses);
    - Policy TC5 (Small and independent shops); and
    - TC6 Markets.
- The town centre designation includes two areas covered by Conservation Areas – Regent's Canal in the north and Camden Town in the south.
- Camden Town is designated as a Major Town Centre in the London Plan 2021with high commercial growth potential and medium residential growth potential.
- It is within a Strategic Area for Regeneration as defined in Policy SD10 of the London Plan (Annex 1, Table A1.1).
- The London Plan 2021 designates Camden Town as an area of international and national significance for the night-time economy (NT1).
- Camden Town's markets are protected (Camden Policy TC6).
- Site allocations include Hawley Wharf (Site 32) (now delivered)

Footfall:

The figure below illustrates the pedestrian heat map for Camden Town and shows a particular concentration of footfall along Camden High Street and around the Camden Market area but also very high levels of footfall throughout the centre.

Camden Town Footfall Heat Map



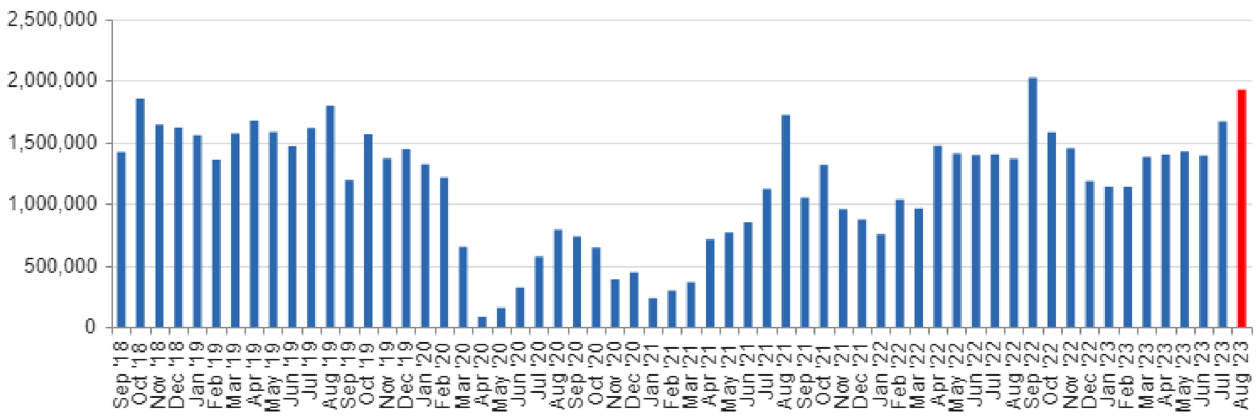
Source: Datscha

A busy section of Camden Town, located along Camden High Street, was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall fell dramatically during the pandemic due to national lockdown restrictions as well as limitations on international travel but has bounced back from April 2022 onwards.

When comparing the 12-month period from September 2018 (pre-pandemic) to the 12-month period from September 2022 (post-pandemic), pedestrian activity has fallen by 7.5% (monthly average of 1.6m down to 1.48m). Footfall levels however appear to be on the increase again after a relatively poor start to 2023.

Footfall of Camden High Street, Camden Town (September 2018 – August 2023)



Source: Datscha

Catchment Area:

The convenience offer within Camden Town primarily serves the Camden residents, although around a quarter of spend does come from visitors from outside the borough.

The trade draw for comparison goods is wide, with less than half of all spend coming from Camden residents, reflecting the draw of the markets and the rest of the town centre offer.

The extensive F&B sector is also reliant on trade from visitors to the centre.

Previous Retail Study Findings

Conclusions from Retail Town Centre Study 2013:

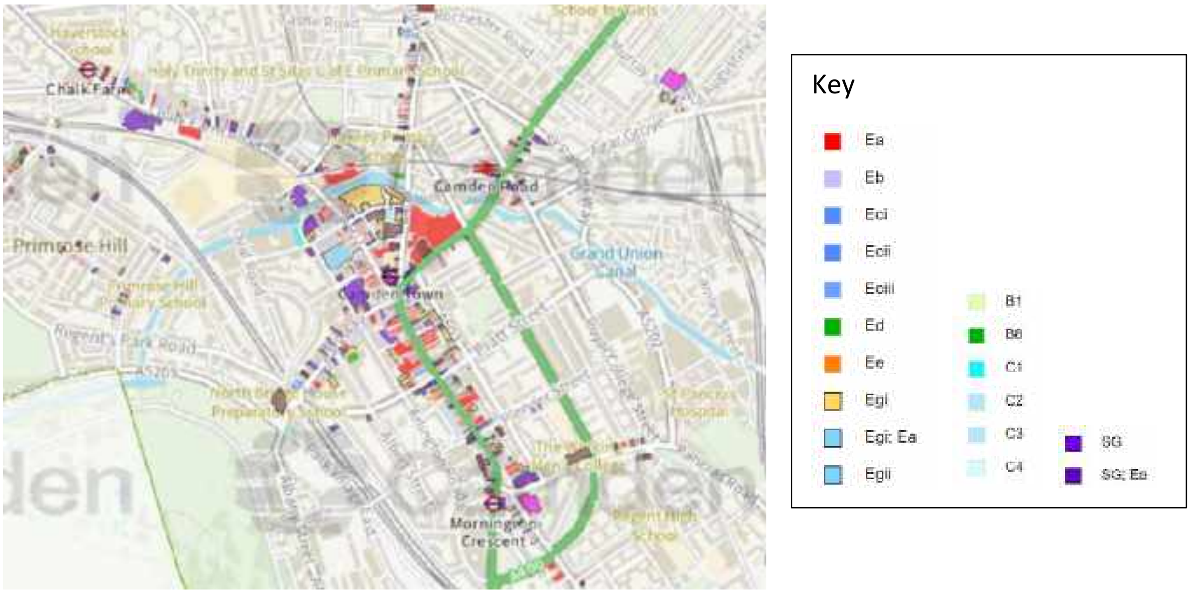
Key strengths identified for Camden Town include:

- Camden Town is a successful, vibrant and unique retail and leisure destination, combining an eclectic mix of bohemian shops, thriving street markets and legendary music and entertainment venues which attract a significant number of tourists each year, as well as shops and services catering to the needs of local residents and workers.
- It has a particularly strong leisure offer including restaurants, cafes, bars and clubs which makes the area a distinctive daytime and evening visitor destination in its own right.
- The centre currently has a good diversity of food, non-food and service uses.
- The centre has a low level of vacant units indicating that the centre is performing well and there is strong demand for retail space in the centre.
- Camden Town is a popular retail and leisure destination for local people as well as people from outside the survey area, including oversee visitors. Results of the household telephone survey and in-centre survey show that people chose to visit Camden Town primarily because it is close to home, it has a good range of chain stores and independent retailers, and to visit the markets.
- Daytime and evening eating, evening drinking and evening cultural activities all attract a high proportion of telephone survey respondents to visit the centre. People surveyed highlighted the importance to maintain an appropriate range and provision of food, drink and entertainment uses in Camden over the plan period.

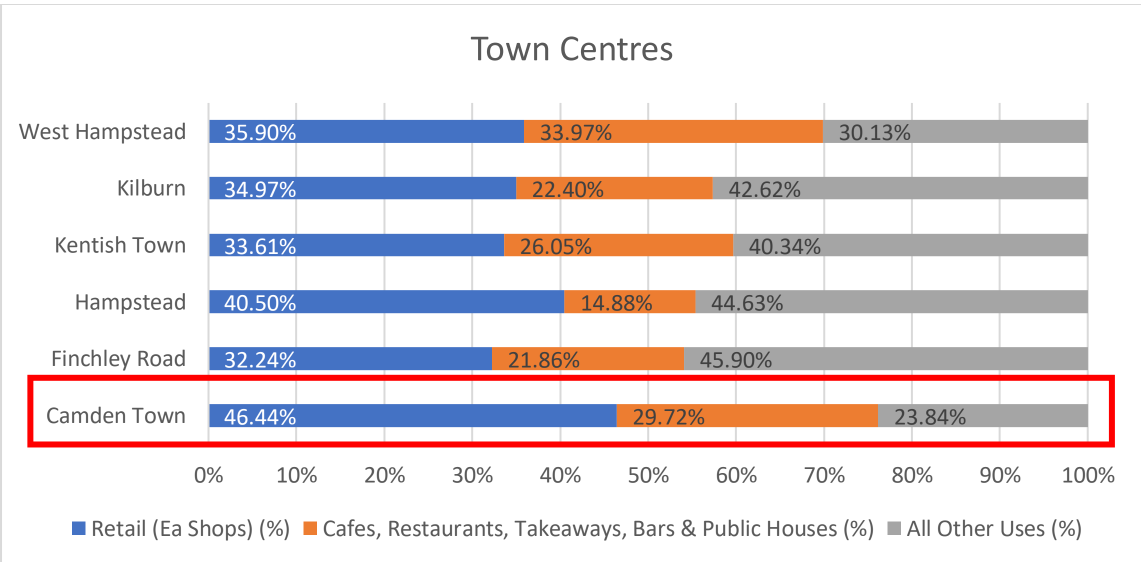
Key weaknesses identified for Camden Town have been identified as follows:

- There is scope to increase security and improve perceptions of safety in Camden Town (noise, crime, anti-social behaviour and litter).
- Further enhancements to the quality of the environment in the town centre, particularly south of Camden Town underground station, should be considered.

Diversity of Uses 2023

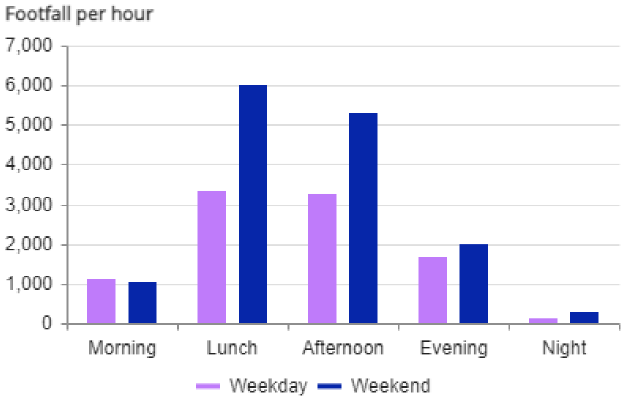


Camden Town	Number	%	Camden Average (%)
Retail (Ea Shops)	411	46.44	37.4
Food & Beverage	263	29.72	23.3
All Other Uses	211	23.84	39.4
Total	885	100.0	100.0



EVENING / NIGHT TIME ECONOMY

Camden Town	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	50	5.4	3.9%



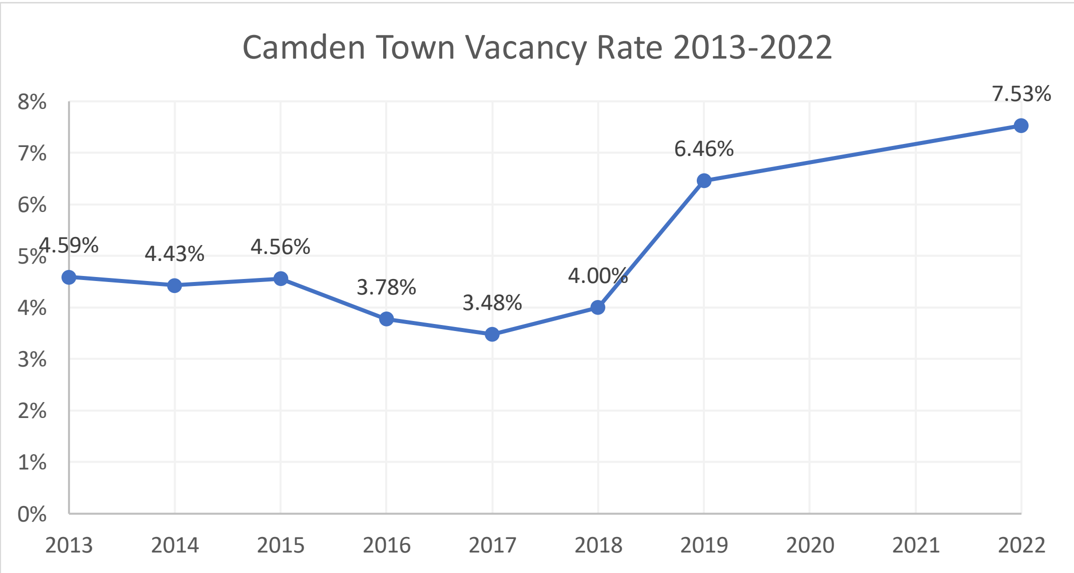
Conclusions on Diversity of Uses:

Camden Town has a very strong retail offer concentrated around Camden Town tube station and the area to the south. The convenience offer includes two large supermarkets (Morrisons and Sainsbury's) with both national multiples and independents represented in smaller units.

The comparison offer is also extensive and is primarily provided by independent or specialist retailers.

The evening / night time economy is supported by a good range of F&B outlets and pubs / bars, a cinema (with a second on the edge of the centre), bingo hall and The Roundhouse music venue to the north of the centre and KOKO to the south.

Vacancies 2013 - 2022



Vacancy rates in Camden Town have risen slightly since 2019 but remain low compared with the UK average, particularly given the size of the centre.

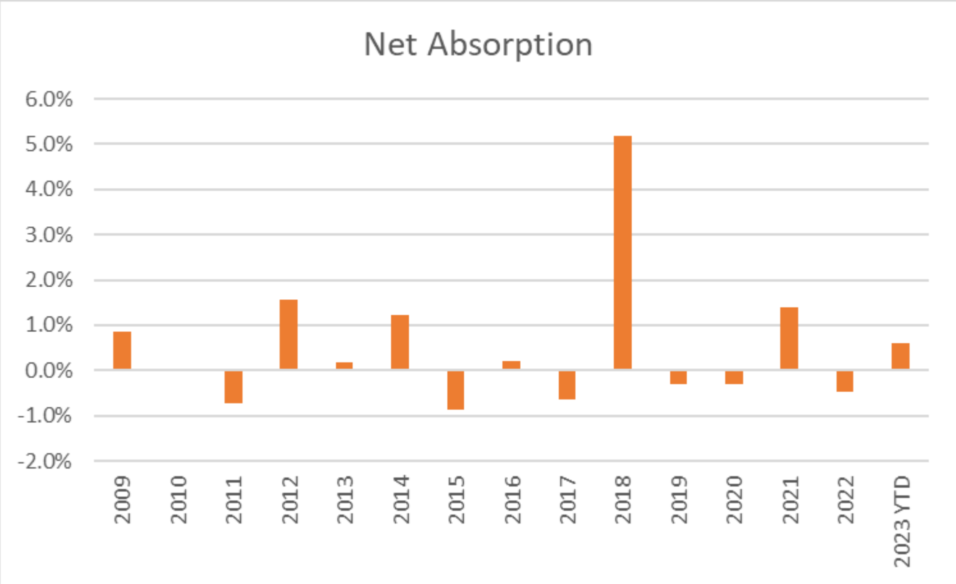
Changes in Representation and Market Demand

Market demand can be assessed by looking at net absorption of retail floorspace in the area.

> ***Net absorption*** *= additional floorspace occupied (move-ins) – floorspace vacated (move-outs)*

The net absorption rate in Camden Town overall since 2009 has been positive, and has been relatively strong, with an average net take-up of 0.5% per annum since 2009. This is one of the highest performing areas in terms of net absorption, whilst also being the largest retail area in terms of floorspace.

This demonstrates the strength as Camden Town Centre as a retail area and stability of the market over time.



Commercial Rents

Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

The following rental levels are therefore broad estimates of prime Zone A rental tone within each location.

Location	Estimated Zone A rate
High Holborn/Kingsway	£190-210
King’s Cross	£90-100
Tottenham Court Road	£90-100
Camden Town	£200-220
Finchley Road	£65 -70
Hampstead	£150-160
Kentish Town	£50-55
Kilburn High Road	£80-90
West Hampstead	£80-90
Seven Dials	£160-180
Fitzrovia	£85-95

Hatton Garden	£125-135
Museum Street	£70-80
Denmark Street	£80-90

Most Central and Inner London investments are mixed use by nature which impacts on the yield analysis for the individual constituent parts. Certain retail locations such as Bond Street attract the highest pricing driven by overseas investors and premium brands acquiring flagship stores but there is still good sentiment for other Central London locations including Covent Garden, Fitzrovia, Camden, Tottenham Court Road etc.

Whilst there has been a softening in retail value the lack of transactional volumes has meant comparable evidence within the Borough is limited so in the broadest of terms we would set out the following:

- Prime retail yields – 4.5% – 6.0%
- Good secondary retail yields – 6.0% – 7.0%

This is consistent with information from PMA Promis[1] which indicates that prime rents in Camden Town were around £225 psf Zone A in mid 2023. This represents no change on levels at the end of 2022.

Source: PMA PROMIS

Accessibility

Transport for London's Public Transport Accessibility Levels (PTAL) ranking assesses connectivity across London, with a grading system indicating the strength of the public transport in any given area. The grading goes from 0 which indicates very poor access to public transport through to 6b which indicates excellent access to public transport. The measures include walk time to public transport, the reliability of the public transport services and the number of services within the area.

A central point within Camden Town provides a PTAL output of 6b, indicating that public transport accessibility in the area is excellent.

Camden Town underground station is located centrally to the area, with Mornington Crescent underground station to the south and Chalk Farm to the north west. All stations are part of the Northern

[1] In-house data from Property Market Analysis (PMA) Retail Report for Romford

line which connects to Edgware and High Barnet to the north and Battersea Power Station and Morden to the south. The line also serves Euston, King's Cross, Tottenham Court Road and London Bridge.

The overground can also be accessed nearby along Camden Road. Services from Camden Road overground station provide regular routes to and from Stratford to the east and Willesden Green and beyond to the west.

Bus services run regularly through the centre and provide great connectivity to areas in all directions including Angel, Parliament Hill, Hampstead and Canada Water.

Camden Town can be accessed and navigated by car, however, with heavy traffic, one-way systems and a high volume of pedestrians and cyclists, accessibility via this mode of transport can be challenging.

Wide pavements on both sides of the road can be found throughout the area, however, during peak times of the week when footfall levels are very high, pavements can become very congested and harder to navigate. Traffic light and zebra crossings can be found to support pedestrians moving around Camden Town.

Perception of Safety and Occurrence of Crime

Between June 2022 and May 2023, crime data from the MET Police referenced 5,053 crimes in Camden Town, representing 11.1% of all crimes committed in the London Borough of Camden over this period.

The centre therefore has the highest number of crimes reported for all the town centres.

The following table present a breakdown of crimes committed in Camden Town by crime type.

The majority of crimes committed in the area are related to anti-social behaviour, violence and sexual offences and thefts. We note a particular concentration of drug related crimes and robberies (in comparison to % of all crimes of the same type in LB Camden).

Further analysis of the data shows that Camden Town Centre is the area with the highest number of crimes for almost all types of crime.

Camden Town	# Crimes	As % of all crimes in area	As % of similar crime type in LB Camden
ALL Crimes	**5,053**	**100.0%**	11.1%
Anti-social behaviour	966	19.1%	10.0%
Bicycle theft	92	1.8%	8.5%
Burglary	123	2.4%	6.3%
Criminal damage and arson	143	2.8%	8.8%
Drugs	235	4.7%	19.8%
Other crime	20	0.4%	8.5%
Other theft	814	16.1%	10.0%
Possession of weapons	17	0.3%	13.4%
Public order	259	5.1%	11.8%
Robbery	278	5.5%	19.2%
Shoplifting	178	3.5%	11.5%
Theft from the person	784	15.5%	14.1%
Vehicle crime	231	4.6%	6.8%

Violence and sexual offences	913	18.1%	12.5%

Environmental Quality

Parts of Camden Town have historic and architectural importance and this is reflected in their designation within the Camden Town and Regent's Canal Conservation Areas. This recognises the positive contribution that these areas make to the character and appearance of Camden Town. However, the quality of some of the frontages, especially in the southern part of the centre are of poor quality and distract from the overall appearance of the area.

Whilst Regent's Park is nearby, there is little greenery and open space within the town centre itself. There are trees sparsely located along Camden High Street, and some of the outlets do add to the appearance of the area, such as The Elephants Head with its hanging baskets.

The canal path offers the greatest escape from the hard, built-up environment of Camden Town. Large trees can be found dominating the scenery by the market area. Wildlife and passing boats can be enjoyed whilst walking or cycling along the canal footpath. This footpath also provides a great link to Primrose Hill and Regent's Park to the west and King's Cross and Coal Drops Yard to the south east.

One-way systems are in place to minimise the negative impacts of traffic flow through the centre, but with narrow pavements in parts, and large crowds at peak times, the busy roads can become hazardous and challenging to navigate.

Investment Plans and Development Opportunities

Camden Town has seen major recent investment in recent years with the completion of Hawley Wharf to the east of Chalk Farm Road and north of the Regent's Canal. This development was completed in early 2020 and increased commercial floorspace by nearly 10,000 sqm, replacing an area of the market destroyed by fire in 2008.

The redevelopment of the Morrison's site also represents major investment in the area and will provide a strong convenience anchor at the north end of the centre.

Stakeholder Feedback

Stakeholder engagement identified the following points of relevance to the Camden Town:

- Developer/landowner No. 1:
  - Health of centre has not changed significantly in 20 years. It is dominated by the main road. Lots of expansion of the market at the top end of the road – tourist etc, while the bottom end is still convenience / retail. Not as gentrified but meets the population's needs.
  - Centre is suffering in terms of expansion compared with King's Cross. It is healthy but decreased footfall and it has lost something.
  - Camden Town will always be a popular spot for evening and night time activities.
  - Main challenge for the centre is the main road – it is a bad experience in general. Not pedestrian-friendly. Needs environmental improvements, which would help air quality, which is a big complaint of residents there already.
  - Will need a balance between pressure for housing and keeping retail going.
  - Area has a lot of SMEs, so getting places to work more locally and how this is treated on the high street will be important.
  - The high street must be kept alive which means it needs to adapt to changes.

- Developer / landowner No. 2:
  - Camden's town centres tend to have very dense populus and have been and continue to be very popular.
  - They are resilient in the context of new occupiers coming in, people want to be there.

- More present in a '7-day cycle' compared to historically when the busy periods were only from Friday-Sunday. Issues of quiet periods elevated.
    - Any of the central areas where there isn't an overarching landlord, where the mix can be evolved or played to a strength of an area, the weight of demand can have a detrimental affect on the area.
    - Rent is a major player in terms of health of an area but those that can afford rent do not necessarily add vitality to an area. What is right for the area isn't always what is coming through the development.
    - In the Camden centres of this nature, levels of trade are not as good as the leasing activity suggests. There is a question regarding the viability of some operators.
- BID No. 2:
    - Footfall has come back stronger post-pandemic and is better than the West End. This is due to the visitor economy, which is the strongest.
    - There are higher levels of high street vacancy than ever before, even pre-2007 levels, not because people don't want them but it is to do with prices. There is not a lack of footfall.
    - The retail markets are propped up by first time retailers but those later in their careers and using 'life savings' with 3 free months to get started are distorting the market.
    - Camden is a thriving, young people destination. The visitor economy means there is constantly international visitors but the culture in the borough means that there is always interest in the place.
    - There has always been a very viable tourist economy but also a big music undertone. Reopening of 'Koko' at the southern end of the high street is significant. Also venues such as the Roundhouse. This attracts local residents as well as visitors.
    - Creative industries are an important non-retail attractor.
    - Camden Town has a big night time economy, which is less tourist focused than the day time economy. Mixture of music and creativity. Challenges to night time economy not seen as much in Camden Town as other areas. Crime is increasing post-pandemic – anti-social behaviour, drug related, shoplifting. Recruitment for pubs and venues have post-Brexit issue as 75% of staff pre- Brexit / pandemic were continental Europeans who have moved back. This has reduced to 10%.
    - Noticed more effect when PDR was first introduced. Two large offices lost to PDR initially but Article 4 Directive has not had much effect as what was going to change has.
    - More flexible Use Classes would be positive in Camden Town.
    - Key challenges for the centre are rent prices, crime and recruitment.
    - Changes over the next 5-10 years are difficult to predict. People are keen to get rid of property. Rent is too high but there are always people willing to pay the prices. Combination of crime and rents and not being able to recruit means it is hard to do everyday business.

SWOT Analysis

Strengths

- Internationally known destination
- Strong retail, F&B and markets offer
- Strong independent and start-up offer
- Very accessible by public transport
- Strongest net absorption of retail space in Camden

Weaknesses

- Relatively high levels of crime

Opportunities

- Area for introduction of innovative offer, including new products and retailing formats

- Development of more overnight accommodation to support evening economy

Threats

- Dilution/loss of independent offer if national multiple interest increases, replication of existing offer rather than innovations and/or loss of genuine market offer
- Loss of character and unique identity due to increase in demand from national multiples or ‘sanitisation’ of the area
- Popularity of offer leading to levels of congestion that then dissuades some customers (ie need customers not just visitors) – needs successful businesses not just high footfall
- High rental levels and associated business costs

Conclusions

Camden Town is an extremely popular and successful centre that provides a unique offer of market-based and traditional retail and leisure businesses. It is also an area known for its independent business offer.

The recent development at Hawley Wharf has strengthened the overall offer in the area and introduced new market and cinema provision. However, the extent of the scheme exceeds the current centre boundary and some minor boundary changes are recommended to reflect the new town centre uses immediately south and under the railway lines.

We would also note that the town centre boundary for Camden Town has historically been drawn more broadly than the other town centres in Camden to encompass secondary retail frontage along side streets and small areas of employment and leisure uses (particularly behind properties fronting onto the southern end of Camden High Street). There has been a relatively high degree of land use change in these areas, including the loss of retail and employment premises. We therefore recommend that the precise alignment of the town centre boundary is reviewed and where necessary, minor changes made to frontages to reflect these changes of use (e.g. Greenland Street, Greenland Road, Greenland Place, Pratt Street, Plender Street). Some of the designated “sensitive frontages” shown on the Policies Map and in the Council’s planning guidance also include areas subject to land use change and therefore a review of existing designations is likely to be needed.

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This tool gives you the ability to compare selected target audiences against a base comparison such as the UK population, or another audience, to highlight the key characteristics of your audience; and how they differ.

Target values:

96,676	40,287
Population	Households

Report: **Camden Town Demographic Data**

Camden Town 1.5km (1.5 Km) UK22
Selected Target

VS

Base values:

268,198	116,712
Population	Households

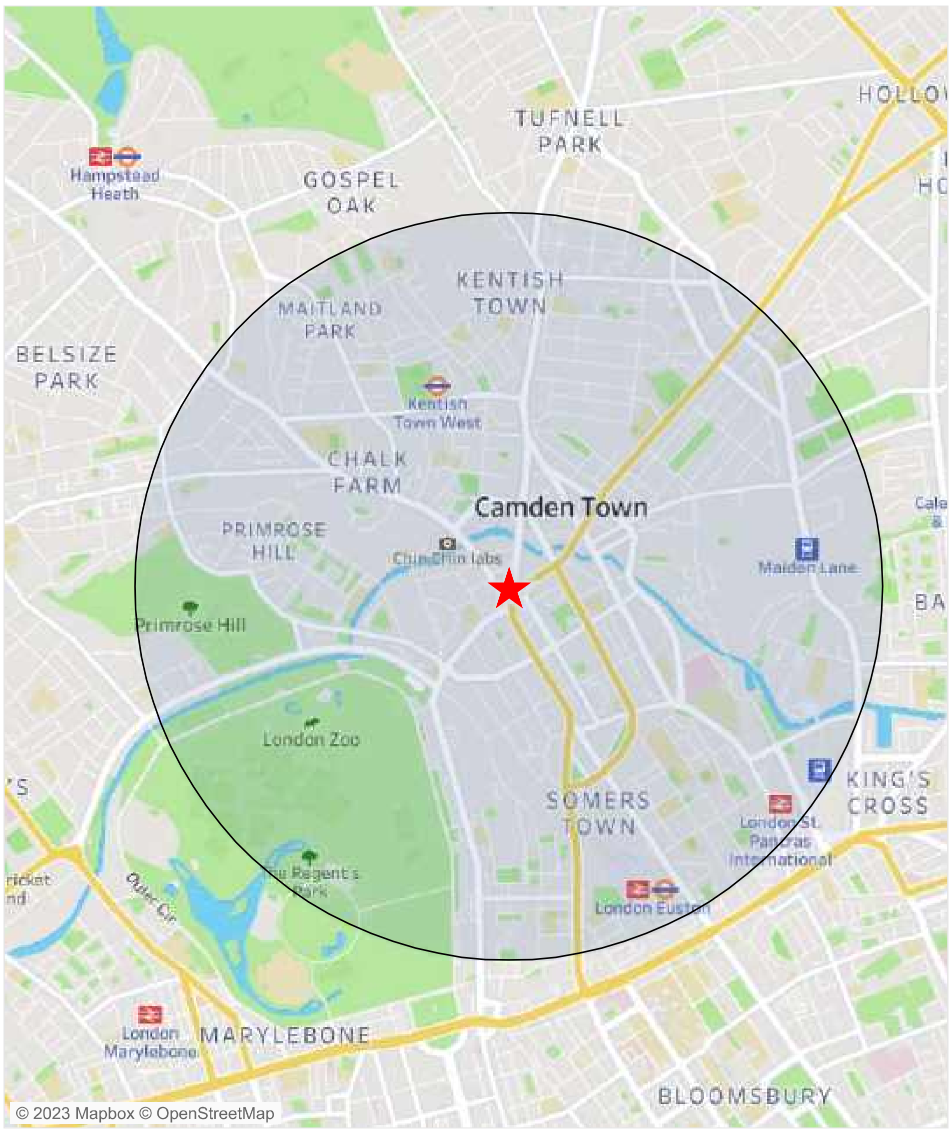
Camden
Selected Base

Did you know?

We also offer enrichment at Person and Household level, using UK ConsumerView, and in-depth profiling through iCoder Online. Contact our Helpdesk to find out more.

Summary

Summary | Demographics | Segmentation | Raw Data



Make up of your area

	Target	Base
Total Population	96,676	268,198
Number of Females	47,551	130,635
Number of Males	49,125	137,563
Total Households	40,287	116,712
Economically Active	50,567	147,755
Economically Inactive	22,417	58,877
Owner Occupied (HH)	11,325	40,166
Private Rented (HH)	11,135	37,000

The population of the area is expected to change by: -16.46%.
This percentage change is expected by 2026 and based on future projections.

The three highest Mosaic groups are:

		Target	Base
A	City Prosperity	47,943	172,134
K	Municipal Tenants	41,868	72,391
O	Rental Hubs	6,623	22,321

Report generated on December 20, 2023

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Target values:		VS	Base values:	
96,676 Population	40,287 Households		268,198 Population	116,712 Households
Report: Camden Town Demographic Data				
Camden Town 1.5km (1.5 Km) UK22 Selected Target			Camden Selected Base	

Select Chart
- (●) Percentage
- ( ) Index

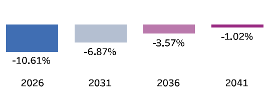
Chart sort
- (●) Sequence
- ( ) High to Low

Select Ranking and Highlights by: % (Highest population) or Index (Greatest difference compared to the selected base).

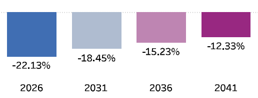
Demographics

Summary | Demographics | Segmentation | Raw Data

Population change | Female



Male

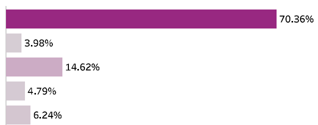


Population change

	Target	% Change since 2021	Base	% Change since 2021
Population in 2026	80,760	-16.46%	222,328	-17.10%
Population in 2031	84,346	-12.75%	229,851	-14.30%
Population in 2036	87,498	-9.49%	236,326	-11.88%
Population in 2041	90,135	-6.77%	241,510	-9.95%

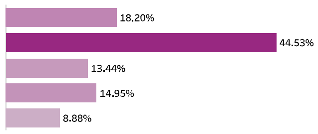
Economically Active

	Target	Target %	Base	Base %	Index
Employee	35,581	70.36%	104,520	70.74%	99
Self employed with employees	2,012	3.98%	6,635	4.49%	89
Self employed without employees	7,393	14.62%	22,900	15.50%	94
Unemployed	2,424	4.79%	5,998	4.06%	118
Full-time students	3,156	6.24%	7,702	5.21%	120



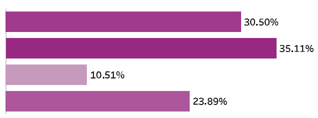
Economically Inactive

	Target	Target %	Base	Base %	Index
Retired	4,080	18.20%	11,777	20.00%	91
Student	9,982	44.53%	27,095	46.02%	97
Looking after home/family	3,012	13.44%	7,705	13.09%	103
Permanently sick/disabled	3,352	14.95%	7,314	12.42%	120
Other	1,990	8.88%	4,986	8.47%	105



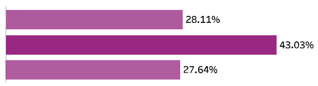
Social Grade

	Target	Target %	Base	Base %	Index
AB Higher & intermediate manage/admin/prof	10,152	30.50%	37,662	39.20%	78
C1 Supervisory, cleric, junior manage/admin/prof	11,687	35.11%	33,021	34.37%	102
C2 Skilled manual workers	3,497	10.51%	8,110	8.44%	124
DE Semi-skilled/unskilled manual workers; on state benefit, unemployed, lowest grade workers	7,952	23.89%	17,283	17.99%	133



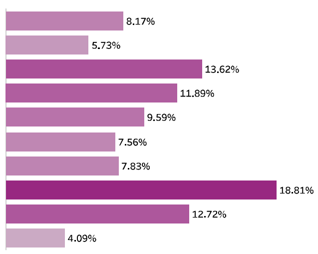
Tenure

	Target	Target %	Base	Base %	Index
Owner Occupied (HH)	11,325	28.11%	40,166	34.41%	82
Social Rented (HH)	17,335	43.03%	37,594	32.21%	134
Private Rented (HH)	11,135	27.64%	37,000	31.70%	87



Household Income

	Target	Target %	Base	Base %	Index
£14,999 or Less	3,291	8.17%	7,238	6.20%	132
£15,000 to £19,999	2,307	5.73%	4,618	3.96%	145
£20,000 to £29,999	5,486	13.62%	11,072	9.49%	144
£30,000 to £39,999	4,791	11.89%	10,837	9.29%	128
£40,000 to £49,999	3,863	9.59%	10,088	8.64%	111
£50,000 to £59,999	3,046	7.56%	9,050	7.75%	97
£60,000 to £69,999	3,154	7.83%	9,192	7.88%	99
£70,000 to £99,999	7,578	18.81%	25,558	21.90%	86
£100,000 to £149,999	5,124	12.72%	20,265	17.36%	73
£150,000 or Over	1,647	4.09%	8,794	7.53%	54

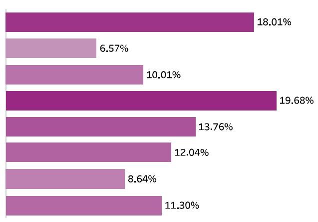


Dwelling type

	Target	Target %	Base	Base %	Index
Detached	128	0.36%	1,283	1.30%	28
Semi-detached	478	1.35%	2,179	2.21%	61
Bungalow	17	0.05%	69	0.07%	69
Terraced (including end-terrace)	3,200	9.03%	8,046	8.17%	111
Flat, maisonette or apartment	31,595	89.21%	86,956	88.25%	101

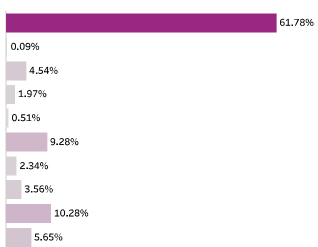
Age Bands

	Target	Target %	Base	Base %	Index
Under 15	17,407	18.01%	43,647	16.27%	111
15-19	6,348	6.57%	15,110	5.63%	117
20-24	9,677	10.01%	22,966	8.56%	117
25-34	19,030	19.68%	56,301	20.99%	94
35-44	13,299	13.76%	40,141	14.97%	92
45-54	11,638	12.04%	32,625	12.16%	99
55-64	8,356	8.64%	24,757	9.23%	94
65+	10,921	11.30%	32,651	12.17%	93



Ethnic mix

	Target	Target %	Base	Base %	Index
White	59,722	61.78%	174,968	65.24%	95
Gypsy / Traveller / Irish Traveller	91	0.09%	191	0.07%	133
Mixed / Multiple Ethnic Groups	4,392	4.54%	12,321	4.59%	99
Asian / Asian British: Indian	1,906	1.97%	7,423	2.77%	71
Asian / Asian British: Pakistani	489	0.51%	1,794	0.67%	76
Asian / Asian British: Bangladeshi	8,969	9.28%	16,192	6.04%	154
Asian / Asian British: Chinese	2,265	2.34%	8,044	3.00%	78
Asian / Asian British: Other Asian	3,444	3.56%	10,974	4.09%	87
Black / African / Caribbean / Black British	9,936	10.28%	20,892	7.79%	132
Other Ethnic Group	5,461	5.65%	15,399	5.74%	98



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Camden Town 1.5km (1.5 Km) UK22
Selected Target

VS

Base values:

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Camden
Selected Base

Select Chart
- (●) Percentage
- ( ) Index
- ( ) Penetration

Select Ranking and Highlights by: % (Highest population) or Index (Greatest difference compared to the selected base) or Penetration (The number of targets found in the base area).

Segmentation

Summary | Demographics | Segmentation | Raw Data

Match Level: Pop

Chart Sort: Segment Order

Mosaic UK 7

1st	2nd	3rd
A City Prosperity 47,943 (49.59%) | 77	K Municipal Tenants 41,868 (43.31%) | 160	O Rental Hubs 6,623 (6.85%) | 82

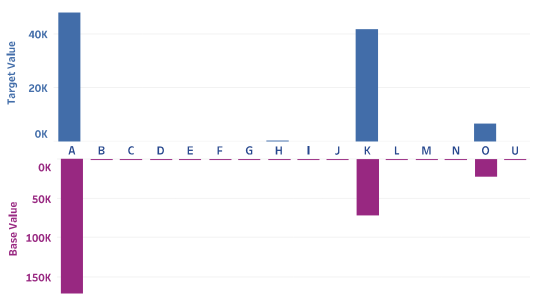
A City Prosperity	K Municipal Tenants	O Rental Hubs
Urban areas	Council/HA flats	Young singles and homesharers
High value flats	Densely populated	Rent flats
High income	No qualifications	Very high internet use
Cosmopolitan lifestyles	Low discretionary income	Internet via smartphone
High-tech homes	Low environmental impact gap	Watch videos online
Uber passengers	Fuel poverty	Don't use landlines

		Target	Base	%
A	City Prosperity	47,943	172,134	49.59%
B	Prestige Positions	0	293	0.00%
C	Country Living	0	0	0.00%
D	Rural Reality	0	0	0.00%
E	Senior Security	0	38	0.00%
F	Suburban Stability	0	0	0.00%
G	Domestic Success	0	0	0.00%
H	Aspiring Homemakers	240	463	0.25%
I	Family Basics	0	0	0.00%
J	Transient Renters	0	0	0.00%
K	Municipal Tenants	41,868	72,391	43.31%
L	Vintage Value	0	556	0.00%
M	Modest Traditions	0	0	0.00%
N	Urban Cohesion	2	2	0.00%
O	Rental Hubs	6,623	22,321	6.85%
U	Unclassified	0	0	0.00%

Mosaic Profile | Groups

	Target	Target %	Base	Base %	Index
A	47,943	49.59%	172,134	64.18%	77
B	0	0.00%	293	0.11%	0
C	0	0.00%	0	0.00%	0
D	0	0.00%	0	0.00%	0
E	0	0.00%	38	0.01%	0
F	0	0.00%	0	0.00%	0
G	0	0.00%	0	0.00%	0
H	240	0.25%	463	0.17%	144
I	0	0.00%	0	0.00%	0
J	0	0.00%	0	0.00%	0
K	41,868	43.31%	72,391	26.99%	160
L	0	0.00%	556	0.21%	0
M	0	0.00%	0	0.00%	0
N	2	0.00%	2	0.00%	275
O	6,623	6.85%	22,321	8.32%	82
U	0	0.00%	0	0.00%	0

Mosaic Profile | Groups



Mosaic UK 7 Daytime

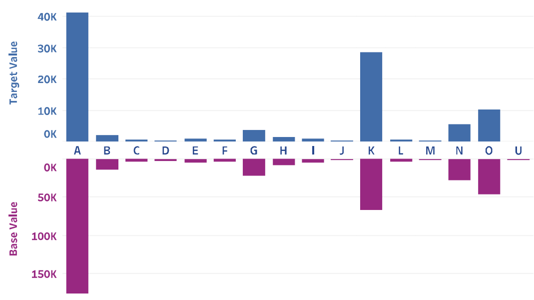
1st	2nd	3rd
A City Prosperity 41,163 (42.65%) | 93	K Municipal Tenants 28,588 (29.62%) | 171	O Rental Hubs 10,092 (10.46%) | 88

		Target	Base	%
A	City Prosperity	41,163	176,394	42.65%
B	Prestige Positions	1,989	14,150	2.06%
C	Country Living	536	4,020	0.56%
D	Rural Reality	350	1,987	0.36%
E	Senior Security	738	4,506	0.76%
F	Suburban Stability	651	3,646	0.67%
G	Domestic Success	3,578	21,662	3.71%
H	Aspiring Homemakers	1,542	7,863	1.60%
I	Family Basics	943	4,725	0.98%
J	Transient Renters	280	1,377	0.29%
K	Municipal Tenants	28,588	66,562	29.62%
L	Vintage Value	438	3,010	0.45%
M	Modest Traditions	148	744	0.15%
N	Urban Cohesion	5,481	28,059	5.68%
O	Rental Hubs	10,092	45,710	10.46%
U	Unclassified	0	0	0.00%

Mosaic Daytime Profile | Groups

	Target	Target %	Base	Base %	Index
A	41,163	42.65%	176,394	45.89%	93
B	1,989	2.06%	14,150	3.68%	56
C	536	0.56%	4,020	1.05%	53
D	350	0.36%	1,987	0.52%	70
E	738	0.76%	4,506	1.17%	65
F	651	0.67%	3,646	0.95%	71
G	3,578	3.71%	21,662	5.64%	66
H	1,542	1.60%	7,863	2.05%	78
I	943	0.98%	4,725	1.23%	80
J	280	0.29%	1,377	0.36%	81
K	28,588	29.62%	66,562	17.32%	171
L	438	0.45%	3,010	0.78%	58
M	148	0.15%	744	0.19%	79
N	5,481	5.68%	28,059	7.30%	78
O	10,092	10.46%	45,710	11.89%	88
U	0	0.00%	0	0.00%	0

Mosaic Daytime Profile | Groups



Report generated on December 20, 2023

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CAMDEN RETAIL STUDY – TOWN CENTRE HEALTH CHECKS

FINCHLEY ROAD / SWISS COTTAGE

Description

Current Designation: Town Centre as defined in the Camden Local Plan 2017 and District Centre in The London Plan.

Description of Centre:

Finchley Road / Swiss Cottage is located in the north west of Camden borough and is the third largest town centre in the Borough after Camden Town and Kilburn High Road. The centre is linear in character running from Finchley Road and Frognal station in the north to Swiss Cottage tube station in the south, with Finchley Road tube station located close to the centre.

In Camden's Planning Guidance, the centre is described as follows:

The main shopping area of Finchley Road/ Swiss Cottage runs from the O2 Centre, with its concentration of food, drink and entertainment uses, to Swiss Cottage Underground Station. The Swiss Cottage Leisure Centre and the listed Swiss Cottage Library are located in the south of the centre.

Finchley Road/Swiss Cottage provides a significant convenience goods role in the Borough, serving local needs and those from a wider catchment; however, the centre has a more limited comparison role. The main retail offer in this centre is provided in the O2 Centre. Finchley Road/ Swiss Cottage town centre generally serves the local population, a role which is expected to continue.

The centre runs either side of the busy A41 Finchley Road (managed by Transport for London), which creates a barrier between the two sides of the centre, restricting pedestrian movement and creating a poor environment for visitors.

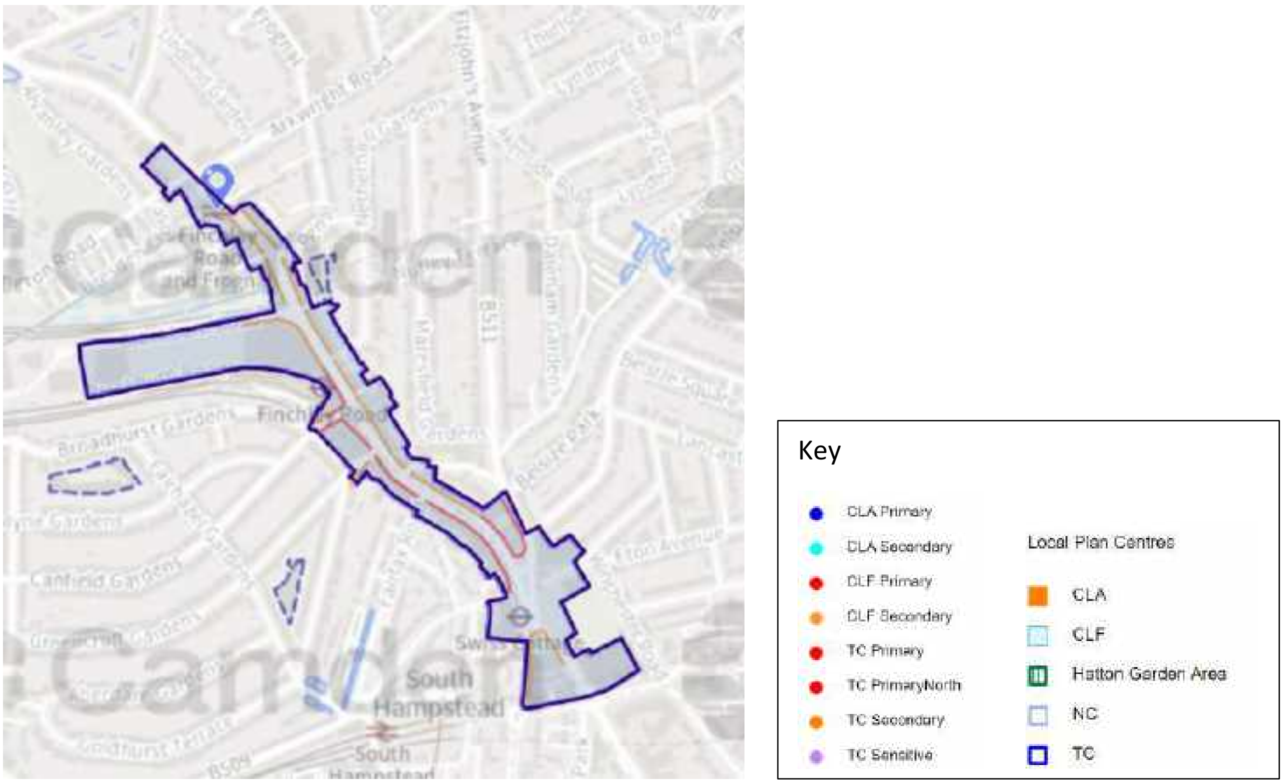


Figure 4.1: Finchley Road / Swiss Cottage Boundary and Primary Shopping Area

Source: Camden Planning Guidance, Town Centres and Retail, January 2021

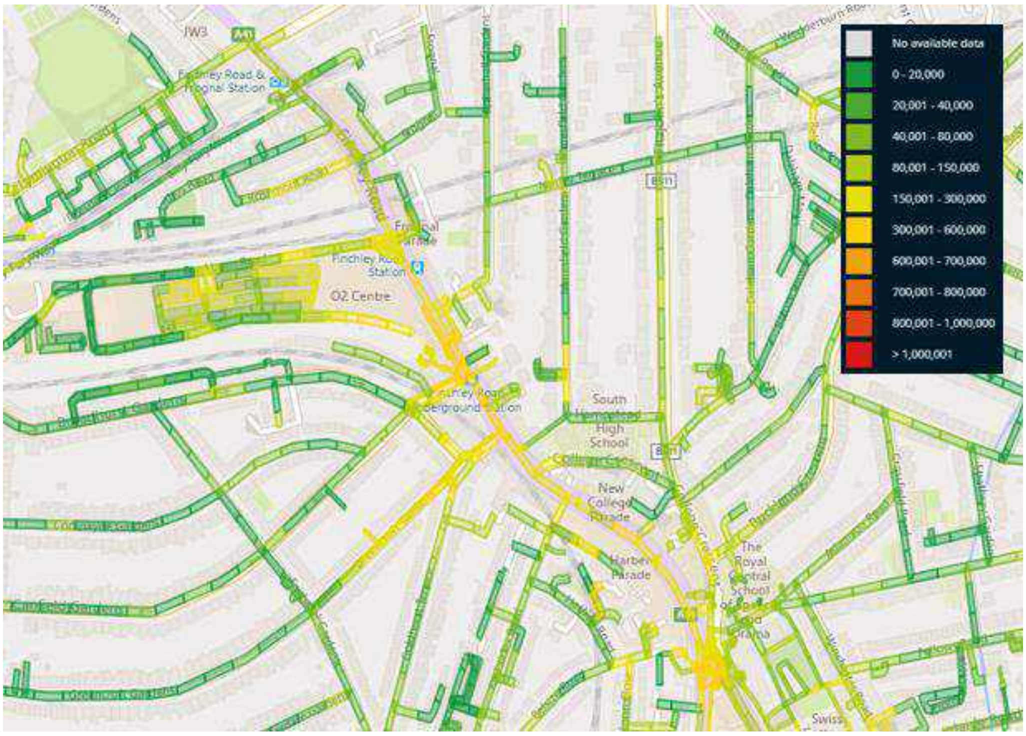
Current Planning Policies / Designations:

- As Central London Frontage (CLF)/ Central Activity Zone (CAZ), the following policies of the Camden Local Plan apply to the centre:
    - Policy E3 (Tourism);
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden's centres and other shopping areas);
    - Policy TC4 (Town centre uses); and
    - Policy TC5 (Small and independent shops).
- The town centre designation includes a small part of the Fitzjohns Netherhall Conservation Area.
- Finchley Road / Swiss Cottage is designated as a District Centre in the London Plan 2021with low potential for commercial growth and high potential for residential growth.
- It is within a Strategic Area for Regeneration as defined in Policy SD10 of the London Plan (Annex 1, Table A1.1).
- The London Plan 2021 designates Finchley Road as an area of regional and sub-regional significance for the night-time economy (NT2).

Footfall:

The figure below illustrates the pedestrian heat map for Finchley Road and Swiss Cottage and shows a particular concentration of footfall near to Finchley Road and Swiss Cottage underground stations.

Finchley Road and Swiss Cottage Footfall Heat Map



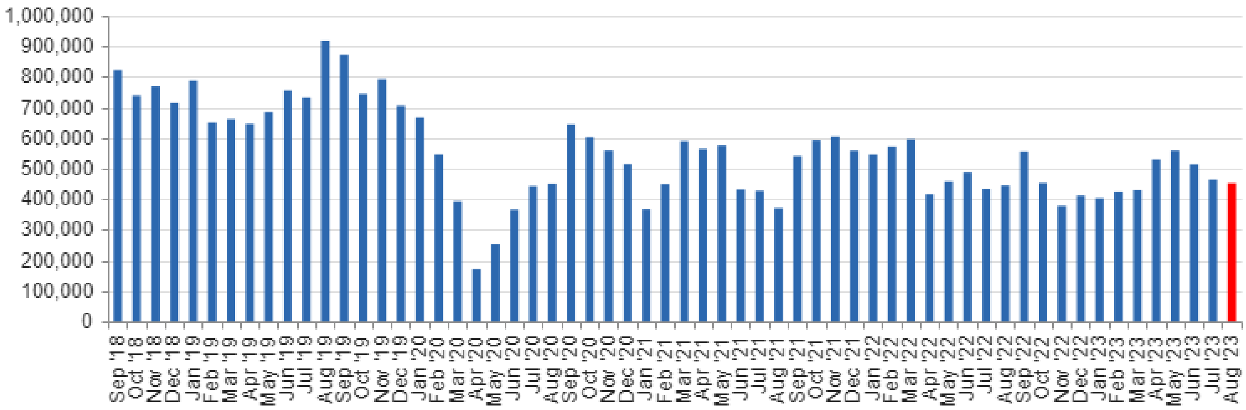
Source: Datscha

A busy section of Finchley Road, nearby to the Finchley Road underground station, was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall has not recovered to pre-pandemic levels, although the initial impact was less than seen elsewhere - whilst there was a clear drop in April and May 2020, pedestrian activity has been relatively consistent between June 2020 and August 2023.

When comparing the 12-month period from September 2018 (pre-pandemic) to the 12-month period from September 2022 (post-pandemic), pedestrian activity has fallen by 38% (monthly average of 740,000 down to 460,000).

Footfall of Finchley Road (September 2018 – August 2023)



Source: Datscha

Catchment Area:

Finchley Road has a strong local draw, attracting nearly 50% of its comparison turnover from its 'home zone' (Zone 3) and around half of its convenience turnover. The rest of the trade comes from Zones 4, 5 and 6 with some inflows from the rest of the study area and the rest of London. Inflows from further afield are more limited, especially for convenience sales.

Use of Centre:

The centre is well used for convenience shopping reflecting the strong retailer offer, including Waitrose, Sainsbury's and Aldi at the O2 Centre and M&S Simply Food and Tesco Express to the south. The comparison draw is more limited but it is well used for its food & beverage offer and the entertainment activities are an important draw, although spend is more limited.

Previous Retail Study Findings

Conclusions from Retail Town Centre Study 2013:

Key strengths identified for Finchley Road / Swiss Cottage include:

- Finchley Road/Swiss Cottage is performing well in relation to the provision of convenience and service units, benefiting from the provision of two large food stores and a high proportion of retail and leisure services.
- The convenience and retail service offer is particularly strong in Finchley Road/Swiss Cottage, with a relatively large amount of floorspace.
- The centre caters to the needs of local residents as well as serving a wider catchment area (particularly for food and bulky DIY goods).
- The vacancy rate in the centre is broadly in line with the Greater London regional average and there has been a significant decline in vacancy since July 2012.
- The centre is easily accessible by public transport and by car.

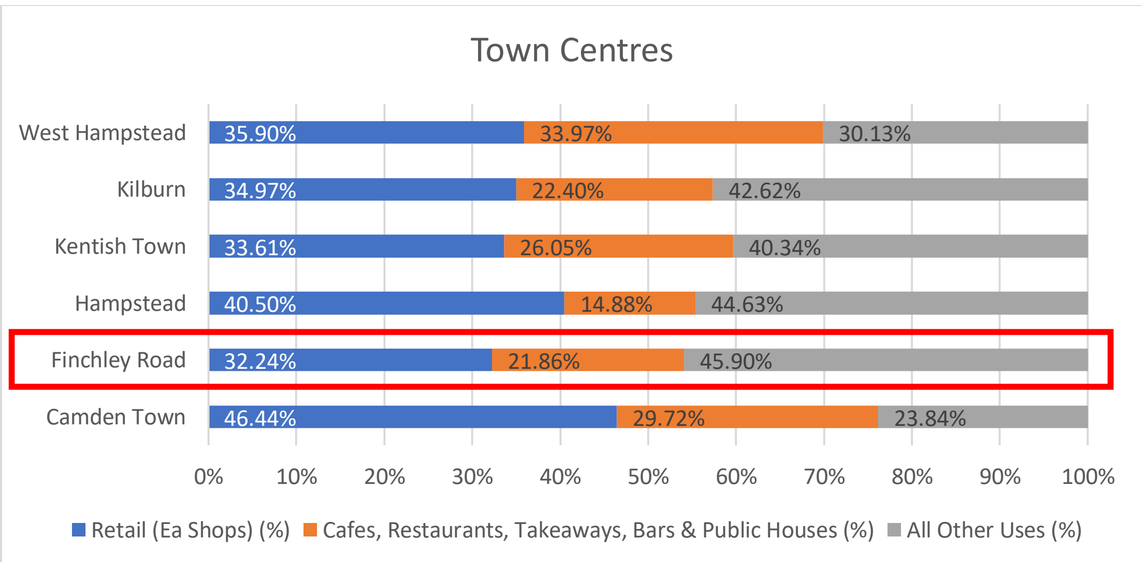
Key weaknesses identified for Finchley Road / Swiss Cottage include:

- The comparison retail offer in the centre is weak and below the national average in terms of unit and floorspace. There is a particularly limited clothing offer.

- Despite an overall low vacancy rate, there is a high vacancy rate on the upper floor of the O2 Centre (but this does not significantly detract from the strong performance of the centre as a whole).
- The linkages within the centre are weak due to the physical barrier dividing Finchley Road. The A41 has a significant adverse impact on accessibility throughout the centre.

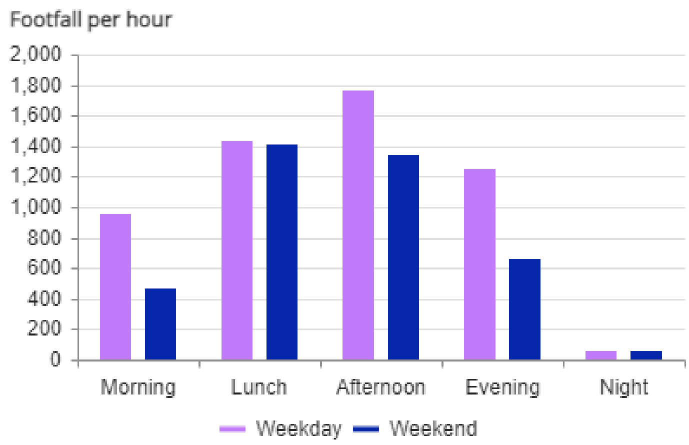
Diversity of Uses 2023

Finchley Road / Swiss Cottage	Number	%	Camden Average (%)
Retail (Ea Shops)	59	32.2	37.4
Food & Beverage	40	21.9	23.3
All Other Uses	84	45.9	39.4
Total	183	100.0	100.0



EVENING / NIGHT TIME ECONOMY

Finchley Road / Swiss Cottage	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	1	0.6	3.9%



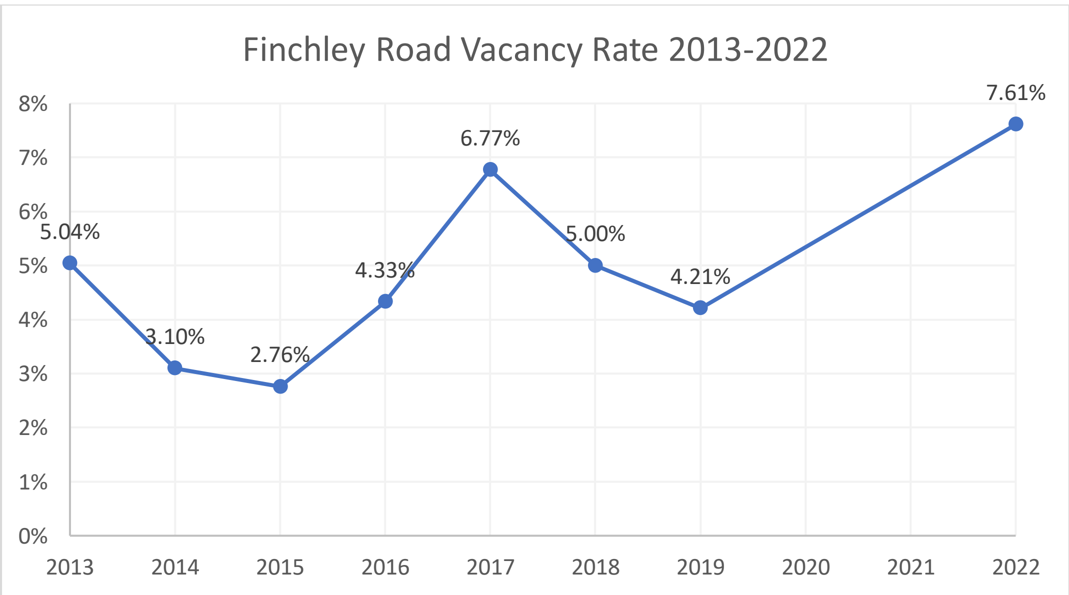
Conclusions on Diversity of Uses:

The centre has a relatively good mix of retail, F&B and other uses and a strong convenience offer, which accounts for the majority of sales in the centre. The comparison offer is more limited with some national multiple representation in the O2 Centre and in smaller units in the south of the centre, and a greater proportion of independents in the north.

The centre includes two cinemas (Vue at the O2 Centre and Odeon at Swiss Cottage) and these together with the F&B offer support footfall into the evening but there is limited provision to support night time activities.

Gorillas, a grocery delivery service has taken over a number of units on Finchley Road, opposite the O2 Centre, introducing a new type of use to the centre.

Vacancies 2013 - 2022



Vacancy rates in Finchley Road are below the UK average but have risen slightly since 2020 and are now at their highest for a decade. This partly due to higher vacancy rates within the O2 Centre.

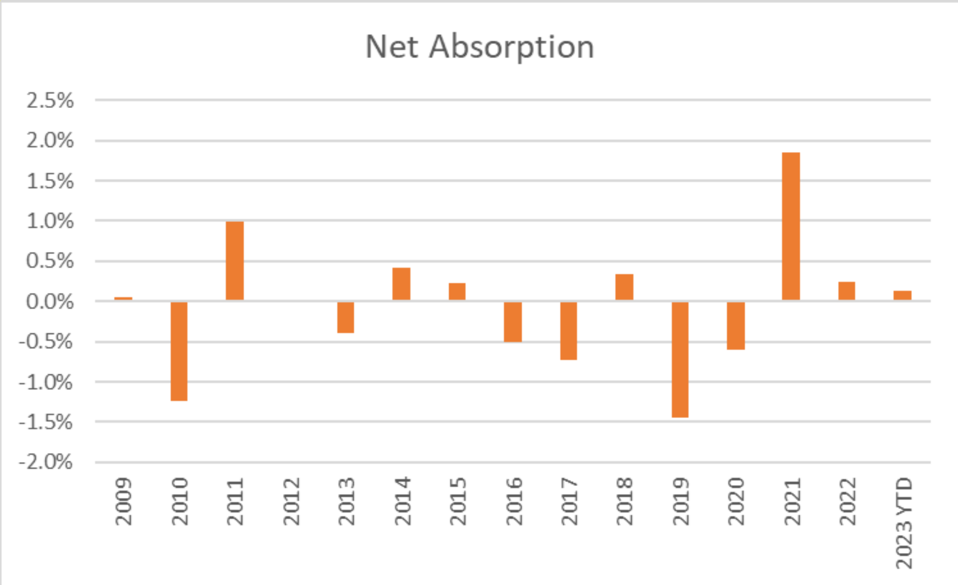
Changes in Representation and Market Demand

Market demand can be assessed by looking at net absorption of retail floorspace in the area.

> ***Net absorption*** *= additional floorspace occupied (move-ins) – floorspace vacated (move-outs)*

The net absorption rate in Finchley Road / Swiss Cottage since 2009 has been mitigated, with an overall stability (0% net absorption in average per annum between 2009 and 2023).

This can be partly explained by the absence of new retail stock being delivered in this area since 2009 and the vacancy rate over the past 10 years remaining relatively low. The lack of options may have prevented the take-up of space by new occupiers and constrained growth in this area.



Commercial Rents

Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

The following rental levels are therefore broad estimates of prime Zone A rental tone within each location.

Location	Estimated Zone A rate
High Holborn/Kingsway	£190-210
King’s Cross	£90-100
Tottenham Court Road	£90-100
Camden Town	£200-220

Finchley Road / Swiss Cottage	£65 -70
Hampstead	£150-160
Kentish Town	£50-55
Kilburn High Road	£80-90
West Hampstead	£80-90
Seven Dials	£160-180
Fitzrovia	£85-95
Hatton Garden	£125-135
Museum Street	£70-80
Denmark Street	£80-90

Most Central and Inner London investments are mixed use by nature which impacts on the yield analysis for the individual constituent parts. Certain retail locations such as Bond Street attract the highest pricing driven by overseas investors and premium brands acquiring flagship stores but there is still good sentiment for other Central London locations including Covent Garden, Fitzrovia, Camden, Tottenham Court Road etc.

Whilst there has been a softening in retail value the lack of transactional volumes has meant comparable evidence within the Borough is limited so in the broadest of terms we would set out the following:

- Prime retail yields – 4.5% – 6.0%
- Good secondary retail yields – 6.0% – 7.0%

Accessibility

Transport for London's Public Transport Accessibility Levels (PTAL) ranking assesses connectivity across London, with a grading system indicating the strength of the public transport in any given area. The grading goes from 0 which indicates very poor access to public transport through to 6b which indicates excellent access to public transport. The measures include walk time to public transport, the reliability of the public transport services and the number of services within the area.

A central point for Finchley Road and Swiss Cottage provides a PTAL output of 6b, indicating that public transport accessibility in the area is excellent.

Finchley Road underground station is located centrally to the area, with Swiss Cottage underground station found to the southern edge. The Metropolitan and Jubilee lines can be accessed from these stations. The Metropolitan line runs north west through Wembley and to the extremities of Uxbridge, Amersham, Chesham and Watford and east through Kings Cross and terminating at Aldgate. The Jubilee line also goes through Wembley and to Stanmore in one direction and through Green Park, Waterloo and Canary Wharf terminating at Stratford in the other direction. However, there is no step free access from the Jubilee line at Finchley Road, nor the West Hampstead station which is nearby.

Finchley Road & Frognal overground station can also be accessed within the centre. This provides regular services connecting passengers to Clapham Junction, Richmond, Stratford and various other places across London.

Bus services run regularly through the heart of the area along Finchley Road, providing great connectivity to areas in all directions including Victoria, Marble Arch and Golders Green.

Finchley Road is a dual-carriageway A road that leads to Regents Park to the south and Brent Cross shopping centre and beyond to the north. It is part of coach routes that run to and from Victoria coach station, with some services offering a stop off/ pick up point along Finchley Road itself.

Given the busy dual carriageway that runs through the area, pedestrian accessibility can be compromised in parts. Traffic light crossings are in place to support, as well as a subway located nearby to Finchley Road underground station.

Perception of Safety and Occurrence of Crime

Between June 2022 and May 2023, crime data from the MET Police referenced 1,606 crimes in Finchley Road / Swiss Cottage, representing 3.5% of all crimes committed in the London Borough of Camden over this period.

The following table present a breakdown of crimes committed in Finchley Road / Swiss Cottage by crime type.

Finchley Road / Swiss Cottage	# Crimes	As % of all crimes in area	As % of similar crime type in LB Camden
ALL Crimes	**1,606**	**100.0%**	3.5%
Anti-social behaviour	269	16.7%	2.8%
Bicycle theft	34	2.1%	3.2%
Burglary	78	4.9%	4.0%
Criminal damage and arson	57	3.5%	3.5%
Drugs	19	1.2%	1.6%
Other crime	9	0.6%	3.8%
Other theft	232	14.4%	2.9%
Possession of weapons	5	0.3%	3.9%
Public order	92	5.7%	4.2%
Robbery	59	3.7%	4.1%
Shoplifting	158	9.8%	10.2%
Theft from the person	199	12.4%	3.6%
Vehicle crime	138	8.6%	4.1%
Violence and sexual offences	257	16.0%	3.5%

Environmental Quality

The majority of the town centre falls within one of the Conservation Areas

Much of the centre is dominated by the impact of road traffic, both as a result of the centre's location along the A41 and the draw of the O2 Centre and specifically its large surface car park, which attracts high volumes of car borne trade.

Barriers are in place between the road and the pavement to the north of the centre (on the east side of the road) as well as more centrally (to the west side where the road level is higher than the pavement level), which improves pedestrian safety within the area. A central reservation barrier also runs for large parts of the A41 within the centre to improve driver safety as multiple lanes of traffic move at speed in opposite directions.

Bins can regularly be found, assisting visitors with disposing of rubbish and reducing the likelihood of litter on the streets and pavements. Cycle parking is also available throughout the centre, allowing cyclists to safely lock their bikes whilst in the area. Public benches are less frequently found however, and there is a distinct lack of greenery within Finchley Road/ Swiss Cottage Town Centre. Whilst there are trees sporadically located along the pavements, and a reasonable concentration located nearby to the Swiss Cottage underground station, they are very limited in large parts of the centre. In addition, there is little to no supporting green space or planters, making the area look and feel very hard and cold.

Investment Plans and Development Opportunities

The key development opportunity in Finchley Road relates to the recently approved plans to redevelop the O2 centre, the major shopping centre in the middle of the town centre. The Council approved an application for the redevelopment of the Masterplan site in March 2023, subject to referral to the Mayor of London and a Section 106 Agreement (Application Ref: 2022/0528/P).

The hybrid application proposes the demolition and redevelopment of land encompassing the O2 Centre and associated car park, Homebase store, car showrooms and a Builder's Merchant and its redevelopment for a mixed use scheme. This will include a new Town Square, to the east of the Site which will be the focus for the retail, leisure and employment uses and up to 1,800 new residential units. The proposal would provide 19,682sq. m of town centre uses across the O2 Masterplan Site, a reduction of approximately 5,000 sqm on current provision but would be developed in a form to meet current occupier requirements. The existing supermarket, cinema and gym will be re-provided.

This redevelopment will address a number of the problems identified in the centre, including better integration with the rest of the centre, reduced reliance on the private car and funding to improve step-free access at West Hampstead underground station. The proposal also proposes significant residential development with supporting services and the development of two public parks.

The redevelopment proposal covers much of the same area as the recently adopted West End Lane to Finchley Road SPD, the eastern part of which is within the town centre boundary. The SPD seeks to provide new east/west linkage through the site from West Hampstead underground station to Finchley Road, improve pedestrian and cycle connectivity and provision and reduce cars and car parking provision. The SPD also seeks environmental improvements and substantial housing development.

Stakeholder Feedback

Stakeholder engagement in relation to the recently adopted West End Lane to Finchley Road SPD undertaken in early 2021 resulted in the following feedback relevant to the town centre being raised[1]:

- The shops, facilities and services at the O2 Centre are valued, particularly the large supermarket but also the leisure uses, places to eat and drink, mix of shops and a convenient bus stop
- The key improvements wanted in the town centre are:
    - More tree planting and greening
    - A more pedestrian friendly environment
    - Attractive shop frontages and entrances
    - High quality public spaces
    - Improvements to pedestrian crossings including dealing with narrow footways, the street frontages, heavy traffic and the underpass

Other stakeholder feedback identified the following points of relevance to the Finchley Road:

- Developer / Landowner No.1:
    - Not much has changed. The motorway is dominating.
    - O2 Centre has enhanced the centre
    - Better by 'Swiss Cottage' end
    - Centre suffers from the main road going through it. It is not pedestrian friendly.
    - Air quality is a big complaint of residents
- Developer / landowner No. 2:
    - Camden's town centres tend to have very dense populus and have been and continue to be very popular.

[1] West End Lane to Finchley Road – Public Consultation Feedback Summary

- They are resilient in the context of new occupiers coming in, people want to be there.
- More present in a '7-day cycle' compared to historically when the busy periods were only from Friday-Sunday. Issues of quiet periods elevated.
- Any of the central areas where there isn't an overarching landlord, where the mix can be evolved or played to a strength of an area, the weight of demand can have a detrimental affect on the area.
- Rent is a major player in terms of health of an area but those that can afford rent do not necessarily add vitality to an area. What is right for the area isn't always what is coming through the development.
- In the Camden centres of this nature, levels of trade are not as good as the leasing activity suggests. There is a question regarding the viability of some operators.

SWOT Analysis

Strengths

- Strong convenience offer
- Good accessibility
- Presence of two cinemas and supporting F&B and leisure facilities

Weaknesses

- Limited comparison offer
- Poor integration of the O2 Centre with the rest of the centre
- Poor pedestrian and cycle facilities in a traffic dominated environment

Opportunities

- Planned investment in the O2 centre including new space for town centre uses and major residential development replacing an area currently providing surface car parking
- Potential to use O2 redevelopment to address many of the negative features in the town centre and immediate area
- Increased local population

Threats

- Rising vacancy rates
- O2 redevelopment not proceeding / not proceeding as envisaged
- Focus on O2 Centre redevelopment to the detriment of the rest of the centre.

Conclusions

Finchley Road / Swiss Cottage is a relatively large linear centre with a strong convenience offer. It benefits from good public transport accessibility and a good mix of uses, although the comparison offer is limited.

The emerging investment plans for the O2 centre represent a major redevelopment opportunity in the centre introducing a major mixed use scheme into the heart of the town centre and addressing many of the adverse features of the existing central town centre area.

The centre boundary is considered appropriate at the present time given the composition and distribution of existing uses and the below average vacancy rate.

Location Analyst | Understanding Demographics

Learn about the people who live in an area, with a wide range of person and household demographics and projections, alongside Mosaic profiles, the top three Mosaic groups and their key characteristics.

This tool gives you the ability to compare selected target audiences against a base comparison such as the UK population, or another audience, to highlight the key characteristics of your audience; and how they differ.

Target values:

98,987	46,010
Population	Households

Report: **Finchley Road/ Swiss Cottage Demographic Data**

Finchley Rd/ Swiss Cottage 1.5km (1.5 Km) UK22
Selected Target

VS

Base values:

268,198	116,712
Population	Households

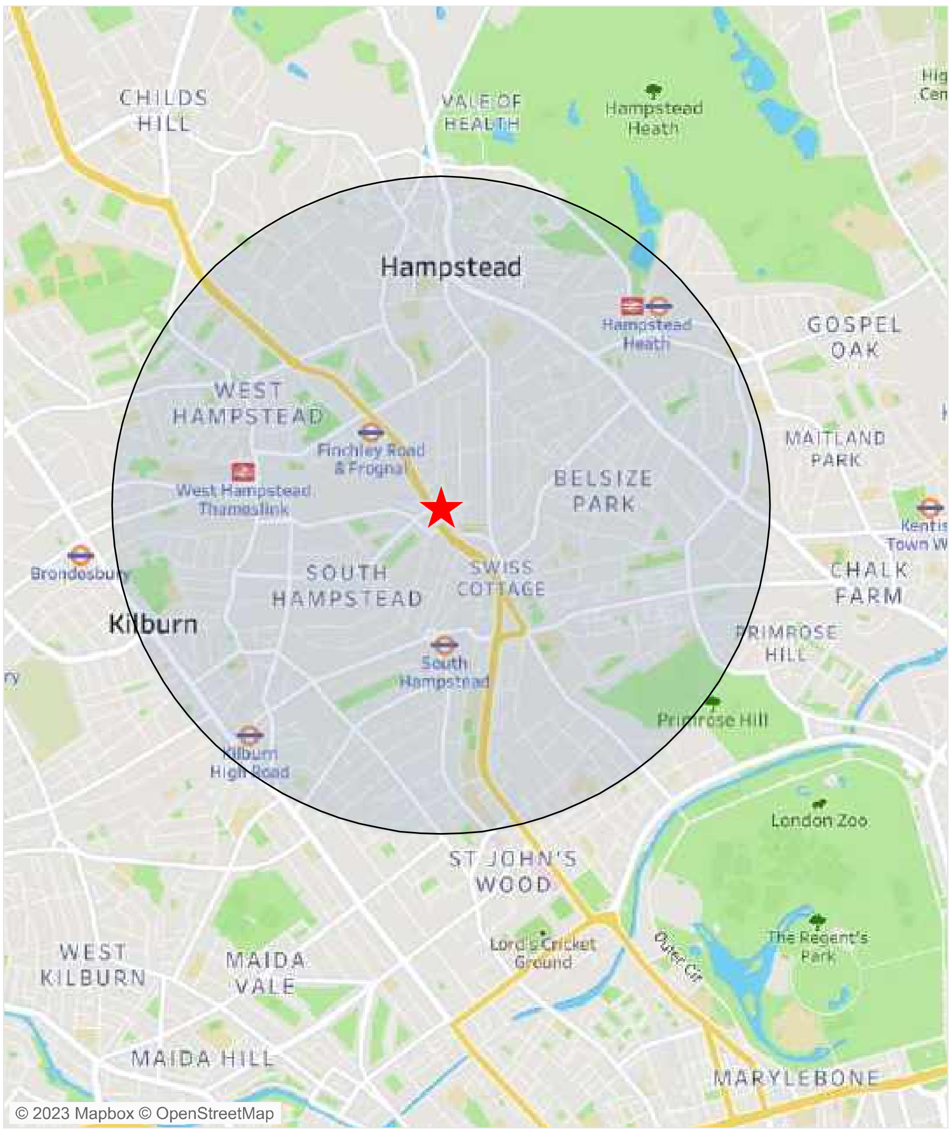
Camden
Selected Base

Did you know?

We also offer enrichment at Person and Household level, using UK ConsumerView, and in-depth profiling through iCoder Online. Contact our Helpdesk to find out more.

Summary

Summary | Demographics | Segmentation | Raw Data



Make up of your area

	Target	Base
Total Population	98,987	268,198
Number of Females	49,129	130,635
Number of Males	49,858	137,563
Total Households	46,010	116,712
Economically Active	57,943	147,755
Economically Inactive	16,540	58,877
Owner Occupied (HH)	18,822	40,166
Private Rented (HH)	16,876	37,000

The population of the area is expected to change by: -18.29%.
This percentage change is expected by 2026 and based on future projections.

The three highest Mosaic groups are:

		Target	Base
A	City Prosperity	83,211	172,134
K	Municipal Tenants	13,694	72,391
O	Rental Hubs	1,496	22,321

If you have any queries, please don't hesitate to contact us and a member of our team will be happy to help.
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Camden
Selected Base

Select Chart
- (●) Percentage
- ( ) Index

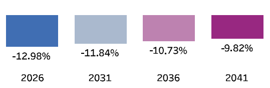
Chart sort
- (●) Sequence
- ( ) High to Low

Select Ranking and Highlights by: % (Highest population) or Index (Greatest difference compared to the selected base).

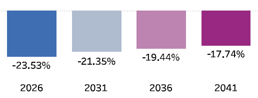
Demographics

Summary | Demographics | Segmentation | Raw Data

Population change | Female



Male

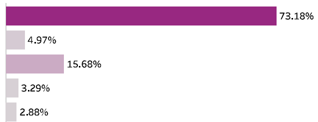


Population change

	Target	% Change since 2021	Base	% Change since 2021
Population in 2026	80,882	-18.29%	222,328	-17.10%
Population in 2031	82,524	-16.63%	229,851	-14.30%
Population in 2036	84,023	-15.12%	236,326	-11.88%
Population in 2041	85,318	-13.81%	241,510	-9.95%

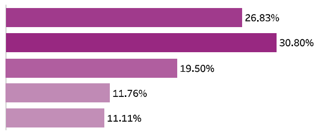
Economically Active

	Target	Target %	Base	Base %	Index
Employee	42,402	73.18%	104,520	70.74%	103
Self employed with employees	2,882	4.97%	6,635	4.49%	111
Self employed without employees	9,084	15.68%	22,900	15.50%	101
Unemployed	1,908	3.29%	5,998	4.06%	81
Full-time students	1,666	2.88%	7,702	5.21%	55



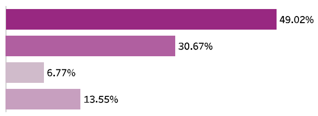
Economically Inactive

	Target	Target %	Base	Base %	Index
Retired	4,437	26.83%	11,777	20.00%	134
Student	5,094	30.80%	27,095	46.02%	67
Looking after home/family	3,225	19.50%	7,705	13.09%	149
Permanently sick/disabled	1,946	11.76%	7,314	12.42%	95
Other	1,838	11.11%	4,986	8.47%	131



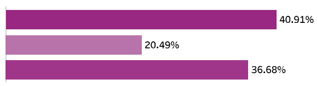
Social Grade

	Target	Target %	Base	Base %	Index
AB Higher & intermediate manage/admin/prof	18,382	49.02%	37,662	39.20%	125
C1 Supervisory, cleric, junior manage/admin/prof	11,501	30.67%	33,021	34.37%	89
C2 Skilled manual workers	2,539	6.77%	8,110	8.44%	80
DE Semi-skilled/unskilled manual workers; on state benefit, unemployed, lowest grade workers	5,080	13.55%	17,283	17.99%	75



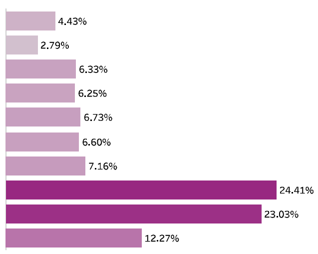
Tenure

	Target	Target %	Base	Base %	Index
Owner Occupied (HH)	18,822	40.91%	40,166	34.41%	119
Social Rented (HH)	9,428	20.49%	37,594	32.21%	64
Private Rented (HH)	16,876	36.68%	37,000	31.70%	116



Household Income

	Target	Target %	Base	Base %	Index
£14,999 or Less	2,039	4.43%	7,238	6.20%	71
£15,000 to £19,999	1,286	2.79%	4,618	3.96%	71
£20,000 to £29,999	2,915	6.33%	11,072	9.49%	67
£30,000 to £39,999	2,874	6.25%	10,837	9.29%	67
£40,000 to £49,999	3,095	6.73%	10,088	8.64%	78
£50,000 to £59,999	3,036	6.60%	9,050	7.75%	85
£60,000 to £69,999	3,295	7.16%	9,192	7.88%	91
£70,000 to £99,999	11,231	24.41%	25,558	21.90%	111
£100,000 to £149,999	10,596	23.03%	20,265	17.36%	133
£150,000 or Over	5,645	12.27%	8,794	7.53%	163

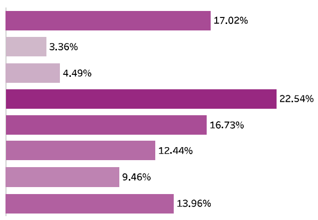


Dwelling type

	Target	Target %	Base	Base %	Index
Detached	777	2.12%	1,283	1.30%	163
Semi-detached	1,115	3.04%	2,179	2.21%	138
Bungalow	32	0.09%	69	0.07%	124
Terraced (including end-terrace)	3,318	9.05%	8,046	8.17%	111
Flat, maisonette or apartment	31,414	85.70%	86,956	88.25%	97

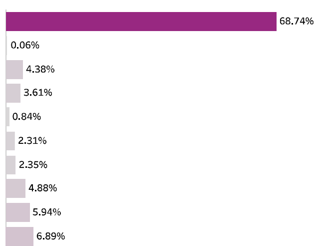
Age Bands

	Target	Target %	Base	Base %	Index
Under 15	16,849	17.02%	43,647	16.27%	105
15-19	3,324	3.36%	15,110	5.63%	60
20-24	4,444	4.49%	22,966	8.56%	52
25-34	22,313	22.54%	56,301	20.99%	107
35-44	16,560	16.73%	40,141	14.97%	112
45-54	12,315	12.44%	32,625	12.16%	102
55-64	9,363	9.46%	24,757	9.23%	102
65+	13,819	13.96%	32,651	12.17%	115



Ethnic mix

	Target	Target %	Base	Base %	Index
White	68,048	68.74%	174,968	65.24%	105
Gypsy / Traveller / Irish Traveller	55	0.06%	191	0.07%	78
Mixed / Multiple Ethnic Groups	4,331	4.38%	12,321	4.59%	95
Asian / Asian British: Indian	3,571	3.61%	7,423	2.77%	130
Asian / Asian British: Pakistani	836	0.84%	1,794	0.67%	126
Asian / Asian British: Bangladeshi	2,289	2.31%	16,192	6.04%	38
Asian / Asian British: Chinese	2,329	2.35%	8,044	3.00%	78
Asian / Asian British: Other Asian	4,828	4.88%	10,974	4.09%	119
Black / African / Caribbean / Black British	5,882	5.94%	20,892	7.79%	76
Other Ethnic Group	6,818	6.89%	15,399	5.74%	120



If you have any queries, please don't hesitate to contact us and a member of our team will be happy to help.
Call us on 0115 968 5099 or email EMSUKHelpdesk@experian.com

Location Analyst | Understanding Demographics

Learn about the people who live in an area, with a wide range of person and household demographics and projections, alongside Mosaic profiles, the top three Mosaic groups and their key characteristics.

This tool gives you the ability to compare selected target audiences against a base comparison such as the UK population, or another audience, to highlight the key characteristics of your audience; and how they differ.

Target values:

98,987 Population	46,010 Households

Report: Finchley Road/ Swiss Cottage Demographic Data

Finchley Rd/ Swiss Cottage 1.5km (1.5 Km) UK22
Selected Target

VS

Base values:

268,198 Population	116,712 Households

Camden
Selected Base

Select Chart
- (•) Percentage
- ( ) Index
- ( ) Penetration

Select Ranking and Highlights by: % (Highest population) or Index (Greatest difference compared to the selected base) or Penetration (The number of targets found in the base area).

Segmentation

Summary | Demographics | Segmentation | Raw Data

Match Level | Pop

Chart Sort | Segment Order

Mosaic UK 7

1st	2nd	3rd
A City Prosperity 83,211 (84.06%) | 131	K Municipal Tenants 13,694 (13.83%) | 51	O Rental Hubs 1,496 (1.51%) | 18



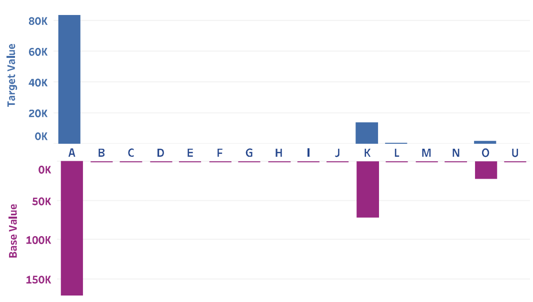
Urban areas	Council/HA flats	Young singles and homesharers
High value flats	Densely populated	Rent flats
High income	No qualifications	Very high internet use
Cosmopolitan lifestyles	Low discretionary income	Internet via smartphone
High-tech homes	Low environmental impact gap	Watch videos online
Uber passengers	Fuel poverty	Don't use landlines

		Target	Base	
A	City Prosperity	83,211	172,134	84.06%
B	Prestige Positions	0	293	0.00%
C	Country Living	0	0	0.00%
D	Rural Reality	0	0	0.00%
E	Senior Security	0	38	0.00%
F	Suburban Stability	0	0	0.00%
G	Domestic Success	0	0	0.00%
H	Aspiring Homemakers	33	463	0.03%
I	Family Basics	0	0	0.00%
J	Transient Renters	0	0	0.00%
K	Municipal Tenants	13,694	72,391	13.83%
L	Vintage Value	553	556	0.56%
M	Modest Traditions	0	0	0.00%
N	Urban Cohesion	0	2	0.00%
O	Rental Hubs	1,496	22,321	1.51%
U	Unclassified	0	0	0.00%

Mosaic Profile | Groups

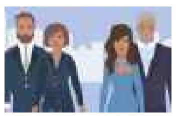
	Target	Target %	Base	Base %	Index
A	83,211	84.06%	172,134	64.18%	131
B	0	0.00%	293	0.11%	0
C	0	0.00%	0	0.00%	0
D	0	0.00%	0	0.00%	0
E	0	0.00%	38	0.01%	0
F	0	0.00%	0	0.00%	0
G	0	0.00%	0	0.00%	0
H	33	0.03%	463	0.17%	19
I	0	0.00%	0	0.00%	0
J	0	0.00%	0	0.00%	0
K	13,694	13.83%	72,391	26.99%	51
L	553	0.56%	556	0.21%	269
M	0	0.00%	0	0.00%	0
N	0	0.00%	2	0.00%	0
O	1,496	1.51%	22,321	8.32%	18
U	0	0.00%	0	0.00%	0

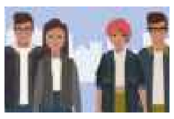
Mosaic Profile | Groups



Mosaic UK 7 Daytime

1st	2nd	3rd
A City Prosperity 48,464 (65.71%) | 143	K Municipal Tenants 10,784 (14.62%) | 84	O Rental Hubs 4,491 (6.09%) | 51



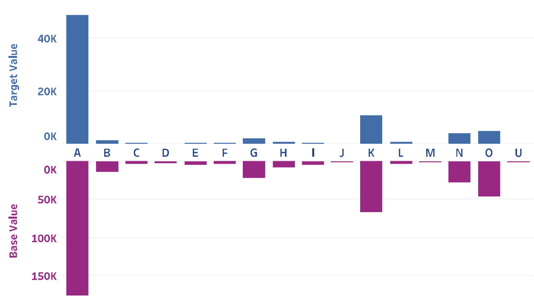


		Target	Base	
A	City Prosperity	48,464	176,394	65.71%
B	Prestige Positions	1,302	14,150	1.77%
C	Country Living	185	4,020	0.25%
D	Rural Reality	96	1,987	0.13%
E	Senior Security	290	4,506	0.39%
F	Suburban Stability	182	3,646	0.25%
G	Domestic Success	1,983	21,662	2.69%
H	Aspiring Homemakers	561	7,863	0.76%
I	Family Basics	492	4,725	0.67%
J	Transient Renters	106	1,377	0.14%
K	Municipal Tenants	10,784	66,562	14.62%
L	Vintage Value	672	3,010	0.91%
M	Modest Traditions	44	744	0.06%
N	Urban Cohesion	4,098	28,059	5.56%
O	Rental Hubs	4,491	45,710	6.09%
U	Unclassified	0	0	0.00%

Mosaic Daytime Profile | Groups

	Target	Target %	Base	Base %	Index
A	48,464	65.71%	176,394	45.89%	143
B	1,302	1.77%	14,150	3.68%	48
C	185	0.25%	4,020	1.05%	24
D	96	0.13%	1,987	0.52%	25
E	290	0.39%	4,506	1.17%	34
F	182	0.25%	3,646	0.95%	26
G	1,983	2.69%	21,662	5.64%	48
H	561	0.76%	7,863	2.05%	37
I	492	0.67%	4,725	1.23%	54
J	106	0.14%	1,377	0.36%	40
K	10,784	14.62%	66,562	17.32%	84
L	672	0.91%	3,010	0.78%	116
M	44	0.06%	744	0.19%	31
N	4,098	5.56%	28,059	7.30%	76
O	4,491	6.09%	45,710	11.89%	51
U	0	0.00%	0	0.00%	0

Mosaic Daytime Profile | Groups



CAMDEN RETAIL STUDY – TOWN CENTRE HEALTH CHECKS

HAMPSTEAD

Description

Current Designation: Town Centre as defined in the Camden Local Plan 2017 and a District Centre in The London Plan.

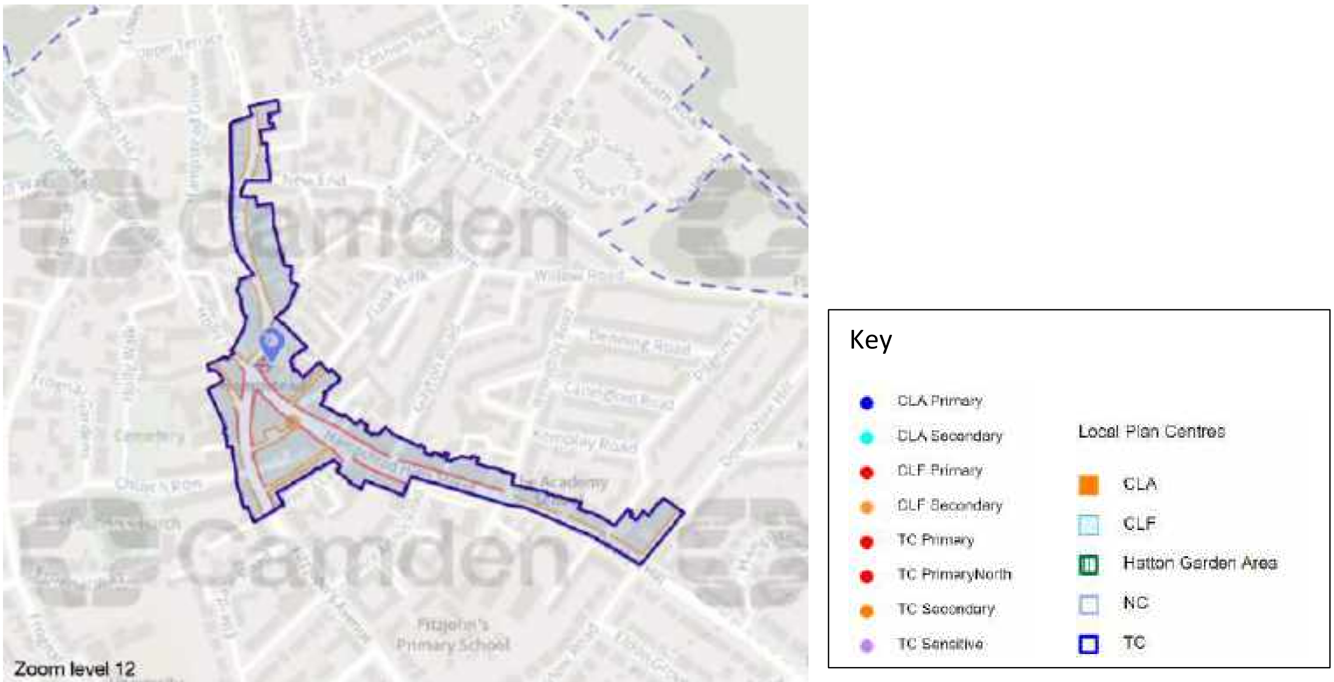
Description of Centre:

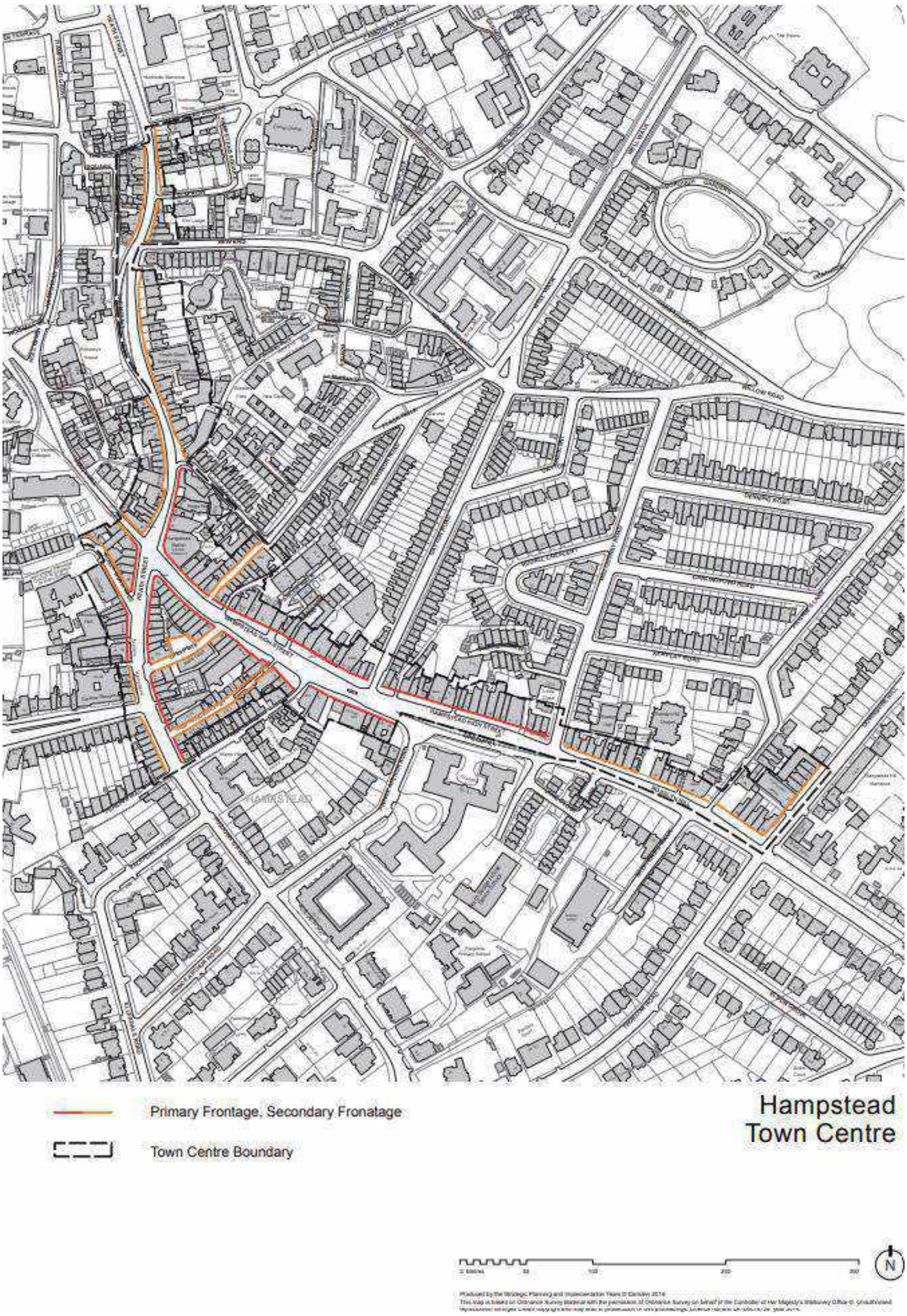
Hampstead is centrally located in the northern part of the borough, with the main retail area extending to the south east of Hampstead tube station along Hampstead High Road, where the main primary frontages are located. Primary and secondary frontages extend along Heath Street, with additional secondary frontages along Holly Hill, in the south of the centre and along the side roads.

In Camden's Planning Guidance, the centre is described as follows:

This is one of Camden's smallest centres, but draws many people from outside of the borough, attracted by the high quality environment and up-market shops, cafés and bars. The whole centre is within a Conservation Area and has many listed buildings, contributing to the special character of the area.

The Council will focus on protecting Hampstead's current special character, attractiveness and success as a centre, enabling the centre to continue its role as a retail and leisure destination serving a wide catchment area, as well as the needs of the local population.





Current Planning Policies / Designations:

- As defined Town Centre, the following policies of the Camden Local Plan apply to the centre:
    - Policy E3 (Tourism);
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden’s centres and other shopping areas);

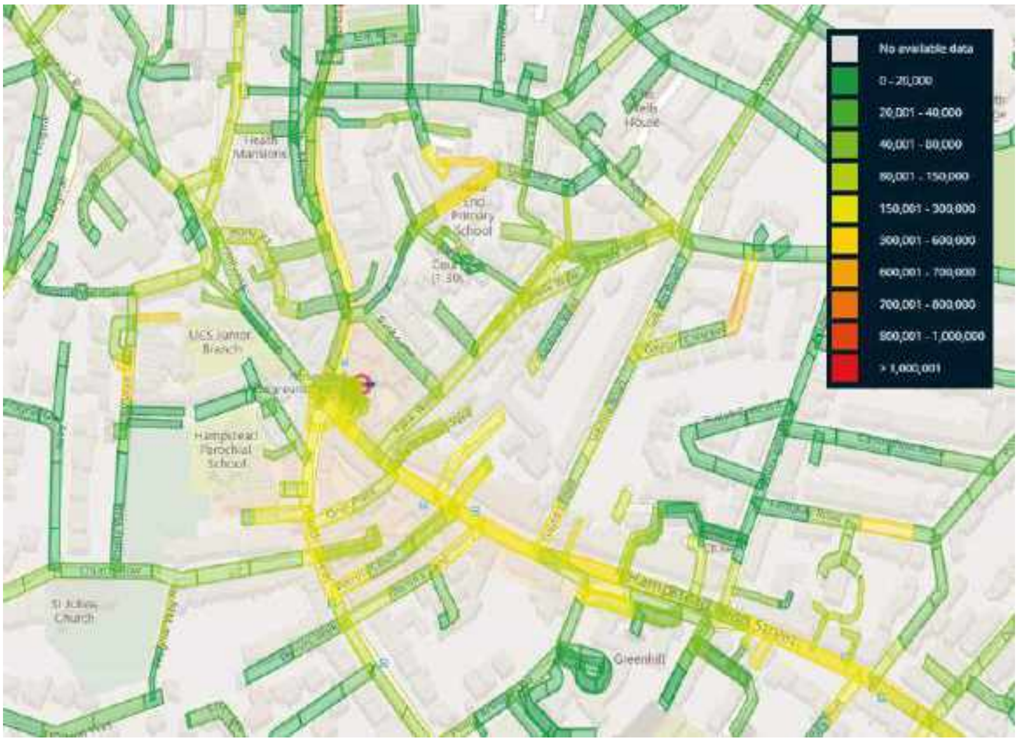
- Policy TC4 (Town centre uses); and
- Policy TC5 (Small and independent shops).

- The town centre is within the Hampstead Conservation Area.
- Hampstead is designated as district centre in the London Plan 2021 with low commercial growth potential and incremental potential for residential growth.
- The London Plan 2021 designates Camden as an area with more than local significance for the night-time economy (NT3).

Footfall:

The figure below illustrates the pedestrian heat map for Hampstead and shows a fair level of footfall along Hampstead High Street.

Hampstead Footfall Heat Map



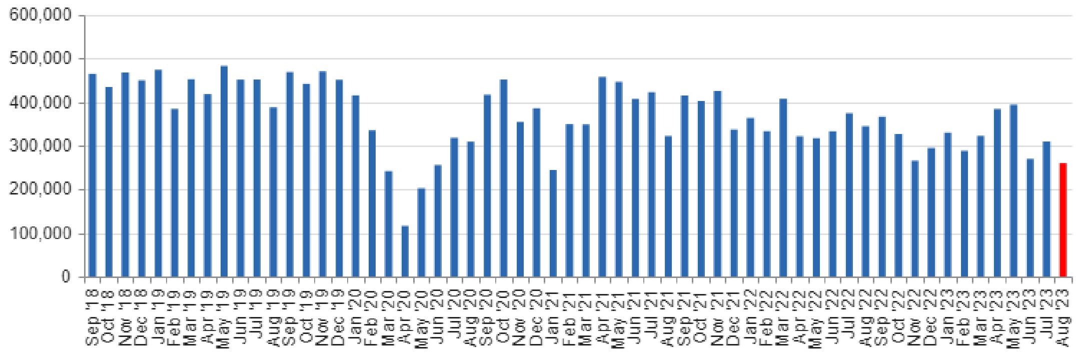
Source: Datscha

The busiest section of Hampstead, located along Hampstead High Street (by the Sainsbury's Local store), was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall was briefly impacted by the early response to the pandemic but bounced back well towards the end of 2020. It then seems that in recent years, pedestrian activity has been steadily declining (a year-on-year comparison between August 2022 and August 2023 shows a 24.5% fall in footfall).

When comparing the 12-month period from September 2018 (pre-pandemic) to the 12-month period from September 2022 (post-pandemic), pedestrian activity has fallen by 27% (monthly average from 440,000 down to 320,000).

Footfall of Hampstead High Street, Hampstead (September 2018 – August 2023)



Source: Datscha

Catchment Area:

Hampstead town centre appears to have a specialist but relatively limited retail offer that means both convenience and comparison turnover is limited. However, it has a relatively wide draw, with more than half of its convenience trade coming from outside of Camden, particularly Zone 5. There is also a relatively high inflow from the rest of London. This is similar to the pattern seen for comparison spend which sees similar amounts coming from Zone 5 as Zones 3 and 4 combined. Around a third of spend comes from the Rest of London.

Use of Centre:

Hampstead attracts both local and spend from a wider area on convenience goods, comparison goods and F&B reflecting the mix of uses in the centre.

Previous Retail Study Findings

Conclusions from Retail Town Centre Study 2013:

Key strengths identified for Hampstead include:

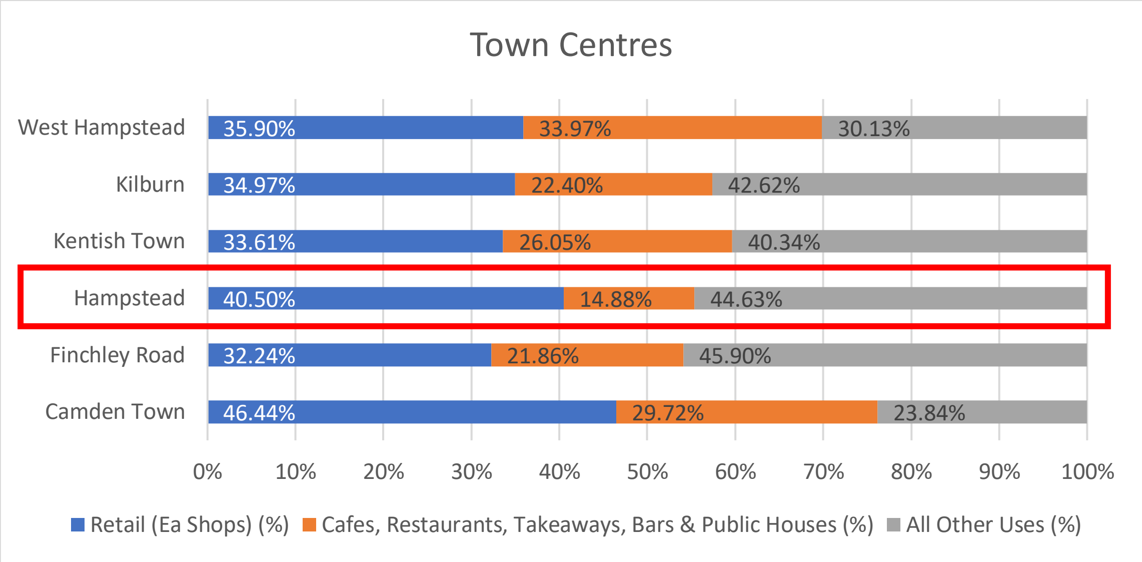
- Overall, Hampstead is performing very strongly against a number of key indicators and this centre is the most attractive of all Camden's town centres.
- The centre boasts a mix of traditional architecture, a village like atmosphere and shops catered towards upmarket clientele.
- There is a good mix of multiple and independent retailer which brings vibrancy and vitality to the centre.
- Hampstead benefits from a particularly strong high end comparison goods offer. The centre is renowned for its boutique and niche shops; with comparison goods shopping for both high end multiple and independent retailers.
- Hampstead is a significant tourist destination and therefore has a strong café and restaurant offer.
- Hampstead has a low vacancy rate, which demonstrates the strength of retail demand in the centre.
- There is a very strong demand particularly in the comparison and restaurant sectors for new floorspace.

Key weaknesses identified for Hampstead include:

- The convenience goods offer of the town is more limited, with only one small supermarket serving the centre (performing as a top-up shopping role).
- The low vacancy rate also highlights a lack of available space to extend the provision of retail floorspace.

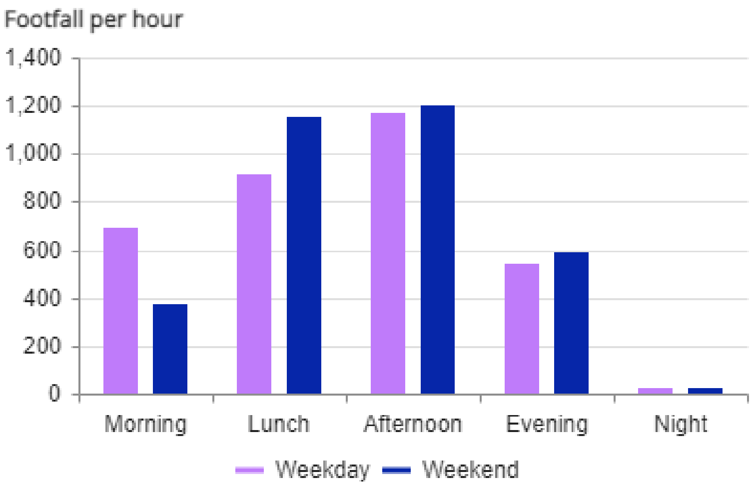
Diversity of Uses 2023

Hampstead	Number	%	Camden Average (%)
Retail (Ea Shops)	98	40.5	37.4
Food & Beverage	36	14.9	23.3
All Other Uses	108	44.6	39.4
Total	242	100.0	100.0



EVENING / NIGHT TIME ECONOMY

Hampstead	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	3	1.2	3.9%



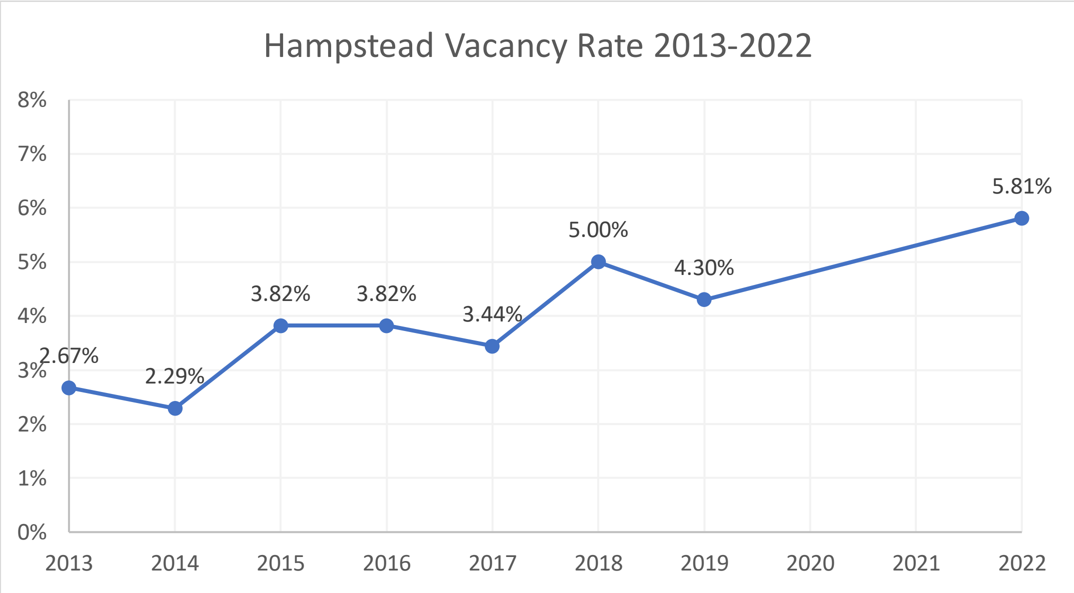
Conclusions on Diversity of Uses:

Hampstead has a good retail offer and range of other uses including an Everyman cinema, but F&B provision is below the Camden average in terms of the number of units. This is likely to reflect the more limited size of the centre, but the quality of the offer is likely to be a major draw.

Activities levels during the day are reasonable but decrease in the evening period, although higher footfall at weekends indicates the importance of visitor trade.

A comparison with 2014 data shows a noticeable decline in retail uses within the centre, but particularly north of Hampstead Station along Heath Street.

Vacancies 2013 - 2022



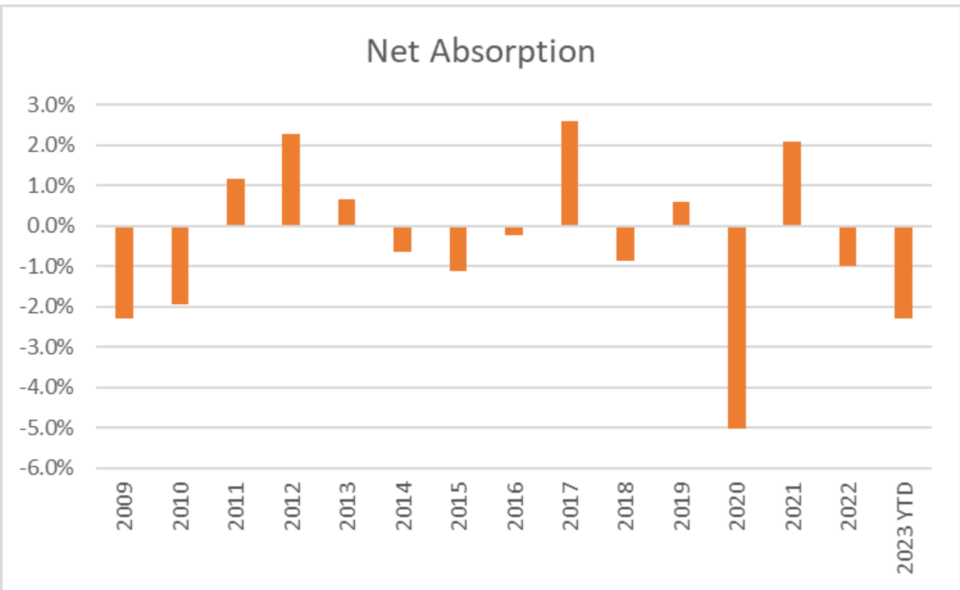
Vacancy rates in the centre are below average but with a slight increase during the last decade. However, this would equate to an increase of just 1 or 2 units and does not suggest any specific reason for concern.

Changes in Representation and Market Demand

Market demand can be assessed by looking at net absorption of retail floorspace in the area.

> ***Net absorption** = additional floorspace occupied (move-ins) – floorspace vacated (move-outs)*

The net absorption rate in Hampstead since 2009 has been variable, with some positive and some negative periods. As a result Hampstead is one of the worst performing major retail areas in Camden (ranking 12th out of 14 areas) in terms of net absorption of retail space.



Commercial Rents

Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

The following rental levels are therefore broad estimates of prime Zone A rental tone within each location.

Location	Estimated Zone A rate
High Holborn/Kingsway	£190-210
King's Cross	£90-100
Tottenham Court Road	£90-100
Camden Town	£200-220
Finchley Road / Swiss Cottage	£65 -70
Hampstead	£150-160
Kentish Town	£50-55
Kilburn High Road	£80-90
West Hampstead	£80-90
Seven Dials	£160-180
Fitzrovia	£85-95
Hatton Garden	£125-135
Museum Street	£70-80
Denmark Street	£80-90

Most Central and Inner London investments are mixed use by nature which impacts on the yield analysis for the individual constituent parts. Certain retail locations such as Bond Street attract the highest pricing driven by overseas investors and premium brands acquiring flagship stores but there is still good sentiment for other Central London locations including Covent Garden, Fitzrovia, Camden, Tottenham Court Road etc.

Whilst there has been a softening in retail value the lack of transactional volumes has meant comparable evidence within the Borough is limited so in the broadest of terms we would set out the following:

- Prime retail yields – 4.5% – 6.0%
- Good secondary retail yields – 6.0% – 7.0%

Accessibility

Transport for London's Public Transport Accessibility Levels (PTAL) ranking assesses connectivity across London, with a grading system indicating the strength of the public transport in any given area. The grading goes from 0 which indicates very poor access to public transport through to 6b which

indicates excellent access to public transport. The measures include walk time to public transport, the reliability of the public transport services and the number of services within the area.

A central point within Hampstead provides a PTAL output of 4, indicating that public transport accessibility in the area is fair.

Hampstead underground station is located at the heart of the centre, where Heath Street meets Hampstead High Street. This station is served by the Northern line, which provides regular services to the north, terminating at Edgware as well as to the south through Camden Town, Euston and beyond. Hampstead Heath overground station is located approximately 500m to the west of the centre. i

Buses run along Heath Street and Hampstead High Street, with services connecting passengers to nearby and further afield places such as Paddington, Swiss Cottage, Muswell Hill and Golders Green.

As with many areas of London, the main roads can be busy and narrow in parts. On-street parking can be found along Heath Street and Hampstead High Street allowing for quick and convenient trips by car. Dedicated cycle lanes can be found in limited parts of the centre.

Zebra crossings are located along Hampstead High Street, with traffic light crossings at the Heath Street/ Hampstead High Street junction to support pedestrians when navigating the heavy traffic flow. Pavements run along both sides of the main roads and are wide enough to deal with the pedestrian flows seen in the area, even at peak lunch/ afternoon times.

Perception of Safety and Occurrence of Crime

Between June 2022 and May 2023, crime data from the MET Police referenced 815 crimes in Hampstead, representing 1.8% of all crimes committed in the London Borough of Camden over this period.

The following table present a breakdown of crimes committed in Hampstead by crime type.

One in five crimes committed in Hampstead are related to anti-social behaviour, the highest proportion of all crime types.

Hampstead	# Crimes	As % of all crimes in area	As % of similar crime type in LB Camden
ALL Crimes	**815**	**100.0%**	1.8%
Anti-social behaviour	163	20.0%	1.7%
Bicycle theft	23	2.8%	2.1%
Burglary	44	5.4%	2.3%
Criminal damage and arson	38	4.7%	2.3%
Drugs	5	0.6%	0.4%
Other crime	3	0.4%	1.3%
Other theft	112	13.7%	1.4%
Possession of weapons	0	0.0%	0.0%
Public order	44	5.4%	2.0%
Robbery	23	2.8%	1.6%
Shoplifting	76	9.3%	4.9%
Theft from the person	38	4.7%	0.7%
Vehicle crime	128	15.7%	3.8%
Violence and sexual offences	118	14.5%	1.6%

Environmental Quality

Hampstead has historic and architectural importance and has been designated as the Hampstead Conservation Area. This recognises the positive contribution that features such as buildings and trees have on the character and appearance of the area.

Whilst Hampstead Heath is nearby, there are also areas of strong greenery with Hampstead Town Centre itself. This is particularly true along Hampstead High Street where the pavement width allows for the existing trees to be kept without causing issues for pedestrian accessibility. In other parts of the centre (such as Heath Street), where the pavement width does not allow for the planting of new trees, hanging baskets can be found, adding colour and vibrancy to the area.

Heavy traffic in the area creates noise and air pollution and could be said to make the area less enjoyable and pleasant.

Buildings in the area are generally of a high quality with many traditional, attractive features. In the main, they are kept in good condition and significantly add to the environmental quality of Hampstead Town Centre. Heath Street Baptist Church in particular stands out as a characterful and impressive building with its grand arched doors and windows.

In terms of street furniture, bins, benches, bollards and cycle parking can be found around the centre to improve cleanliness, safety and visitor experience.

Investment Plans and Development Opportunities

There are limited investment and development plans in the public domain for Hampstead at the present time.

Stakeholder Feedback

Stakeholder engagement identified the following points of relevance to the Hampstead:

- Developer/Landowner No. 1
    - Very strong centre but high end
- Developer / landowner No. 2:
    - Camden's town centres tend to have very dense populus and have been and continue to be very popular.
    - They are resilient in the context of new occupiers coming in, people want to be there.
    - More present in a '7-day cycle' compared to historically when the busy periods were only from Friday-Sunday. Issues of quiet periods elevated.
    - Any of the central areas where there isn't an overarching landlord, where the mix can be evolved or played to a strength of an area, the weight of demand can have a detrimental affect on the area.
    - Rent is a major player in terms of health of an area but those that can afford rent do not necessarily add vitality to an area. What is right for the area isn't always what is coming through the development.
    - In the Camden centres of this nature, levels of trade are not as good as the leasing activity suggests. There is a question regarding the viability of some operators. Hampstead is an example where returns on investments questioned even though the demand to occupy is strong.

SWOT Analysis

Strengths

- Attractive environment with unique character and village atmosphere, making it a desirable place to visit
- Diverse mix of shops, including independent retailers, national chains, and high-end boutiques
- Characterful side streets and pedestrian only areas

- High proportion of affluent residents supporting the demand for high-end retail
- Popular tourist destination
- Strong occupier demand
- Low level of crime

Weaknesses

- Limited convenience offer
- Specialist comparison offer with relatively narrow range of goods available
- Restricted local catchment given proximity to Finchley Road to west and Hampstead Heath to east
- High rents in Hampstead can make it difficult for small businesses to operate
- Limited offer of affordable retail and F&B options
- Lack of new retail space being delivered in the area to provide space for new occupiers

Opportunities

- Proximity to Hampstead Heath and visitor trade
- Access to catchment population with above average household incomes
- Developing the local food and drink scene to increase visitors and tourists dwell time in the area

Threats

- Competition from other centres for F&B and leisure operators
- Declining footfall
- Loss of independent retail and F&B uses due to competition from national multiples or business/service uses able to afford higher rents
- Balancing demand from occupiers whilst retaining the area's character.

Conclusions

Hampstead is an attractive centre, with a reputation and draw that extends beyond the LB of Camden. However, the retail offer appears to be declining and is not being replaced by F&B uses to the same extent as elsewhere, although vacancies remain low. Footfall is also in decline.

A more detailed review may be required of this centre to understand the causes for the recent changes, as this would appear to be a centre that ought to be performing better. However, the centre boundary is considered appropriate given the composition and distribution of existing uses and the below average vacancy rate.

Location Analyst | Understanding Demographics

Learn about the people who live in an area, with a wide range of person and household demographics and projections, alongside Mosaic profiles, the top three Mosaic groups and their key characteristics.

This tool gives you the ability to compare selected target audiences against a base comparison such as the UK population, or another audience, to highlight the key characteristics of your audience; and how they differ.

Target values:

66,380	30,621
Population	Households

Report: **Hampstead Demographic Data**

Hampstead 1.5km (1.5 Km) UK22
Selected Target

VS

Base values:

268,198	116,712
Population	Households

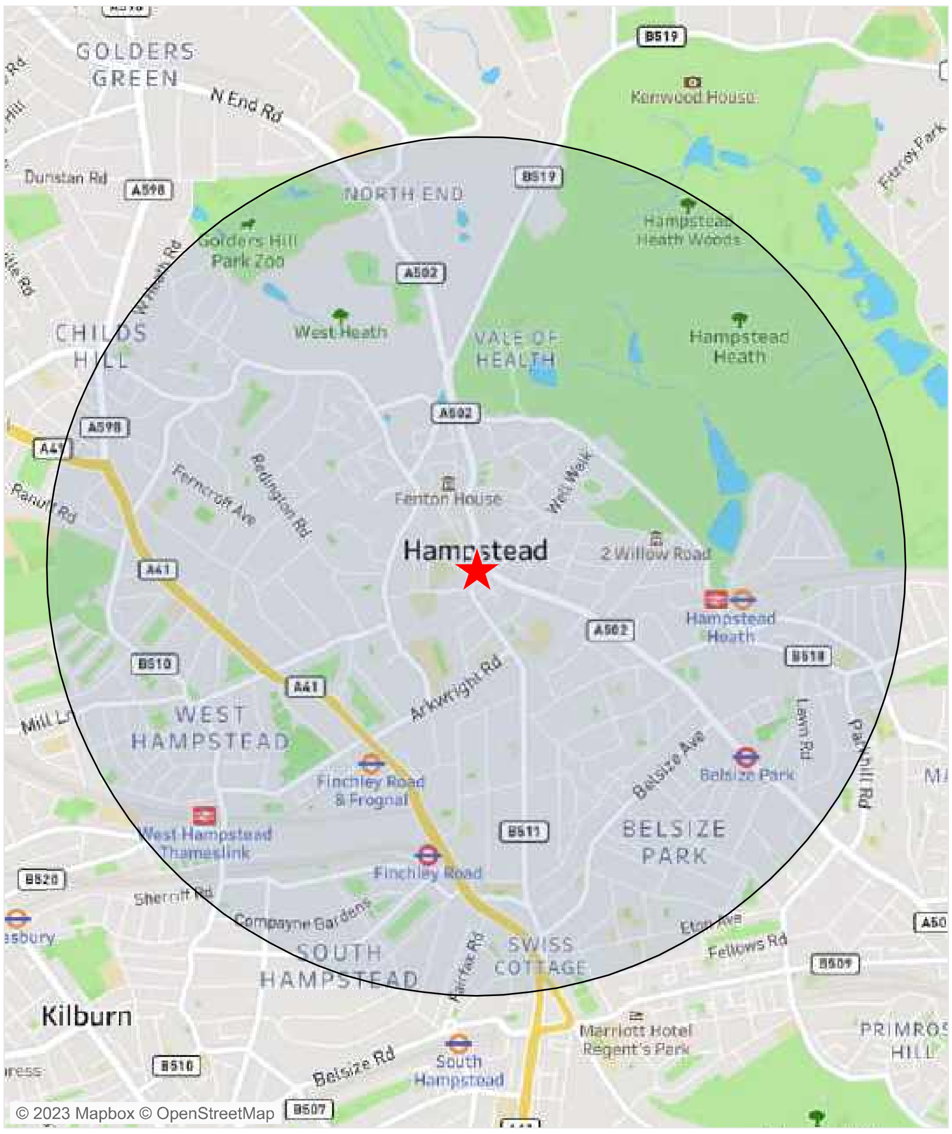
Camden
Selected Base

Did you know?

We also offer enrichment at Person and Household level, using UK ConsumerView, and in-depth profiling through iCoder Online. Contact our Helpdesk to find out more.

Summary

Summary | Demographics | Segmentation | Raw Data



Make up of your area

	Target	Base
Total Population	66,380	268,198
Number of Females	32,661	130,635
Number of Males	33,719	137,563
Total Households	30,621	116,712
Economically Active	39,729	147,755
Economically Inactive	10,666	58,877
Owner Occupied (HH)	14,301	40,166
Private Rented (HH)	11,265	37,000

The population of the area is expected to change by: -17.91%.
This percentage change is expected by 2026 and based on future projections.

The three highest Mosaic groups are:

		Target	Base
A	City Prosperity	61,002	172,134
K	Municipal Tenants	3,952	72,391
O	Rental Hubs	987	22,321

Report generated on December 20, 2023

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Camden
Selected Base

Select Chart
◉ Percentage
○ Index

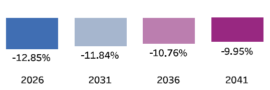
Chart sort
◉ Sequence
○ High to Low

Select Ranking and Highlights by: % (Highest population) or Index (Greatest difference compared to the selected base).

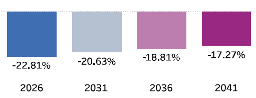
Demographics

Summary | Demographics | Segmentation | Raw Data

Population change | Female



Male

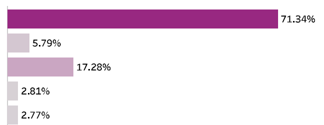


Population change

	Target	% Change since 2021	Base	% Change since 2021
Population in 2026	54,493	-17.91%	222,328	-17.10%
Population in 2031	55,557	-16.30%	229,851	-14.30%
Population in 2036	56,523	-14.85%	236,326	-11.88%
Population in 2041	57,308	-13.67%	241,510	-9.95%

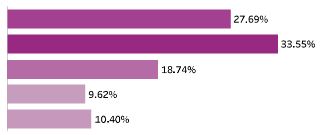
Economically Active

	Target	Target %	Base	Base %	Index
Employee	28,344	71.34%	104,520	70.74%	101
Self employed with employees	2,302	5.79%	6,635	4.49%	129
Self employed without employees	6,865	17.28%	22,900	15.50%	111
Unemployed	1,118	2.81%	5,998	4.06%	69
Full-time students	1,100	2.77%	7,702	5.21%	53



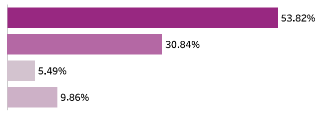
Economically Inactive

	Target	Target %	Base	Base %	Index
Retired	2,954	27.69%	11,777	20.00%	138
Student	3,578	33.55%	27,095	46.02%	73
Looking after home/family	1,998	18.74%	7,705	13.09%	143
Permanently sick/disabled	1,026	9.62%	7,314	12.42%	77
Other	1,110	10.40%	4,986	8.47%	123



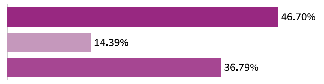
Social Grade

	Target	Target %	Base	Base %	Index
AB Higher & intermediate manage/admin/prof	13,339	53.82%	37,662	39.20%	137
C1 Supervisory, cleric, junior manage/admin/prof	7,643	30.84%	33,021	34.37%	90
C2 Skilled manual workers	1,361	5.49%	8,110	8.44%	65
DE Semi-skilled/unskilled manual workers; on state benefit, unemployed, lowest grade workers	2,444	9.86%	17,283	17.99%	55



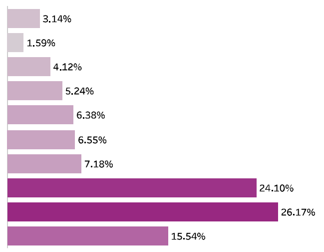
Tenure

	Target	Target %	Base	Base %	Index
Owner Occupied (HH)	14,301	46.70%	40,166	34.41%	136
Social Rented (HH)	4,407	14.39%	37,594	32.21%	45
Private Rented (HH)	11,265	36.79%	37,000	31.70%	116



Household Income

	Target	Target %	Base	Base %	Index
£14,999 or Less	961	3.14%	7,238	6.20%	51
£15,000 to £19,999	487	1.59%	4,618	3.96%	40
£20,000 to £29,999	1,262	4.12%	11,072	9.49%	43
£30,000 to £39,999	1,605	5.24%	10,837	9.29%	56
£40,000 to £49,999	1,954	6.38%	10,088	8.64%	74
£50,000 to £59,999	2,005	6.55%	9,050	7.75%	84
£60,000 to £69,999	2,197	7.18%	9,192	7.88%	91
£70,000 to £99,999	7,380	24.10%	25,558	21.90%	110
£100,000 to £149,999	8,012	26.17%	20,265	17.36%	151
£150,000 or Over	4,757	15.54%	8,794	7.53%	206

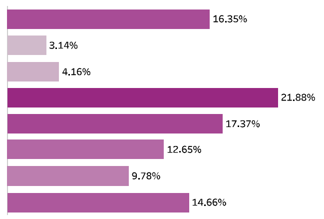


Dwelling type

	Target	Target %	Base	Base %	Index
Detached	811	3.45%	1,283	1.30%	265
Semi-detached	947	4.03%	2,179	2.21%	182
Bungalow	38	0.16%	69	0.07%	230
Terraced (including end-terrace)	2,480	10.55%	8,046	8.17%	129
Flat, maisonette or apartment	19,225	81.81%	86,956	88.25%	93

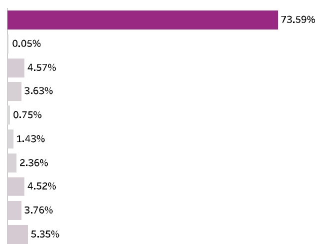
Age Bands

	Target	Target %	Base	Base %	Index
Under 15	10,853	16.35%	43,647	16.27%	100
15-19	2,085	3.14%	15,110	5.63%	56
20-24	2,764	4.16%	22,966	8.56%	49
25-34	14,521	21.88%	56,301	20.99%	104
35-44	11,533	17.37%	40,141	14.97%	116
45-54	8,396	12.65%	32,625	12.16%	104
55-64	6,495	9.78%	24,757	9.23%	106
65+	9,734	14.66%	32,651	12.17%	120



Ethnic mix

	Target	Target %	Base	Base %	Index
White	48,846	73.59%	174,968	65.24%	113
Gypsy / Traveller / Irish Traveller	30	0.05%	191	0.07%	64
Mixed / Multiple Ethnic Groups	3,035	4.57%	12,321	4.59%	100
Asian / Asian British: Indian	2,412	3.63%	7,423	2.77%	131
Asian / Asian British: Pakistani	496	0.75%	1,794	0.67%	112
Asian / Asian British: Bangladeshi	952	1.43%	16,192	6.04%	24
Asian / Asian British: Chinese	1,565	2.36%	8,044	3.00%	79
Asian / Asian British: Other Asian	3,001	4.52%	10,974	4.09%	110
Black / African / Caribbean / Black British	2,493	3.76%	20,892	7.79%	48
Other Ethnic Group	3,550	5.35%	15,399	5.74%	93



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Hampstead 1.5km (1.5 Km) UK22
Selected Target

VS

Base values:

268,198	116,712
Population	Households

Camden
Selected Base

Select Chart
- (●) Percentage
- ( ) Index
- ( ) Penetration

Select Ranking and Highlights by: % (Highest population) or Index (Greatest difference compared to the selected base) or Penetration (The number of targets found in the base area).

Segmentation

Summary | Demographics | Segmentation | Raw Data

Match Level | Pop

Chart Sort | Segment Order

Mosaic UK 7

1st	2nd	3rd
A City Prosperity 61,002 (91.90%) | 143	K Municipal Tenants 3,952 (5.95%) | 22	O Rental Hubs 987 (1.49%) | 18



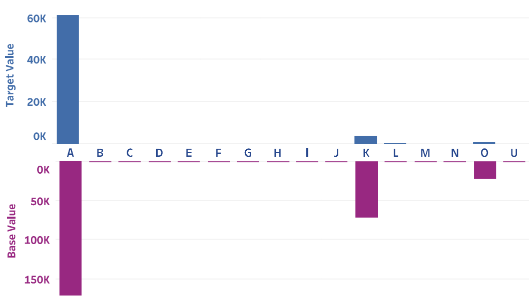
Urban areas	Council/HA flats	Young singles and homesharers
High value flats	Densely populated	Rent flats
High income	No qualifications	Very high internet use
Cosmopolitan lifestyles	Low discretionary income	Internet via smartphone
High-tech homes	Low environmental impact gap	Watch videos online
Uber passengers	Fuel poverty	Don't use landlines

		Target	Base	%
A	City Prosperity	61,002	172,134	91.90%
B	Prestige Positions	190	293	0.29%
C	Country Living	0	0	0.00%
D	Rural Reality	0	0	0.00%
E	Senior Security	0	38	0.00%
F	Suburban Stability	0	0	0.00%
G	Domestic Success	0	0	0.00%
H	Aspiring Homemakers	12	463	0.02%
I	Family Basics	0	0	0.00%
J	Transient Renters	0	0	0.00%
K	Municipal Tenants	3,952	72,391	5.95%
L	Vintage Value	228	556	0.34%
M	Modest Traditions	0	0	0.00%
N	Urban Cohesion	10	2	0.01%
O	Rental Hubs	987	22,321	1.49%
U	Unclassified	0	0	0.00%

Mosaic Profile | Groups

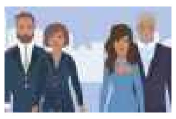
	Target	Target %	Base	Base %	Index
A	61,002	91.90%	172,134	64.18%	143
B	190	0.29%	293	0.11%	261
C	0	0.00%	0	0.00%	0
D	0	0.00%	0	0.00%	0
E	0	0.00%	38	0.01%	0
F	0	0.00%	0	0.00%	0
G	0	0.00%	0	0.00%	0
H	12	0.02%	463	0.17%	10
I	0	0.00%	0	0.00%	0
J	0	0.00%	0	0.00%	0
K	3,952	5.95%	72,391	26.99%	22
L	228	0.34%	556	0.21%	166
M	0	0.00%	0	0.00%	0
N	10	0.01%	2	0.00%	1,973
O	987	1.49%	22,321	8.32%	18
U	0	0.00%	0	0.00%	0

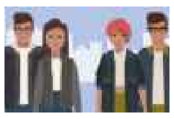
Mosaic Profile | Groups



Mosaic UK 7 Daytime

1st	2nd	3rd
A City Prosperity 36,456 (69.33%) | 151	K Municipal Tenants 4,994 (9.50%) | 55	O Rental Hubs 3,354 (6.38%) | 54



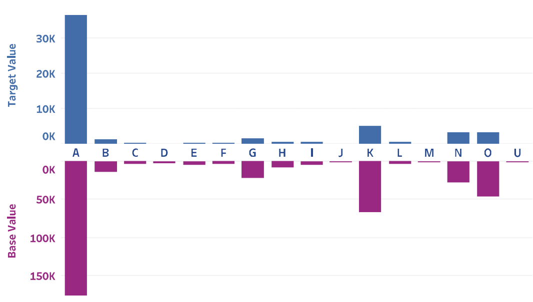


		Target	Base	%
A	City Prosperity	36,456	176,394	69.33%
B	Prestige Positions	1,167	14,150	2.22%
C	Country Living	138	4,020	0.26%
D	Rural Reality	73	1,987	0.14%
E	Senior Security	228	4,506	0.43%
F	Suburban Stability	147	3,646	0.28%
G	Domestic Success	1,570	21,662	2.99%
H	Aspiring Homemakers	432	7,863	0.82%
I	Family Basics	394	4,725	0.75%
J	Transient Renters	78	1,377	0.15%
K	Municipal Tenants	4,994	66,562	9.50%
L	Vintage Value	388	3,010	0.74%
M	Modest Traditions	35	744	0.07%
N	Urban Cohesion	3,129	28,059	5.95%
O	Rental Hubs	3,354	45,710	6.38%
U	Unclassified	0	0	0.00%

Mosaic Daytime Profile | Groups

	Target	Target %	Base	Base %	Index
A	36,456	69.33%	176,394	45.89%	151
B	1,167	2.22%	14,150	3.68%	60
C	138	0.26%	4,020	1.05%	25
D	73	0.14%	1,987	0.52%	27
E	228	0.43%	4,506	1.17%	37
F	147	0.28%	3,646	0.95%	30
G	1,570	2.99%	21,662	5.64%	53
H	432	0.82%	7,863	2.05%	40
I	394	0.75%	4,725	1.23%	61
J	78	0.15%	1,377	0.36%	41
K	4,994	9.50%	66,562	17.32%	55
L	388	0.74%	3,010	0.78%	94
M	35	0.07%	744	0.19%	35
N	3,129	5.95%	28,059	7.30%	82
O	3,354	6.38%	45,710	11.89%	54
U	0	0.00%	0	0.00%	0

Mosaic Daytime Profile | Groups



CAMDEN RETAIL STUDY – TOWN CENTRE HEALTH CHECKS

KENTISH TOWN

Description

Current Designation: Town Centre as defined in the Camden Local Plan 2017 and a District Centre in The London Plan.

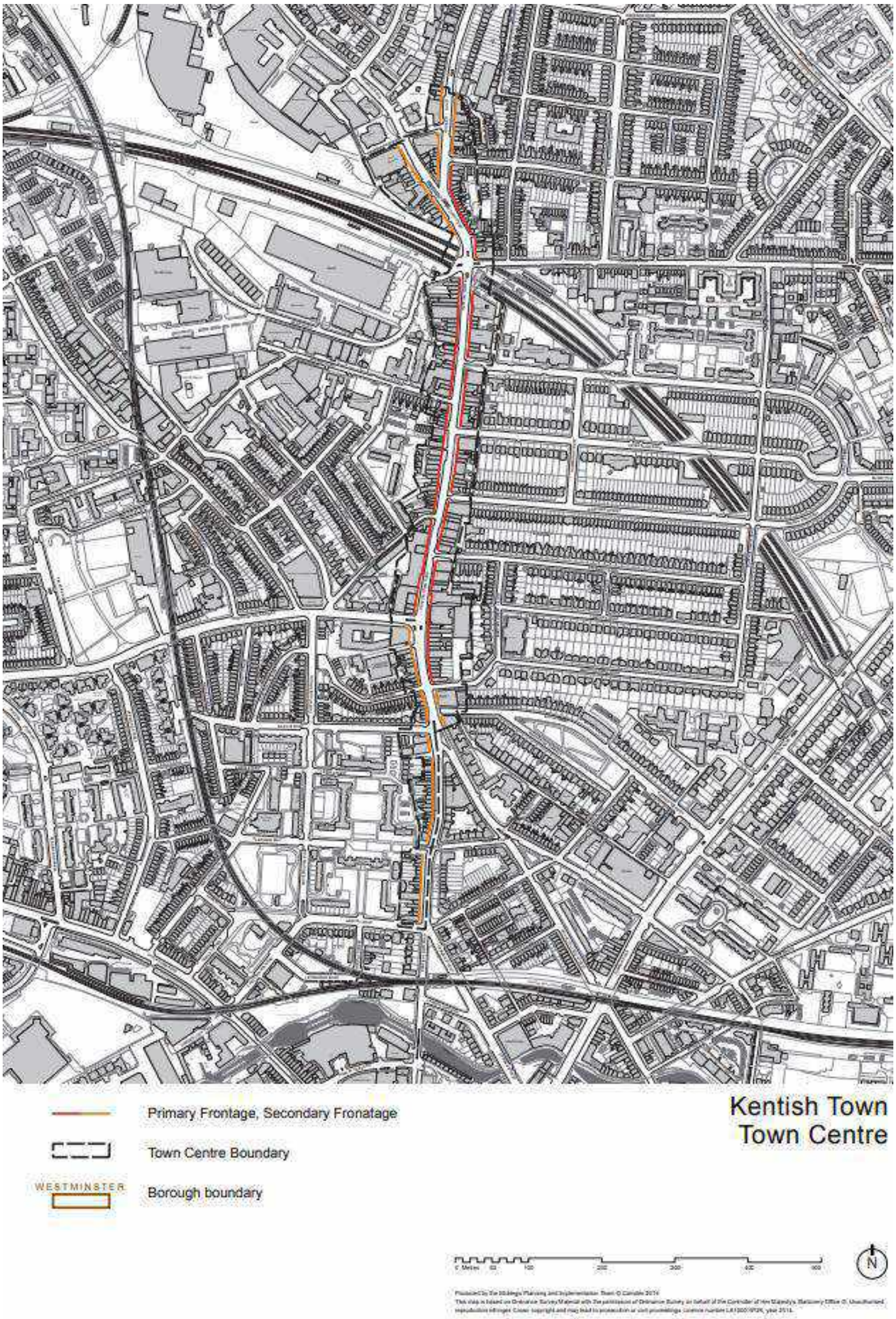
Description of Centre:

Kentish Town is centrally located in the borough and is a linear centre extending southwards from Fortress Road and Highgate Road north of Kentish Town station, past the station southwards to just north of Camden Town town centre. Primary frontages are located on both sides of the A400 Kentish Town Road in the centre of the centre, with secondary frontages north of the station and to the south.

In Camden’s Planning Guidance, the centre is described as follows:

Kentish Town Town Centre is located just to the north of Camden Town and is the third smallest town centre in the borough. It provides for the day to day shopping and service uses for the local area. It is designated as a district centre in the London Plan.

It is also noted that it has a good convenience offer and is considered to be functioning reasonably well but could be improved in some areas.



Current Planning Policies / Designations:

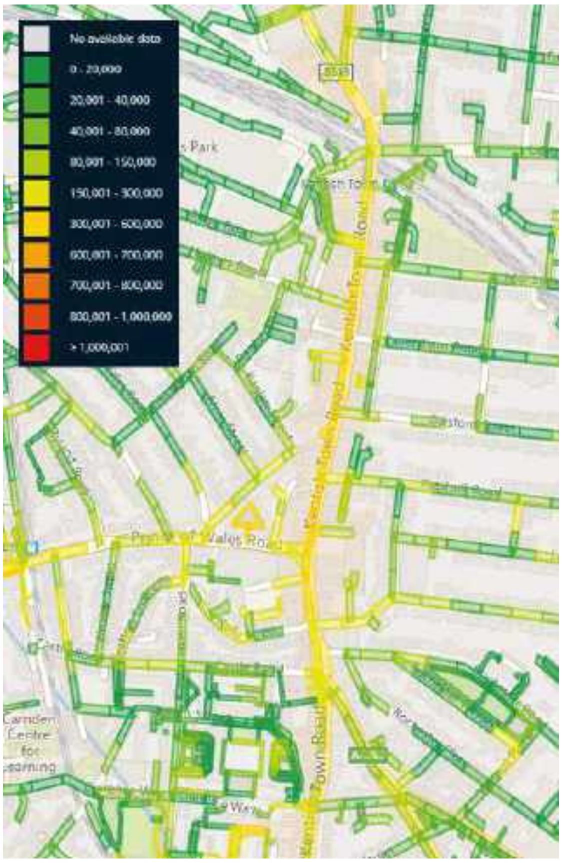
- As Central London Frontage (CLF)/Central Activity Zone (CAZ), the following policies of the Camden Local Plan apply to the centre:
    - Policy E3 (Tourism);
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden's centres and other shopping areas);
    - Policy TC4 (Town centre uses); and
    - Policy TC5 (Small and independent shops).

- The town centre designation is close to a number of Conservation Areas but very little of the centre is located within any of them.
- Kentish Town is designated as a District Centre in the London Plan 2021with low commercial growth potential and high residential growth potential.
- It is within a Strategic Area for Regeneration as defined in Policy SD10 of the London Plan (Annex 1, Table A1.1).
- The London Plan 2021 designates Kentish Town as an area with more than local significance for the night-time economy (NT3).

Footfall:

The figure below illustrates the pedestrian heat map for Kentish Town and shows a consistent level of footfall along Kentish Town Road, with lower levels along side streets and nearby minor roads.

Kentish Town Footfall Heat Map



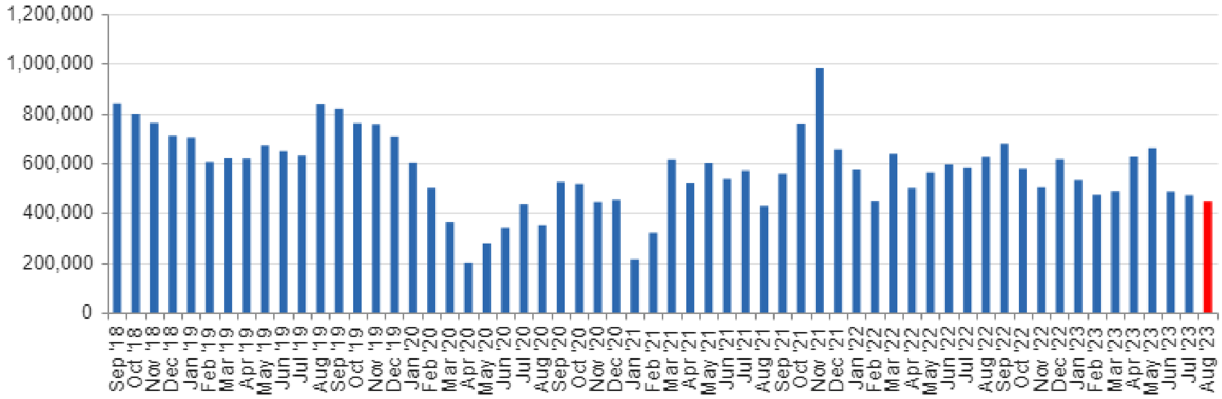
Source: Datscha

A busy section along Kentish Town Road was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall levels dipped in line with strict COVID-19 restriction periods but have since recovered and stabilised. However, whilst November 2021 provided the highest footfall month over this period, pedestrian activity overall is below pre-pandemic levels.

When comparing the 12-month period from September 2018 (pre-pandemic) to the 12-month period from September 2022 (post-pandemic), pedestrian activity has fallen by 21% (monthly average from 700,000 down to 550,000).

Footfall of Kentish Town Road, Kentish Town (September 2018 – August 2023)



Source: Datscha

Catchment Area:

The strong convenience offer attracts trade from both Zones 2 and 4, with around a third of the centre's convenience spend coming from Camden. The rest of the trade comes from visitors to the centre (ie Rest of the UK). The comparison sector also relies on trade from the rest of the UK.

This level of inflow is higher than might be anticipated for the centre offer.

Use of Centre:

The centre has a strong convenience offer and this accounts for much of the spend in the centre. Comparison sales are considerably lower.

Previous Retail Study Findings

Conclusions from Retail Town Centre Study 2013:

Key strengths identified for Kentish Town include:

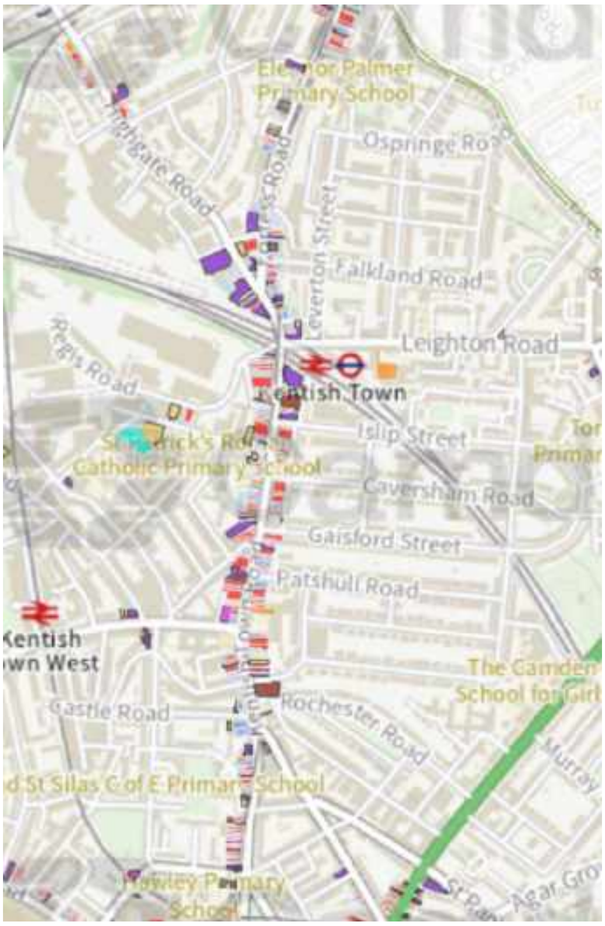
- Kentish Town is considered to be performing well in relation to the provision of convenience and service units.
- Overall, the vacancy rate in the centre is below the national and regional average for Greater London.
- The centre is easily accessible.

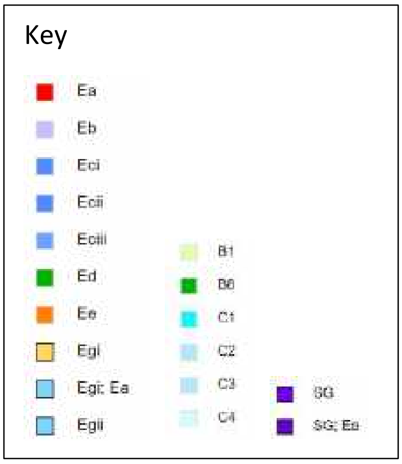
Key weaknesses identified for Kentish Town include:

- There is limited comparison goods retail floorspace in the centre.
- The below average provision of comparison units in Kentish Town is accentuated by the low quality of existing retailers. The comparison offer is dominated by discounted goods units, such as charity shops, home wares and fashion.
- There was a slight increase in the number of vacant units in the centre over the previous year, which reflected wider national retail trends as retailers continued to struggle in the economic climate.

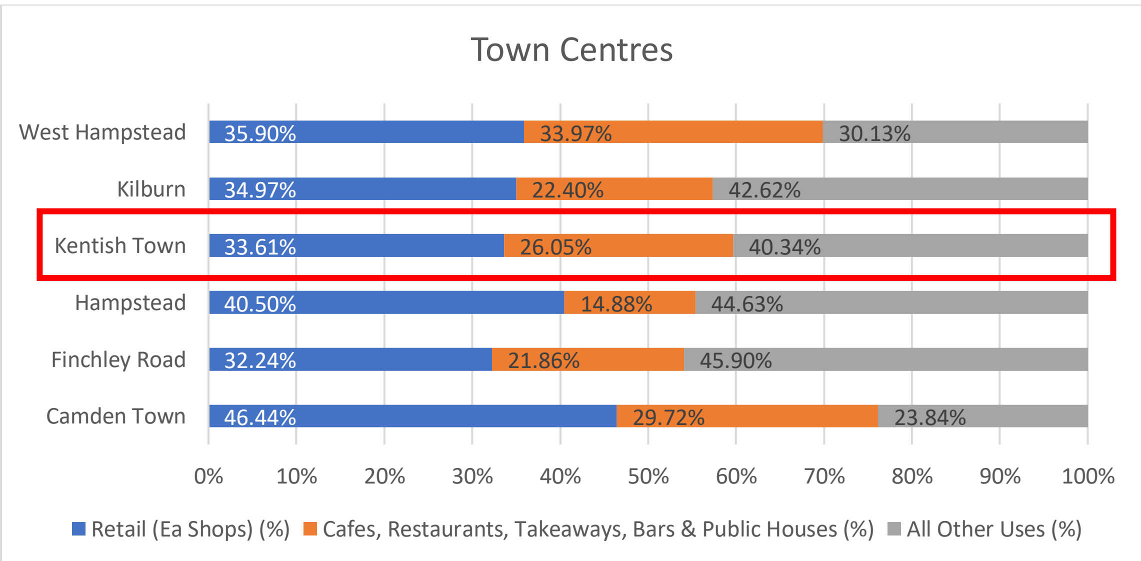
The environmental quality of the centre varies throughout, and the centre would benefit from shopfront improvements to improve the street scene, particularly along the secondary frontages which are blighted by lower quality retail units.

Diversity of Uses 2023



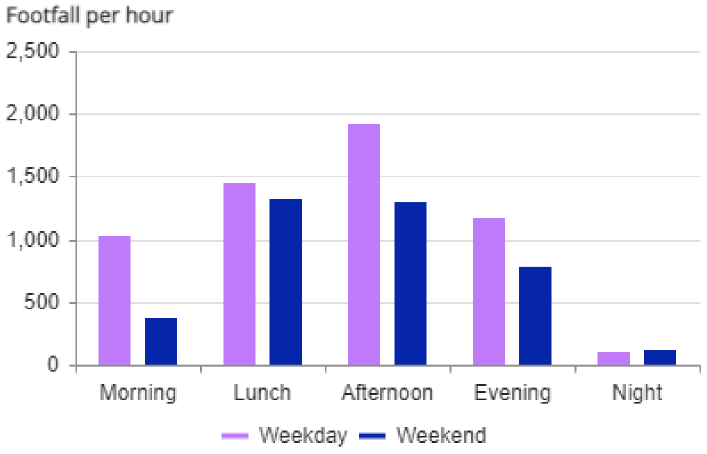


Kentish Town	Number	%	Camden Average (%)
Retail (Ea Shops)	80	33.6	37.4
Food & Beverage	62	26.1	23.3
All Other Uses	96	40.3	39.4
Total	238	100.0	100.0



EVENING / NIGHT TIME ECONOMY

Kentish Town	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	8	3.3	3.9%

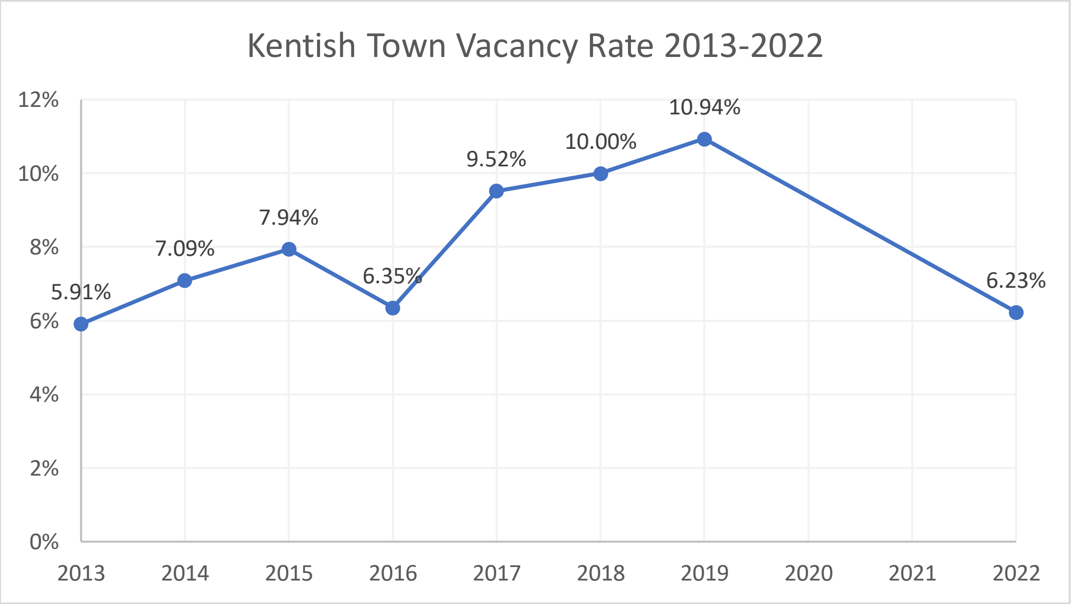


Conclusions on Diversity of Uses:

The retail offer in the centre has declined since 2014, with the area immediately south of the station seeing F&B outlets replacing retail. The overall retail offer in the centre now is only slightly below the average for Camden but is geared more towards a convenience than a comparison offer reflecting the needs of the local catchment. Comparison uses are more limited.

F&B provision is slightly above the Camden average and evening and night time provision means footfall remains relatively high into the evening.

Vacancies 2013 - 2022



Vacancy rates in Kentish Town peaked in 2019 but have now decreased to the lowest level since 2013 and remain below the UK average.

Changes in Representation and Market Demand

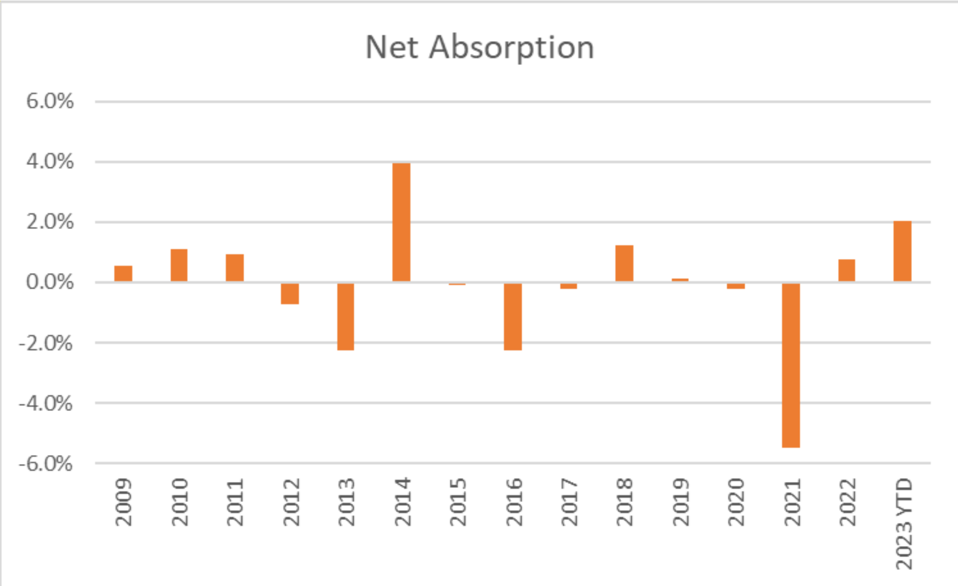
Market demand can be assessed by looking at net absorption of retail floorspace in the area.

> ***Net absorption*** *= additional floorspace occupied (move-ins) – floorspace vacated (move-outs)*

The net absorption rate in Kentish Town has been mitigated since 2009 and overall averaged 0% per annum.

It can be noted that net absorption figures have been supported positively by the reduction of the actual retail floorspace available in the area (loss of space) and would otherwise have been negative).

This could demonstrate a decline of this area as a retail destination.



Commercial Rents

Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

The following rental levels are therefore broad estimates of prime Zone A rental tone within each location.

Location	Estimated Zone A rate
High Holborn/Kingsway	£190-210
King’s Cross	£90-100
Tottenham Court Road	£90-100
Camden Town	£200-220

Finchley Road	£65 -70
Hampstead	£150-160
Kentish Town	£50-55
Kilburn High Road	£80-90
West Hampstead	£80-90
Seven Dials	£160-180
Fitzrovia	£85-95
Hatton Garden	£125-135
Museum Street	£70-80
Denmark Street	£80-90

Most Central and Inner London investments are mixed use by nature which impacts on the yield analysis for the individual constituent parts. Certain retail locations such as Bond Street attract the highest pricing driven by overseas investors and premium brands acquiring flagship stores but there is still good sentiment for other Central London locations including Covent Garden, Fitzrovia, Camden, Tottenham Court Road etc.

Whilst there has been a softening in retail value the lack of transactional volumes has meant comparable evidence within the Borough is limited so in the broadest of terms we would set out the following:

- Prime retail yields – 4.5% – 6.0%
- Good secondary retail yields – 6.0% – 7.0%

Accessibility

Transport for London's Public Transport Accessibility Levels (PTAL) ranking assesses connectivity across London, with a grading system indicating the strength of the public transport in any given area. The grading goes from 0 which indicates very poor access to public transport through to 6b which indicates excellent access to public transport. The measures include walk time to public transport, the reliability of the public transport services and the number of services within the area.

A central point within Kentish Town provides a PTAL output of 6a, indicating that public transport accessibility in the area is very good.

Kentish Town railway station and Kentish Town underground station are located within the northern part of the centre, accessible directly via Kentish Town Road. The railway station operates regular Thameslink services that run north to St Albans and south to Sutton. Kentish Town underground station is part of the Northern line of the London underground system, with services heading north to High Barnet and south to Camden Town, Euston and beyond. Kentish Town West overground station is also close by (approximately 400m to the west).

Kentish Town Road is a busy route that runs through Kentish Town, connecting to Camden to the south and Archway to the north. On-street parking is available in parts, whilst cycle lanes are extremely limited. Bike storage facilities can be found within the area, allowing cyclists to securely store their bikes whilst visiting.

With up to three lanes of traffic along the main road, traffic light crossings are necessarily found along the road to support pedestrian movement around the centre. Pavements run along both sides of the main road and are sufficiently wide in the main, however, with street furniture, bus stops, seating areas for cafes and restaurants as well as high footfall in parts, navigating the pavements can be challenging.

Perception of Safety and Occurrence of Crime

Between June 2022 and May 2023, crime data from the MET Police referenced 1,751 crimes in Kentish Town, representing 3.9% of all crimes committed in the London Borough of Camden over this period.

The following table present a breakdown of crimes committed in Kentish Town by crime type.

Note that a high proportion of crimes relating to violence and sexual offences were reported in the area over the period, with about one in four crimes falling in this category.

Kentish Town	# Crimes	As % of all crimes in area	As % of similar crime type in LB Camden
ALL Crimes	**1,751**	**100.0%**	3.9%
Anti-social behaviour	384	21.9%	4.0%
Bicycle theft	58	3.3%	5.4%
Burglary	81	4.6%	4.2%
Criminal damage and arson	103	5.9%	6.4%
Drugs	70	4.0%	5.9%
Other crime	7	0.4%	3.0%
Other theft	172	9.8%	2.1%
Possession of weapons	6	0.3%	4.7%
Public order	111	6.3%	5.1%
Robbery	59	3.4%	4.1%
Shoplifting	90	5.1%	5.8%
Theft from the person	82	4.7%	1.5%
Vehicle crime	118	6.7%	3.5%
Violence and sexual offences	410	23.4%	5.6%

Environmental Quality

There is a distinct lack of greenery within Kentish Town Town Centre. Whilst there are trees sporadically located along the pavements of Kentish Town Road and some side streets, these are few and far between. Additionally, there is little to no supporting green space or planters to soften the look and feel of the area.

Characterful lampposts line the streets, adding to the appearance of the area whilst making it safer in the early morning and evenings. Bins can regularly be found, assisting visitors with disposing of rubbish and reducing the likelihood of litter on the streets and pavements. Cycle parking is also available throughout the centre, allowing cyclists to safely lock their bikes whilst in the area. Public benches are less frequently found however, although with the aforementioned lack of green space, perhaps visitors have less reason to want to sit and enjoy the surroundings. It is still important to note that many visitors would appreciate the ability to take a rest whilst in Kentish Town Town Centre.

Traffic along Kentish Town Road creates noise and air pollution and could be said to make the area less enjoyable and pleasant.

Investment Plans and Development Opportunities

There are limited investment and development plans in the public domain for Kentish Town at the present time, although the former Carpetright site at 152-156 Kentish Town Road is currently being redeveloped. Planning permission was granted in November 2016 for the replacement of the existing building with a four storey (plus basement) mixed use building comprising retail (A1 Use Class) at ground and basement level, office space and Dental Practice, with residential units on upper floors. The redevelopment increases the retail floorspace on the site by 684 sqm.

To the north of the town centre and including a small part of it along Highgate Road and Kentish Town Station, there is an adopted planning framework covering two major development sites at Regis Road and Murphy's Yard. These are likely to be brought forward for employment-led mixed use development, complementing the town centre offer and supporting it with the inclusion of residential development.

Stakeholder Feedback

Stakeholder engagement identified the following points of relevance to the Kentish Town:

- Developer / Landowner 1:
    - Has 'come up' but there is still a mix of value and gentrified areas with expensive housing, enhanced with a good range from value to high end.
- Developer / landowner 2:
    - Camden's town centres tend to have very dense populus and have been and continue to be very popular.
    - They are resilient in the context of new occupiers coming in, people want to be there.
    - More present in a '7-day cycle' compared to historically when the busy periods were only from Friday-Sunday. Issues of quiet periods elevated.
    - Any of the central areas where there isn't an overarching landlord, where the mix can be evolved or played to a strength of an area, the weight of demand can have a detrimental affect on the area.
    - Rent is a major player in terms of health of an area but those that can afford rent do not necessarily add vitality to an area. What is right for the area isn't always what is coming through the development.
    - In the Camden centres of this nature, levels of trade are not as good as the leasing activity suggests. There is a question regarding the viability of some operators.

SWOT Analysis

Strengths

- Strong convenience offer
- Low vacancies
- Above average F&B provision
- Good representation of independent businesses
- Rents in Kentish Town are generally below the levels observed in nearby centres

Weaknesses

- Limited comparison offer
- Declining footfall
- Lack of greenery
- Kentish Town lacks a clear identity as a retail destination

Opportunities

- Proximity to Camden Town could allow spin-off trade and draw

Threats

- Greater draw of Camden Town taking trade and footfall from the area
- Competition from Camden Town, particularly in terms of night time economy

Conclusions

The proximity of Kentish Town to Camden Town could be both a benefit and a hindrance for the centre, with a degree of competition between the centres to attract those uses with a wider / visitor draw. However, Kentish Town also has an important role serving its local catchment and for this the convenience offer is key.

The centre appears to be adjusting to the change in demand for retail and F&B uses and vacancy rates are low. The centre boundary is therefore considered appropriate.

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This tool gives you the ability to compare selected target audiences against a base comparison such as the UK population, or another audience, to highlight the key characteristics of your audience; and how they differ.

Target values:

112,184	47,567
Population	Households

Report: **Kentish Town Demograhic Data**

Kentish Town 1.5km (1.5 Km) UK22
Selected Target

VS

Base values:

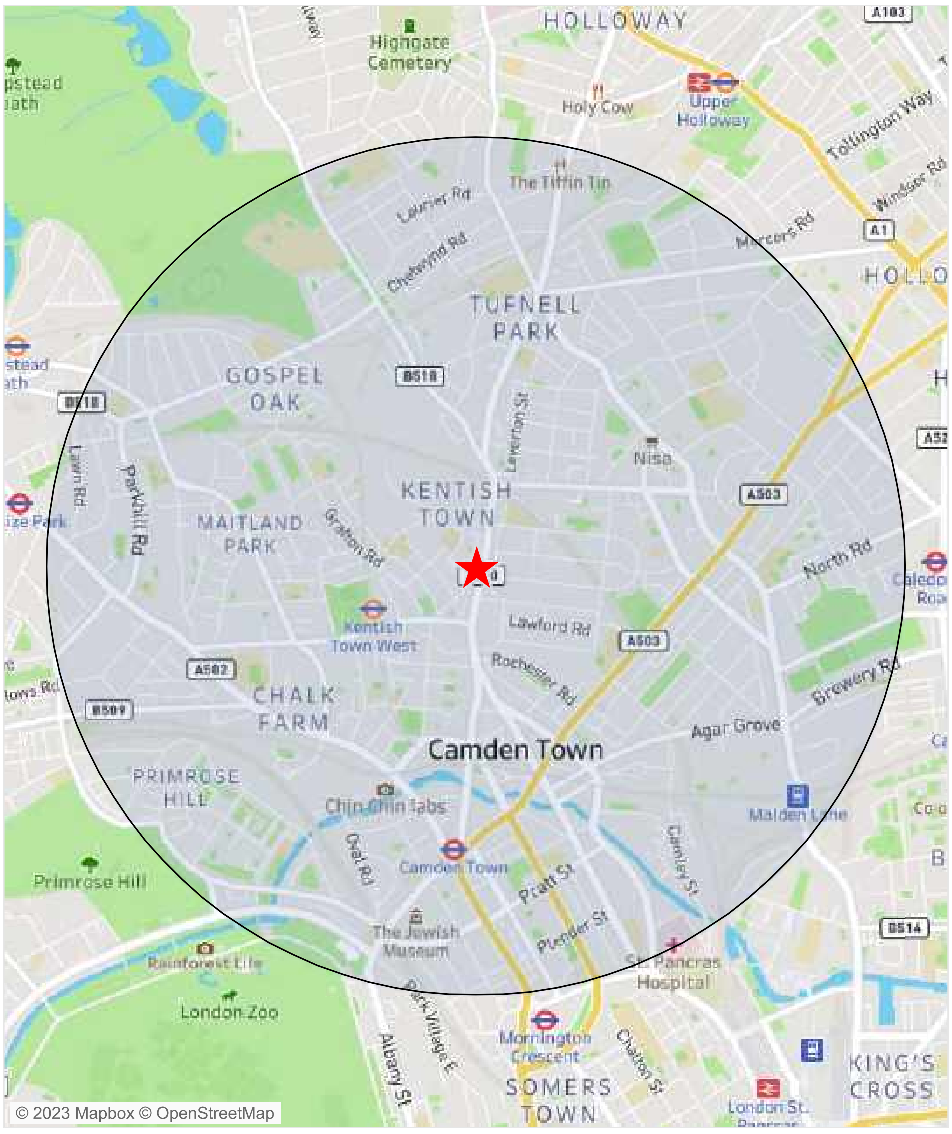
268,198	116,712
Population	Households

Camden
Selected Base

Did you know? We also offer enrichment at Person and Household level, using UK ConsumerView, and in-depth profiling through iCoder Online. Contact our Helpdesk to find out more.

Summary

Summary | Demographics | Segmentation | Raw Data



Make up of your area

	Target	Base
Total Population	112,184	268,198
Number of Females	55,511	130,635
Number of Males	56,673	137,563
Total Households	47,567	116,712
Economically Active	62,687	147,755
Economically Inactive	23,687	58,877
Owner Occupied (HH)	15,740	40,166
Private Rented (HH)	12,607	37,000

The population of the area is expected to change by: -15.42%.
This percentage change is expected by 2026 and based on future projections.

The three highest Mosaic groups are:

		Target	Base
A	City Prosperity	67,551	172,134
K	Municipal Tenants	37,576	72,391
O	Rental Hubs	6,762	22,321

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Select Chart
- (●) Percentage
- ( ) Index

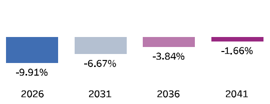
Chart sort
- (●) Sequence
- ( ) High to Low

Select Ranking and Highlights by: % (Highest population) or Index (Greatest difference compared to the selected base).

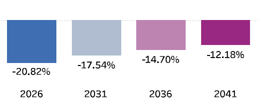
Demographics

Summary | Demographics | Segmentation | Raw Data

Population change | Female



Male

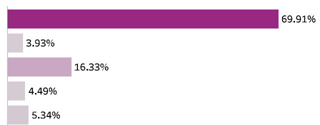


Population change

	Target	% Change since 2021	Base	% Change since 2021
Population in 2026	94,885	-15.42%	222,328	-17.10%
Population in 2031	98,540	-12.16%	229,851	-14.30%
Population in 2036	101,726	-9.32%	236,326	-11.88%
Population in 2041	104,358	-6.98%	241,510	-9.95%

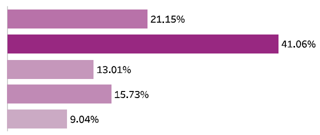
Economically Active

	Target	Target %	Base	Base %	Index
Employee	43,825	69.91%	104,520	70.74%	99
Self employed with employees	2,462	3.93%	6,635	4.49%	87
Self employed without employees	10,238	16.33%	22,900	15.50%	105
Unemployed	2,812	4.49%	5,998	4.06%	111
Full-time students	3,350	5.34%	7,702	5.21%	103



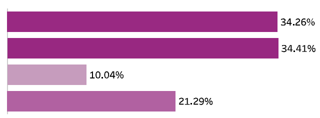
Economically Inactive

	Target	Target %	Base	Base %	Index
Retired	5,011	21.15%	11,777	20.00%	106
Student	9,726	41.06%	27,095	46.02%	89
Looking after home/family	3,081	13.01%	7,705	13.09%	99
Permanently sick/disabled	3,726	15.73%	7,314	12.42%	127
Other	2,142	9.04%	4,986	8.47%	107



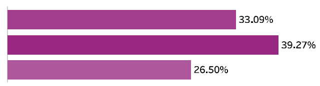
Social Grade

	Target	Target %	Base	Base %	Index
AB Higher & intermediate manage/admin/prof	13,579	34.26%	37,662	39.20%	87
C1 Supervisory, cleric, junior manage/admin/prof	13,639	34.41%	33,021	34.37%	100
C2 Skilled manual workers	3,977	10.04%	8,110	8.44%	119
DE Semi-skilled/unskilled manual workers; on state benefit, unemployed, lowest grade workers	8,439	21.29%	17,283	17.99%	118



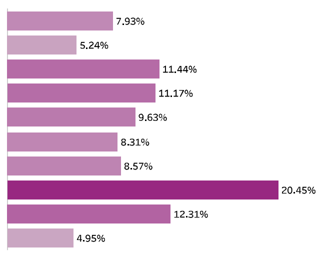
Tenure

	Target	Target %	Base	Base %	Index
Owner Occupied (HH)	15,740	33.09%	40,166	34.41%	96
Social Rented (HH)	18,681	39.27%	37,594	32.21%	122
Private Rented (HH)	12,607	26.50%	37,000	31.70%	84



Household Income

	Target	Target %	Base	Base %	Index
£14,999 or Less	3,773	7.93%	7,238	6.20%	128
£15,000 to £19,999	2,493	5.24%	4,618	3.96%	132
£20,000 to £29,999	5,441	11.44%	11,072	9.49%	121
£30,000 to £39,999	5,312	11.17%	10,837	9.29%	120
£40,000 to £49,999	4,581	9.63%	10,088	8.64%	111
£50,000 to £59,999	3,953	8.31%	9,050	7.75%	107
£60,000 to £69,999	4,076	8.57%	9,192	7.88%	109
£70,000 to £99,999	9,729	20.45%	25,558	21.90%	93
£100,000 to £149,999	5,854	12.31%	20,265	17.36%	71
£150,000 or Over	2,354	4.95%	8,794	7.53%	66

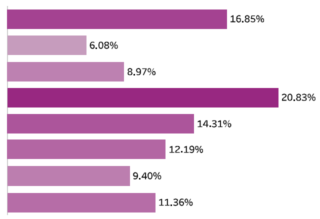


Dwelling type

	Target	Target %	Base	Base %	Index
Detached	203	0.51%	1,283	1.30%	39
Semi-detached	800	1.99%	2,179	2.21%	90
Bungalow	24	0.06%	69	0.07%	87
Terraced (including end-terrace)	4,870	12.11%	8,046	8.17%	148
Flat, maisonette or apartment	34,309	85.33%	86,956	88.25%	97

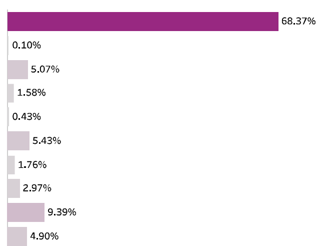
Age Bands

	Target	Target %	Base	Base %	Index
Under 15	18,904	16.85%	43,647	16.27%	104
15-19	6,824	6.08%	15,110	5.63%	108
20-24	10,065	8.97%	22,966	8.56%	105
25-34	23,371	20.83%	56,301	20.99%	99
35-44	16,051	14.31%	40,141	14.97%	96
45-54	13,677	12.19%	32,625	12.16%	100
55-64	10,544	9.40%	24,757	9.23%	102
65+	12,747	11.36%	32,651	12.17%	93



Ethnic mix

	Target	Target %	Base	Base %	Index
White	76,699	68.37%	174,968	65.24%	105
Gypsy / Traveller / Irish Traveller	109	0.10%	191	0.07%	136
Mixed / Multiple Ethnic Groups	5,693	5.07%	12,321	4.59%	110
Asian / Asian British: Indian	1,767	1.58%	7,423	2.77%	57
Asian / Asian British: Pakistani	486	0.43%	1,794	0.67%	65
Asian / Asian British: Bangladeshi	6,092	5.43%	16,192	6.04%	90
Asian / Asian British: Chinese	1,979	1.76%	8,044	3.00%	59
Asian / Asian British: Other Asian	3,329	2.97%	10,974	4.09%	73
Black / African / Caribbean / Black British	10,534	9.39%	20,892	7.79%	121
Other Ethnic Group	5,496	4.90%	15,399	5.74%	85



Report generated on December 20, 2023

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Camden
Selected Base

Select Chart
- Percentage
- Index
- Penetration

Select Ranking and Highlights by: % (Highest population) or Index (Greatest difference compared to the selected base) or Penetration (The number of targets found in the base area).

Segmentation

Summary | Demographics | Segmentation | Raw Data

Match Level: Pop

Chart Sort: Segment Order

Mosaic UK 7

1st	2nd	3rd
A City Prosperity 67,551 (60.21%) | 94	K Municipal Tenants 37,576 (33.49%) | 124	O Rental Hubs 6,762 (6.03%) | 72

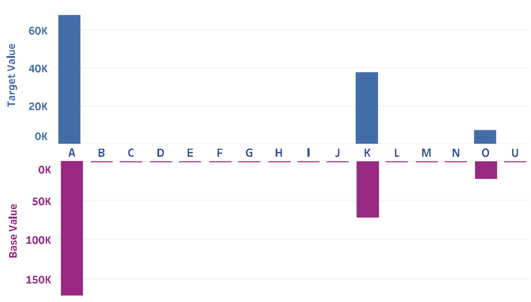
A City Prosperity	K Municipal Tenants	O Rental Hubs
Urban areas	Council/HA flats	Young singles and homesharers
High value flats	Densely populated	Rent flats
High income	No qualifications	Very high internet use
Cosmopolitan lifestyles	Low discretionary income	Internet via smartphone
High-tech homes	Low environmental impact gap	Watch videos online
Uber passengers	Fuel poverty	Don't use landlines

	Group	Target	Base	%
A	City Prosperity	67,551	172,134	60.21%
B	Prestige Positions	0	293	0.00%
C	Country Living	0	0	0.00%
D	Rural Reality	0	0	0.00%
E	Senior Security	4	38	0.00%
F	Suburban Stability	0	0	0.00%
G	Domestic Success	0	0	0.00%
H	Aspiring Homemakers	208	463	0.19%
I	Family Basics	0	0	0.00%
J	Transient Renters	0	0	0.00%
K	Municipal Tenants	37,576	72,391	33.49%
L	Vintage Value	81	556	0.07%
M	Modest Traditions	0	0	0.00%
N	Urban Cohesion	2	2	0.00%
O	Rental Hubs	6,762	22,321	6.03%
U	Unclassified	0	0	0.00%

Mosaic Profile | Groups

	Target	Target %	Base	Base %	Index
A	67,551	60.21%	172,134	64.18%	94
B	0	0.00%	293	0.11%	0
C	0	0.00%	0	0.00%	0
D	0	0.00%	0	0.00%	0
E	4	0.00%	38	0.01%	26
F	0	0.00%	0	0.00%	0
G	0	0.00%	0	0.00%	0
H	208	0.19%	463	0.17%	108
I	0	0.00%	0	0.00%	0
J	0	0.00%	0	0.00%	0
K	37,576	33.49%	72,391	26.99%	124
L	81	0.07%	556	0.21%	35
M	0	0.00%	0	0.00%	0
N	2	0.00%	2	0.00%	239
O	6,762	6.03%	22,321	8.32%	72
U	0	0.00%	0	0.00%	0

Mosaic Profile | Groups



Mosaic UK 7 Daytime

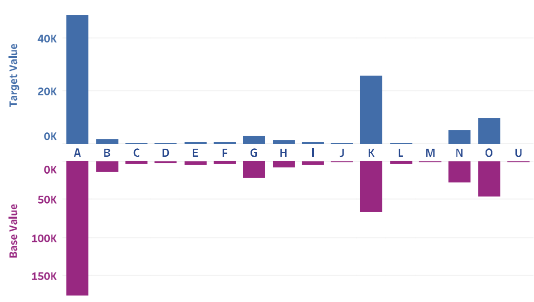
1st	2nd	3rd
A City Prosperity 48,383 (49.69%) | 108	K Municipal Tenants 25,427 (26.11%) | 151	O Rental Hubs 9,594 (9.85%) | 83

	Group	Target	Base	%
A	City Prosperity	48,383	176,394	49.69%
B	Prestige Positions	1,664	14,150	1.71%
C	Country Living	420	4,020	0.43%
D	Rural Reality	273	1,987	0.28%
E	Senior Security	568	4,506	0.58%
F	Suburban Stability	510	3,646	0.52%
G	Domestic Success	3,000	21,662	3.08%
H	Aspiring Homemakers	1,193	7,863	1.23%
I	Family Basics	763	4,725	0.78%
J	Transient Renters	210	1,377	0.22%
K	Municipal Tenants	25,427	66,562	26.11%
L	Vintage Value	426	3,010	0.44%
M	Modest Traditions	106	744	0.11%
N	Urban Cohesion	4,841	28,059	4.97%
O	Rental Hubs	9,594	45,710	9.85%
U	Unclassified	0	0	0.00%

Mosaic Daytime Profile | Groups

	Target	Target %	Base	Base %	Index
A	48,383	49.69%	176,394	45.89%	108
B	1,664	1.71%	14,150	3.68%	46
C	420	0.43%	4,020	1.05%	41
D	273	0.28%	1,987	0.52%	54
E	568	0.58%	4,506	1.17%	50
F	510	0.52%	3,646	0.95%	55
G	3,000	3.08%	21,662	5.64%	55
H	1,193	1.23%	7,863	2.05%	60
I	763	0.78%	4,725	1.23%	64
J	210	0.22%	1,377	0.36%	60
K	25,427	26.11%	66,562	17.32%	151
L	426	0.44%	3,010	0.78%	56
M	106	0.11%	744	0.19%	56
N	4,841	4.97%	28,059	7.30%	68
O	9,594	9.85%	45,710	11.89%	83
U	0	0.00%	0	0.00%	0

Mosaic Daytime Profile | Groups



Report generated on December 20, 2023

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CAMDEN RETAIL STUDY – TOWN CENTRE HEALTH CHECKS

KILBURN HIGH ROAD

Description

Current Designation: Town Centre as defined in the Camden Local Plan 2017 and Major Centre in The London Plan (including western part of the centre which is the London Borough of Brent).

Description of Centre:

Kilburn High Road is Camden's second largest Town Centre, after Camden Town and is located in the north west of the borough. It is a linear centre with the eastern side of the A5 falling within Camden Borough and the western side within Brent and extends from Kilburn High Road station in the south, northwards to Brondesbury station and then on to Kilburn tube station. There is also a small part of the centre located to the south of the High Road station.

The primary shopping frontages are located towards the central part of the centre, between Kilburn High Road station and Willesden Avenue to the north. Secondary frontages extend to the north and south, with similar designations in the Brent part of the centre.

In Camden's Planning Guidance 2021 the centre is described as follows:

The centre performs a mainly functional role to the needs of local residents. It is home to three foodstores and has a high proportion of retail, financial, and leisure services. The leisure offer is particularly important to Kilburn, and includes the Tricycle Theatre, pubs, restaurants, and a nightclub. The Camden Retail Study states that there is scope to improve the role of comparison retail in Kilburn, which is a weak element of its current offer.

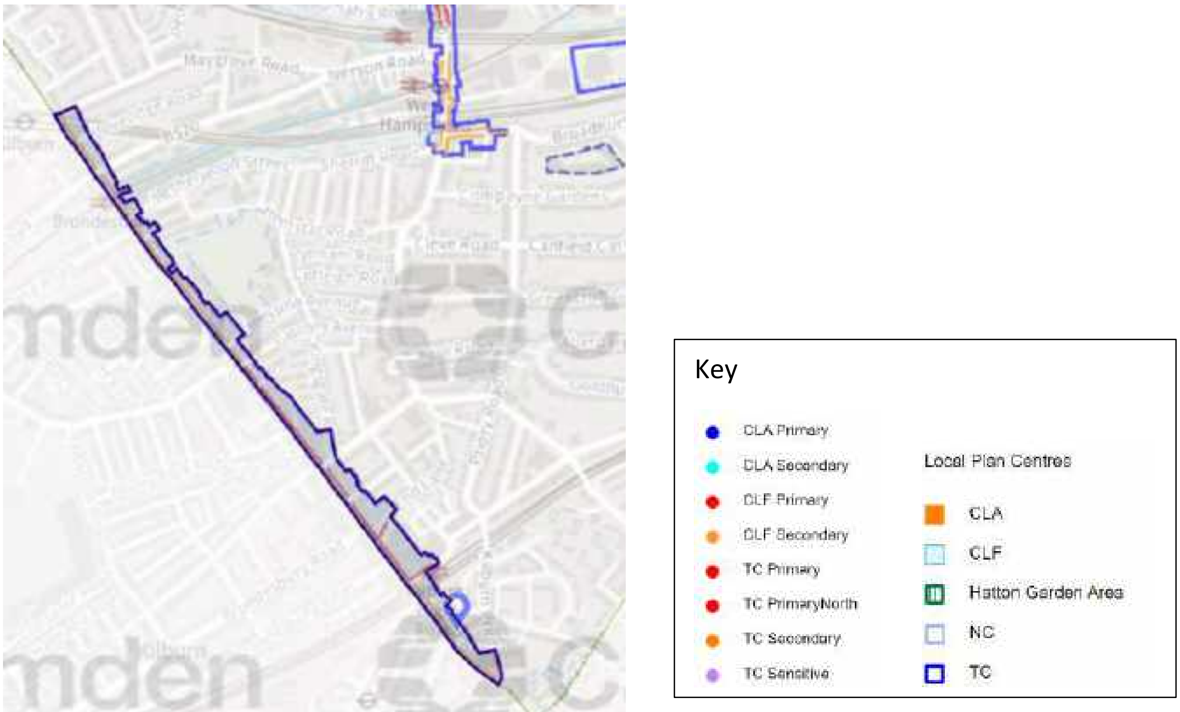
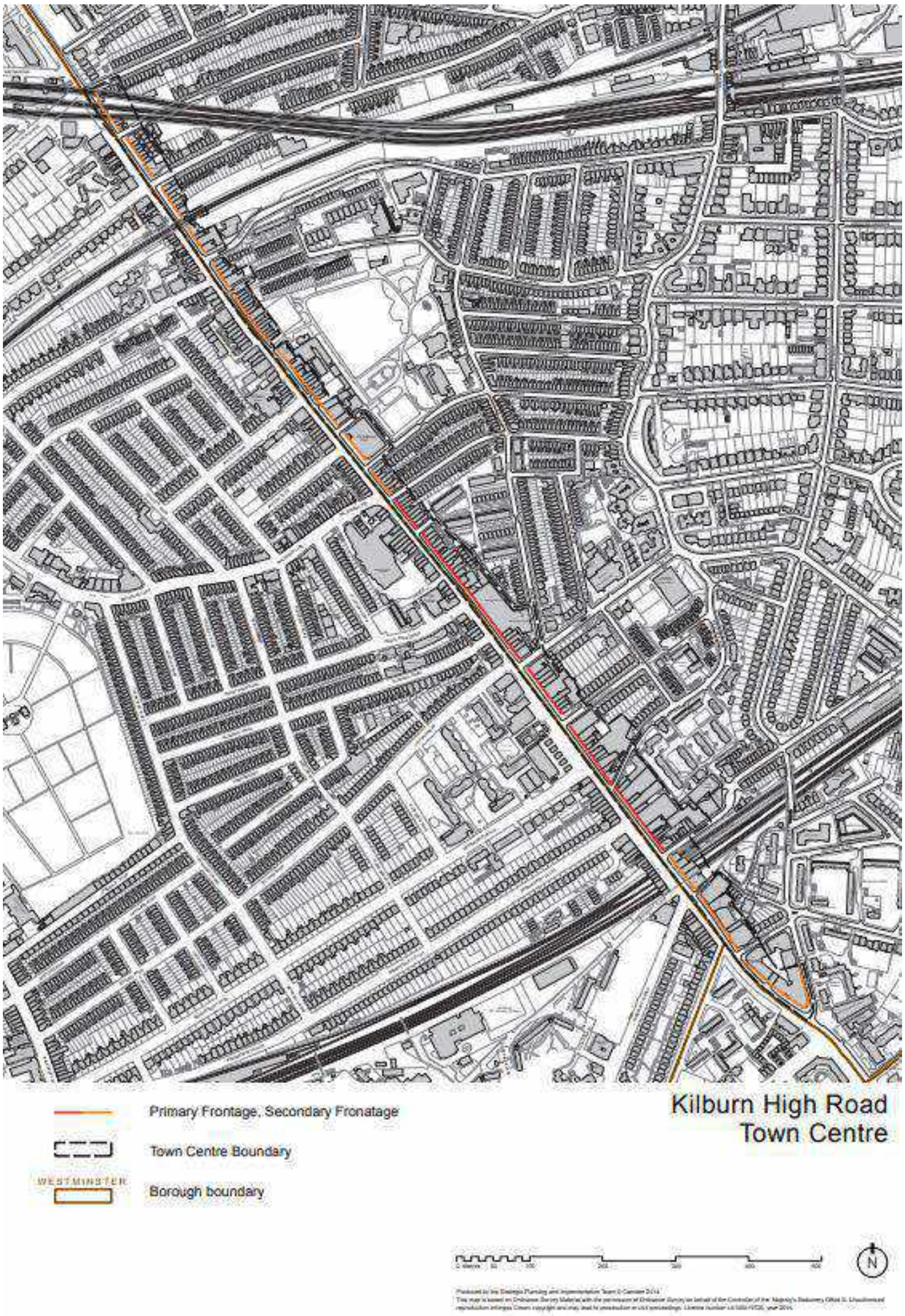


Figure 3.1: Kilburn High Road Boundary



Source: Camden Planning Guidance, Town Centres and Retail, January 2021

Current Planning Policies / Designations:

- As a defined Town Centre the following policies of the Camden Local Plan apply to the centre:
    - Policy E3 (Tourism);
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden's centres and other shopping areas);
    - Policy TC4 (Town centre uses); and
    - Policy TC5 (Small and independent shops).

- Kilburn is designated as a Major Town Centre in the London Plan 2021 with low commercial growth potential and medium residential growth potential.
- The part of the centre within Camden is designated as a Town Centre.
- It is within a Strategic Area for Regeneration as defined in Policy SD10 of the London Plan (Annex 1, Table A1.1).
- It is defined as a NT3 centre within The London Plan's night-time economy classification.

Footfall:

The figure below illustrates the pedestrian heat map for Kilburn and shows a particular concentration of footfall along Kilburn High Road, just north of Kilburn High Road overground station.

Kilburn Footfall Heat Map

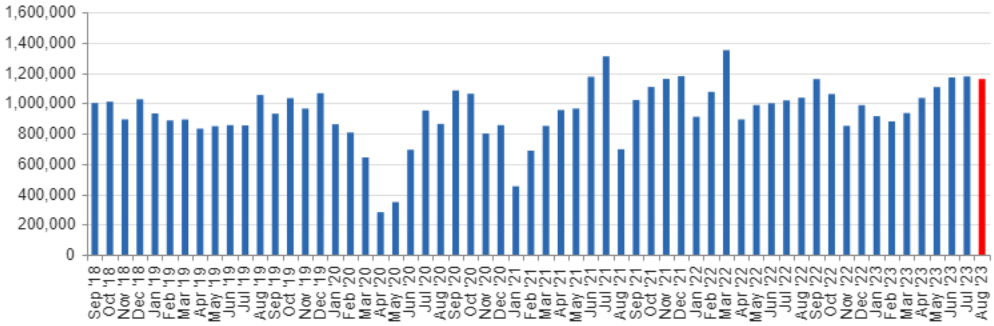
Source: Datscha

A busy section of Kilburn High Road (nearby to Boots, JD, Greggs etc.) was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, whilst footfall levels briefly dipped during periods of strict COVID-19 restrictions (April 2020, May 2020 and January 2021), pedestrian activity in this section of Kilburn High Road has been consistent over this period. Unlike several other centres covered, post-pandemic levels indicate a positive picture and now exceed those seen in 2019.

When comparing the 12-month period from September 2018 (pre-pandemic) to the 12-month period from September 2022 (post-pandemic), pedestrian activity has increased by 13% (monthly average from 0.92m up to 1.04m).

Footfall of Kilburn High Road, Kilburn (September 2018 – August 2023)



Source: Datscha

Catchment Area:

As would be expected for a centre that is located on the edge of the Camden borough, Kilburn High Road attracts a higher proportion of its trade from Zone 5, with just over a quarter of comparison expenditure coming from each of the zones. For convenience expenditure over half comes from Zone 5 compared with around 30% from Zone 3.

Most of the remainder of the centre's trade comes from elsewhere in London, with limited inflows from further afield.

Previous Retail Study Findings

Conclusions from Retail Town Centre Study 2013:

Key strengths identified for Kilburn High Road include:

- Kilburn High Road is continuing to perform a mainly functional role catering to the needs of local residents.
- Kilburn High Road is considered to be performing well in relation to the provision of convenience and service units, benefiting from the provision of three food stores in the centre and a high proportion of retail, financial and leisure services.
- Kilburn High Road has a good range of multiple and independent retailers.
- The leisure offer in the centre is particularly important to the strength of the centre and includes a theatre, pubs, restaurants and a nightclub.
- The centre is perceived to be safe, including during the evenings.

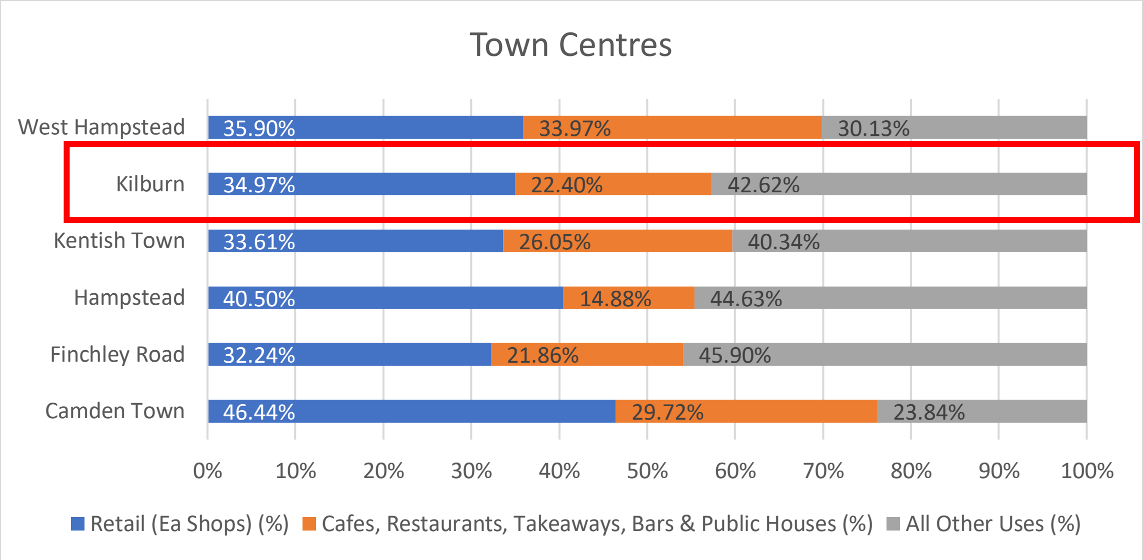
Key Weaknesses identified for Kilburn High Road have been identified as follows:

- The comparison retail offer in the centre is poor and below the national average in terms of units and floorspace.
- The comparison retail offer is dominated by discount retail, mainly provided by poor quality independent retailers.
- Whilst the vacancy rate in the centre is broadly in line with the national average, there has been an increase in the number of vacant units in the centre over the last year leading to 2013.
- The environmental quality of the centre varies from north to south, and the centre would benefit from shopfront improvements to improve the street scene, particularly in secondary areas which are blighted by vacancies and lower quality retail units.

- The busy A5 which dissects the centre results in problems with congestion which detract from the quality of the centre.
- The centre appears to be run down and is too busy.

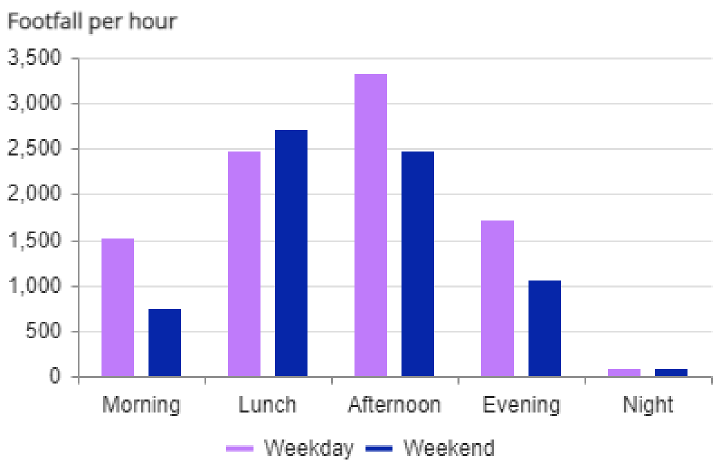
Diversity of Uses 2023

Kilburn High Road	Number	%	Camden Average (%)
Retail (Ea Shops)	64	35.0	37.4
Food & Beverage	41	22.4	23.3
All Other Uses	78	42.6	39.4
Total	183	100.0	100.0



EVENING / NIGHT TIME ECONOMY

Kilburn High Road	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	6	3.3	3.9%

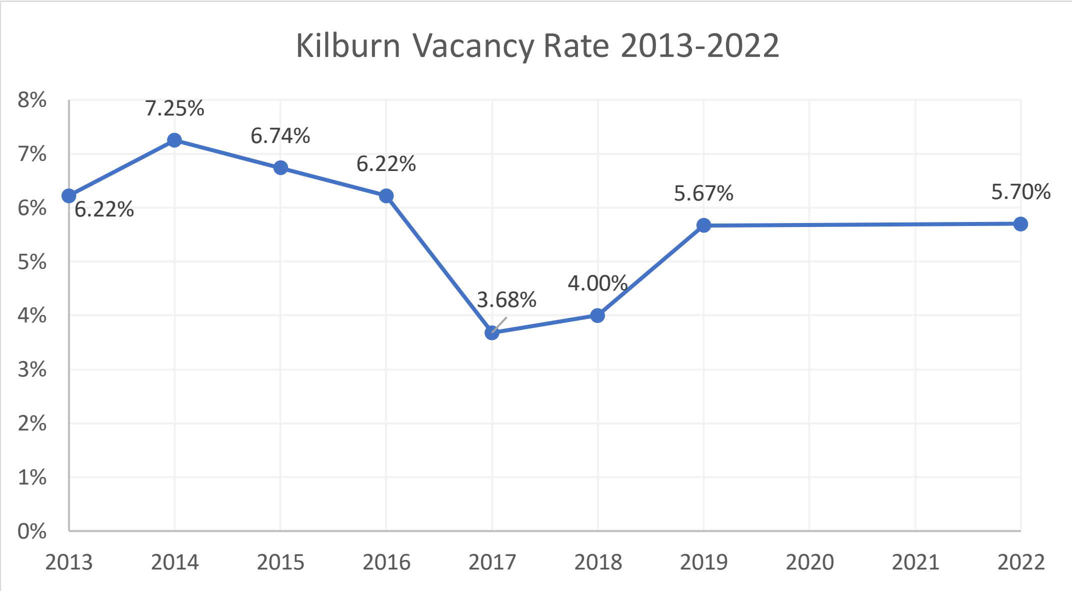


Conclusions on Diversity of Uses:

Kilburn High Road (Camden part) contains a good mix of uses with an average proportion of retail, F&B and other uses. The retail offer is concentrated within the Primary Shopping frontage and includes a Primark store that is likely to be an important draw given the popularity of discount and value retailers. The centre also includes a number of other national comparison retailers and a good range of both discount and quality foodstore operators. However, there is also a good range of independent retailers.

The F&B offer also provides a mix of national multiples and independents and evening footfall is good. The centre also provides a good range of leisure and service uses.

Vacancies 2013 - 2022



Vacancy rates have been relatively constant over time but at levels significantly below the UK average.

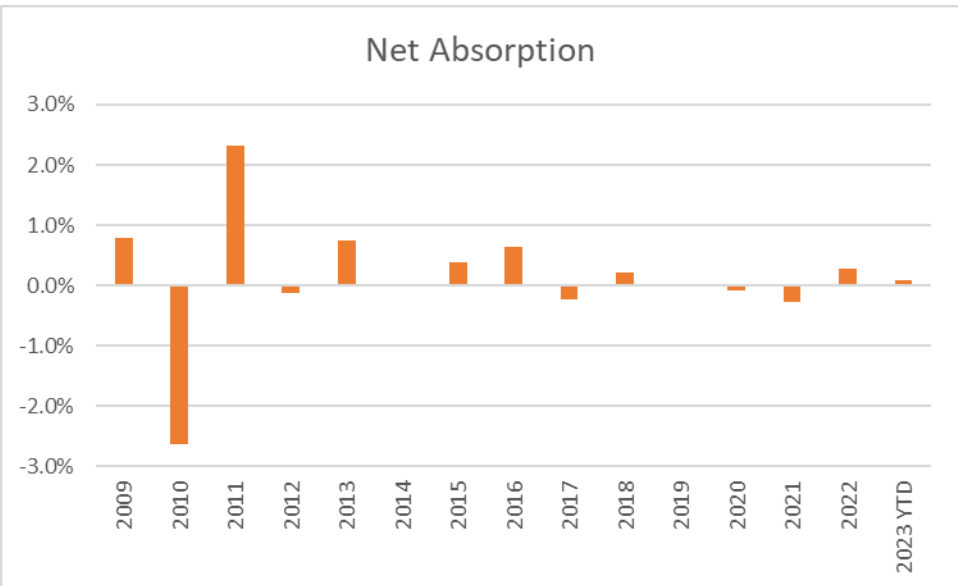
Changes in Representation and Market Demand

Market demand can be assessed by looking at net absorption of retail floorspace in the area.

> ***Net absorption*** = *additional floorspace occupied (move-ins) – floorspace vacated (move-outs)*

The net absorption rate in Kilburn High Road has been positive most years since 2009, with a notable exception in 2010. Overall, in average, net absorption was 0.1% per annum, which makes the area the third highest achieving retail centre in Camden in terms of net take-up of retail space.

It should however be noted that net absorption could have been constrained by limited new stock being delivered in the area, with based on CoStar data, a growth of the retail stock of only 0.6% between 2009 and 2023.



Commercial Rents

Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

The following rental levels are therefore broad estimates of prime Zone A rental tone within each location.

Location	Estimated Zone A rate
High Holborn/Kingsway	£190-210
King's Cross	£90-100
Tottenham Court Road	£90-100
Camden Town	£200-220
Finchley Road	£65 -70
Hampstead	£150-160
Kentish Town	£50-55
Kilburn High Road	£80-90
West Hampstead	£80-90
Seven Dials	£160-180
Fitzrovia	£85-95
Hatton Garden	£125-135
Museum Street	£70-80
Denmark Street	£80-90

Most Central and Inner London investments are mixed use by nature which impacts on the yield analysis for the individual constituent parts. Certain retail locations such as Bond Street attract the highest pricing driven by overseas investors and premium brands acquiring flagship stores but there is still good sentiment for other Central London locations including Covent Garden, Fitzrovia, Camden, Tottenham Court Road etc.

Whilst there has been a softening in retail value the lack of transactional volumes has meant comparable evidence within the Borough is limited so in the broadest of terms we would set out the following:

- Prime retail yields – 4.5% – 6.0%
- Good secondary retail yields – 6.0% – 7.0%

Accessibility

Transport for London's Public Transport Accessibility Levels (PTAL) ranking assesses connectivity across London, with a grading system indicating the strength of the public transport in any given area. The grading goes from 0 which indicates very poor access to public transport through to 6b which

indicates excellent access to public transport. The measures include walk time to public transport, the reliability of the public transport services and the number of services within the area.

A central point for Kilburn provides a PTAL output of 6a, indicating that public transport accessibility in the area is very good.

With Kilburn underground station and Brondesbury overground station to the north of the centre and Kilburn High Road overground station to the south, the area is well connected by rail services. Kilburn underground station has Jubilee line services running north west to Wembley and beyond and south east into central London and through to Stratford. Regular overground services from the two stations within the centre give access to places such as Richmond, Clapham, Camden and Euston.

Kilburn High Road (A5) provides a route through the centre and leads north to the M1 and south to Hyde Park. Traffic can be heavy during peak hours as can be expected on a route that leads in and out of central London. On-street parking is present in parts along the main road, supporting those looking to make a passing visit.

With up to three lanes of traffic, crossing can become challenging for pedestrians. A combination of traffic light crossings and pedestrian islands support in the movement of people by foot around the area. There is little to no dedicated cycle space which limits the safety of cyclists when travelling through Kilburn. Facilities to store bikes can be found, allowing cyclists to safely lock their bikes whilst in the area.

Perception of Safety and Occurrence of Crime

Between June 2022 and May 2023, crime data from the MET Police referenced 1,623 crimes in Kilburn High Road, representing 3.6% of all crimes committed in the London Borough of Camden over this period.

The following table present a breakdown of crimes committed in Kilburn High Road by crime type.

One in every four crimes committed in Kilburn High Road is related to anti-social behaviour, the crime category representing the highest proportion of all crimes in the area. This is followed by shoplifting, with one in ten crimes committed.

Kilburn High Road	# Crimes	As % of all crimes in area	As % of similar crime type in LB Camden
ALL Crimes	**1,623**	**100.0%**	3.6%
Anti-social behaviour	396	24.4%	4.1%
Bicycle theft	25	1.5%	2.3%
Burglary	89	5.5%	4.6%
Criminal damage and arson	71	4.4%	4.4%
Drugs	17	1.0%	1.4%
Other crime	11	0.7%	4.7%
Other theft	165	10.2%	2.0%
Possession of weapons	6	0.4%	4.7%
Public order	111	6.8%	5.1%
Robbery	48	3.0%	3.3%
Shoplifting	172	10.6%	11.1%
Theft from the person	89	5.5%	1.6%
Vehicle crime	123	7.6%	3.6%
Violence and sexual offences	300	18.5%	4.1%

Environmental Quality

There is a distinct lack of greenery within Kilburn High Road Town Centre. Whilst there are trees sporadically located along the pavements of the A5, these are few and far between, with little to no supporting green space or planters to soften the look and feel of the area. However, there is a large park/recreation space immediately east of the centre (Grange Park). This benefits from direct access from the High Road.

Within the centre, bollards are in place in some areas of high traffic congestion, particularly to the north of the centre, improving pedestrian safety within the area. Bins can regularly be found, assisting visitors with disposing of rubbish and reducing the likelihood of litter on the streets and pavements. Cycle parking is also available throughout the centre, allowing cyclists to safely lock their bikes whilst in the area.

Traffic along the A5 creates noise and air pollution and could be said to make the area less enjoyable and pleasant.

Investment Plans and Development Opportunities

There are limited investment and development plans in the public domain for Kilburn at the present time. However, both the LB Camden and LB Brent are supporting the One Kilburn initiative, which is a physical and online shared space allowing local community groups, the Councils and individuals to share projects and ideas for the area and to bring them forward.

Stakeholder Feedback

The One Kilburn initiative has identified a number of key themes from previous stakeholder engagement in the area and this is summarised on the One Kilburn website[1]. The key issues for the area are identified as follows:

- Concerns around road safety
- Lack of space for shopping and walking - narrow pavements in the centre are barely coping with the flow of people shopping.
- Air Quality and Noise - annual mean NO2 levels are significantly higher than the UK legal limit.
- Poor quality public realm - the public realm and street materials in Kilburn need renewing. Uneven surfaces are hazardous for older people and those with disabilities
- More cycle parking, benches and bins are needed to cater for the higher volumes of people using and visiting the town centre.
- Dirty streets - many businesses have private waste contracts, leading to bin bags being placed on the street at different hours of the day awaiting pick up.
- Lack of a sense of arrival and distinctiveness
- Lack of greening in the town centre - tree cover on Kilburn High Road is sporadic and clustered in short sections only with very little ground level greening. Kilburn Grange Park feels disconnected from Kilburn High Road, despite having an entrance straight off the main road.
- Concerns about crime and safety - anti-social behaviour, violence and sexual assault are the most common forms of crime in Kilburn.
- Difficult accessibility for disabled people and older residents – concerns have been raised by visitors on the accessibility of the town centre. This includes the general poor state of the paving, the use of cobbles, side road pedestrian crossings and crossing times provided at the signal junctions.
- Lack of community spaces - whilst Kilburn historically had many drinking houses and music halls for people to gather in the past, today's residents lack the diversity of spaces to meet their needs.

[1] One Kilburn - https://onekilburn.commonplace.is/proposals/what-people-say-about-kilburn/step1

- Responsibilities being split between different councils is being replaced by more collaboration on how to tackle the challenges in Kilburn. Critical to this new approach is sticking to the principle of Kilburn being treated as one place.
- Cycling is tricky in Kilburn, with Kilburn High Road being a barrier to getting safely across the neighbourhood due to a lack of safe cycle crossings.

Stakeholder engagement identified the following points of relevance to the Kilburn:

- Developer / landowner No. 2:
    - Camden's town centres tend to have very dense populus and have been and continue to be very popular.
    - They are resilient in the context of new occupiers coming in, people want to be there.
    - More present in a '7-day cycle' compared to historically when the busy periods were only from Friday-Sunday. Issues of quiet periods elevated.
    - Any of the central areas where there isn't an overarching landlord, where the mix can be evolved or played to a strength of an area, the weight of demand can have a detrimental effect on the area.
    - Rent is a major player in terms of health of an area but those that can afford rent do not necessarily add vitality to an area. What is right for the area isn't always what is coming through the development.
    - In the Camden centres of this nature, levels of trade are not as good as the leasing activity suggests. There is a question regarding the viability of some operators.

SWOT Analysis

Strengths

- Good mix of uses and balance between national multiples and independent businesses
- Good accessibility by public transport
- Strong convenience offer including international / ethnic food stores
- Medical centre and theatre within Brent frontage
- Varied range of retail units (size)

Weaknesses

- Centre divided by busy A5, making environment less attractive for pedestrians
- Long linear nature of the centre which diminishes the sense of place and can discourage extended visits to the whole of the centre
- Concentration of discount stores
- Low level of vacancy and new stock being delivered in the area
- Lack of greening

Opportunities

- Comparison offer appears to have improved since 2013

Threats

- Centre falls within two London borough authorities
- Lack of investment in some parts of Kilburn High Road contribute to the negative perception of the wider area

Conclusions

Kilburn High Road is a very accessible centre on the borough boundary with an extensive retail and F&B offer. It provides a good mix of uses and balance between national chains and independents. Its catchment area spans the borough boundary and trade draw from west of the Borough is good, although the centre has a limited wider draw.

The centre boundary is considered appropriate considering the composition and distribution of existing uses and the below average vacancy rate.

Location Analyst | Understanding Demographics

Learn about the people who live in an area, with a wide range of person and household demographics and projections, alongside Mosaic profiles, the top three Mosaic groups and their key characteristics.

This tool gives you the ability to compare selected target audiences against a base comparison such as the UK population, or another audience, to highlight the key characteristics of your audience; and how they differ.

Target values:

104,120 Population	47,248 Households

Report: Kilburn High Road Demographic Data

Kilburn High Road 1.5km (1.5 Km) UK22
Selected Target

VS

Base values:

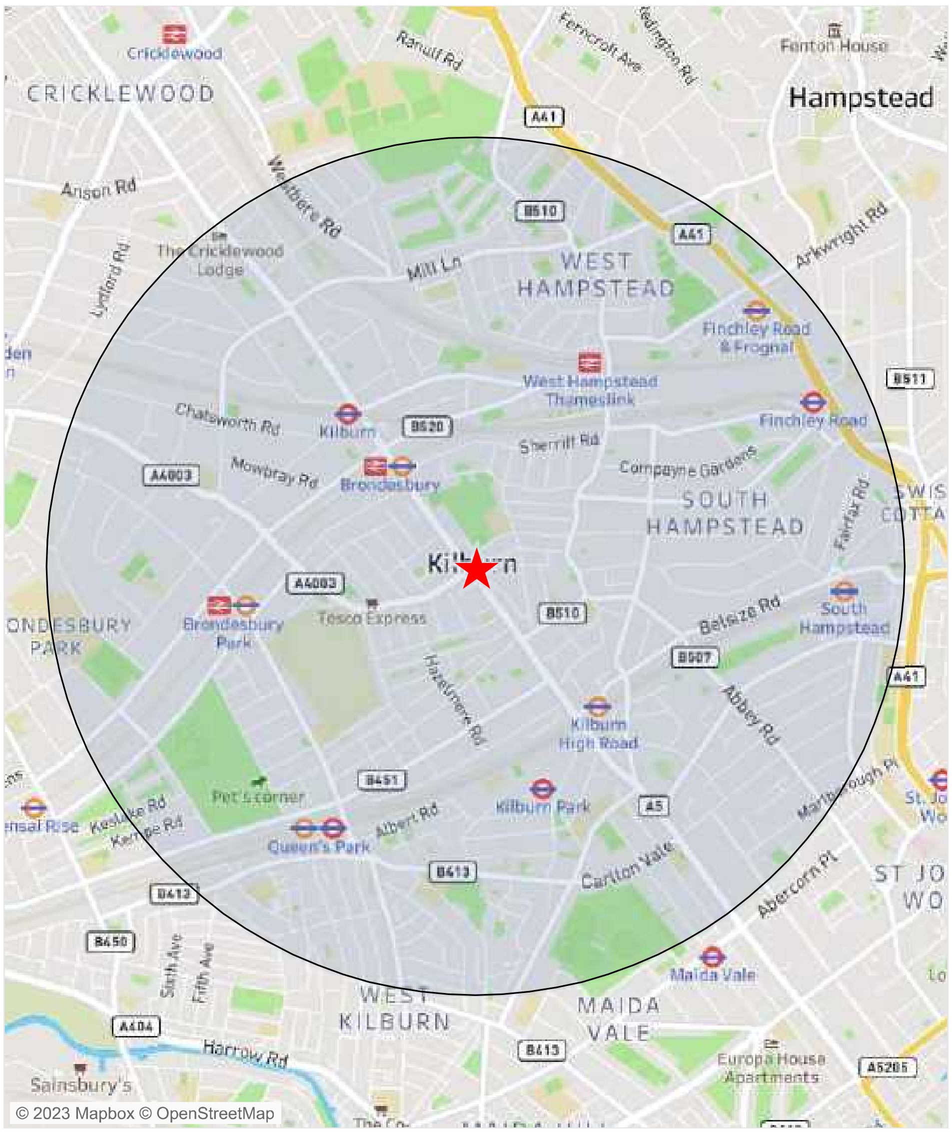
268,198 Population	116,712 Households

Camden
Selected Base

Did you know? We also offer enrichment at Person and Household level, using UK ConsumerView, and in-depth profiling through iCoder Online. Contact our Helpdesk to find out more.

Summary

Summary | Demographics | Segmentation | Raw Data



Make up of your area

	Target	Base
Total Population	104,120	268,198
Number of Females	51,447	130,635
Number of Males	52,673	137,563
Total Households	47,248	116,712
Economically Active	61,269	147,755
Economically Inactive	17,943	58,877
Owner Occupied (HH)	16,528	40,166
Private Rented (HH)	17,156	37,000

The population of the area is expected to change by: -12.17%.
This percentage change is expected by 2026 and based on future projections.

The three highest Mosaic groups are:

		Target	Base
A	City Prosperity	74,784	172,134
K	Municipal Tenants	24,106	72,391
O	Rental Hubs	3,963	22,321

Report generated on December 20, 2023

If you have any queries, please don't hesitate to contact us and a member of our team will be happy to help.
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Kilburn High Road 1.5km (1.5 Km) UK22
Selected Target

VS

Base values:

268,198	116,712
Population	Households

Camden
Selected Base

Select Chart
◉ Percentage
○ Index

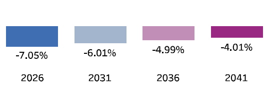
Chart sort
◉ Sequence
○ High to Low

Select Ranking and Highlights by: % (Highest population) or Index (Greatest difference compared to the selected base).

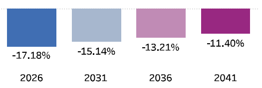
Demographics

Summary | Demographics | Segmentation | Raw Data

Population change | Female



Male



Population change

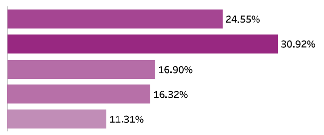
	Target	% Change since 2021	Base	% Change since 2021
Population in 2026	91,444	-12.17%	222,328	-17.10%
Population in 2031	93,053	-10.63%	229,851	-14.30%
Population in 2036	94,596	-9.15%	236,326	-11.88%
Population in 2041	96,051	-7.75%	241,510	-9.95%

Economically Active

	Target	Target %	Base	Base %	Index
Employee	45,321	73.97%	104,520	70.74%	105
Self employed with employees	2,264	3.70%	6,635	4.49%	82
Self employed without employees	8,699	14.20%	22,900	15.50%	92
Unemployed	2,748	4.49%	5,998	4.06%	110
Full-time students	2,237	3.65%	7,702	5.21%	70

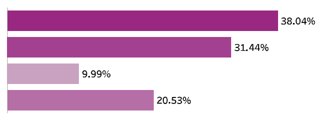
Economically Inactive

	Target	Target %	Base	Base %	Index
Retired	4,405	24.55%	11,777	20.00%	123
Student	5,547	30.92%	27,095	46.02%	67
Looking after home/family	3,032	16.90%	7,705	13.09%	129
Permanently sick/disabled	2,929	16.32%	7,314	12.42%	131
Other	2,029	11.31%	4,986	8.47%	134



Social Grade

	Target	Target %	Base	Base %	Index
AB Higher & intermediate manage/admin/prof	15,210	38.04%	37,662	39.20%	97
C1 Supervisory, cleric, junior manage/admin/prof	12,573	31.44%	33,021	34.37%	91
C2 Skilled manual workers	3,993	9.99%	8,110	8.44%	118
DE Semi-skilled/unskilled manual workers; on state benefit, unemployed, lowest grade workers	8,210	20.53%	17,283	17.99%	114

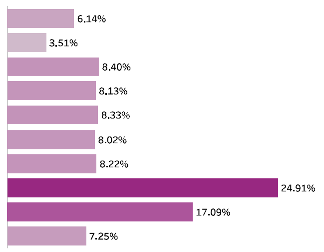


Tenure

	Target	Target %	Base	Base %	Index
Owner Occupied (HH)	16,528	34.98%	40,166	34.41%	102
Social Rented (HH)	12,983	27.48%	37,594	32.21%	85
Private Rented (HH)	17,156	36.31%	37,000	31.70%	115

Household Income

	Target	Target %	Base	Base %	Index
£14,999 or Less	2,900	6.14%	7,238	6.20%	99
£15,000 to £19,999	1,659	3.51%	4,618	3.96%	89
£20,000 to £29,999	3,967	8.40%	11,072	9.49%	88
£30,000 to £39,999	3,843	8.13%	10,837	9.29%	88
£40,000 to £49,999	3,938	8.33%	10,088	8.64%	96
£50,000 to £59,999	3,789	8.02%	9,050	7.75%	103
£60,000 to £69,999	3,885	8.22%	9,192	7.88%	104
£70,000 to £99,999	11,769	24.91%	25,558	21.90%	114
£100,000 to £149,999	8,074	17.09%	20,265	17.36%	98
£150,000 or Over	3,425	7.25%	8,794	7.53%	96

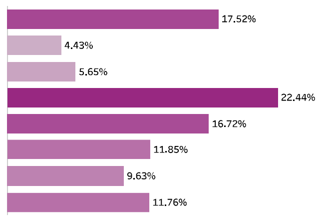


Dwelling type

	Target	Target %	Base	Base %	Index
Detached	542	1.42%	1,283	1.30%	109
Semi-detached	1,027	2.68%	2,179	2.21%	121
Bungalow	24	0.06%	69	0.07%	91
Terraced (including end-terrace)	3,450	9.02%	8,046	8.17%	110
Flat, maisonette or apartment	33,222	86.82%	86,956	88.25%	98

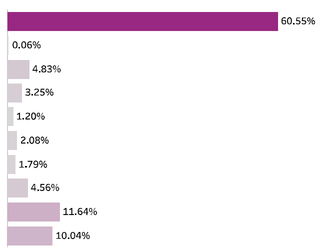
Age Bands

	Target	Target %	Base	Base %	Index
Under 15	18,239	17.52%	43,647	16.27%	108
15-19	4,613	4.43%	15,110	5.63%	79
20-24	5,888	5.65%	22,966	8.56%	66
25-34	23,366	22.44%	56,301	20.99%	107
35-44	17,408	16.72%	40,141	14.97%	112
45-54	12,339	11.85%	32,625	12.16%	97
55-64	10,026	9.63%	24,757	9.23%	104
65+	12,241	11.76%	32,651	12.17%	97



Ethnic mix

	Target	Target %	Base	Base %	Index
White	63,046	60.55%	174,968	65.24%	93
Gypsy / Traveller / Irish Traveller	62	0.06%	191	0.07%	84
Mixed / Multiple Ethnic Groups	5,025	4.83%	12,321	4.59%	105
Asian / Asian British: Indian	3,387	3.25%	7,423	2.77%	118
Asian / Asian British: Pakistani	1,247	1.20%	1,794	0.67%	179
Asian / Asian British: Bangladeshi	2,166	2.08%	16,192	6.04%	34
Asian / Asian British: Chinese	1,867	1.79%	8,044	3.00%	60
Asian / Asian British: Other Asian	4,749	4.56%	10,974	4.09%	111
Black / African / Caribbean / Black British	12,122	11.64%	20,892	7.79%	149
Other Ethnic Group	10,449	10.04%	15,399	5.74%	175



If you have any queries, please don't hesitate to contact us and a member of our team will be happy to help.
Call us on 0115 968 5099 or email EMSUKHelpdesk@experian.com

Location Analyst | Understanding Demographics

Learn about the people who live in an area, with a wide range of person and household demographics and projections, alongside Mosaic profiles, the top three Mosaic groups and their key characteristics.

This tool gives you the ability to compare selected target audiences against a base comparison such as the UK population, or another audience, to highlight the key characteristics of your audience; and how they differ.

Target values:

104,120	47,248
Population	Households

Report: **Kilburn High Road Demographic Data**

Kilburn High Road 1.5km (1.5 Km) UK22
Selected Target

VS

Base values:

268,198	116,712
Population	Households

Camden
Selected Base

Select Chart
- (●) Percentage
- ( ) Index
- ( ) Penetration

Select Ranking and Highlights by: % (Highest population) or Index (Greatest difference compared to the selected base) or Penetration (The number of targets found in the base area).

Segmentation

Summary | Demographics | Segmentation | Raw Data

Match Level: Pop

Chart Sort: Segment Order

Mosaic UK 7

1st	2nd	3rd
A City Prosperity 74,784 (71.82%) | 112	K Municipal Tenants 24,106 (23.15%) | 86	O Rental Hubs 3,963 (3.81%) | 46

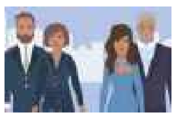


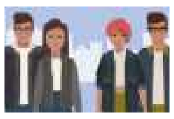
A City Prosperity	K Municipal Tenants	O Rental Hubs
Urban areas	Council/HA flats	Young singles and homesharers
High value flats	Densely populated	Rent flats
High income	No qualifications	Very high internet use
Cosmopolitan lifestyles	Low discretionary income	Internet via smartphone
High-tech homes	Low environmental impact gap	Watch videos online
Uber passengers	Fuel poverty	Don't use landlines

		Target	Base	%
A	City Prosperity	74,784	172,134	71.82%
B	Prestige Positions	0	293	0.00%
C	Country Living	0	0	0.00%
D	Rural Reality	0	0	0.00%
E	Senior Security	0	38	0.00%
F	Suburban Stability	0	0	0.00%
G	Domestic Success	0	0	0.00%
H	Aspiring Homemakers	312	463	0.30%
I	Family Basics	0	0	0.00%
J	Transient Renters	0	0	0.00%
K	Municipal Tenants	24,106	72,391	23.15%
L	Vintage Value	418	556	0.40%
M	Modest Traditions	0	0	0.00%
N	Urban Cohesion	538	2	0.52%
O	Rental Hubs	3,963	22,321	3.81%
U	Unclassified	0	0	0.00%

Mosaic UK 7 Daytime

1st	2nd	3rd
A City Prosperity 37,268 (59.90%) | 131	K Municipal Tenants 13,928 (22.39%) | 129	O Rental Hubs 4,288 (6.89%) | 58





		Target	Base	%
A	City Prosperity	37,268	176,394	59.90%
B	Prestige Positions	722	14,150	1.16%
C	Country Living	85	4,020	0.14%
D	Rural Reality	37	1,987	0.06%
E	Senior Security	159	4,506	0.26%
F	Suburban Stability	119	3,646	0.19%
G	Domestic Success	1,178	21,662	1.89%
H	Aspiring Homemakers	548	7,863	0.88%
I	Family Basics	299	4,725	0.48%
J	Transient Renters	61	1,377	0.10%
K	Municipal Tenants	13,928	66,562	22.39%
L	Vintage Value	436	3,010	0.70%
M	Modest Traditions	30	744	0.05%
N	Urban Cohesion	3,061	28,059	4.92%
O	Rental Hubs	4,288	45,710	6.89%
U	Unclassified	0	0	0.00%

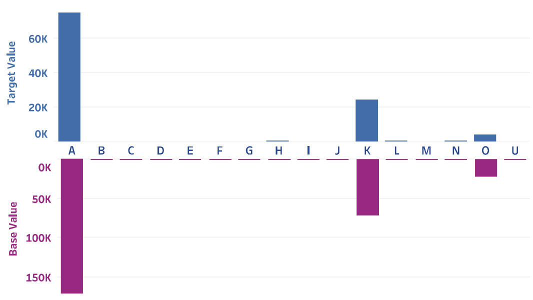
Mosaic Profile | Groups

	Target	Target %	Base	Base %	Index
A	74,784	71.82%	172,134	64.18%	112
B	0	0.00%	293	0.11%	0
C	0	0.00%	0	0.00%	0
D	0	0.00%	0	0.00%	0
E	0	0.00%	38	0.01%	0
F	0	0.00%	0	0.00%	0
G	0	0.00%	0	0.00%	0
H	312	0.30%	463	0.17%	174
I	0	0.00%	0	0.00%	0
J	0	0.00%	0	0.00%	0
K	24,106	23.15%	72,391	26.99%	86
L	418	0.40%	556	0.21%	194
M	0	0.00%	0	0.00%	0
N	538	0.52%	2	0.00%	69,272
O	3,963	3.81%	22,321	8.32%	46
U	0	0.00%	0	0.00%	0

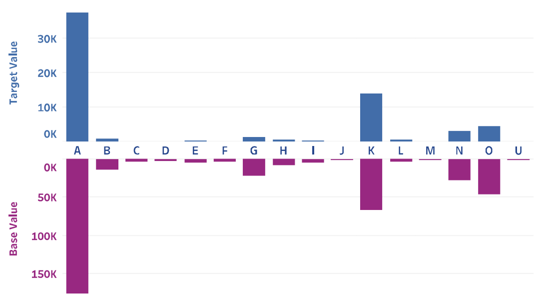
Mosaic Daytime Profile | Groups

	Target	Target %	Base	Base %	Index
A	37,268	59.90%	176,394	45.89%	131
B	722	1.16%	14,150	3.68%	32
C	85	0.14%	4,020	1.05%	13
D	37	0.06%	1,987	0.52%	12
E	159	0.26%	4,506	1.17%	22
F	119	0.19%	3,646	0.95%	20
G	1,178	1.89%	21,662	5.64%	34
H	548	0.88%	7,863	2.05%	43
I	299	0.48%	4,725	1.23%	39
J	61	0.10%	1,377	0.36%	27
K	13,928	22.39%	66,562	17.32%	129
L	436	0.70%	3,010	0.78%	90
M	30	0.05%	744	0.19%	25
N	3,061	4.92%	28,059	7.30%	67
O	4,288	6.89%	45,710	11.89%	58
U	0	0.00%	0	0.00%	0

Mosaic Profile | Groups



Mosaic Daytime Profile | Groups



CAMDEN RETAIL STUDY – TOWN CENTRE HEALTH CHECKS

WEST HAMPSTEAD

Description

Current Designation: Town Centre as defined in the Camden Local Plan 2017 and a District Centre in The London Plan.

Description of Centre:

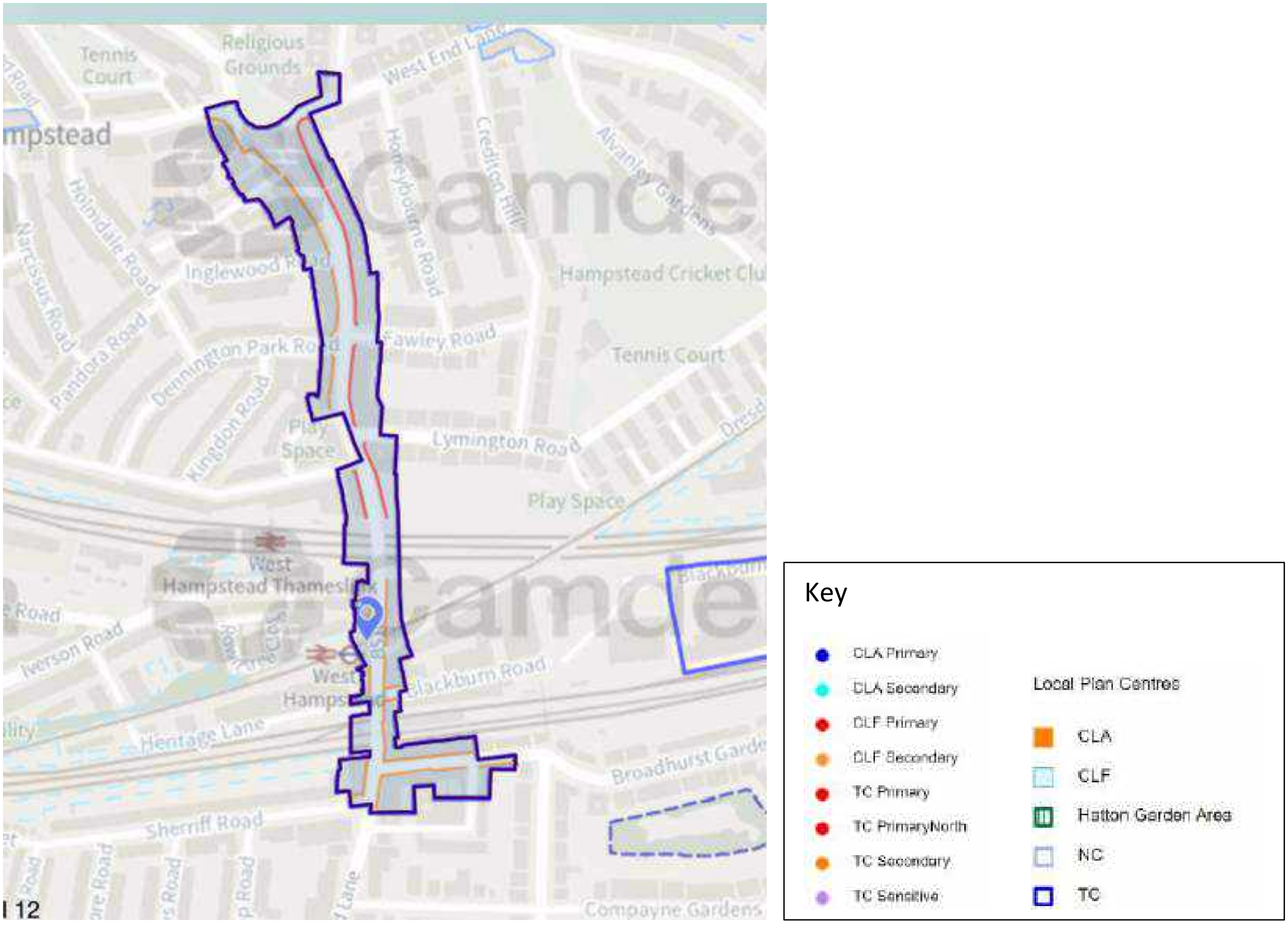
West Hampstead is located in the north west of the borough, between Finchley Road/Swiss Cottage to the east and Kilburn to the west. The centre is linear in nature and extends along West End Lane. It is the smallest town centre in the London Borough of Camden.

The Primary frontage areas are located to the north of the centre, on the east side of West End Lane. Secondary frontages are to the west and south. There is a small part of the centre to the south of the railway lines.

The centre is highly accessible by public transport with three stations (Thameslink, London Underground and London Overground).

In Camden's Planning Guidance 2021 it notes that:

The strength of West Hampstead's offer is in service provision and in particular the leisure sector. The convenience role is smaller and is serviced by three smaller food stores. It is a priority to secure more convenience retail in the centre to encourage more local and sustainable shopping trips. The centre has a high proportion of independent retailers.



Current Planning Policies / Designations:

- As a defined Town Centre, the following policies of the Camden Local Plan apply to the centre:
    - Policy E3 (Tourism);
    - Policy TC1 (Quality and location of retail development);

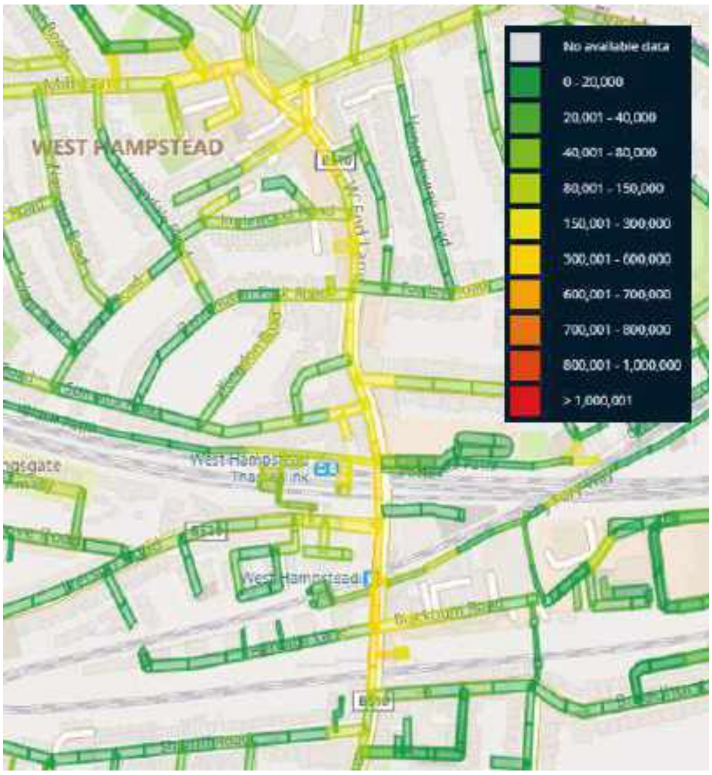
- Policy TC2 (Camden's centres and other shopping areas);
- Policy TC4 (Town centre uses); and
- Policy TC5 (Small and independent shops).

- The town centre designation includes two areas covered by Conservation Areas – West End Green in the north and South Hampstead in the south.
- West Hampstead is designated as a District Town Centre in the London Plan 2021 with low potential for commercial growth and medium residential growth potential.
- It is within a Strategic Area for Regeneration as defined in Policy SD10 of the London Plan (Annex 1, Table A1.1).
- West Hampstead is allocated as an Area of Intensification (growth area) in the London Plan.

Footfall:

The figure below illustrates the pedestrian heat map for West Hampstead and shows a fair footfall level throughout the area along West End Lane.

West Hampstead Footfall Heat Map



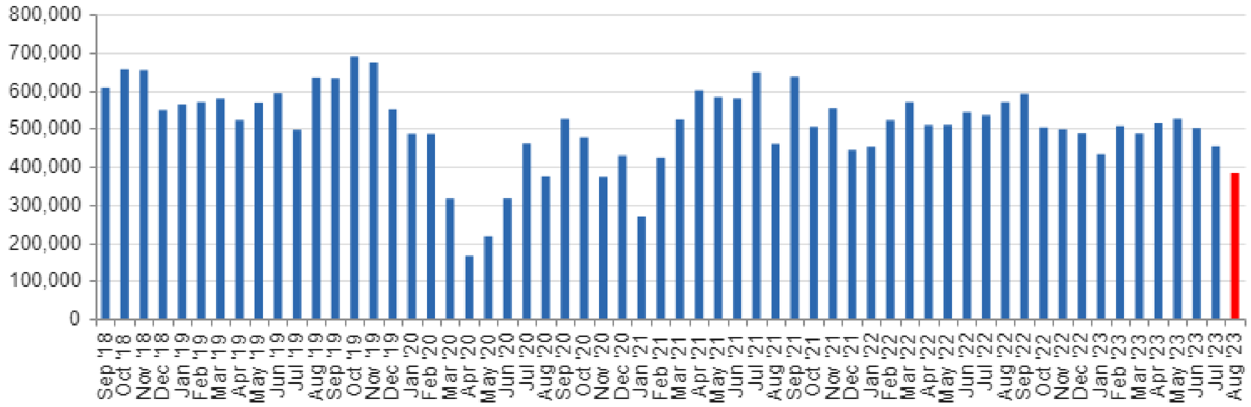
Source: Datscha

A busy section along West End Lane (near the overground station, Starbucks and Costa Coffee) was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall has been relatively stable over this period. Whilst there was a fall in activity during the strictest periods of COVID-19 restrictions, the drop-off that can be seen for West Hampstead is not as severe as seen in other centres.

When comparing the 12-month period from September 2018 (pre-pandemic) to the 12-month period from September 2022 (post-pandemic), pedestrian activity has fallen by 16% (monthly average from 580,000 down to 490,000).

Footfall of West End Lane, West Hampstead (September 2018 – August 2023)



Source: Datscha

Catchment Area:

West Hampstead serves a mainly local catchment drawing nearly three-quarters of its convenience trade from Zones 3 and 4. Comparison trade draw appears to be more extensive, with trade draw across London but absolute turnover is low.

Use of Centre:

The centre primarily provides a convenience offer for local residents. Spend on comparison goods is more limited and inflows of spend from outside of Camden are more limited in both cases. Spend on F&B is similar to that on comparison goods indicating this provides an important element of the centre's offer.

Previous Retail Study Findings

Conclusions from Retail Town Centre Study 2013:

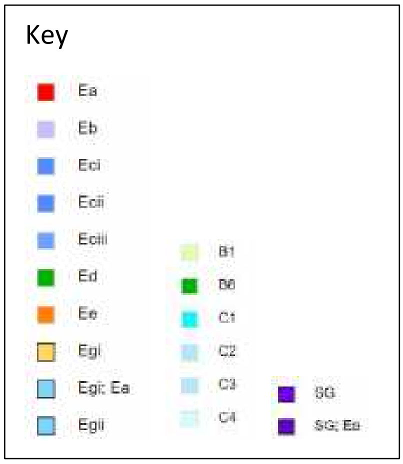
Key strengths identified for West Hampstead include:

- The strength of West Hampstead's offer is its service provision, particularly the leisure sector which draws a high proportion of visitors.
- The centre has good accessibility and strong links with the wider Greater London area.
- There is a relatively good level of retailer demand.

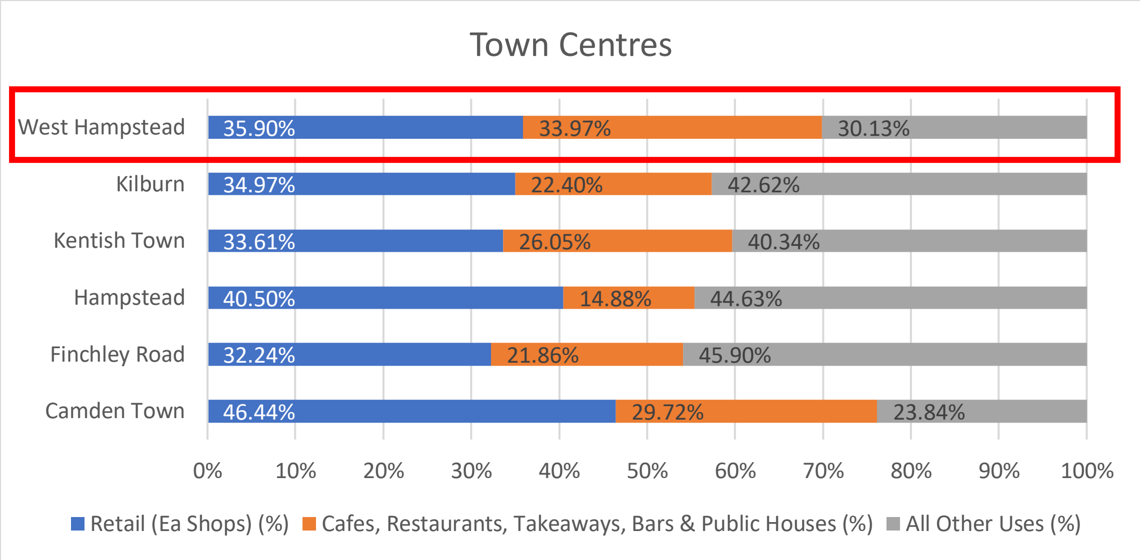
Key weaknesses identified for West Hampstead include:

- As the smallest centre in the borough, it e attracts a smaller proportion of frequent visitors, with residents more likely to visit larger, higher order centres, particularly for comparison goods shopping.
- West Hampstead has a limited representation of comparison goods retailers within the centre.
- The convenience goods offer in the centre is also relatively weak, served by three main food stores distributed throughout the centre which are of a small scale and have a local catchment.
- The quality of the environment is relatively poor, particularly in the south of the centre.

Diversity of Uses 2023

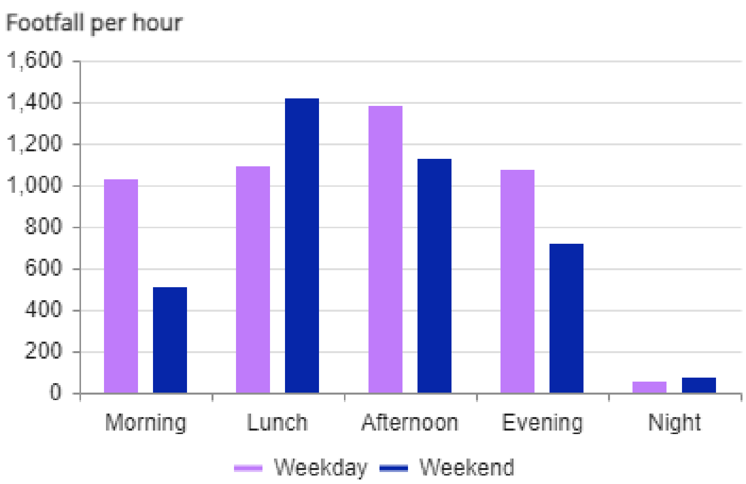


West Hampstead	Number	%	Camden Average (%)
Retail (Ea Shops)	56	35.9	37.4
Food & Beverage	53	34.0	23.3
All Other Uses	47	30.1	39.4
Total	156	100.0	100.0



EVENING / NIGHT TIME ECONOMY

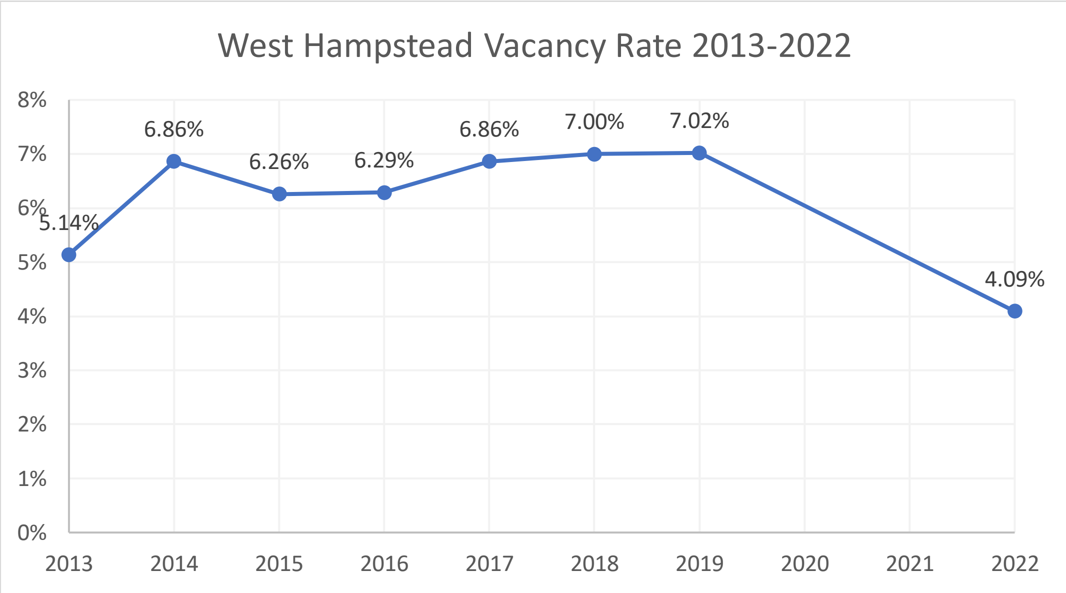
West Hampstead	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	7	4.3	3.9%



Conclusions on Diversity of Uses:

The retail offer in West Hampstead has decreased since 2014 but remains at a similar level to the Camden average. The F&B offer is particularly strong and has been increasing in the areas to the north of the centre. As a result footfall in the evening and at weekends is strong.

Vacancies 2013 - 2022



Vacancy rates have been decreasing over the last decade and are currently at their lowest level for more than 10 years.

Changes in Representation and Market Demand

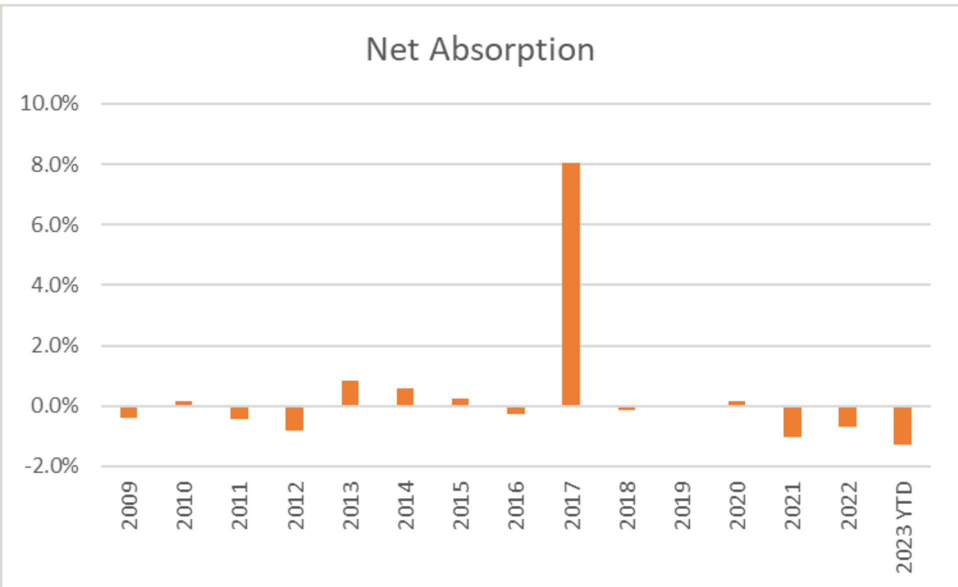
Market demand can be assessed by looking at net absorption of retail floorspace in the area.

> ***Net absorption*** = *additional floorspace occupied (move-ins) – floorspace vacated (move-outs)*

The net absorption rate in West Hampstead has been close to 0% most years since 2009. It can be noted the particularly strong net take up of space in 2017 (8% of all floorspace in the area), which has boosted the overall take-up of space since 2009.

It should also be noted that additional retail floorspace was delivered in the area in 2017, which was immediately taken up by new occupiers.

With low levels of vacancy, the net absorption data compared to floorspace delivery data would suggest a potential demand for additional retail floorspace in the area.



Commercial Rents

Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

The following rental levels are therefore broad estimates of prime Zone A rental tone within each location.

Location	Estimated Zone A rate
High Holborn/Kingsway	£190-210
King’s Cross	£90-100
Tottenham Court Road	£90-100
Camden Town	£200-220
Finchley Road	£65 -70
Hampstead	£150-160
Kentish Town	£50-55
Kilburn High Road	£80-90
West Hampstead	£80-90
Seven Dials	£160-180
Fitzrovia	£85-95
Hatton Garden	£125-135
Museum Street	£70-80
Denmark Street	£80-90

Most Central and Inner London investments are mixed use by nature which impacts on the yield analysis for the individual constituent parts. Certain retail locations such as Bond Street attract the highest pricing driven by overseas investors and premium brands acquiring flagship stores but there is still good sentiment for other Central London locations including Covent Garden, Fitzrovia, Camden, Tottenham Court Road etc.

Whilst there has been a softening in retail value the lack of transactional volumes has meant comparable evidence within the Borough is limited so in the broadest of terms we would set out the following:

- Prime retail yields – 4.5% – 6.0%
- Good secondary retail yields – 6.0% – 7.0%

Accessibility

Transport for London’s Public Transport Accessibility Levels (PTAL) ranking assesses connectivity across London, with a grading system indicating the strength of the public transport in any given area.

The grading goes from 0 which indicates very poor access to public transport through to 6b which indicates excellent access to public transport. The measures include walk time to public transport, the reliability of the public transport services and the number of services within the area.

A central point for West Hampstead provides a PTAL output of 5, indicating that public transport accessibility in the area is good.

West Hampstead underground, overground and rail stations are all clustered within close distance, making it easy for travellers to switch between transport modes. The underground station is serviced by the Jubilee line which offers routes to places such as Wembley, Baker Street, Waterloo and Stratford. The overground station provides services running east to Hampstead Heath, Camden and beyond and west/ south to Acton, Shepherd's Bush and beyond. The railway station is serviced by Thameslink trains that connect passengers to Brighton, St Albans, Luton and more. However, it should be noted that whilst the overground stations have lifts to platform level, the Jubilee Line station does not.

West End Lane cuts through the heart of West Hampstead and can be followed south towards Marylebone. There are cycle lanes in parts, along with facilities for safe bike storage to encourage cyclists to pass through and visit the area. Pavements are wide and clear for much of the area, with traffic light crossings, zebra crossings and pedestrian islands assisting those navigating West End Lane and West Hampstead.

Perception of Safety and Occurrence of Crime

Between June 2022 and May 2023, crime data from the MET Police referenced 1,054 crimes in West Hampstead, representing 2.3% of all crimes committed in the London Borough of Camden over this period.

The following table present a breakdown of crimes committed in West Hampstead by crime type.

Anti-social behaviour and violence and sexual offences are the most common types of crime in the area, representing respectively 25.7% and 19.9% of all crimes committed in the area.

West Hampstead	# Crimes	As % of all crimes in area	As % of similar crime type in LB Camden
ALL Crimes	**1,054**	**100.0%**	2.3%
Anti-social behaviour	271	25.7%	2.8%
Bicycle theft	13	1.2%	1.2%
Burglary	55	5.2%	2.8%
Criminal damage and arson	66	6.3%	4.1%
Drugs	17	1.6%	1.4%
Other crime	2	0.2%	0.9%
Other theft	104	9.9%	1.3%
Possession of weapons	2	0.2%	1.6%
Public order	63	6.0%	2.9%
Robbery	21	2.0%	1.5%
Shoplifting	92	8.7%	6.0%
Theft from the person	55	5.2%	1.0%
Vehicle crime	83	7.9%	2.4%
Violence and sexual offences	210	19.9%	2.9%

Environmental Quality

A large part of West Hampstead Town Centre is covered by the West End Green Conservation Area. This designation recognises the importance of the area and its qualities and looks to preserve this going forward.

A small patch of green space (West End Green) can be found to the northern edge of the centre with trees, grass and benches to be enjoyed. Trees can be found dotted along the pavements of West End Lane and various leisure outlets have planted dividers to mark their outside space which adds to the greenery and vibrancy of the centre. This is particularly true further north of the centre. In the south such provision is more limited although recent development at 187 West End Lane has allowed the introduction of a small square with seating and planters.

Traffic along West End Lane creates noise and air pollution and could be said to detract from the area's potential to be a pleasant and enjoyable place to spend time.

In terms of street furniture, there are bins, benches and bike racks across the centre to improve cleanliness, visitor experience and cycle accessibility.

Investment Plans and Development Opportunities

There are limited investment and development plans in the public domain for West Hampstead at the present time. However, the centre is close to Finchley Road / Swiss Cottage and specifically the planned redevelopment of the O2 centre. This is expected to improve pedestrian links between the two areas.

Stakeholder Feedback

Stakeholder engagement identified the following points of relevance to the West Hampstead:

- Developer / landowner 2:
    - Camden's town centres tend to have very dense populus and have been and continue to be very popular.
    - They are resilient in the context of new occupiers coming in, people want to be there.
    - More present in a '7-day cycle' compared to historically when the busy periods were only from Friday-Sunday. Issues of quiet periods elevated.
    - Any of the central areas where there isn't an overarching landlord, where the mix can be evolved or played to a strength of an area, the weight of demand can have a detrimental affect on the area.
    - Rent is a major player in terms of health of an area but those that can afford rent do not necessarily add vitality to an area. What is right for the area isn't always what is coming through the development.
    - In the Camden centres of this nature, levels of trade are not as good as the leasing activity suggests. There is a question regarding the viability of some

SWOT Analysis

Strengths

- Convenience offer strengthened by opening of Little Waitrose in 2015 and M&S Simply Food in 2017
- Strong F&B offer and footfall in evenings and at weekends
- Low vacancies
- Variety and interest provided by independent businesses
- Evidenced demand for additional retail space in the area

Weaknesses

- Disconnect between north and south of the centre due to the railway lines

Opportunities

- Local Growth Area and investment

Threats

- Declining footfall
- Limited comparison offer
- Potential impact of improved provision and access in Finchley Road/ Swiss Cottage Town Centre as a result of the O2 redevelopment

Conclusions

West Hampstead is an important centre for the local population and provides a good convenience and F&B offer. Vacancies are low and there is occupier demand for space, but footfall levels remain below those seen pre-pandemic.

The centre boundary is therefore considered appropriate given the composition and distribution of existing uses and the below average vacancy rate.

Location Analyst | Understanding Demographics

Learn about the people who live in an area, with a wide range of person and household demographics and projections, alongside Mosaic profiles, the top three Mosaic groups and their key characteristics.

This tool gives you the ability to compare selected target audiences against a base comparison such as the UK population, or another audience, to highlight the key characteristics of your audience; and how they differ.

Target values:

97,401	44,804
Population	Households

Report: West Hampstead Demographic Data

West Hampstead 1.5km (1.5 Km) UK22
Selected Target

VS

Base values:

268,198	116,712
Population	Households

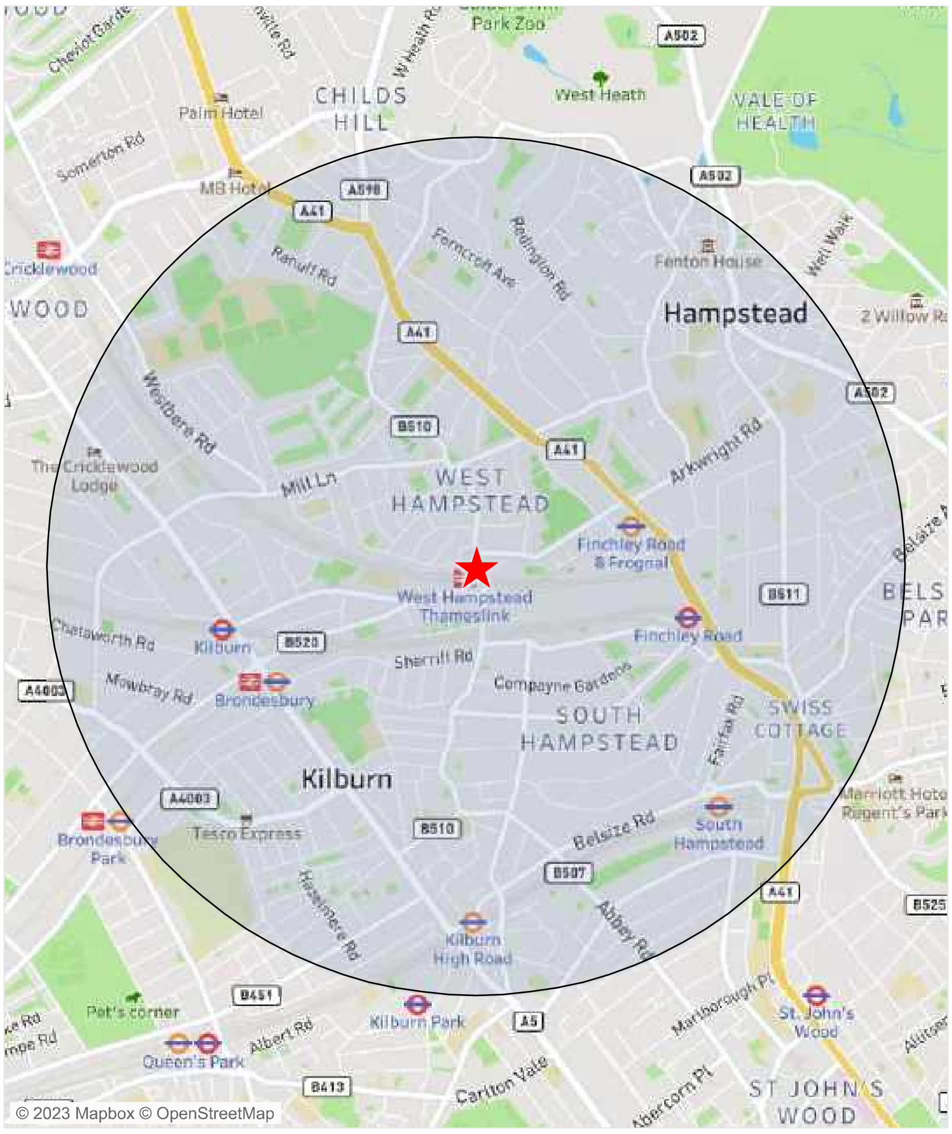
Camden
Selected Base

Did you know?

We also offer enrichment at Person and Household level, using UK ConsumerView, and in-depth profiling through iCoder Online. Contact our Helpdesk to find out more.

Summary

Summary | Demographics | Segmentation | Raw Data



Make up of your area

	Target	Base
Total Population	97,401	268,198
Number of Females	47,744	130,635
Number of Males	49,657	137,563
Total Households	44,804	116,712
Economically Active	58,676	147,755
Economically Inactive	16,096	58,877
Owner Occupied (HH)	17,685	40,166
Private Rented (HH)	17,452	37,000

The population of the area is expected to change by: -14.96%.
This percentage change is expected by 2026 and based on future projections.

The three highest Mosaic groups are:

		Target	Base
A	City Prosperity	80,685	172,134
K	Municipal Tenants	13,060	72,391
O	Rental Hubs	3,078	22,321

Report generated on December 20, 2023

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This tool gives you the ability to compare selected target audiences against a base comparison such as the UK population, or another audience, to highlight the key characteristics of your audience; and how they differ.

Target values:

97,401	44,804
Population	Households

Report: **West Hampstead Demographic Data**

West Hampstead 1.5km (1.5 Km) UK22
Selected Target

VS

Base values:

268,198	116,712
Population	Households

Camden
Selected Base

Select Chart
- (●) Percentage
- ( ) Index

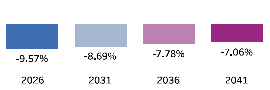
Chart sort
- (●) Sequence
- ( ) High to Low

Select Ranking and Highlights by: % (Highest population) or Index (Greatest difference compared to the selected base).

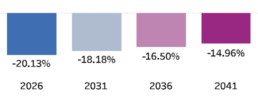
Demographics

Summary | Demographics | Segmentation | Raw Data

Population change | Female



Male

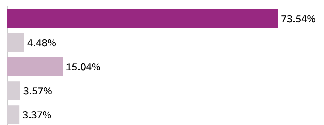


Population change

	Target	% Change since 2021	Base	% Change since 2021
Population in 2026	82,833	-14.96%	222,328	-17.10%
Population in 2031	84,224	-13.53%	229,851	-14.30%
Population in 2036	85,493	-12.23%	236,326	-11.88%
Population in 2041	86,604	-11.09%	241,510	-9.95%

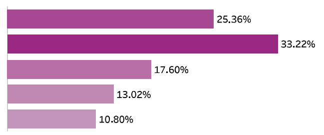
Economically Active

	Target	Target %	Base	Base %	Index
Employee	43,151	73.54%	104,520	70.74%	104
Self employed with employees	2,628	4.48%	6,635	4.49%	100
Self employed without employees	8,824	15.04%	22,900	15.50%	97
Unemployed	2,095	3.57%	5,998	4.06%	88
Full-time students	1,977	3.37%	7,702	5.21%	65



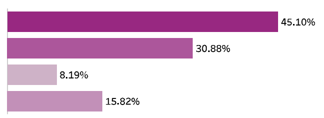
Economically Inactive

	Target	Target %	Base	Base %	Index
Retired	4,082	25.36%	11,777	20.00%	127
Student	5,347	33.22%	27,095	46.02%	72
Looking after home/family	2,834	17.60%	7,705	13.09%	135
Permanently sick/disabled	2,096	13.02%	7,314	12.42%	105
Other	1,738	10.80%	4,986	8.47%	128



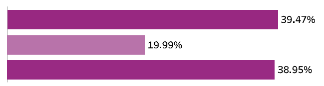
Social Grade

	Target	Target %	Base	Base %	Index
AB Higher & intermediate manage/admin/prof	16,967	45.10%	37,662	39.20%	115
C1 Supervisory, cleric, junior manage/admin/prof	11,615	30.88%	33,021	34.37%	90
C2 Skilled manual workers	3,082	8.19%	8,110	8.44%	97
DE Semi-skilled/unskilled manual workers; on state benefit, unemployed, lowest grade workers	5,953	15.82%	17,283	17.99%	88



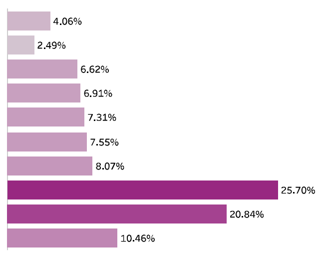
Tenure

	Target	Target %	Base	Base %	Index
Owner Occupied (HH)	17,685	39.47%	40,166	34.41%	115
Social Rented (HH)	8,955	19.99%	37,594	32.21%	62
Private Rented (HH)	17,452	38.95%	37,000	31.70%	123



Household Income

	Target	Target %	Base	Base %	Index
£14,999 or Less	1,818	4.06%	7,238	6.20%	65
£15,000 to £19,999	1,116	2.49%	4,618	3.96%	63
£20,000 to £29,999	2,967	6.62%	11,072	9.49%	70
£30,000 to £39,999	3,096	6.91%	10,837	9.29%	74
£40,000 to £49,999	3,277	7.31%	10,088	8.64%	85
£50,000 to £59,999	3,383	7.55%	9,050	7.75%	97
£60,000 to £69,999	3,615	8.07%	9,192	7.88%	102
£70,000 to £99,999	11,512	25.70%	25,558	21.90%	117
£100,000 to £149,999	9,336	20.84%	20,265	17.36%	120
£150,000 or Over	4,685	10.46%	8,794	7.53%	139

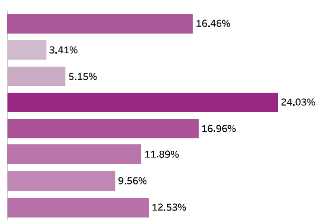


Dwelling type

	Target	Target %	Base	Base %	Index
Detached	765	2.15%	1,283	1.30%	165
Semi-detached	1,163	3.26%	2,179	2.21%	148
Bungalow	36	0.10%	69	0.07%	146
Terraced (including end-terrace)	2,986	8.39%	8,046	8.17%	103
Flat, maisonette or apartment	30,661	86.10%	86,956	88.25%	98

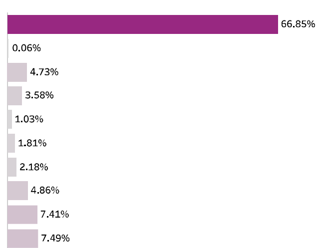
Age Bands

	Target	Target %	Base	Base %	Index
Under 15	16,032	16.46%	43,647	16.27%	101
15-19	3,326	3.41%	15,110	5.63%	61
20-24	5,018	5.15%	22,966	8.56%	60
25-34	23,402	24.03%	56,301	20.99%	114
35-44	16,521	16.96%	40,141	14.97%	113
45-54	11,583	11.89%	32,625	12.16%	98
55-64	9,316	9.56%	24,757	9.23%	104
65+	12,204	12.53%	32,651	12.17%	103



Ethnic mix

	Target	Target %	Base	Base %	Index
White	65,117	66.85%	174,968	65.24%	102
Gypsy / Traveller / Irish Traveller	63	0.06%	191	0.07%	91
Mixed / Multiple Ethnic Groups	4,604	4.73%	12,321	4.59%	103
Asian / Asian British: Indian	3,484	3.58%	7,423	2.77%	129
Asian / Asian British: Pakistani	1,003	1.03%	1,794	0.67%	154
Asian / Asian British: Bangladeshi	1,767	1.81%	16,192	6.04%	30
Asian / Asian British: Chinese	2,120	2.18%	8,044	3.00%	73
Asian / Asian British: Other Asian	4,732	4.86%	10,974	4.09%	119
Black / African / Caribbean / Black British	7,213	7.41%	20,892	7.79%	95
Other Ethnic Group	7,297	7.49%	15,399	5.74%	130



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Target values:

97,401	44,804
Population	Households

Report: **West Hampstead Demographic Data**

West Hampstead 1.5km (1.5 Km) UK22
Selected Target

VS

Base values:

268,198	116,712
Population	Households

Camden
Selected Base

Select Chart
- (●) Percentage
- ( ) Index
- ( ) Penetration

Select Ranking and Highlights by: % (Highest population) or Index (Greatest difference compared to the selected base) or Penetration (The number of targets found in the base area).

Segmentation

Summary | Demographics | Segmentation | Raw Data

Match Level: Pop

Chart Sort: Segment Order

Mosaic UK 7

1st	2nd	3rd
A City Prosperity 80,685 (82.84%) | 129	K Municipal Tenants 13,060 (13.41%) | 50	O Rental Hubs 3,078 (3.16%) | 38



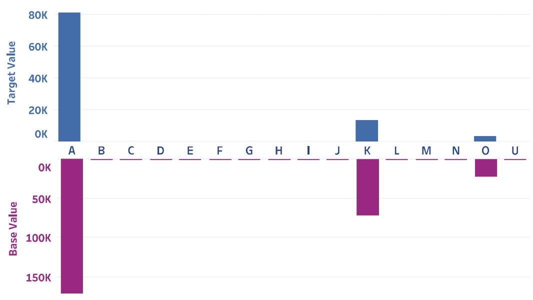
A City Prosperity	K Municipal Tenants	O Rental Hubs
Urban areas	Council/HA flats	Young singles and homesharers
High value flats	Densely populated	Rent flats
High income	No qualifications	Very high internet use
Cosmopolitan lifestyles	Low discretionary income	Internet via smartphone
High-tech homes	Low environmental impact gap	Watch videos online
Uber passengers	Fuel poverty	Don't use landlines

		Target	Base	%
A	City Prosperity	80,685	172,134	82.84%
B	Prestige Positions	107	293	0.11%
C	Country Living	0	0	0.00%
D	Rural Reality	0	0	0.00%
E	Senior Security	0	38	0.00%
F	Suburban Stability	0	0	0.00%
G	Domestic Success	0	0	0.00%
H	Aspiring Homemakers	90	463	0.09%
I	Family Basics	0	0	0.00%
J	Transient Renters	0	0	0.00%
K	Municipal Tenants	13,060	72,391	13.41%
L	Vintage Value	258	556	0.26%
M	Modest Traditions	0	0	0.00%
N	Urban Cohesion	123	2	0.13%
O	Rental Hubs	3,078	22,321	3.16%
U	Unclassified	0	0	0.00%

Mosaic Profile | Groups

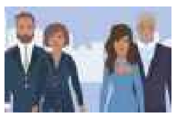
	Target	Target %	Base	Base %	Index
A	80,685	82.84%	172,134	64.18%	129
B	107	0.11%	293	0.11%	100
C	0	0.00%	0	0.00%	0
D	0	0.00%	0	0.00%	0
E	0	0.00%	38	0.01%	0
F	0	0.00%	0	0.00%	0
G	0	0.00%	0	0.00%	0
H	90	0.09%	463	0.17%	54
I	0	0.00%	0	0.00%	0
J	0	0.00%	0	0.00%	0
K	13,060	13.41%	72,391	26.99%	50
L	258	0.26%	556	0.21%	128
M	0	0.00%	0	0.00%	0
N	123	0.13%	2	0.00%	16,991
O	3,078	3.16%	22,321	8.32%	38
U	0	0.00%	0	0.00%	0

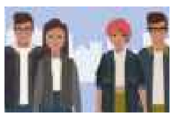
Mosaic Profile | Groups



Mosaic UK 7 Daytime

1st	2nd	3rd
A City Prosperity 42,344 (67.66%) | 147	K Municipal Tenants 8,914 (14.24%) | 82	O Rental Hubs 4,187 (6.69%) | 56





		Target	Base	%
A	City Prosperity	42,344	176,394	67.66%
B	Prestige Positions	982	14,150	1.57%
C	Country Living	118	4,020	0.19%
D	Rural Reality	48	1,987	0.08%
E	Senior Security	193	4,506	0.31%
F	Suburban Stability	131	3,646	0.21%
G	Domestic Success	1,379	21,662	2.20%
H	Aspiring Homemakers	441	7,863	0.70%
I	Family Basics	342	4,725	0.55%
J	Transient Renters	69	1,377	0.11%
K	Municipal Tenants	8,914	66,562	14.24%
L	Vintage Value	354	3,010	0.56%
M	Modest Traditions	28	744	0.05%
N	Urban Cohesion	3,056	28,059	4.88%
O	Rental Hubs	4,187	45,710	6.69%
U	Unclassified	0	0	0.00%

Mosaic Daytime Profile | Groups

	Target	Target %	Base	Base %	Index
A	42,344	67.66%	176,394	45.89%	147
B	982	1.57%	14,150	3.68%	43
C	118	0.19%	4,020	1.05%	18
D	48	0.08%	1,987	0.52%	15
E	193	0.31%	4,506	1.17%	26
F	131	0.21%	3,646	0.95%	22
G	1,379	2.20%	21,662	5.64%	39
H	441	0.70%	7,863	2.05%	34
I	342	0.55%	4,725	1.23%	45
J	69	0.11%	1,377	0.36%	31
K	8,914	14.24%	66,562	17.32%	82
L	354	0.56%	3,010	0.78%	72
M	28	0.05%	744	0.19%	23
N	3,056	4.88%	28,059	7.30%	67
O	4,187	6.69%	45,710	11.89%	56
U	0	0.00%	0	0.00%	0

Mosaic Daytime Profile | Groups

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Lambert Smith Hampton

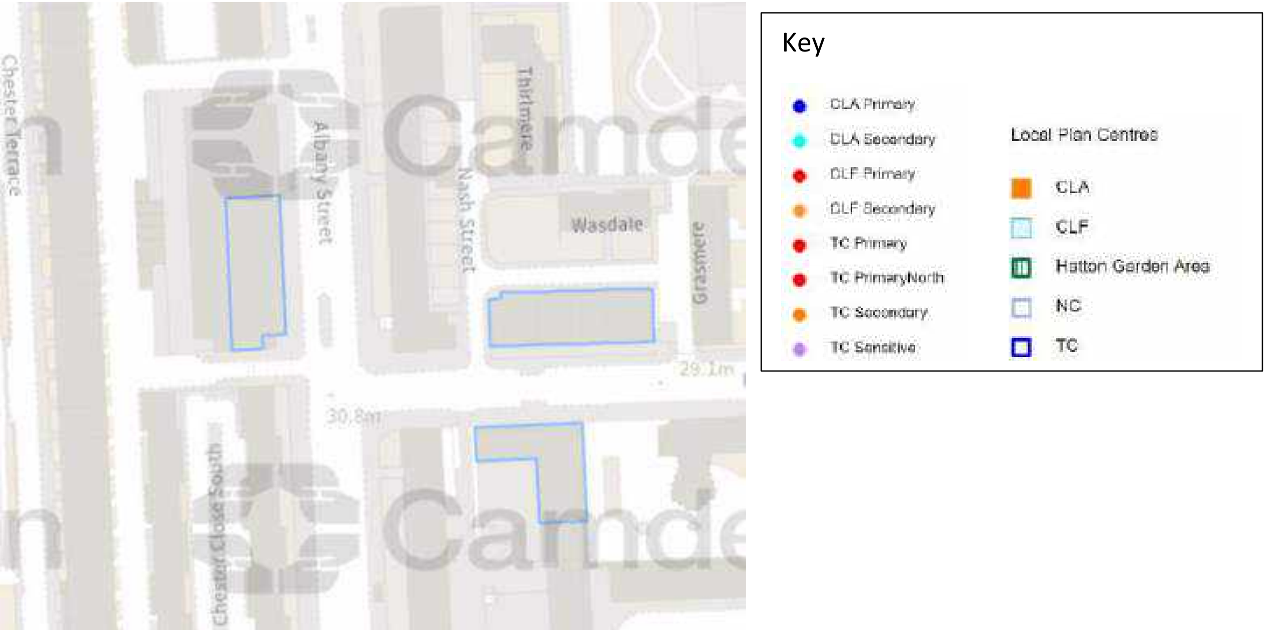
VOLUME C4: NEIGHBOURHOOD CENTRES

CAMDEN – TOWN CENTRE HEALTH CHECKS

ALBANY STREET

Description

Current Designation: Neighbourhood Centre as defined in Camden Local Plan 2017



Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden’s centres and other shopping areas); and
    - Policy TC4 (Town centre uses).
- Part of the centre (west of Albany Street) lies within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage).
- Part of the centre (east of Albany Street) is subject to the Euston Area Plan (EAP) which provides a planning framework for the regeneration of the Euston area.

Description of Centre:

The centre comprises three small clusters of shops and services (20 occupied units in total) focused along Albany Street and Robert Street. It is situated on the east side of Regent’s Park. Albany Street extends from Marylebone Road (to the south) to Gloucester Gate (to the north), and Robert Street runs west towards Euston railway station and the surrounding area.

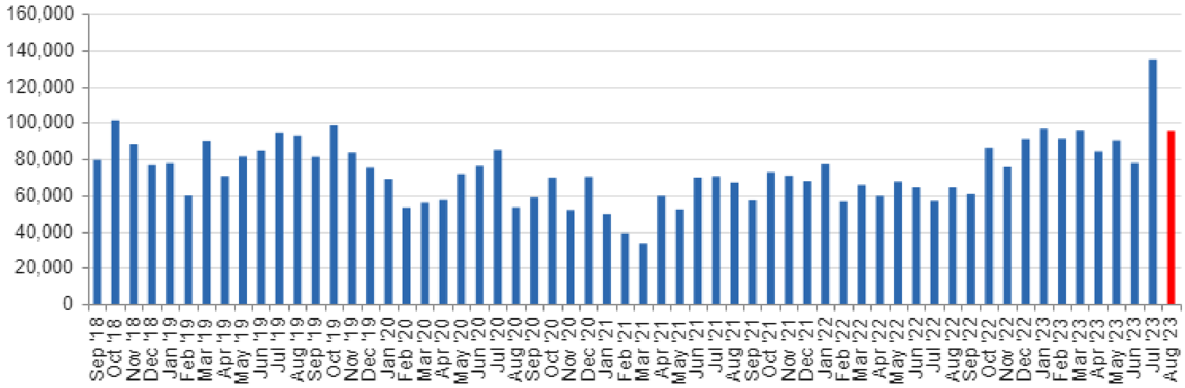
The centre is therefore situated on a prominent, arterial thoroughfare in proximity to Regent’s Park and the Euston area. The nearest Town Centre is Camden Town (circa 1.5km to the north) and there is another, larger Neighbourhood Centre (Drummond Street) approximately 0.5km to the southeast.

Footfall

A street section where Albany Street meets Robert Street was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

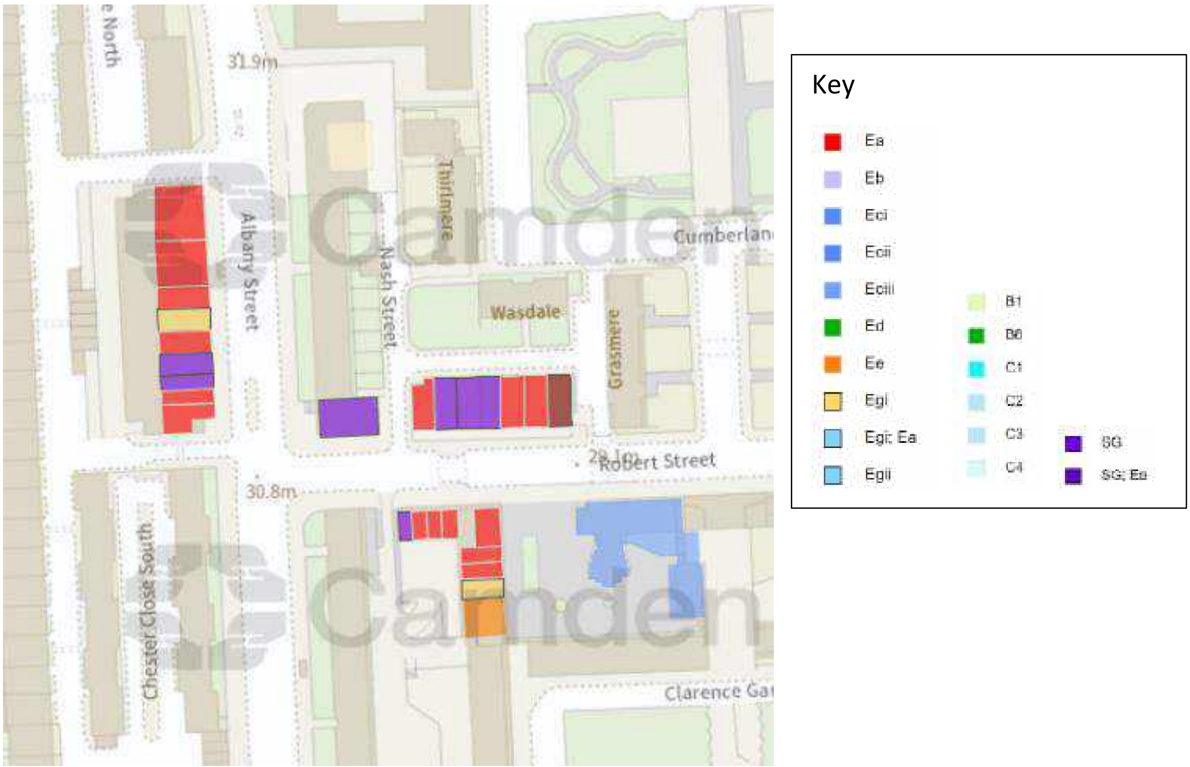
As can be seen in the figure below, footfall has been stable over this period, with a minimal impact from the pandemic when compared to some other centres. Pedestrian activity in 2023 looks to have returned to 2019 levels.

Figure 2: Footfall of Albany Street (September 2018 – August 2023)

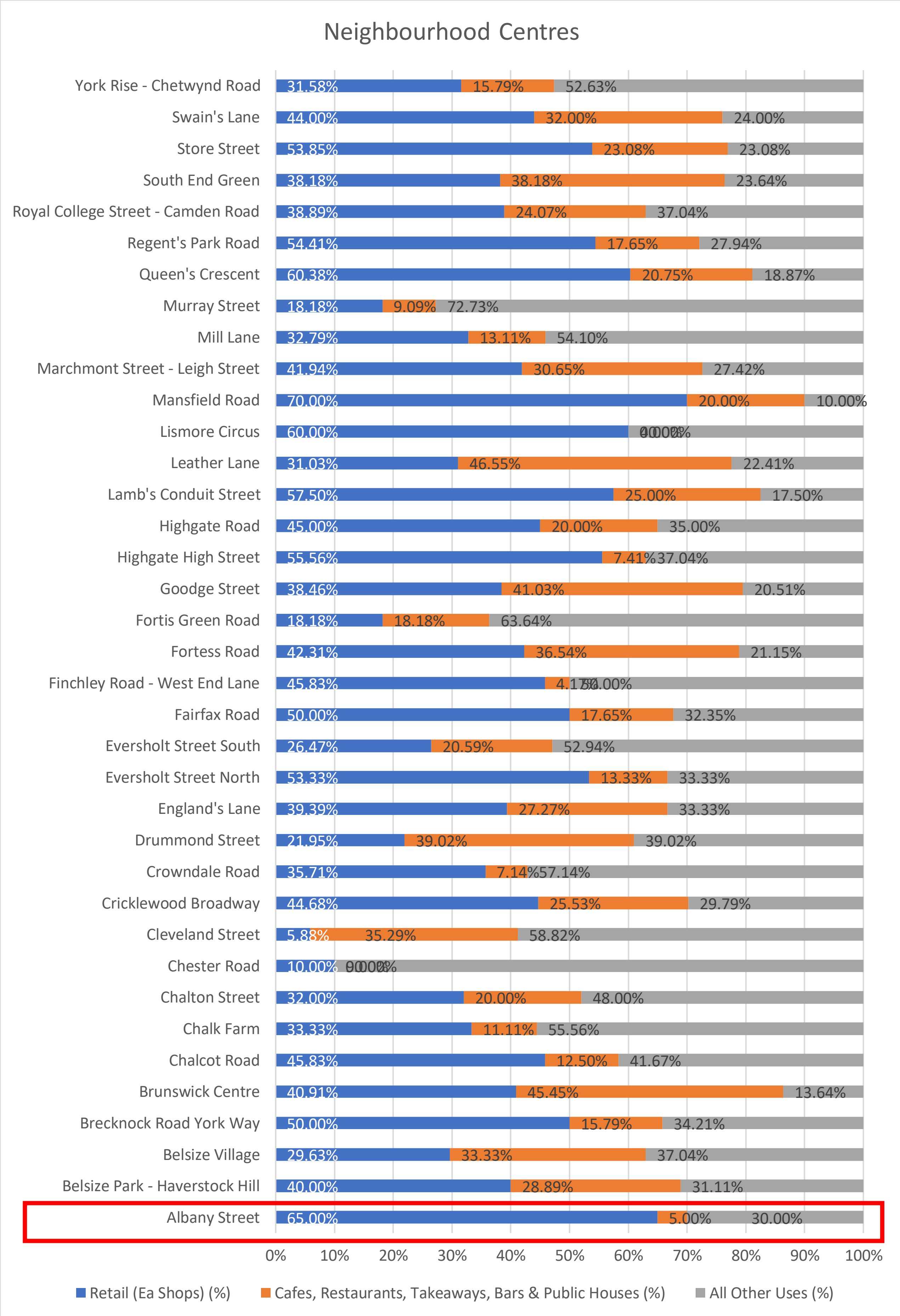


Source: Datscha

Diversity of Uses 2022



Albany Street	Number	%	Camden Average (%)
Retail (Ea Shops)	13	65.0	41.1
Food & Beverage (F&B)	1	5.0	26.3
All Other Uses	6	30.0	32.6
Total	20	100.0	100.0


Neighbourhood Centres
York Rise - Chetwynd Road 31.58% 15.79% 52.63%
Swain's Lane 44.00% 32.00% 24.00%
Store Street 53.85% 23.08% 23.08%
South End Green 38.18% 38.18% 23.64%
Royal College Street - Camden Road 38.89% 24.07% 37.04%
Regent's Park Road 54.41% 17.65% 27.94%
Queen's Crescent 60.38% 20.75% 18.87%
Murray Street 18.18% 9.09% 72.73%
Mill Lane 32.79% 13.11% 54.10%
Marchmont Street - Leigh Street 41.94% 30.65% 27.42%
Mansfield Road 70.00% 20.00% 10.00%
Lismore Circus 60.00%
Leather Lane 31.03% 46.55% 22.41%
Lamb's Conduit Street 57.50% 25.00% 17.50%
Highgate Road 45.00% 20.00% 35.00%
Highgate High Street 55.56% 7.41% 37.04%
Goodge Street 38.46% 41.03% 20.51%
Fortis Green Road 18.18% 18.18% 63.64%
Fortess Road 42.31% 36.54% 21.15%
Finchley Road - West End Lane 45.83%
Fairfax Road 50.00% 17.65% 32.35%
Eversholt Street South 26.47% 20.59% 52.94%
Eversholt Street North 53.33% 13.33% 33.33%
England's Lane 39.39% 27.27% 33.33%
Drummond Street 21.95% 39.02% 39.02%
Crowndale Road 35.71% 7.14% 57.14%
Cricklewood Broadway 44.68% 25.53% 29.79%
Cleveland Street 5.88% 35.29% 58.82%
Chester Road 10.00%
Chalton Street 32.00% 20.00% 48.00%
Chalk Farm 33.33% 11.11% 55.56%
Chalcot Road 45.83% 12.50% 41.67%
Brunswick Centre 40.91% 45.45% 13.64%
Brecknock Road York Way 50.00% 15.79% 34.21%
Belsize Village 29.63% 33.33% 37.04%
Belsize Park - Haverstock Hill 40.00% 28.89% 31.11%
Albany Street 65.00% 5.00% 30.00%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

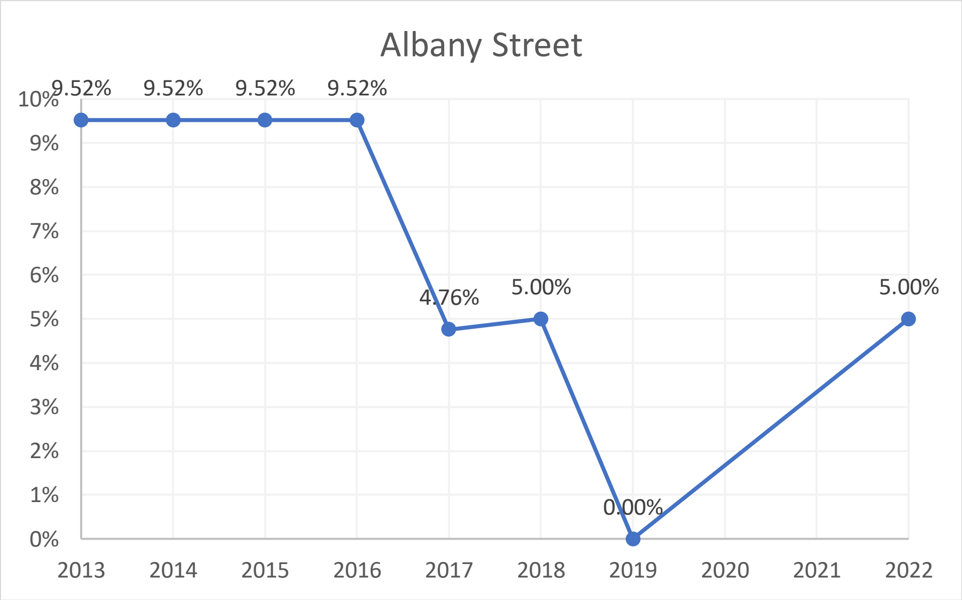
Albany Street	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	0	0.0	3.9%

Conclusions on Diversity of Uses:

Approximately two-thirds (13 units or 65%) of the centre's units comprise Class E(a) shops, which is considerably higher than the Camden average (41.1%). There is just one F&B unit, while other existing uses are predominantly Sui Generis uses including a beauty/nail salon and a dry cleaners. The centre has no evening / night time economy offer.

The current number of shops (13 units) is lower than in 2014 and 2019 (15 and 17 units respectively) and there are more Sui Generis uses (6 units) relative to those earlier years (i.e. 2 units in 2014 and 1 unit in 2019) which, in part, is likely to be attributable to changes to the Use Classes Order.

Vacancies 2014 - 2022



Conclusions

Albany Street appears to be a healthy centre with a limited range of uses and a low vacancy rate. Shops remain the dominant use class, while there is just one F&B unit and no evening / night time economy offer.

The centre is focused along a busy arterial route between Regent's Park and the Euston area. Indeed, footfall has been stable over the period September 2018 – August 2023 and looks to have returned to pre-pandemic levels. As well as catering for the day-to-day shopping and service needs of its localised catchment, the centre is well positioned to meet the basic needs of users of Regent's Park and other local attractions.

The centre boundary is appropriate considering the distribution and composition of existing uses and the below average vacancy rate.

CAMDEN – TOWN CENTRE HEALTH CHECKS

BELSIZE PARK – HAVERSTOCK HILL

Description

Current Designation: Neighbourhood Centre in the Camden Local Plan 2017

Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden's centres and other shopping areas); and
    - Policy TC4 (Town centre uses).
- Part of the centre (on the west side of Haverstock Hill) lies within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage).

Description of Centre:

The centre extends along both sides of Haverstock Hill, a busy arterial route between the Town Centres of Hampstead (less than 1km to the northwest) and Camden Town (circa 2km to the southeast). The Royal Free Hospital is situated to the immediate north.

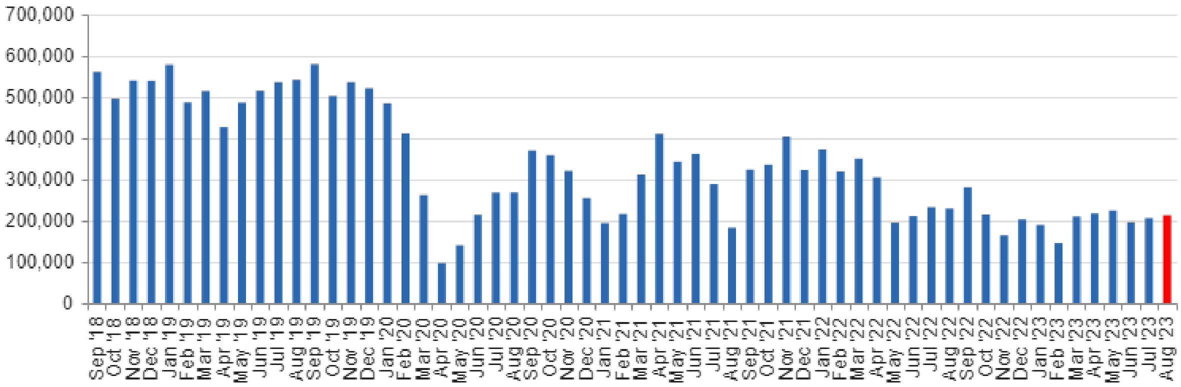
The majority of the centre's commercial area is adjacent to Belsize Park Underground station; however, part of the centre sits further north – broadly opposite Ornan Road. Approximately 300-400m west along Ornan Road is Belsize Village Neighbourhood Centre.

Footfall

A section along Haverstock Hill was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

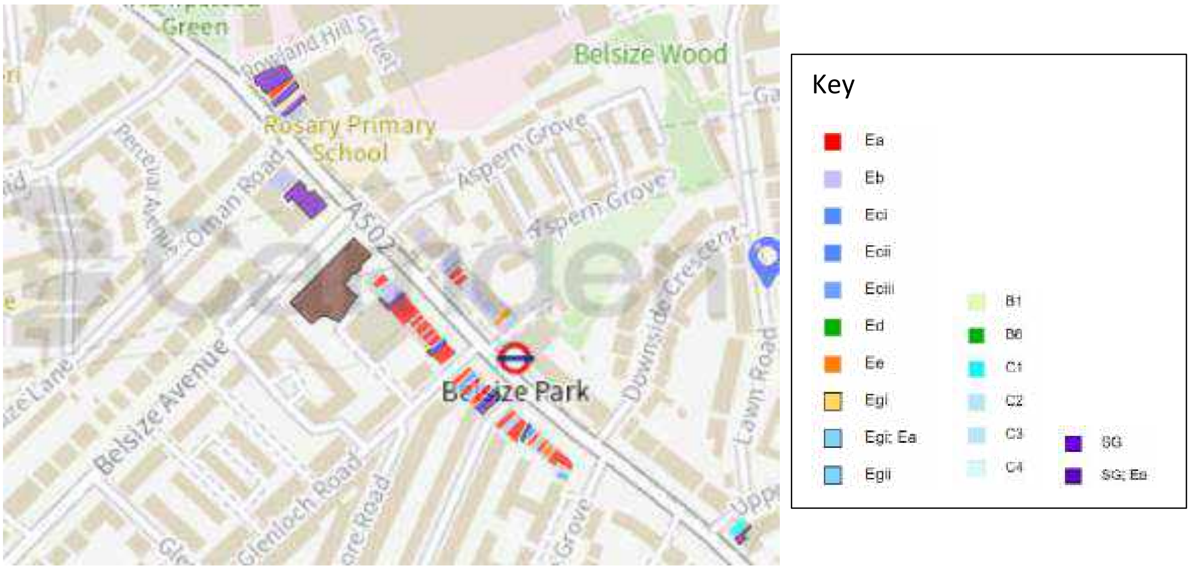
As can be seen in the figure below, footfall has been steadily declining during this period. There was a significant fall at the beginning of the pandemic (April 2020), and whilst pedestrian activity has increased since, it still lags the figures seen in late 2018, 2019 and early 2020.

Figure 2: Footfall of Haverstock Hill, Belsize Park (September 2018 – August 2023)

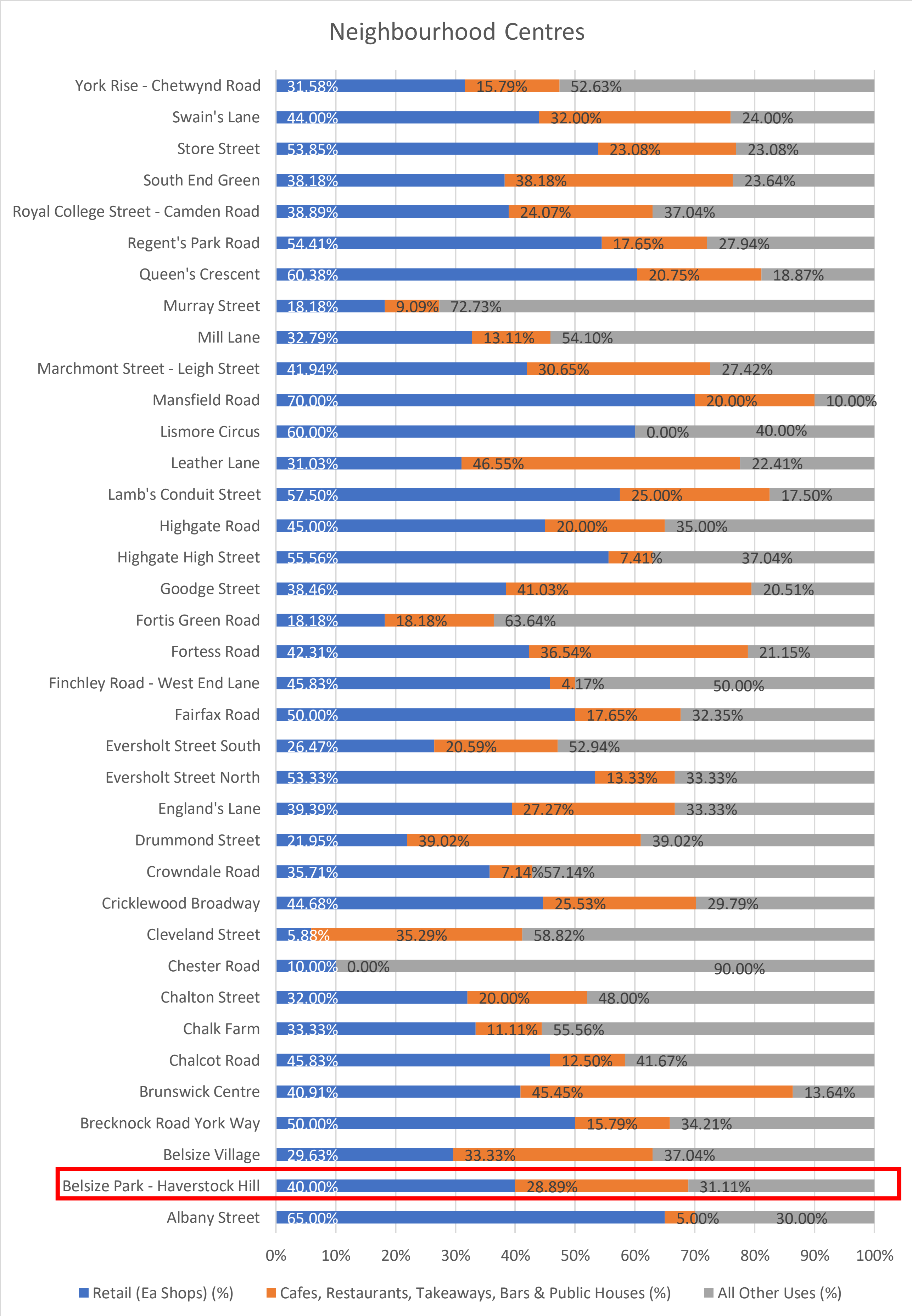


Source: Datscha

Diversity of Uses 2022



Belsize Park – Haverstock Hill	Number	%	Camden Average (%)
Retail (Ea Shops)	18	40	41.1
Food & Beverage (F&B)	13	29.9	26.3
All Other Uses	14	30.1	32.6
Total	45	100.0	100.0


Neighbourhood Centres
York Rise - Chetwynd Road
31.58%
15.79%
52.63%
Swain's Lane
44.00%
32.00%
24.00%
Store Street
53.85%
23.08%
23.08%
South End Green
38.18%
38.18%
23.64%
Royal College Street - Camden Road
38.89%
24.07%
37.04%
Regent's Park Road
54.41%
17.65%
27.94%
Queen's Crescent
60.38%
20.75%
18.87%
Murray Street
18.18%
9.09%
72.73%
Mill Lane
32.79%
13.11%
54.10%
Marchmont Street - Leigh Street
41.94%
30.65%
27.42%
Mansfield Road
70.00%
20.00%
10.00%
Lismore Circus
60.00%
0.00%
40.00%
Leather Lane
31.03%
46.55%
22.41%
Lamb's Conduit Street
57.50%
25.00%
17.50%
Highgate Road
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Goodge Street
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41.03%
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Fortis Green Road
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18.18%
63.64%
Fortess Road
42.31%
36.54%
21.15%
Finchley Road - West End Lane
45.83%
4.17%
50.00%
Fairfax Road
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17.65%
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Eversholt Street South
26.47%
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England's Lane
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Drummond Street
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39.02%
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Crowndale Road
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Chalton Street
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20.00%
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Chalk Farm
33.33%
11.11%
55.56%
Chalcot Road
45.83%
12.50%
41.67%
Brunswick Centre
40.91%
45.45%
13.64%
Brecknock Road York Way
50.00%
15.79%
34.21%
Belsize Village
29.63%
33.33%
37.04%
Belsize Park - Haverstock Hill
40.00%
28.89%
31.11%
Albany Street
65.00%
5.00%
30.00%
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

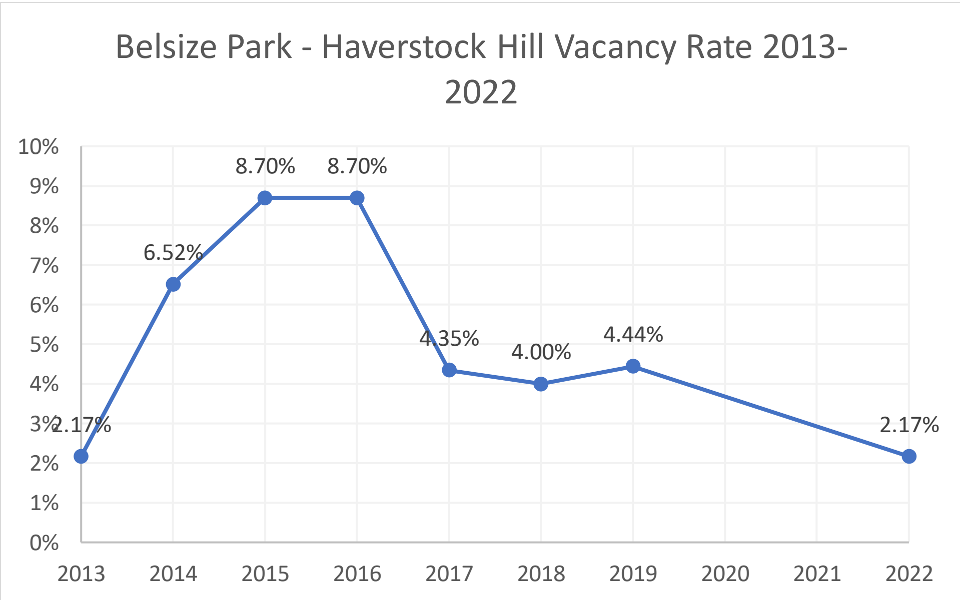
Belsize Park – Haverstock Hill	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	1	2.2	3.9

Conclusions on Diversity of Uses:

The highest proportion of the centre's total units (40% or 18 units) comprise Class E(a) shops, which is broadly in line with the Camden average (41.1%). However, based on monitoring data, the number of shops within the centre has fallen since 2014 (23 units). The existing retail offer includes both multiples (e.g. Boots, Budgens, Gail's Bakery) and independent businesses.

There are 13 F&B units (29.9% compared with the Camden average of 26.3%) and just one unit dedicated to the evening / night time economy. However, the centre also includes an Everyman cinema, which is unusual in a lower order (neighbourhood) centre, but which is likely to be an important draw. The WAC Arts Centre is also located within the centre, offering courses and classes in the creative arts. All 'other' uses (14 units), including services and Sui Generis uses, account for 30.1% of the total number of units – similar to the Camden average of 32.6%.

Vacancies 2013 - 2022



Conclusions

The centre contains a balanced range of uses which broadly correlate with the Camden averages. Its convenience retail and services-orientated offer is capable of meeting the day-to-day needs of local residents and other users of the centre (e.g. passers-by along the busy Haverstock Hill).

Footfall data suggests that pedestrian activity has been steadily declining over the period September 2018 – August 2023 and has not recovered to pre-pandemic levels. However, the findings are more positive in respect of the centre's vacancy rate, which has decreased over the past five years from circa 4.5% to circa 2.2% in 2022. This supports an overall conclusion that the Neighbourhood Centre is healthy and performing reasonably well.

The centre boundary is appropriate considering the composition and distribution of existing uses and the below average vacancy rate.

CAMDEN – TOWN CENTRE HEALTH CHECKS

BELSIZE VILLAGE

Description

Current Designation: Neighbourhood Centre as defined in Camden Local Plan 2017

Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden's centres and other shopping areas); and
    - Policy TC4 (Town centre uses).
- The entire centre lies within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage).

Description of Centre:

The centre offers a pleasant shopping environment with 27 occupied units in total. It is focused on Belsize Lane and the pedestrianised Belsize Terrace.

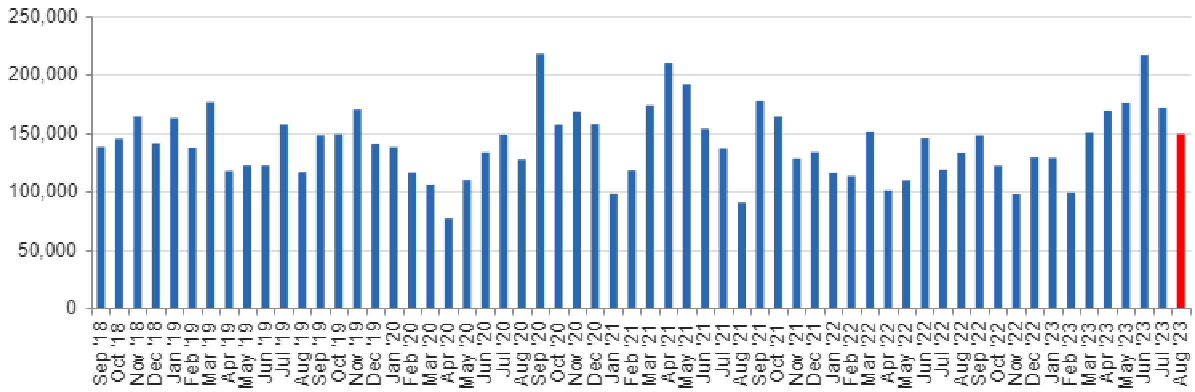
Belsize Village is broadly equidistance between the Town Centres of Hampstead and Finchley Road (circa 1km to the north and west respectively) and there are other Neighbourhood Centres, including Belsize Park – Haverstock Hill, to the east.

Footfall

A section along Belsize Lane was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

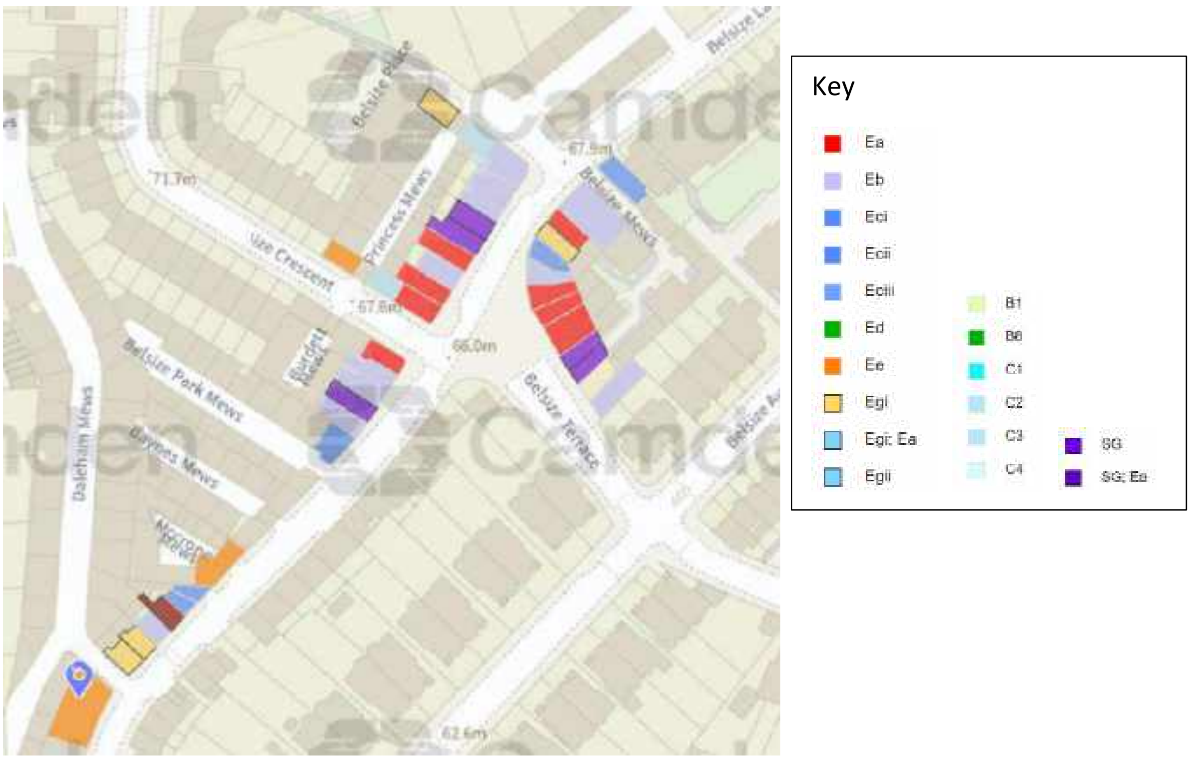
As can be seen in the figure below, footfall has been stable throughout this period. Monthly footfall has fallen below 100,000 on a few occasions, with the lowest month coming in March 2020 when COVID-19 restrictions were first imposed. Pedestrian activity in 2023 has been strong, particularly in June.

Figure 2: Footfall of Belsize Lane, Belsize Village (September 2018 – August 2023)

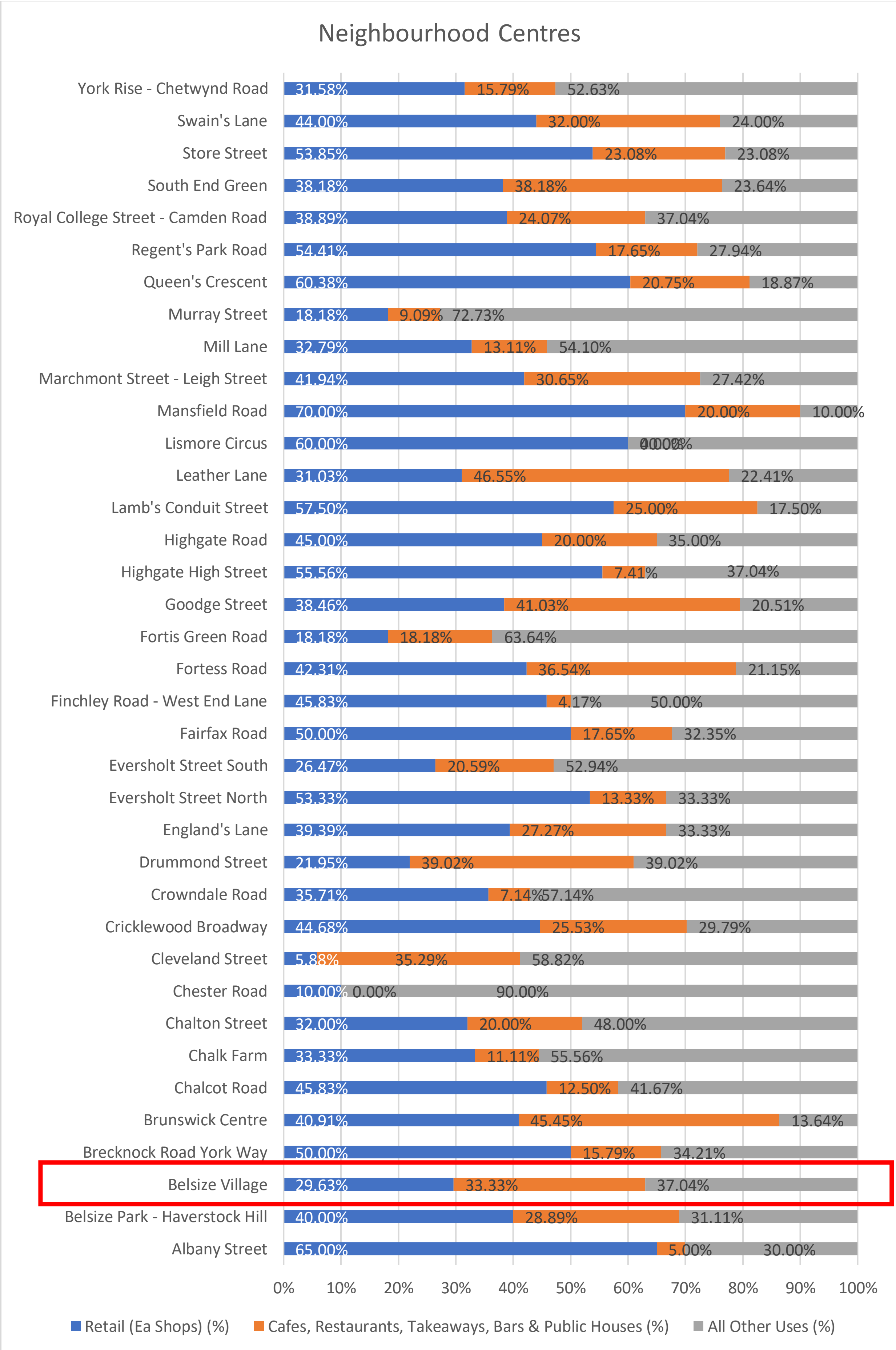


Source: Datscha

Diversity of Uses 2022



Belsize Village	Number	%	Camden Average (%)
Retail (Ea Shops)	8	29.6	41.1
Food & Beverage (F&B)	9	33.3	26.3
All Other Uses	10	37.1	32.6
Total	27	100.0	100.0


Neighbourhood Centres
York Rise - Chetwynd Road 31.58% 15.79% 52.63%
Swain's Lane 44.00% 32.00% 24.00%
Store Street 53.85% 23.08% 23.08%
South End Green 38.18% 38.18% 23.64%
Royal College Street - Camden Road 38.89% 24.07% 37.04%
Regent's Park Road 54.41% 17.65% 27.94%
Queen's Crescent 60.38% 20.75% 18.87%
Murray Street 18.18% 9.09% 72.73%
Mill Lane 32.79% 13.11% 54.10%
Marchmont Street - Leigh Street 41.94% 30.65% 27.42%
Mansfield Road 70.00% 20.00% 10.00%
Lismore Circus 60.00%
Leather Lane 31.03% 46.55% 22.41%
Lamb's Conduit Street 57.50% 25.00% 17.50%
Highgate Road 45.00% 20.00% 35.00%
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Goodge Street 38.46% 41.03% 20.51%
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Fortess Road 42.31% 36.54% 21.15%
Finchley Road - West End Lane 45.83% 4.17% 50.00%
Fairfax Road 50.00% 17.65% 32.35%
Eversholt Street South 26.47% 20.59% 52.94%
Eversholt Street North 53.33% 13.33% 33.33%
England's Lane 39.39% 27.27% 33.33%
Drummond Street 21.95% 39.02% 39.02%
Crowndale Road 35.71% 7.14% 57.14%
Cricklewood Broadway 44.68% 25.53% 29.79%
Cleveland Street 5.88% 35.29% 58.82%
Chester Road 10.00% 0.00% 90.00%
Chalton Street 32.00% 20.00% 48.00%
Chalk Farm 33.33% 11.11% 55.56%
Chalcot Road 45.83% 12.50% 41.67%
Brunswick Centre 40.91% 45.45% 13.64%
Brecknock Road York Way 50.00% 15.79% 34.21%
Belsize Village 29.63% 33.33% 37.04%
Belsize Park - Haverstock Hill 40.00% 28.89% 31.11%
Albany Street 65.00% 5.00% 30.00%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

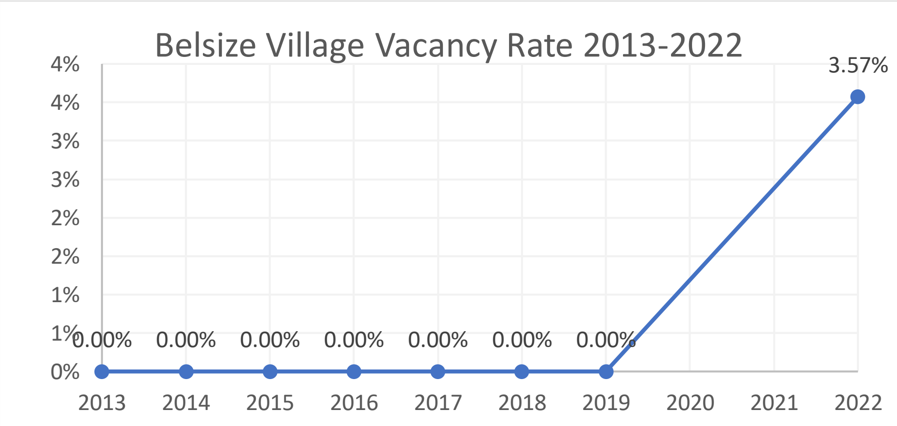
Belsize Village	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	0	0.0	3.9%

Conclusions on Diversity of Uses:

The centre includes a good mix of uses, split broadly evenly between Class E(a) shops, F&B and ‘other’ uses. The F&B offer is particularly strong – as it was in 2014 and 2019 based on monitoring data – accounting for one-third of the centre’s units (above the Camden average of 26.3%). However, the centre has no evening / night time economy offer.

Class E(a) shops are predominantly focused on or close to Belsize Terrace, whereas most of the F&B units are dispersed along Belsize Lane together with other services and Sui Generis uses.

Vacancies 2014 - 2022



Conclusions

Belsize Village appears to be a healthy centre with a good mix of uses and a low vacancy rate. Levels of footfall have been relatively strong and stable over the period September 2018 – August 2023.

The centre offers a pleasant shopping environment and is particularly well represented by F&B units, and is therefore likely to attract occasional visitors from beyond its localised ‘walk-in’ catchment. That said, there is no evening / night time economy offer of note.

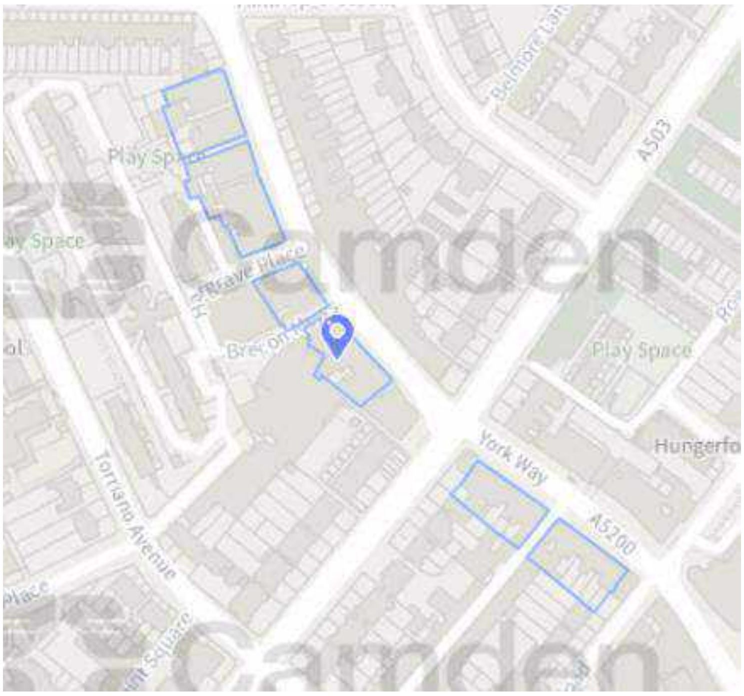
It is noted that there are a small number of units in town centre uses located south of the existing defined centre towards Daleham Mews (north side of Belsize Lane). Consideration should be given to extending the centre boundary to include these units given they are likely to trade as part of the centre.

CAMDEN – TOWN CENTRE HEALTH CHECKS

BRECKNOCK ROAD – YORK WAY

Description

Neighbourhood Centre as defined in Camden Local Plan 2017



Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
  - Policy TC1 (Quality and location of retail development);
  - Policy TC2 (Camden's centres and other shopping areas); and
  - Policy TC4 (Town centre uses).
- Part of the centre (south of Camden Road) lies within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage).
- Part of the centre (north of Camden Road) lies within the 'Kentish Town Neighbourhood Plan' Area Boundary, although there are no site-specific policies relating to the centre.

Description of Centre:

The centre extends north and south of Camden Road (along Brecknock Road and York Way respectively) on the eastern fringes of the borough. Camden Road connects Camden Town in the southwest with Holloway Road and Finsbury Park in the northeast.

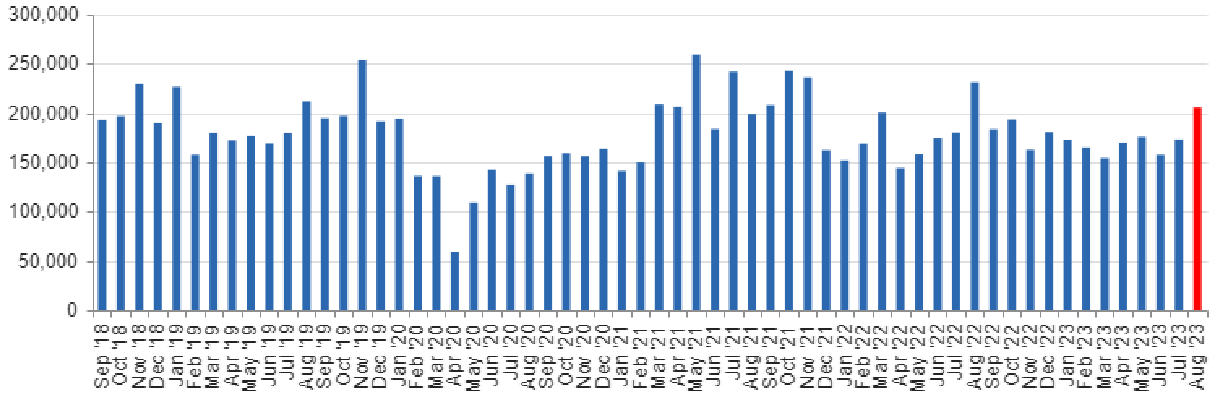
The centre is therefore located off a busy arterial route between the boroughs of Camden and Islington, and the centre itself straddles these two boroughs, with the western side within Camden. Within this part of the centre there are 38 occupied units. The nearest town centres are Kentish Town (less than 1km to the west) and Camden Town (circa 1.5km to the southwest) and there are some closer, Neighbourhood Centres to the north and south.

Footfall

A section along Brecknock Road was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall has been stable over this period, with March and April 2020 representing the particular exceptions with low pedestrian activity due to the introduction of restrictions in response to the pandemic. Footfall levels have bounced back well since.

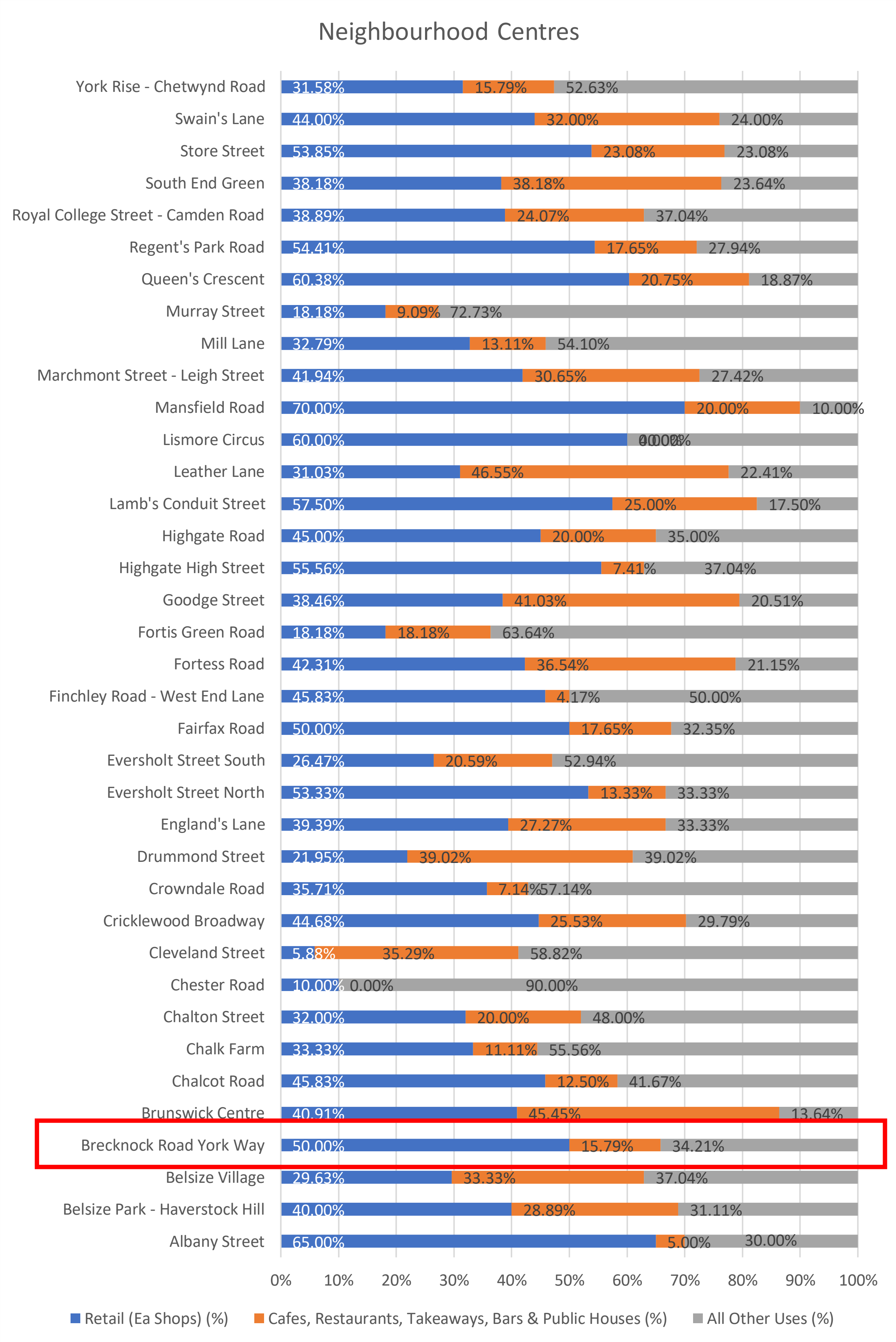
Figure 2: Footfall of Brecknock Road (September 2018 – August 2023)



Source: Datscha

Diversity of Uses 2022

Centre Name	Number	%	Camden Average (%)
Retail (Ea Shops)	19	50.0	41.1
Food & Beverage (F&B)	6	15.8	26.3
All Other Uses	13	34.2	32.6
Total	38	100.0	100.0


Neighbourhood Centres
York Rise - Chetwynd Road
Swain's Lane
Store Street
South End Green
Royal College Street - Camden Road
Regent's Park Road
Queen's Crescent
Murray Street
Mill Lane
Marchmont Street - Leigh Street
Mansfield Road
Lismore Circus
Leather Lane
Lamb's Conduit Street
Highgate Road
Highgate High Street
Goodge Street
Fortis Green Road
Fortess Road
Finchley Road - West End Lane
Fairfax Road
Eversholt Street South
Eversholt Street North
England's Lane
Drummond Street
Crowndale Road
Cricklewood Broadway
Cleveland Street
Chester Road
Chalton Street
Chalk Farm
Chalcot Road
Brunswick Centre
Brecknock Road York Way
Belsize Village
Belsize Park - Haverstock Hill
Albany Street
31.58% 15.79% 52.63%
44.00% 32.00% 24.00%
53.85% 23.08% 23.08%
38.18% 38.18% 23.64%
38.89% 24.07% 37.04%
54.41% 17.65% 27.94%
60.38% 20.75% 18.87%
18.18% 9.09% 72.73%
32.79% 13.11% 54.10%
41.94% 30.65% 27.42%
70.00% 20.00% 10.00%
60.00%
31.03% 46.55% 22.41%
57.50% 25.00% 17.50%
45.00% 20.00% 35.00%
55.56% 7.41% 37.04%
38.46% 41.03% 20.51%
18.18% 18.18% 63.64%
42.31% 36.54% 21.15%
45.83% 4.17% 50.00%
50.00% 17.65% 32.35%
26.47% 20.59% 52.94%
53.33% 13.33% 33.33%
39.39% 27.27% 33.33%
21.95% 39.02% 39.02%
35.71% 7.14% 57.14%
44.68% 25.53% 29.79%
5.88% 35.29% 58.82%
10.00% 0.00% 90.00%
32.00% 20.00% 48.00%
33.33% 11.11% 55.56%
45.83% 12.50% 41.67%
40.91% 45.45% 13.64%
50.00% 15.79% 34.21%
29.63% 33.33% 37.04%
40.00% 28.89% 31.11%
65.00% 5.00% 30.00%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

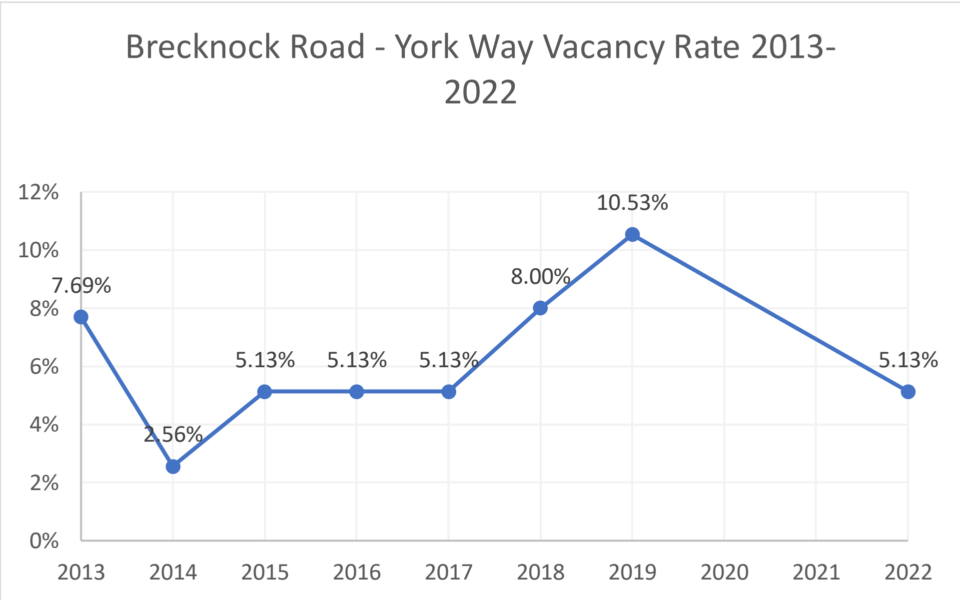
Centre Name	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	0	0.0	3.9%

Conclusions on Diversity of Uses:

Class E(a) shops are the dominant use class with 19 units, accounting for 50% of the total number of units within the centre (above the Camden average of 41.1%). However, the number of shops has fallen since 2014 and 2019 (25 and 22 units respectively); whilst the number and range of 'other' non-retail uses has increased over the same period from 10 to 13 units.

The centre contains 6 F&B units which, as a proportion of the total number of units (15.8%), is below the Camden average (26.3%). In addition, there is no evening / night time economy offer.

Vacancies 2013 - 2022



Conclusions

The low vacancy rate and the range of uses, including above-average provision of Class E(a) shops, suggests the centre is healthy and performing reasonably well within the limitations of its localised function. This is supported by the footfall data, with levels of pedestrian activity recovering well since the pandemic. The centre is also served by good levels of on-street car parking.

However, the F&B offer is limited and there is no evening / night time economy offer of note. The nearby Town Centres of Kentish Town and Camden Town are popular destinations in this respect.

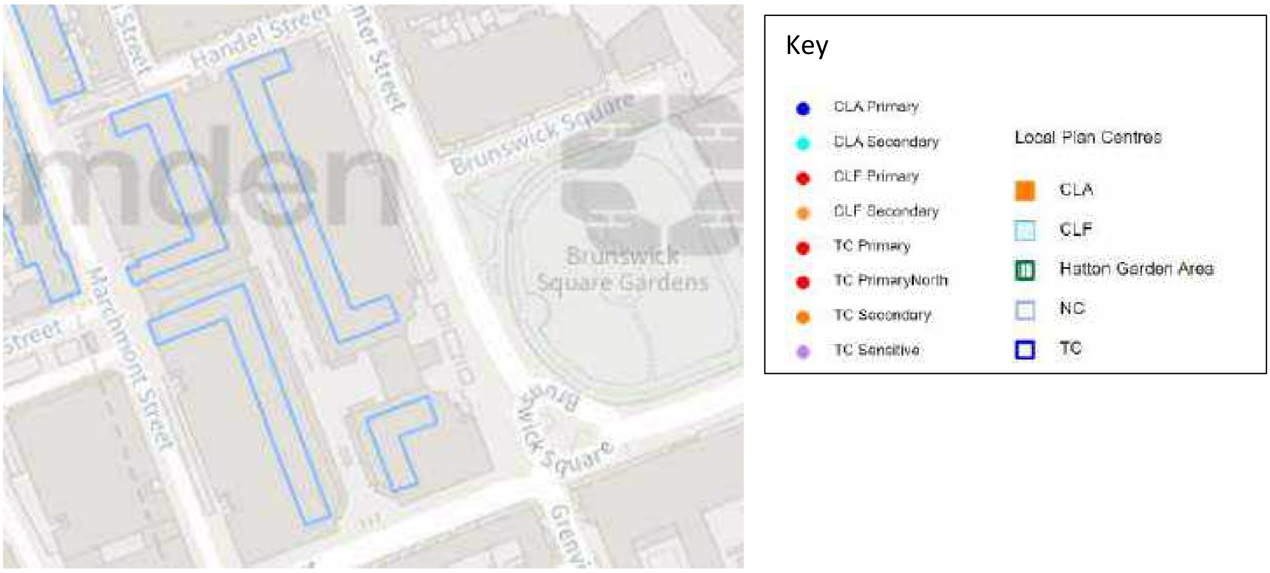
The centre boundary (on the Camden side) is appropriate considering the distribution and composition of existing uses and the below average vacancy rate.

CAMDEN – TOWN CENTRE HEALTH CHECKS

BRUNSWICK CENTRE

Description

Current Designation: Neighbourhood Centre as defined in Camden Local Plan 2017



Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden's centres and other shopping areas); and
    - Policy TC4 (Town centre uses).
- The entire centre lies within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage). The Brunswick Centre is also a Grade II listed building.

Description of Centre:

The Brunswick Centre comprises a 1960s purpose-built residential and shopping complex, including a shopping mall (22 occupied units in total). It is located in Bloomsbury between Russell Square and Brunswick Square, to the immediate west of Brunswick Square Gardens. King's Cross railway station is less than 1km to the north.

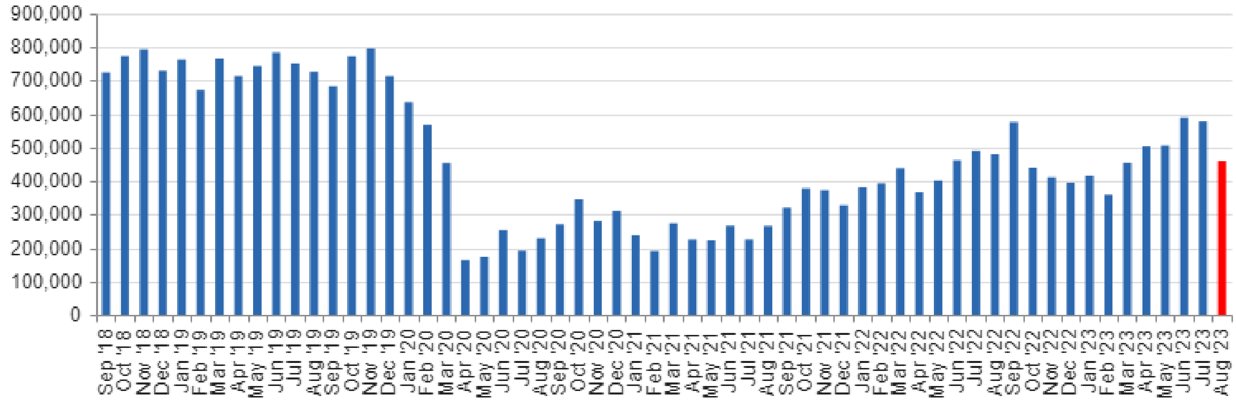
The centre includes Waitrose, a Curzon cinema and an art gallery. There are several other Neighbourhood Centres in the Bloomsbury area, while Camden Town is the nearest Town Centre (circa 2km to the northwest).

Footfall

A section of the Brunswick Centre was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall fell dramatically in April 2020. Pedestrian activity remained low throughout the pandemic period, and although there has been a gradual improvement during 2022 and 2023, the figures remain considerably lower than 2018 and 2019, suggesting that the area has not recovered particularly well from the impacts of the COVID-19 pandemic.

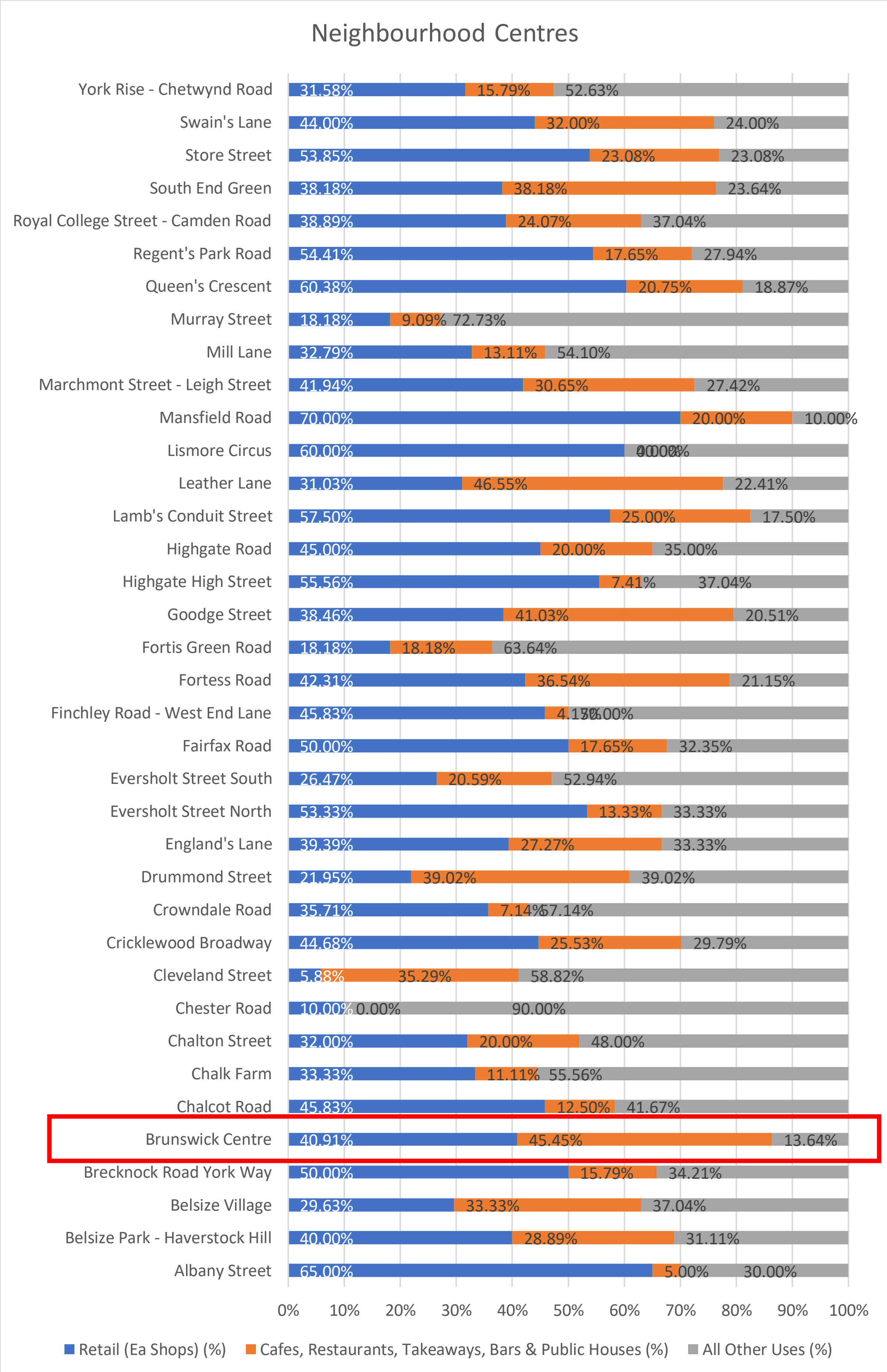
Figure 2: Footfall of Brunswick Centre (September 2018 – August 2023)



Source: Datscha

Diversity of Uses 2022

Brunswick Centre	Number	%	Camden Average (%)
Retail (Ea Shops)	9	40.9	41.1
Food & Beverage (F&B)	10	45.5	26.3
All Other Uses	3	13.6	32.6
Total	22	100.0	100.0


Neighbourhood Centres
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Marchmont Street - Leigh Street
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Mansfield Road
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Fortess Road
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Drummond Street
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Belsize Park - Haverstock Hill
40.00%
28.89%
31.11%
Albany Street
65.00%
5.00%
30.00%
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

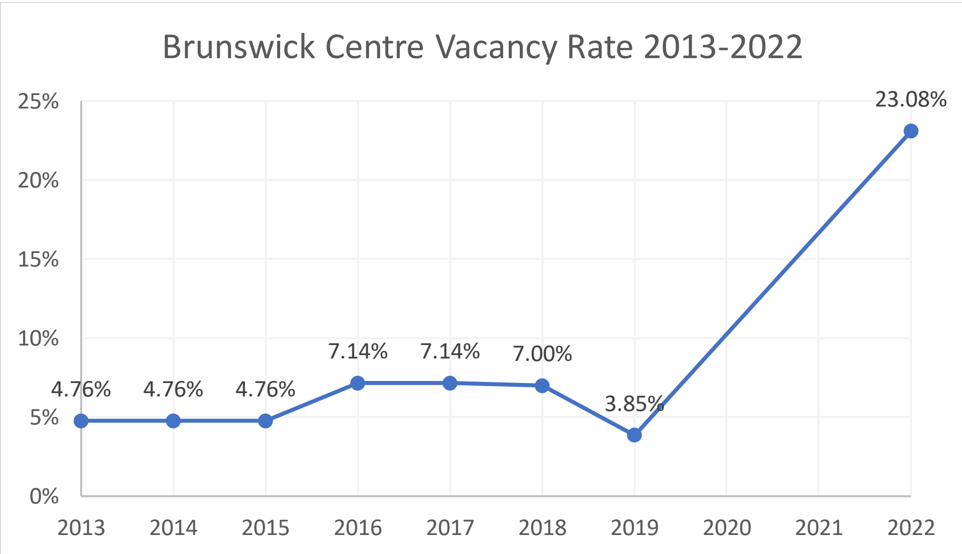
Brunswick Centre	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	0	0	3.9%

Conclusions on Diversity of Uses:

Of the centre's 22 occupied units, 9 accommodate Class E(a) shops. This equates to approximately 41% of the total number of units (in line with the Camden average) yet the centre has seen a notable reduction in the number of shops since 2014 and 2019 (25 and 14 units respectively).

Over the same period, the number of F&B and 'other' uses has also fallen slightly (to 10 and 3 units respectively) resulting in a more limited mix of uses overall. However, the number of F&B units amounts to 45.5% of the centre's units, which is considerably higher than the Camden average (26.3%). The centre has no evening / night time economy offer.

Vacancies 2014 - 2022



Conclusions

A centre's vacancy rate is a strong indicator of its vitality and viability and to that end, the Brunswick Centre has seen its vacancy rate increase from pre-pandemic levels of circa 4%-7% to about 23% in 2022. Contributing factors include (but cannot be limited to) the declining number of shops within the centre, from 14 units in 2019 to just 9. The number of F&B and 'other' uses has also fallen slightly, albeit the centre's F&B offer measured as a proportion of total units (45.5%) is – on this metric – amongst the strongest of all the Neighbourhood Centres in Camden.

Overall, however, there appears to be some issues and challenges facing the Brunswick Centre. This is highlighted by the vacancy rate and also the footfall data, which suggests the centre has not recovered particularly well from the impacts of the pandemic. This is despite the centre having some strong 'anchor' tenants (i.e. Waitrose, Curzon, art gallery).

The owners of the centre are seeking to address this decline in footfall by putting on various events during the year, including themed days, art classes and entertainment. Funland at the Brunswick has also been introduced, providing a variety of games and activities throughout the day and evening.

The centre boundary is considered to be appropriate.

CAMDEN – TOWN CENTRE HEALTH CHECKS

CHALCOT ROAD

Description

Current Designation Neighbourhood Centre as defined in Camden Local Plan 2017

Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
  - Policy TC1 (Quality and location of retail development);
  - Policy TC2 (Camden's centres and other shopping areas); and
  - Policy TC4 (Town centre uses).
- The entire centre lies within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage).

Description of Centre:

The centre is sandwiched between Camden Town (Town Centre) to the east, Regent's Park to the south and Primrose Hill to the west.

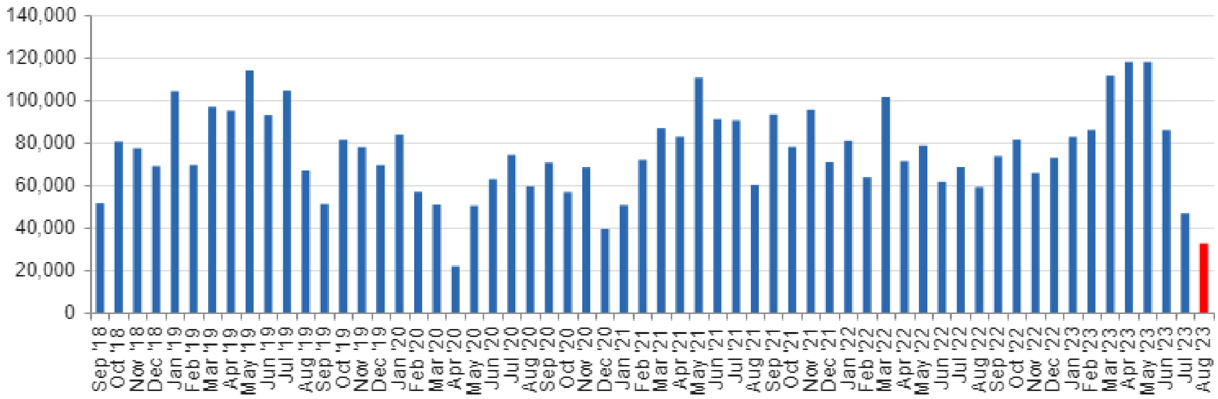
The centre offers an attractive shopping environment and includes 24 occupied units. It consists of two principal commercial areas, focused along Chalcot Road (south side) and Princess Road (west side) respectively. There is another, larger Neighbourhood Centre (Regent's Park Road) less than 0.5km to the northwest.

Footfall

A section along Chalcot Road was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall dropped significantly in March 2020 in line with the beginning of the COVID-19 pandemic. Pedestrian activity did bounce back immediately in April 2020 and has been strong since, up until July and August 2023, where another large decline can be seen, which may be worth monitoring.

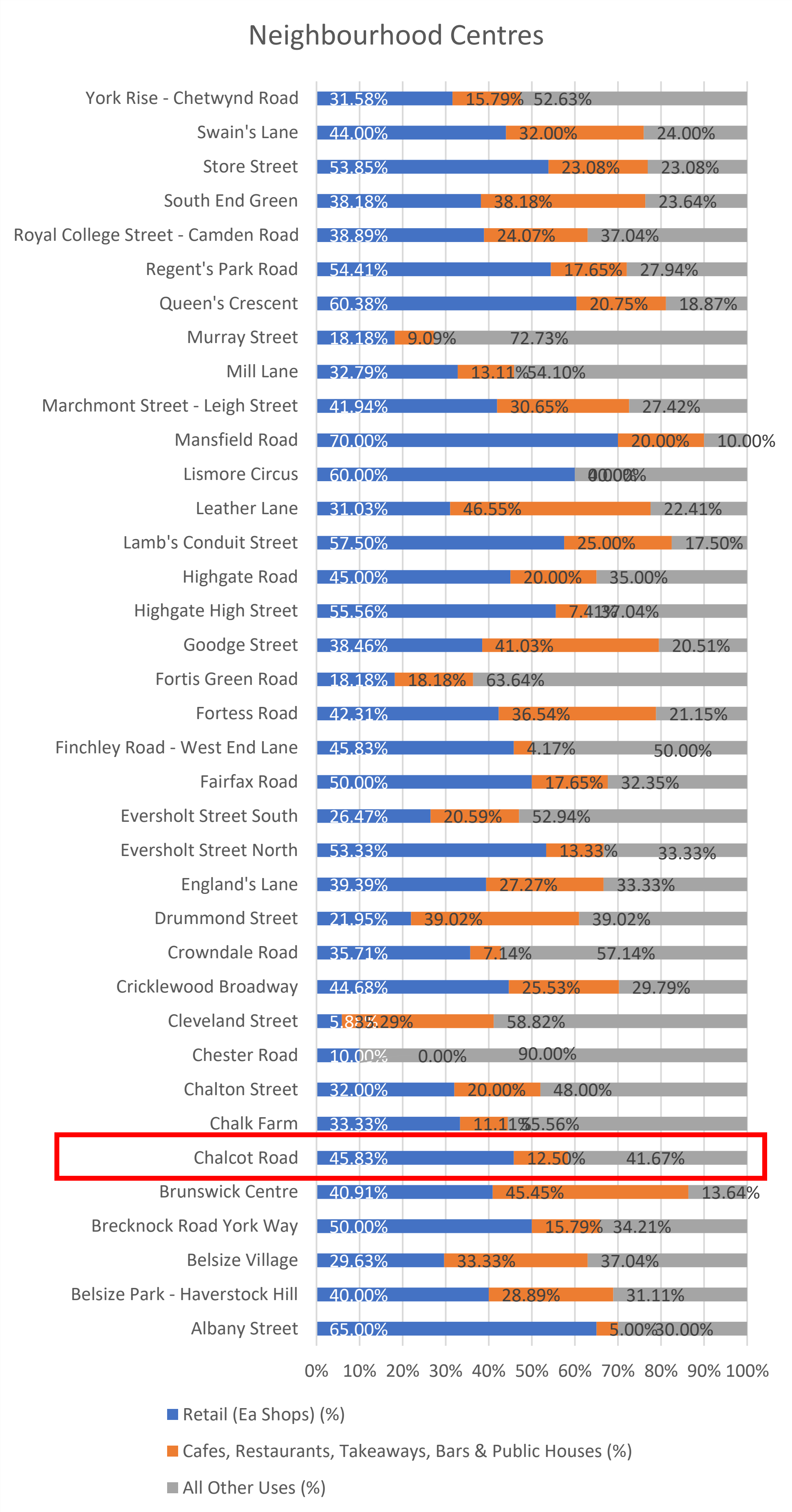
Figure 2: Footfall of Chalcot Road (September 2018 – August 2023)



Source: Datscha

Diversity of Uses 2022

Centre Name	Number	%	Camden Average (%)
Retail (Ea Shops)	11	45.8	41.1
Food & Beverage (F&B)	3	12.5	26.3
All Other Uses	10	41.7	32.6
Total	24	100.0	100.0



Neighbourhood Centres
York Rise - Chetwynd Road 31.58% 15.79% 52.63%
Swain's Lane 44.00% 32.00% 24.00%
Store Street 53.85% 23.08% 23.08%
South End Green 38.18% 38.18% 23.64%
Royal College Street - Camden Road 38.89% 24.07% 37.04%
Regent's Park Road 54.41% 17.65% 27.94%
Queen's Crescent 60.38% 20.75% 18.87%
Murray Street 18.18% 9.09% 72.73%
Mill Lane 32.79% 13.11% 54.10%
Marchmont Street - Leigh Street 41.94% 30.65% 27.42%
Mansfield Road 70.00% 20.00% 10.00%
Lismore Circus 60.00%
Leather Lane 31.03% 46.55% 22.41%
Lamb's Conduit Street 57.50% 25.00% 17.50%
Highgate Road 45.00% 20.00% 35.00%
Highgate High Street 55.56% 7.41% 37.04%
Goodge Street 38.46% 41.03% 20.51%
Fortis Green Road 18.18% 18.18% 63.64%
Fortess Road 42.31% 36.54% 21.15%
Finchley Road - West End Lane 45.83% 4.17% 50.00%
Fairfax Road 50.00% 17.65% 32.35%
Eversholt Street South 26.47% 20.59% 52.94%
Eversholt Street North 53.33% 13.33% 33.33%
England's Lane 39.39% 27.27% 33.33%
Drummond Street 21.95% 39.02% 39.02%
Crowndale Road 35.71% 7.14% 57.14%
Cricklewood Broadway 44.68% 25.53% 29.79%
Cleveland Street 5.88% 35.29% 58.82%
Chester Road 10.00% 0.00% 90.00%
Chalton Street 32.00% 20.00% 48.00%
Chalk Farm 33.33% 11.11% 55.56%
Chalcot Road 45.83% 12.50% 41.67%
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Belsize Park - Haverstock Hill 40.00% 28.89% 31.11%
Albany Street 65.00% 5.00% 30.00%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

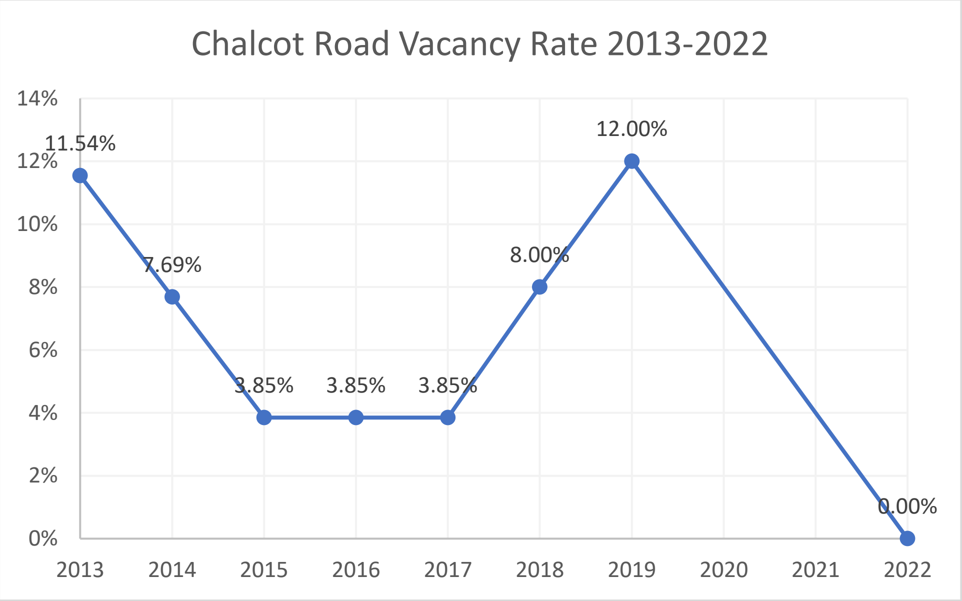
Centre Name	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	1	4.0	3.9%

Conclusions on Diversity of Uses:

Almost half (11 units or circa 46%) of the centre's units comprise Class E(a) shops, which is above the Camden average (41.1%), although there is a limited range of convenience goods shops. There are 3 F&B units and just one unit dedicated to the evening / night time economy. All 'other' uses (10 units) account for 41.7% of the total number of units and include services, offices and Sui Generis uses.

This composition of uses has remained relatively stable since 2014 and 2019, based on headline monitoring data for those years.

Vacancies 2013 - 2022



Conclusions

Chalcot Road appears to be a healthy centre with a mix of uses, good environmental quality and no vacant units. It caters reasonably well for the day-to-day shopping and service needs of its localised 'walk-in' catchment but is lacking in terms of convenience goods provision.

Footfall looks to have recovered well following the pandemic, up until July and August 2023, when another notable decline in pedestrian activity has been observed.

The centre boundary is appropriate considering the distribution and composition of existing uses and the below average vacancy rate.

CAMDEN – TOWN CENTRE HEALTH CHECKS

CHALK FARM

Description

Current Designation: Neighbourhood Centre as defined in Camden Local Plan 2017

Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden's centres and other shopping areas); and
    - Policy TC4 (Town centre uses).

Description of Centre:

The centre is situated on the north-western edge of Camden Town (Town Centre). It comprises two small commercial areas on opposite sides of Adelaide Road, which runs east-west from Chalk Farm towards Finchley Road (Town Centre).

The centre is focused around Chalk Farm Underground station. It is also close to The Roundhouse theatre and Haverstock School.

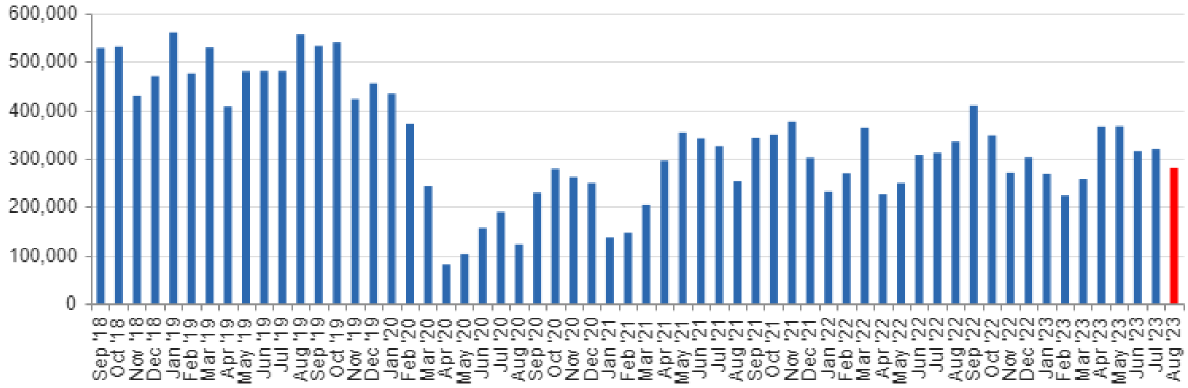
Aside from Camden Town (Town Centre) nearby, there are other Neighbourhood Centres in the adjacent Primrose Hill and Maitland Park areas.

Footfall

A section along Adelaide Road was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

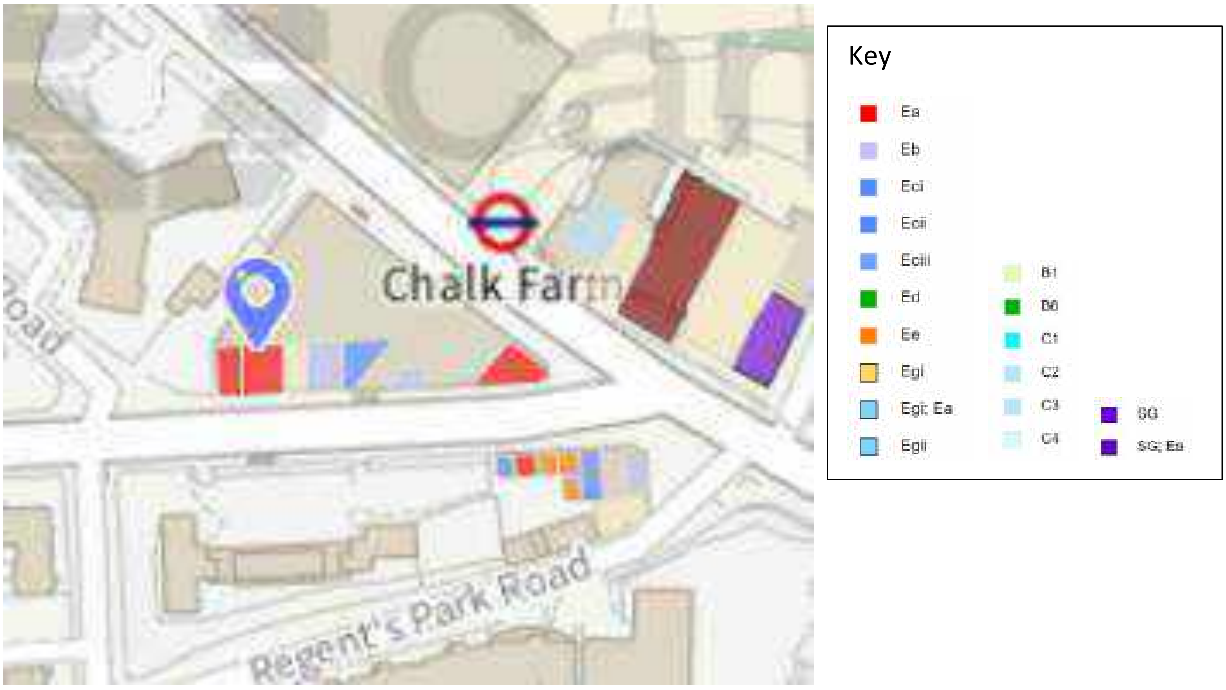
As can be seen in the figure below, footfall has bounced back somewhat since the start of the pandemic but has not quite reached the levels of late 2018, 2019 and early 2020.

Figure 2: Footfall of Adelaide Road, Chalk Farm (September 2018 – August 2023)

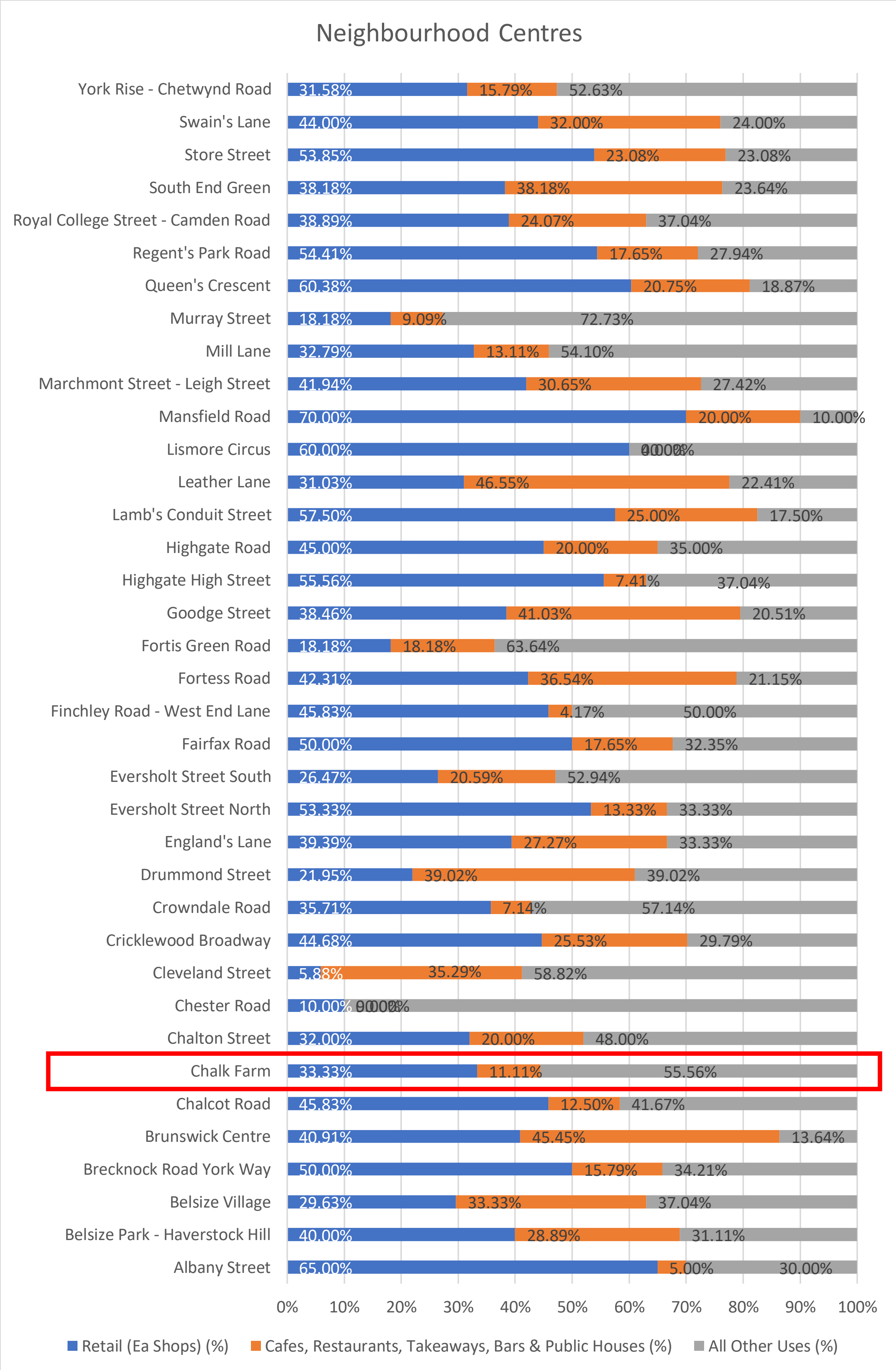


Source: Datscha

Diversity of Uses 2022



Centre Name	Number	%	Camden Average (%)
Retail (Ea Shops)	3	33.3	41.1
Food & Beverage (F&B)	1	11.1	26.3
All Other Uses	5	55.6	32.6
Total	9	100.0	100.0


Neighbourhood Centres
York Rise - Chetwynd Road 31.58% 15.79% 52.63%
Swain's Lane 44.00% 32.00% 24.00%
Store Street 53.85% 23.08% 23.08%
South End Green 38.18% 38.18% 23.64%
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Albany Street 65.00% 5.00% 30.00%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

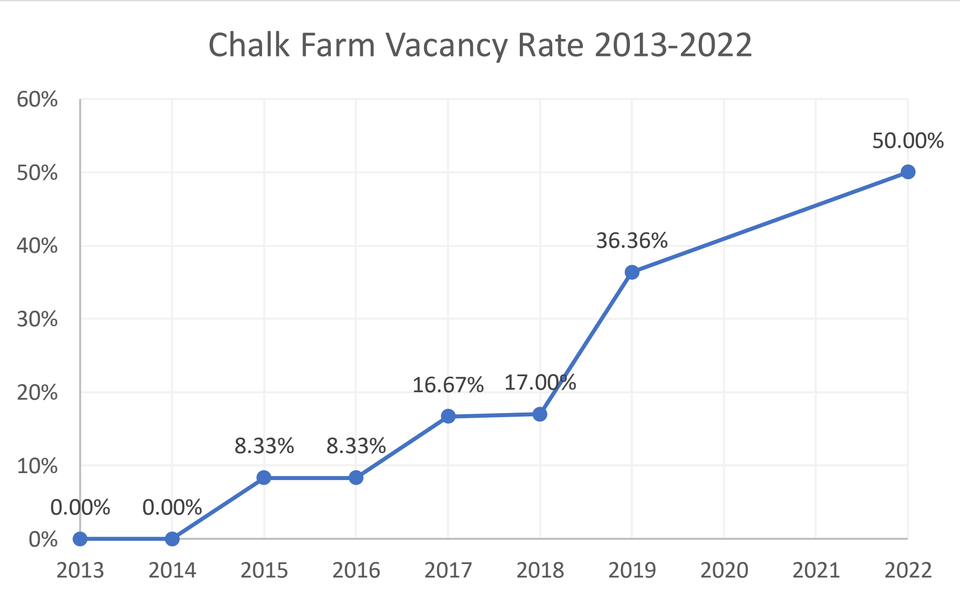
Centre Name	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	0	0.0	3.9%

Conclusions on Diversity of Uses:

Chalk Farm comprises just 9 occupied units, of which one-third (3 units) accommodate Class E(a) convenience goods shops. The centre has just one F&B unit and no evening / night time economy offer.

Overall, the centre has a very limited mix of uses. Since the previous monitoring years of 2014 and 2019, there has been a reduction in the number of shops (from 4 to 3) and F&B units (from 3 to 1). The proximity and scale of Camden Town (Town Centre) is likely to be a significant contributing factor.

Vacancies 2013 - 2022



Vacancy rates in the centre have increased significantly from 2016, albeit the number of units means that a change to a single unit will have a major effect on the percentages. This is likely to be at least partly due to redevelopment plans for the centre, which includes both parts of the centre.

Chalk Farm Parade forms part of the redevelopment site for 5-17 Haverstock Hill (Application Ref: 2016/3975/P) which will see the retail provision in the parade reduced from 6 units to 3 and the floorspace reduced from 406 sqm GEA to 284 sqm.

The southern part of the neighbourhood centre is to be partially redeveloped as part of Application Ref: 2021/0877/P relating to 155-157 Regent's Park Road. This will see the three existing retail /F&B units replaced by the reception/lobby areas of the new hotel.

Conclusions

Chalk Farm appears to be struggling as a centre. It is very small and lacks relevance in the shadow of Camden Town (Town Centre). The centre has a limited and declining mix of uses, and the vacancy rate currently stands at 50% having risen in most monitoring years since 2014. This is reflected in the centre's generally poor environmental quality.

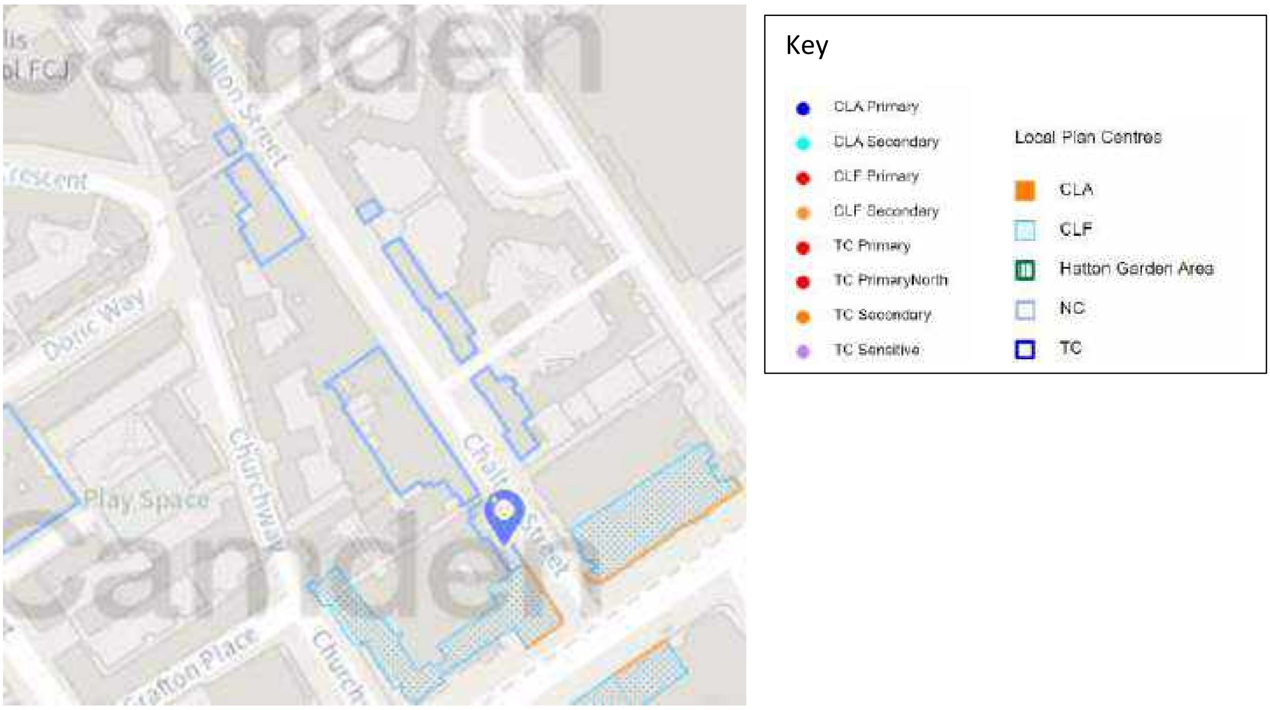
The two redevelopment plans for the centre are likely to further change the centre, although exactly how will need to be monitored. However, the introduction of a hotel and loss of small retail units suggests the designation of the area may need reviewing in the future.

CAMDEN – TOWN CENTRE HEALTH CHECKS

CHALTON STREET

Description

Current Designation: Neighbourhood Centre in Camden Local Plan 2017



Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
  - Policy TC1 (Quality and location of retail development);
  - Policy TC2 (Camden's centres and other shopping areas); and
  - Policy TC4 (Town centre uses).

Description of Centre:

Chalton Street Neighbourhood Centre is a linear centre focused along both sides of Chalton Street. The southern end of Chalton Street has a junction with Euston Road, which runs east-west between King's Cross (less than 0.5km to the east) and the Regent's Park / Fitzrovia areas to the west.

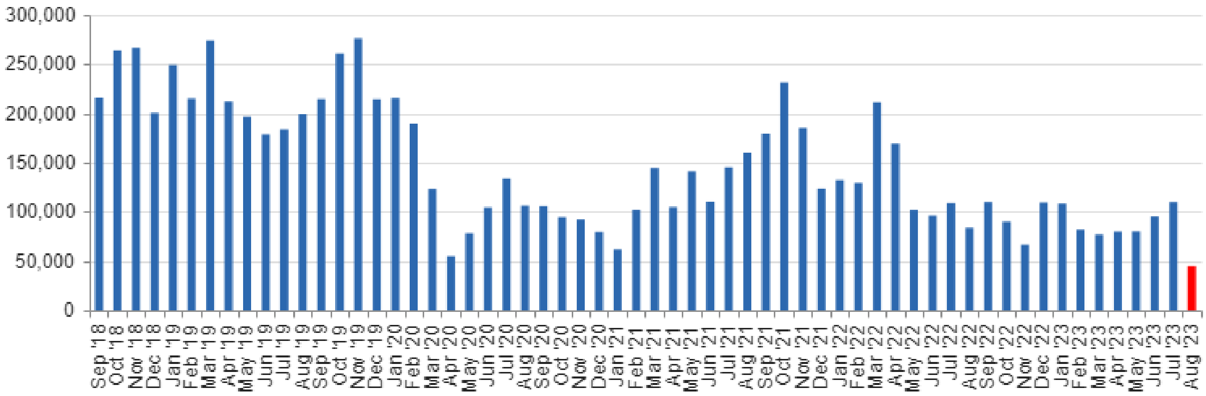
There is another Neighbourhood Centre – Eversholt Street South – approximately 200-300m to the west. The nearest Town Centre is Camden Town to the north.

Footfall

A section along Chalton Street was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall has improved since the start of the pandemic but has not reached the levels of late 2018, 2019 and early 2020.

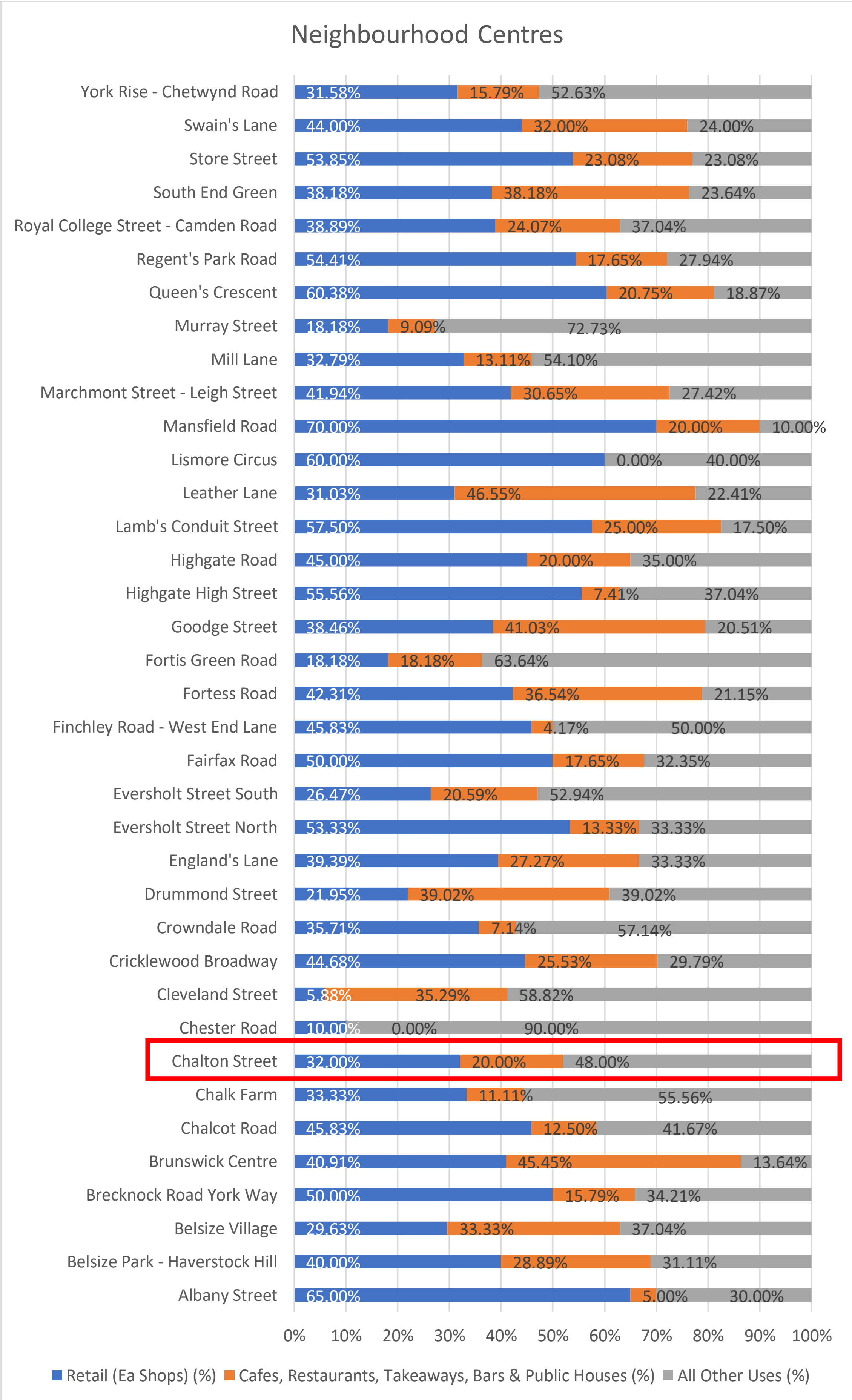
Figure 2: Footfall of Chalton Street (September 2018 – August 2023)



Source: Datscha

Diversity of Uses 2022

Chalton Street	Number	%	Camden Average (%)
Retail (Ea Shops)	8	32.0	41.1
Food & Beverage (F&B)	5	20.0	26.3
All Other Uses	12	48.0	32.6
Total	25	100.0	100.0


Neighbourhood Centres
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Mansfield Road 70.00% 20.00% 10.00%
Lismore Circus 60.00% 0.00% 40.00%
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Belsize Park - Haverstock Hill 40.00% 28.89% 31.11%
Albany Street 65.00% 5.00% 30.00%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Retail (Ea Shops) (%) Cafes, Restaurants, Takeaways, Bars & Public Houses (%) All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

Chalton Street	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	0	0.0	3.9%

Conclusions on Diversity of Uses:

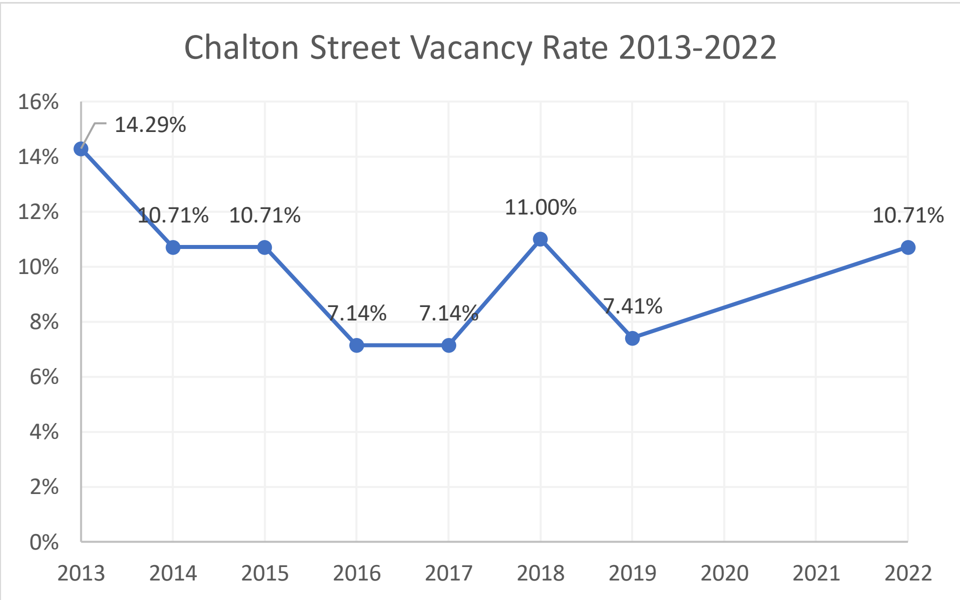
Chalton Street appears to be under-represented by both Class E(a) shops and F&B relative to the Camden averages for such uses. It has 8 shops (32% of total units compared with the Camden average of 41.1%) and to that end, the centre has seen a gradual reduction in the number of shops since 2014 (12 units) and 2019 (10 units).

There are 5 F&B units (20% relative to the Camden average of 26.3%). The number of F&B units has remained unchanged since 2014 and 2019. The centre has no evening / night time economy offer.

All ‘other’ uses account for 12 units (or 48% of total units). Offices and services are the dominant use categories in this regard.

This assessment however does not take account of the street market that operates from the centre on three days a week. This provides 42 trading pitches, with fruit and veg as well as affordable household goods and clothing all available.

Vacancies 2013 - 2022



Conclusions

Chalton Street appears to be facing some issues and challenges to its overall health. Its vacancy rate, whilst below average levels, has risen since 2019 and currently stands at circa 11%. Footfall has also not reached the levels of late 2018, 2019 and 2020.

Meanwhile, relative to Camden averages, the centre is under-represented by both Class E(a) shops and F&B. It has no evening / night time economy offer. The centre appears to have a predominantly services-orientated function and little in the way of retail activity other than the thrice-weekly market.

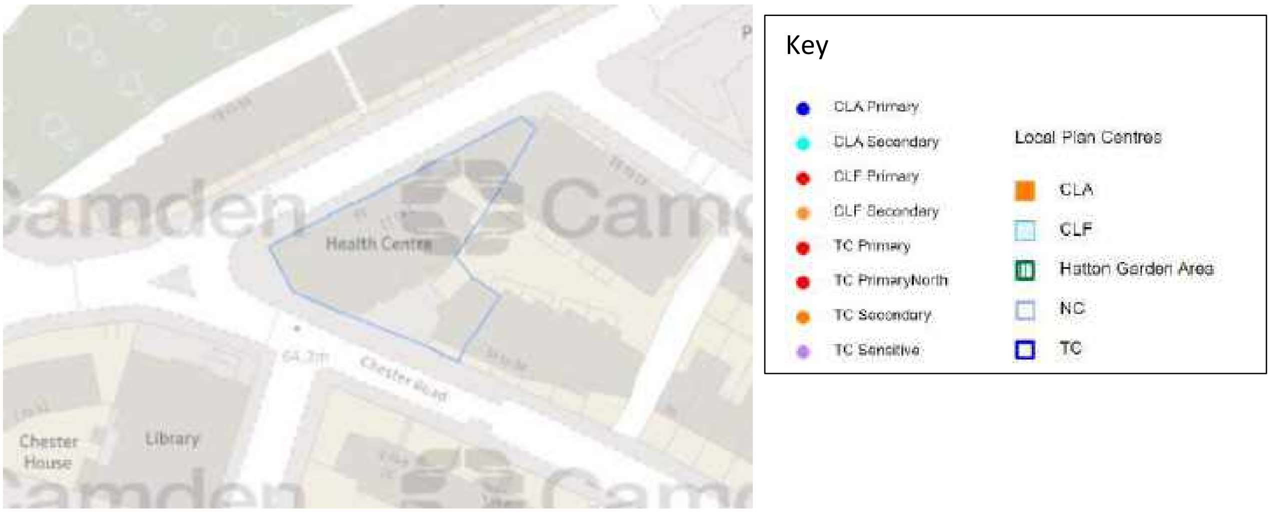
The centre boundary is considered to be appropriate.

CAMDEN – TOWN CENTRE HEALTH CHECKS

CHESTER ROAD

Description

Current Designation: Neighbourhood Centre as defined in Camden Local Plan 2017



Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
  - Policy TC1 (Quality and location of retail development);
  - Policy TC2 (Camden's centres and other shopping areas); and
  - Policy TC4 (Town centre uses).
- The entire centre lies within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage).
- The entire centre lies within a Neighbourhood Plan Area Boundary.

Description of Centre:

Chester Road Neighbourhood Centre is situated to the south of Waterlow Park on the north-eastern fringes of the borough. The centre consists of a mixed use, residential-led development with commercial space at ground floor level.

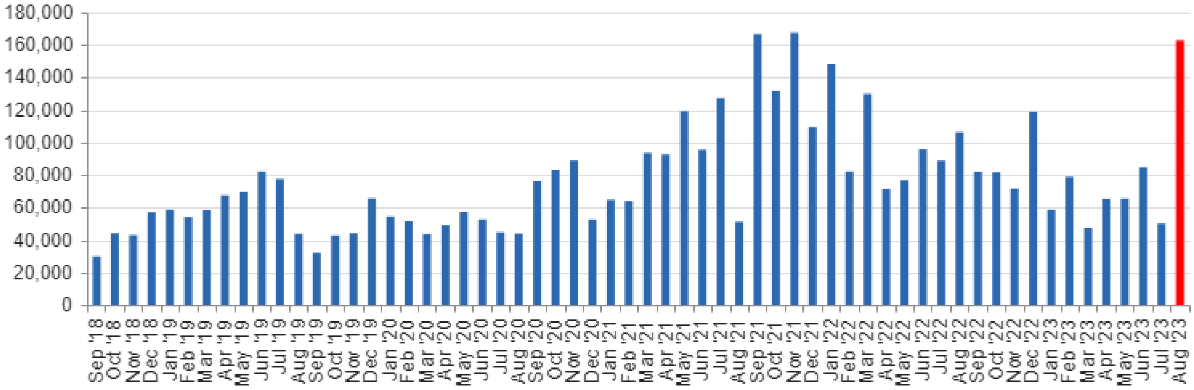
The centre would principally serve a localised 'walk-in' catchment, and the nearest other centres are Neighbourhood Centres (York Rise / Chetwynd Road and Swain's Lane) circa 1km to the south and west respectively.

Footfall

A section along Chester Road was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

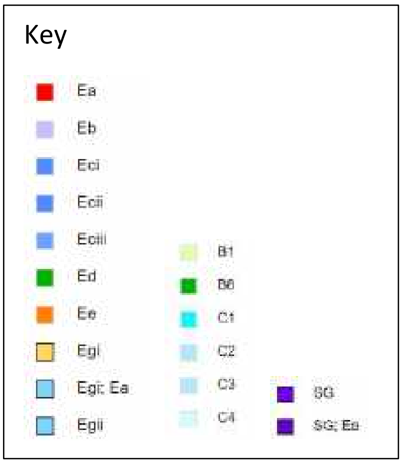
As can be seen in the figure below, footfall has grown considerably overall, with little to no impact seen during the period of the pandemic. September 2021, November 2021 and August 2023 represent particularly strong months over this period.

Figure 2: Footfall of Chester Road (September 2018 – August 2023)

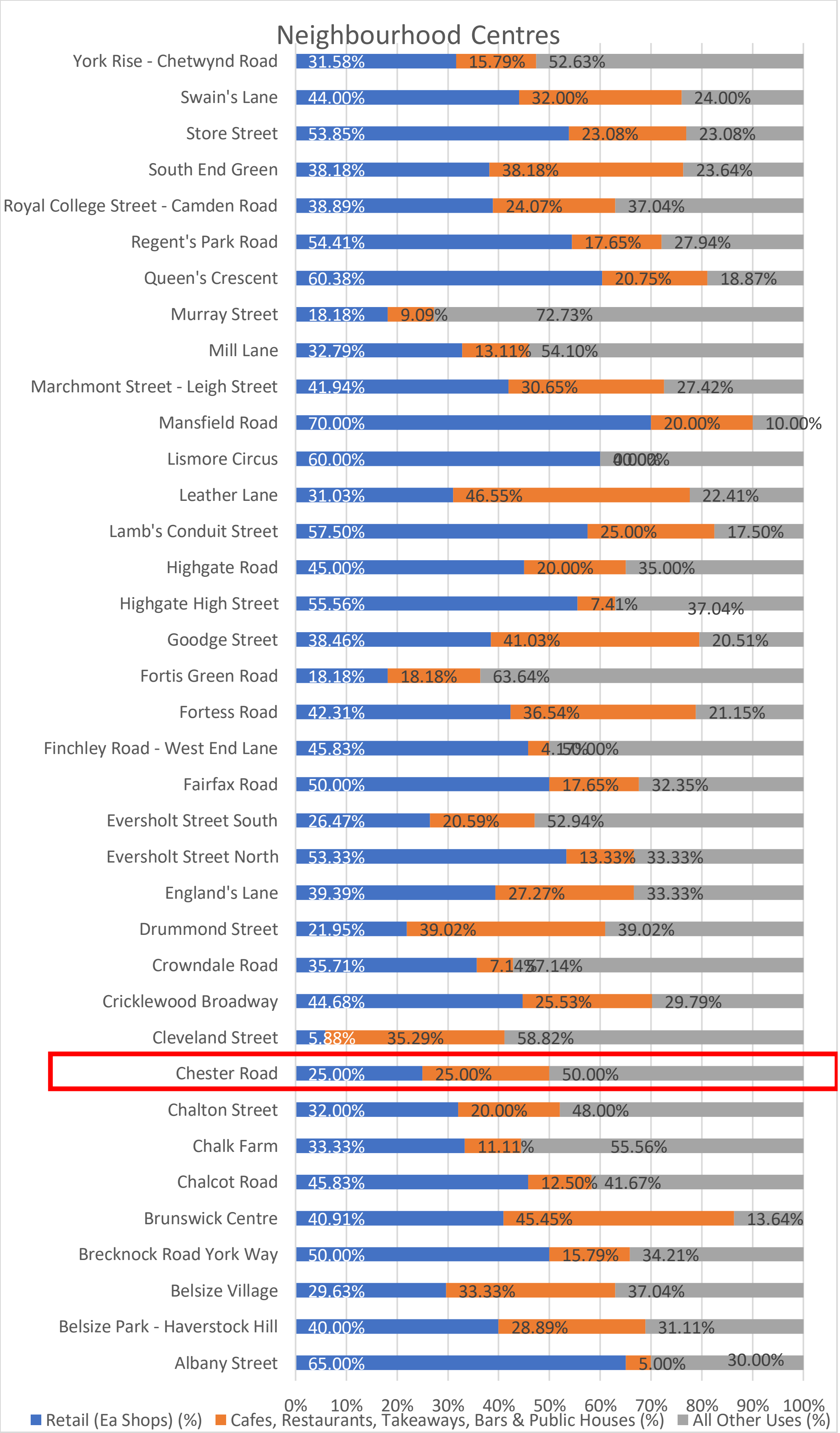


Source: Datscha

Diversity of Uses 2022



Chester Road	Number	%	Camden Average (%)
Retail (Ea Shops)	1	25.0	41.1
Food & Beverage (F&B)	1	25.0	26.3
All Other Uses	2	50.0	32.6
Total	4	100.0	100.0


Neighbourhood Centres
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Store Street 53.85% 23.08% 23.08%
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Albany Street 65.00% 5.00% 30.00%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

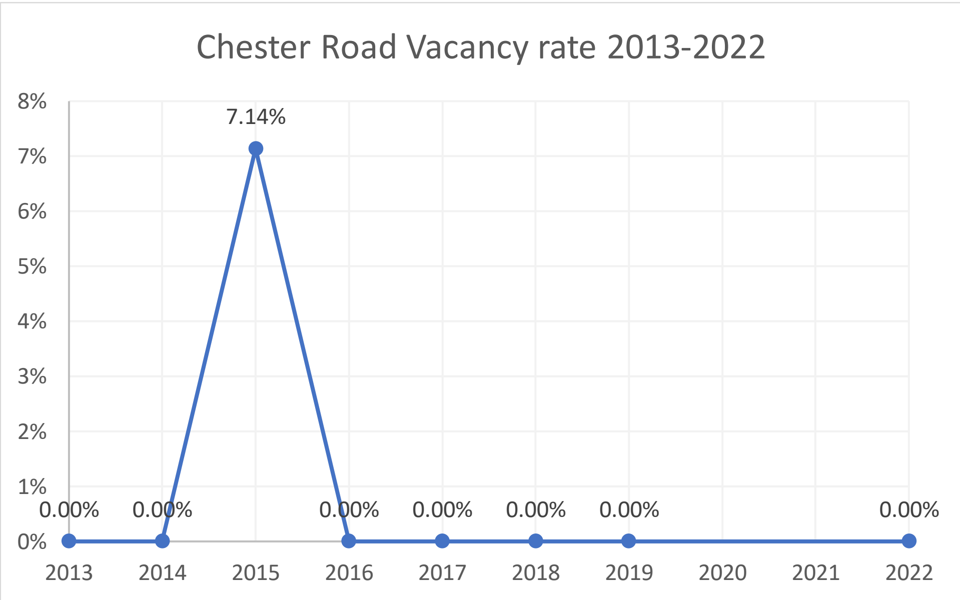
Centre Name	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	0	0.0	3.9%

Conclusions on Diversity of Uses:

Chester Road contains just 4 units, only one of which accommodates a Class E(a) shop – a *Nisa* convenience store. The remaining units are dedicated to 'other' non-retail uses namely a coffee shop, a beauty salon and a GP surgery. There is no evening / night time economy offer.

There have been no notable changes to the centre's composition of uses since 2019.

Vacancies 2013 - 2022



Conclusions

The centre appears to be healthy within the limitations of its small scale and localised function. There are no vacant units and footfall levels remain strong.

Chester Road includes a small convenience store to meet the 'top-up' food shopping needs of local residents and other users of the centre, together with a limited range of services.

The centre boundary is considered to be appropriate.

CAMDEN – TOWN CENTRE HEALTH CHECKS

CLEVELAND STREET

Description

Current Designation: Neighbourhood Centre in Camden Local Plan 2017

Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden's centres and other shopping areas); and
    - Policy TC4 (Town centre uses).
- The entire centre lies within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage).

Description of Centre:

The centre (with 34 occupied units) extends in linear form along the eastern side of Cleveland Street, a short distance to southeast of Great Portland Street Underground station. The northern end of Cleveland Street has a junction with Euston Road, which runs east towards Euston and King's Cross.

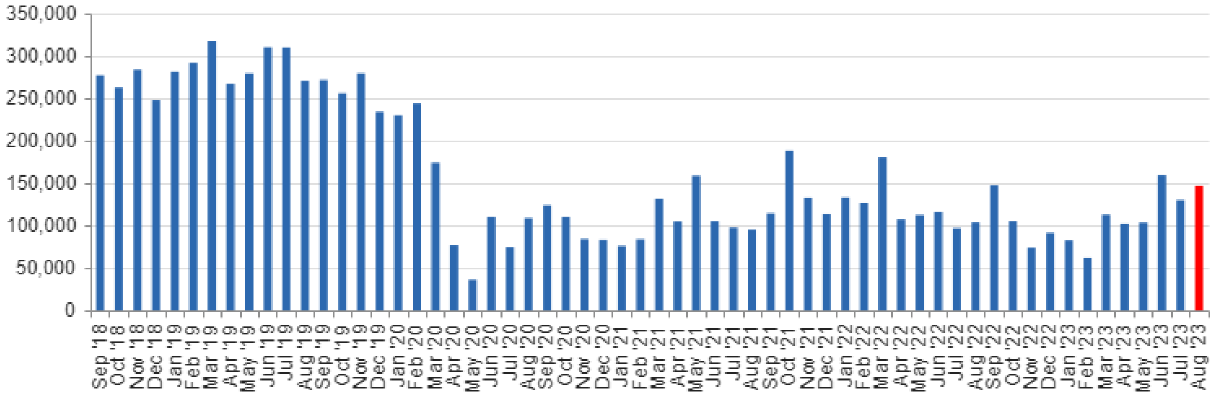
The nearest other centres are Neighbourhood Centres (Drummond Street and Goodge Street) situated less than 1km to the northeast and southeast respectively. The nearest Town Centre is Camden Town to the north.

Footfall

A section along Cleveland Street was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

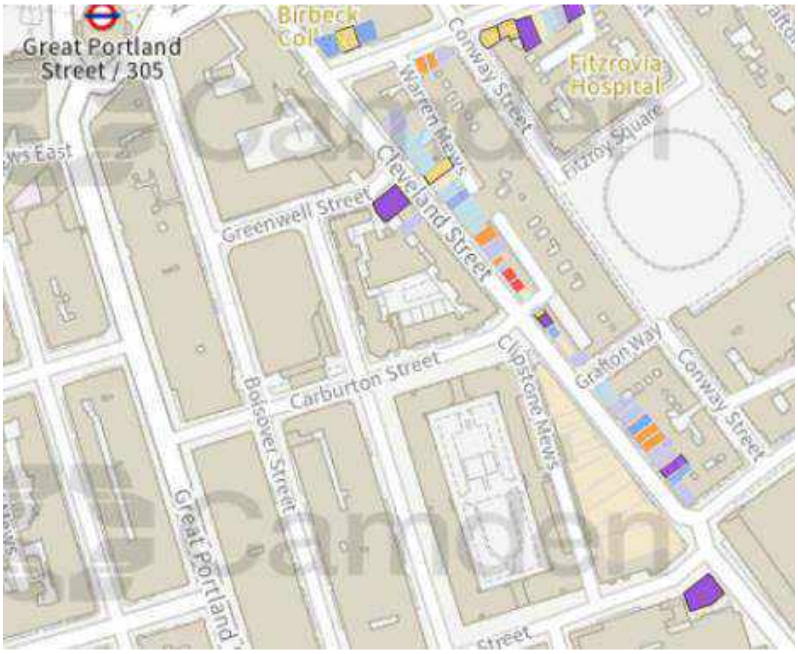
As can be seen in the figure below, footfall levels dropped significantly in early 2020 as a result of the COVID-19 restrictions that came in. Although pedestrian activity has improved since April and May 2020, it is still significantly lower than the levels of late 2018, 2019 and early 2020.

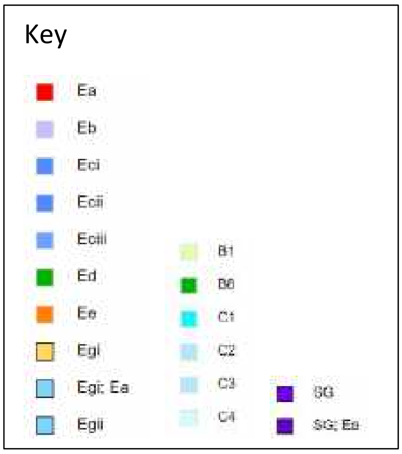
Figure 2: Footfall of Cleveland Street (September 2018 – August 2023)



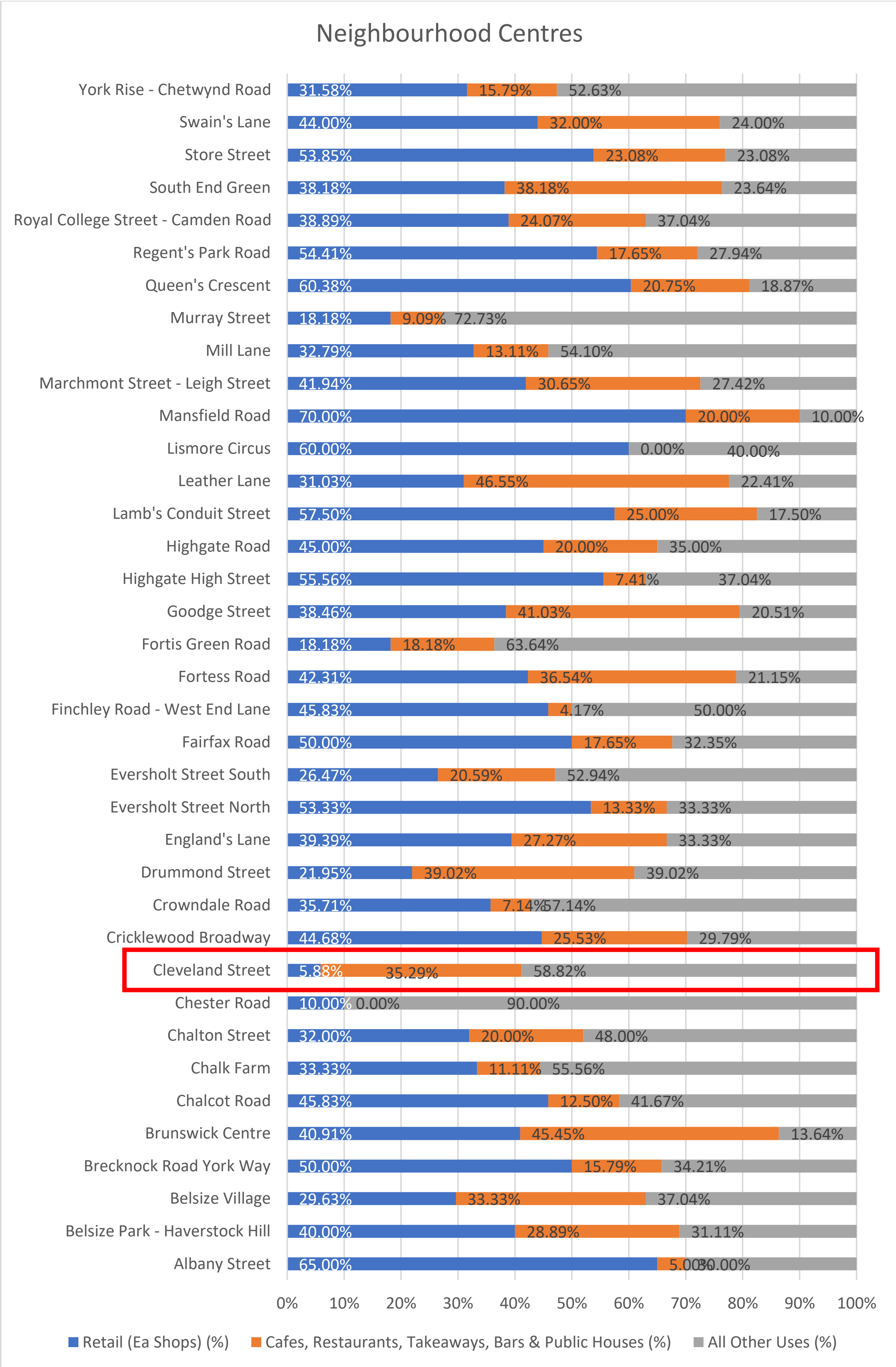
Source: Datscha

Diversity of Uses 2022





Centre Name	Number	%	Camden Average (%)
Retail (Ea Shops)	2	5.9	41.1
Food & Beverage (F&B)	12	35.3	26.3
All Other Uses	20	58.8	32.6
Total	34	100.0	100.0


Neighbourhood Centres
York Rise - Chetwynd Road
31.58%
15.79%
52.63%
Swain's Lane
44.00%
32.00%
24.00%
Store Street
53.85%
23.08%
23.08%
South End Green
38.18%
38.18%
23.64%
Royal College Street - Camden Road
38.89%
24.07%
37.04%
Regent's Park Road
54.41%
17.65%
27.94%
Queen's Crescent
60.38%
20.75%
18.87%
Murray Street
18.18%
9.09%
72.73%
Mill Lane
32.79%
13.11%
54.10%
Marchmont Street - Leigh Street
41.94%
30.65%
27.42%
Mansfield Road
70.00%
20.00%
10.00%
Lismore Circus
60.00%
0.00%
40.00%
Leather Lane
31.03%
46.55%
22.41%
Lamb's Conduit Street
57.50%
25.00%
17.50%
Highgate Road
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Highgate High Street
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Goodge Street
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Fortis Green Road
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Fortess Road
42.31%
36.54%
21.15%
Finchley Road - West End Lane
45.83%
4.17%
50.00%
Fairfax Road
50.00%
17.65%
32.35%
Eversholt Street South
26.47%
20.59%
52.94%
Eversholt Street North
53.33%
13.33%
33.33%
England's Lane
39.39%
27.27%
33.33%
Drummond Street
21.95%
39.02%
39.02%
Crowndale Road
35.71%
7.14%
57.14%
Cricklewood Broadway
44.68%
25.53%
29.79%
Cleveland Street
5.88%
35.29%
58.82%
Chester Road
10.00%
0.00%
90.00%
Chalton Street
32.00%
20.00%
48.00%
Chalk Farm
33.33%
11.11%
55.56%
Chalcot Road
45.83%
12.50%
41.67%
Brunswick Centre
40.91%
45.45%
13.64%
Brecknock Road York Way
50.00%
15.79%
34.21%
Belsize Village
29.63%
33.33%
37.04%
Belsize Park - Haverstock Hill
40.00%
28.89%
31.11%
Albany Street
65.00%
5.00%
30.00%
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

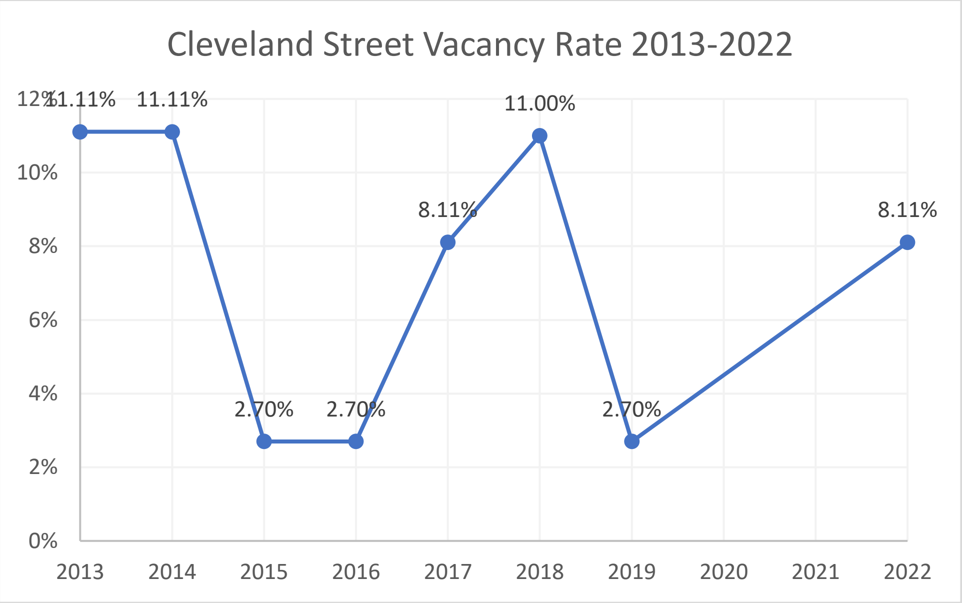
Cleveland Street	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	0	0.0	3.9%

Conclusions on Diversity of Uses:

Only 2 of the centre's 34 occupied units are dedicated to Class E(a) shops. This equates to less than 6% of total units and compares with a Camden average of 41.1% – whereas 8 shops were previously recorded in the monitoring years of 2014 and 2019.

In contrast, the centre is well-served by F&B provision (12 units or 35.3%) and has 20 'other' uses, which account for almost 60% of the centre's units. These include services, offices and Sui Generis uses. Cleveland Street has no evening / night time economy offer.

Vacancies 2013 - 2022



Conclusions

Cleveland Street appears to lack retail activity (i.e. shops) and a balanced mix of uses to support its overall health. However, it is well-served by F&B provision and otherwise has a good services-orientated function.

The vacancy rate has risen since 2019, from 2.7% to circa 8%, and this is partly reflective of the declining number of shops within the centre. Furthermore, footfall remains significantly lower than the levels of late 2018, 2019 and early 2020. These findings point to a centre that has not recovered particularly well from the impacts of the pandemic.

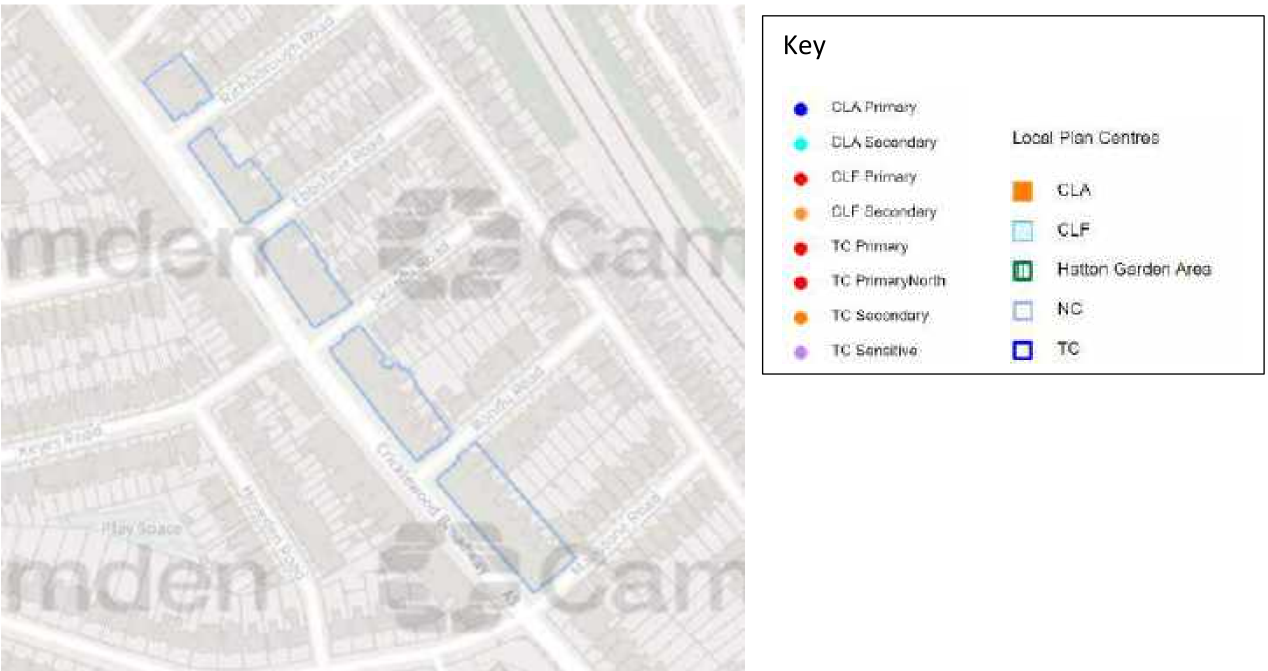
The centre boundary is appropriate considering the distribution of uses and the below average vacancy rate.

CAMDEN – TOWN CENTRE HEALTH CHECKS

CRICKLEWOOD BROADWAY

Description

Current Designation: Neighbourhood Centre in Camden Local Plan 2017



Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
  - Policy TC1 (Quality and location of retail development);
  - Policy TC2 (Camden's centres and other shopping areas); and
  - Policy TC4 (Town centre uses).

Description of Centre:

The centre lies on the north-western fringes of the borough, extending along Cricklewood Broadway. This busy arterial route provides good connections to the North Circular Road (to the north) and to the Kilburn area (to the south).

The centre's commercial areas straddle two borough boundaries: the eastern side between Ash Grove and Manstone Road is the Camden side and is the focus of this healthcheck. It comprises 47 occupied units.

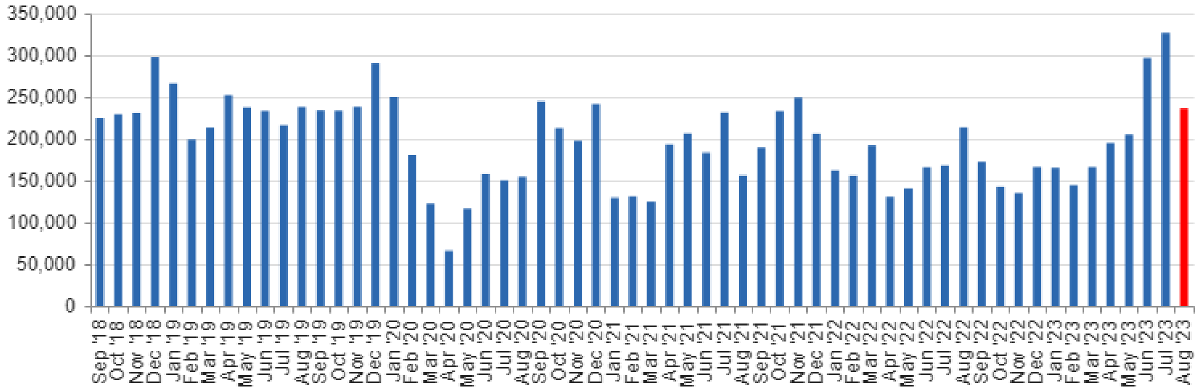
The nearest centres are Mill Lane (Neighbourhood Centre) approximately 1km to the east and Kilburn Town Centre less than 2km to the south.

Footfall

A section along Cricklewood Broadway was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall has been relatively stable during this period with a low coming in March 2020 and a high in July 2023.

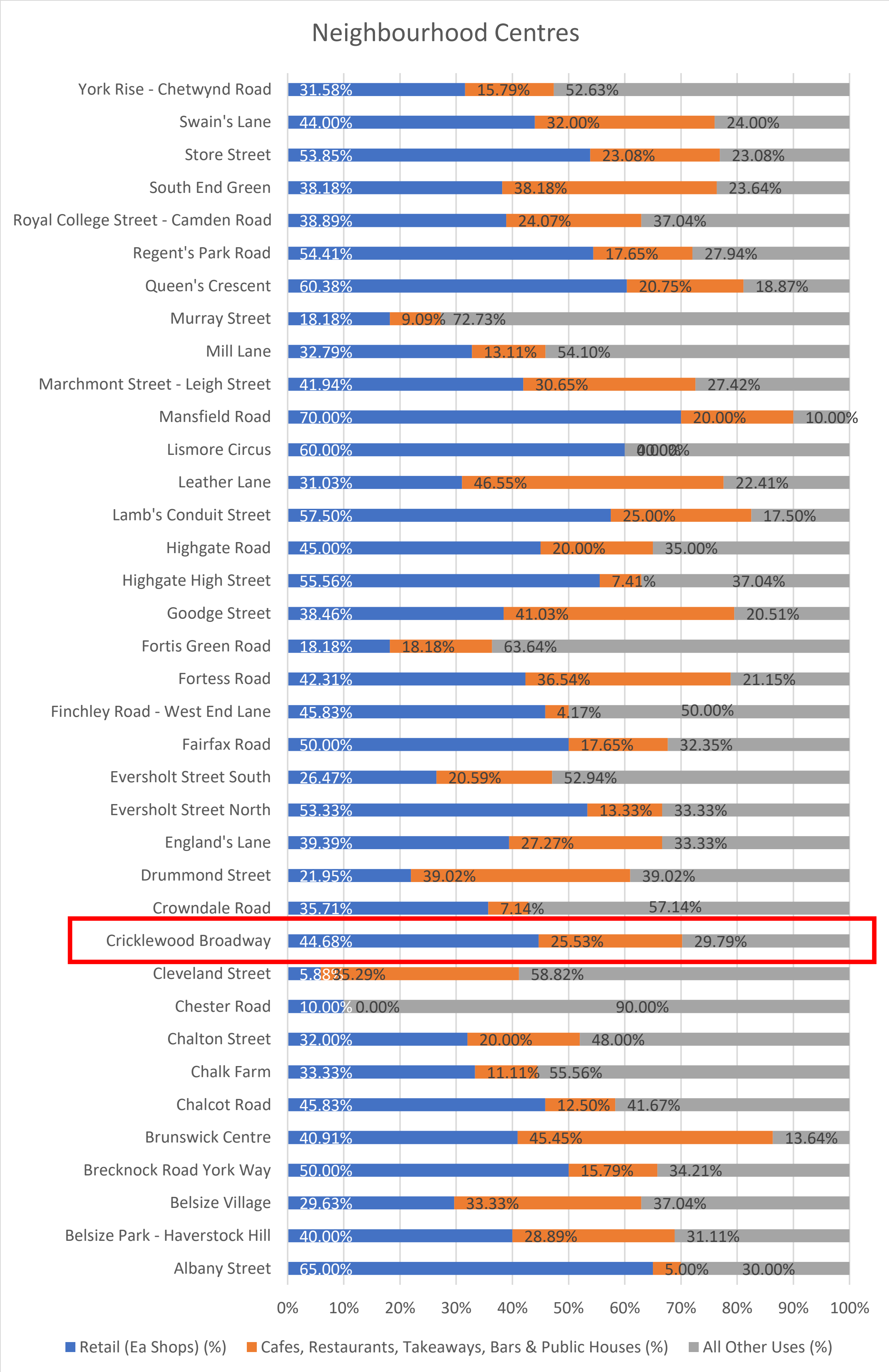
Figure XXX: Footfall of Cricklewood Broadway (September 2018 – August 2023)



Source: Datscha

Diversity of Uses 2022

Cricklewood Broadway	Number	%	Camden Average (%)
Retail (Ea Shops)	21	44.7	41.1
Food & Beverage (F&B)	12	25.5	26.3
All Other Uses	14	29.8	32.6
Total	47	100.0	100.0


Neighbourhood Centres
York Rise - Chetwynd Road
31.58%
15.79%
52.63%
Swain's Lane
44.00%
32.00%
24.00%
Store Street
53.85%
23.08%
23.08%
South End Green
38.18%
38.18%
23.64%
Royal College Street - Camden Road
38.89%
24.07%
37.04%
Regent's Park Road
54.41%
17.65%
27.94%
Queen's Crescent
60.38%
20.75%
18.87%
Murray Street
18.18%
9.09%
72.73%
Mill Lane
32.79%
13.11%
54.10%
Marchmont Street - Leigh Street
41.94%
30.65%
27.42%
Mansfield Road
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20.00%
10.00%
Lismore Circus
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Leather Lane
31.03%
46.55%
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Lamb's Conduit Street
57.50%
25.00%
17.50%
Highgate Road
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Goodge Street
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Fairfax Road
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17.65%
32.35%
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Eversholt Street North
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England's Lane
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27.27%
33.33%
Drummond Street
21.95%
39.02%
39.02%
Crowndale Road
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7.14%
57.14%
Cricklewood Broadway
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Cleveland Street
35.29%
58.82%
Chester Road
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Chalton Street
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Chalk Farm
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Belsize Village
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33.33%
37.04%
Belsize Park - Haverstock Hill
40.00%
28.89%
31.11%
Albany Street
65.00%
5.00%
30.00%
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

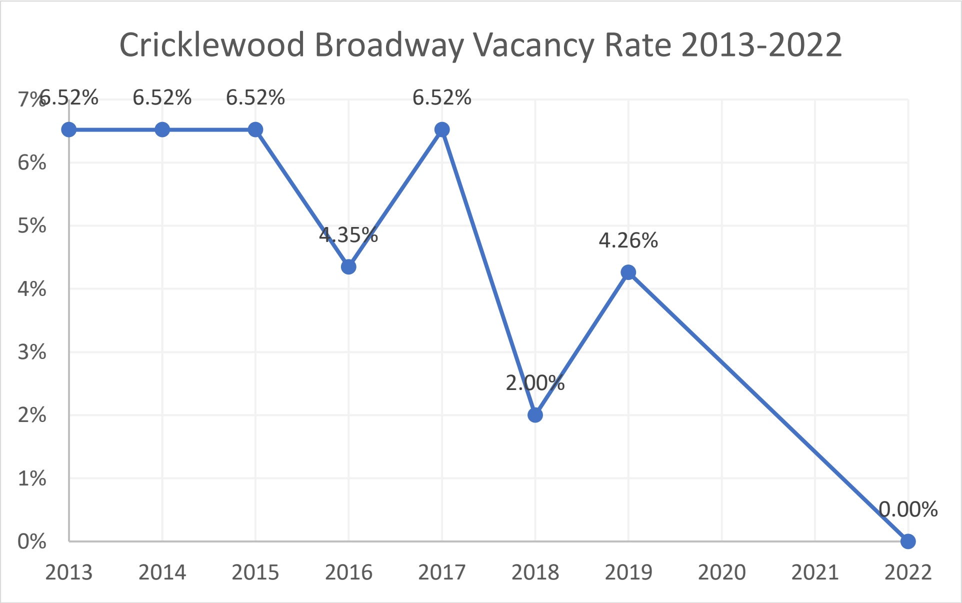
Cricklewood Broadway	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	2	4.3	3.9%

Conclusions on Diversity of Uses:

Almost half (21 units or circa 45%) of the centre's units comprise Class E(a) shops, which is only slightly above the Camden average (41.1%). There are 12 F&B units (about 26% in line with the Camden average) and two units dedicated to the evening / night time economy offer. All 'other' uses (14 units), including services and Sui Generis uses, account for 29.8% of the total number of units.

This diversity of uses is virtually unchanged since the previous monitoring years of 2014 and 2019 (the only change being one less shop and one more F&B unit), indicating that the centre is stable and meeting local needs.

Vacancies 2013 - 2022



Conclusions

Cricklewood Broadway appears to be a healthy centre with a good mix of uses and no vacant units. Indeed, the centre's diversity of uses is broadly unchanged since 2014 and 2019 and correlates with the Camden averages.

Levels of footfall have been relatively stable over the period September 2018 – August 2023, with a particular high in July 2023, indicating that the centre has a relevant offer and is catering well for the day-to-day shopping and service needs of its localised catchment.

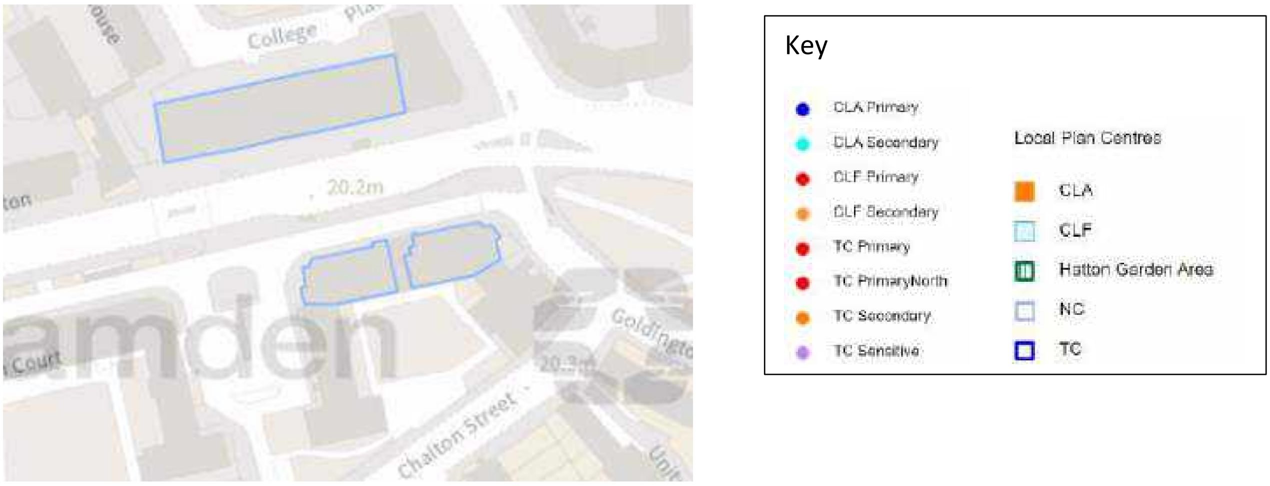
The centre boundary is appropriate considering the distribution and composition of existing uses and the 0% vacancy rate.

CAMDEN – TOWN CENTRE HEALTH CHECKS

CROWNDALE ROAD

Description

Current Designation: Neighbourhood Centre in Camden Local Plan 2017



Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden's centres and other shopping areas); and
    - Policy TC4 (Town centre uses).

Description of Centre:

Crowndale Road Neighbourhood Centre is located between St Pancras railway station to the southeast and Camden Town (Town Centre) to the northwest. Crowndale Road itself runs between Mornington Crescent Underground station at the southern end of Camden Town and the St Pancras / King's Cross area.

The centre comprises two parades of shops and services on opposite sides (north and south) of Crowndale Road. Its south side is set back along Crowndale Court.

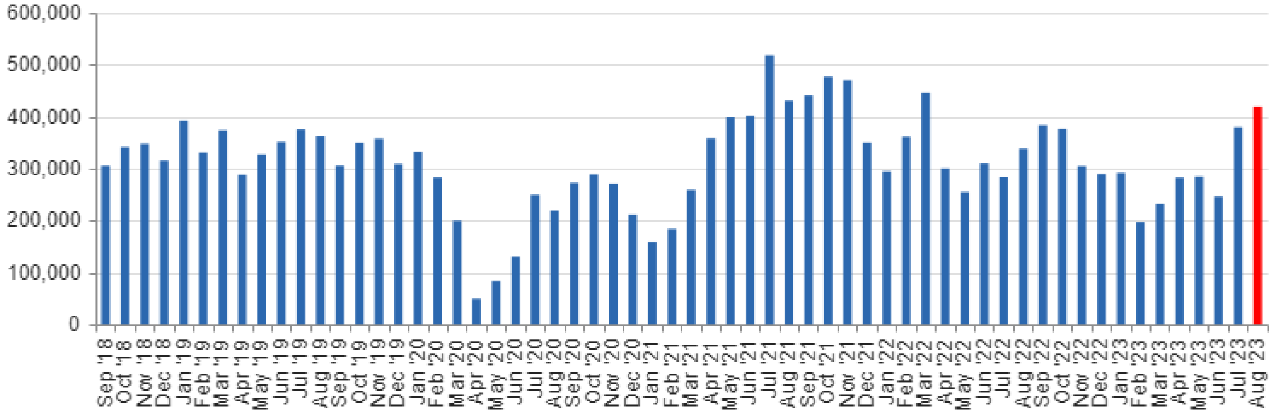
Camden Town (Town Centre) is the closest centre, approximately 0.5km to the northwest. There is also Eversholt Street North (Neighbourhood Centre) to the west in proximity to Mornington Crescent Underground station.

Footfall

A section along Crowndale Road was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall was very stable in late 2018, throughout 2019 and into early 2020. The beginning of the pandemic response in March 2020 saw a huge reduction in pedestrian activity, but figures have now bounced back and even surpassed pre-pandemic levels in some months.

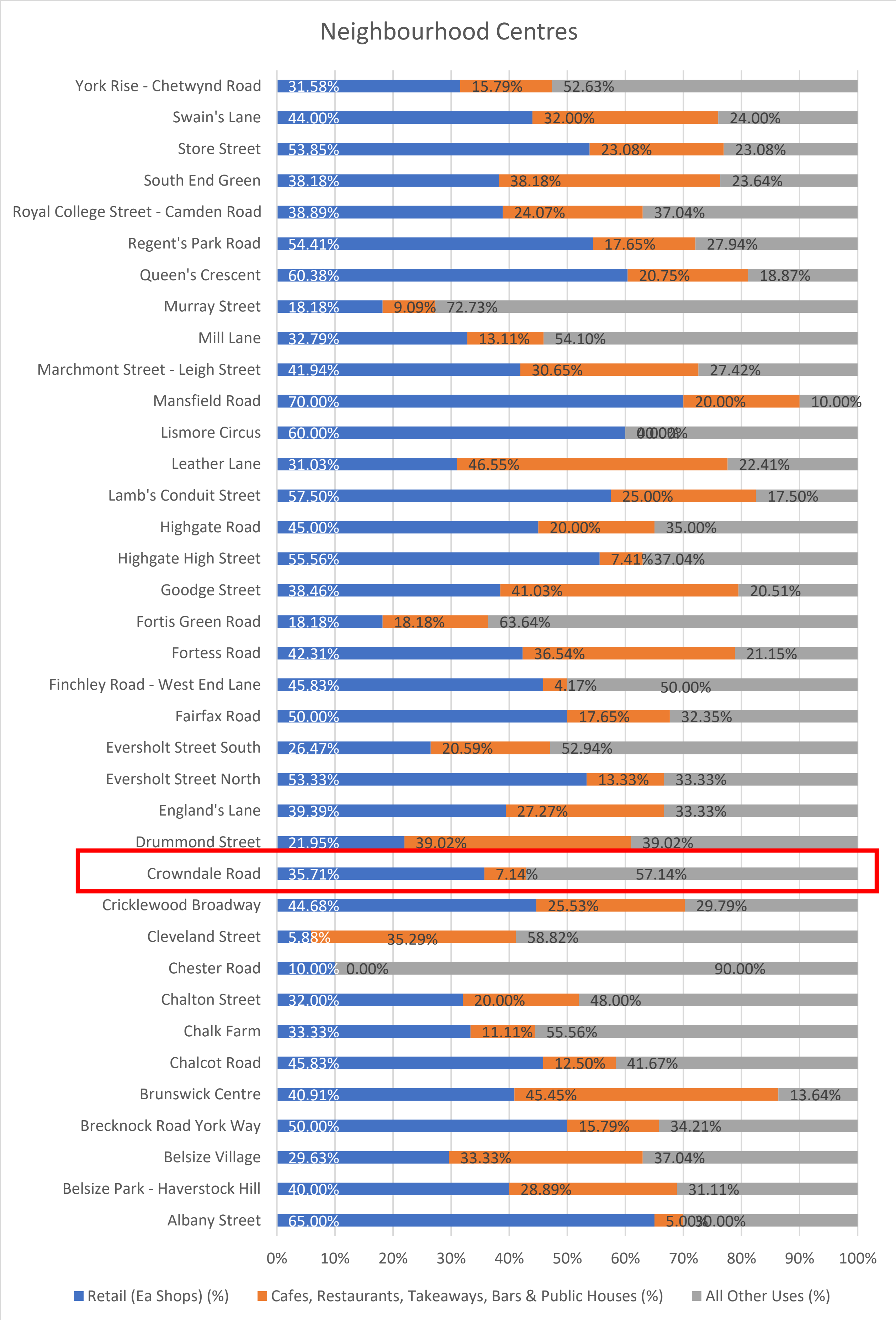
Figure 2: Footfall of Crowndale Road (September 2018 – August 2023)



Source: Datscha

Diversity of Uses 2022

Crowndale Road	Number	%	Camden Average (%)
Retail (Ea Shops)	5	35.7	41.1
Food & Beverage (F&B)	1	7.1	26.3
All Other Uses	8	57.2	32.6
Total	14	100.0	100.0


Neighbourhood Centres
York Rise - Chetwynd Road
31.58%
15.79%
52.63%
Swain's Lane
44.00%
32.00%
24.00%
Store Street
53.85%
23.08%
23.08%
South End Green
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38.18%
23.64%
Royal College Street - Camden Road
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Regent's Park Road
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Queen's Crescent
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Mill Lane
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Marchmont Street - Leigh Street
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27.42%
Mansfield Road
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Lismore Circus
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Albany Street
65.00%
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

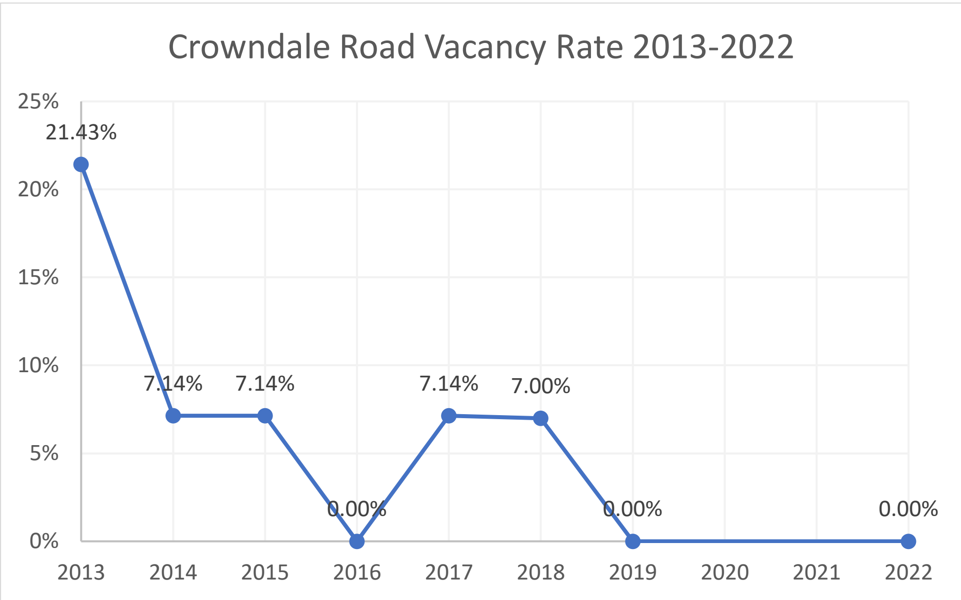
Crowndale Road	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	0	0.0	3.9%

Conclusions on Diversity of Uses:

The centre includes 14 occupied units, of which just over a third (35.7% or 5 units) are occupied by Class E(a) shops – compared with a Camden average of 41.1%. These shops are predominantly focused on the north side of Crowndale Road and include a small grocery store, an off-license and wholesale retail.

The centre has just one F&B unit – consistent with the monitoring years of 2014 and 2019. There is no evening / night time economy offer. Some 57.2% (8 units) of the centre's total number of units accommodate 'other' uses. This is well above the Camden average of 32.6% for such uses. Offices, medical or health services and Sui Generis uses are the dominant 'other' use categories.

Vacancies 2013 - 2022



Conclusions

Crowndale Road appears to be healthy considering it has no vacant units and strong levels of pedestrian activity following the pandemic. The centre has a reasonably good mix of uses, serving the day-to-day shopping and service needs of its localised catchment, yet continues to be under-represented by F&B provision which can help to extend activity into the evening.

The centre boundary is appropriate considering the composition and distribution of existing uses and the 0% vacancy rate.

CAMDEN – TOWN CENTRE HEALTH CHECKS

DRUMMOND STREET

Description

Current Designation: Neighbourhood Centre in Camden Local Plan 2017

Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
  - Policy TC1 (Quality and location of retail development);
  - Policy TC2 (Camden's centres and other shopping areas); and
  - Policy TC4 (Town centre uses).
- The entire centre is subject to the Euston Area Plan (EAP) which provides a planning framework for the regeneration of the Euston area.

Description of Centre:

The centre is situated to the north of Euston Square Underground station. It extends along both the north and south sides of Drummond Street (consisting of 41 occupied units) and is dissected by North Gower Street. Euston railway station lies circa 200-300m to the east and Regent's Park is less than 1km to the west.

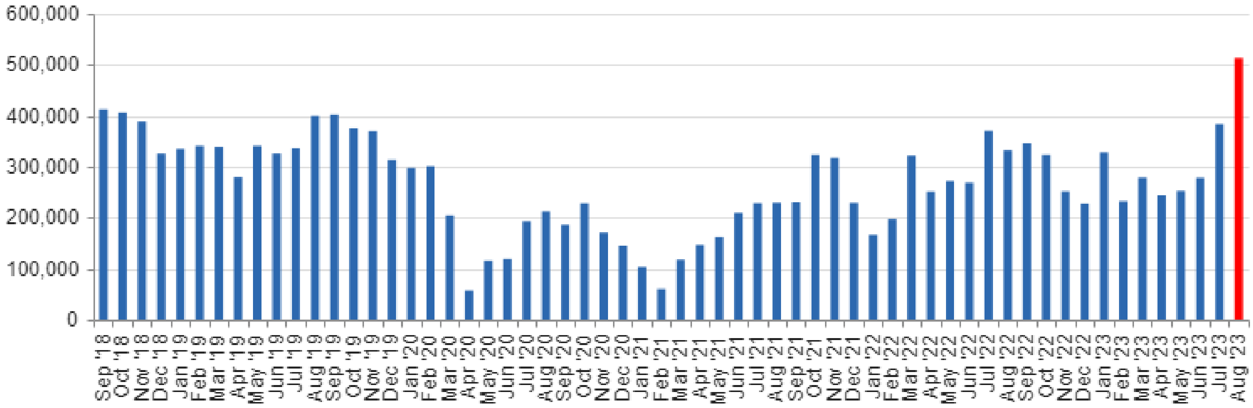
The nearest other centres are Neighbourhood Centres, namely Cleveland Street (less than 1km to the southwest) and Eversholt Street South (beyond Euston railway station to the east). Camden Town is the nearest Town Centre, approximately 2km to the north.

Footfall

A section along Drummond Street was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall has been relatively stable outside of the worst COVID-19 periods. Pedestrian activity from October 2021 onwards has been strong, with August 2023 seeing the highest figure during this timeframe.

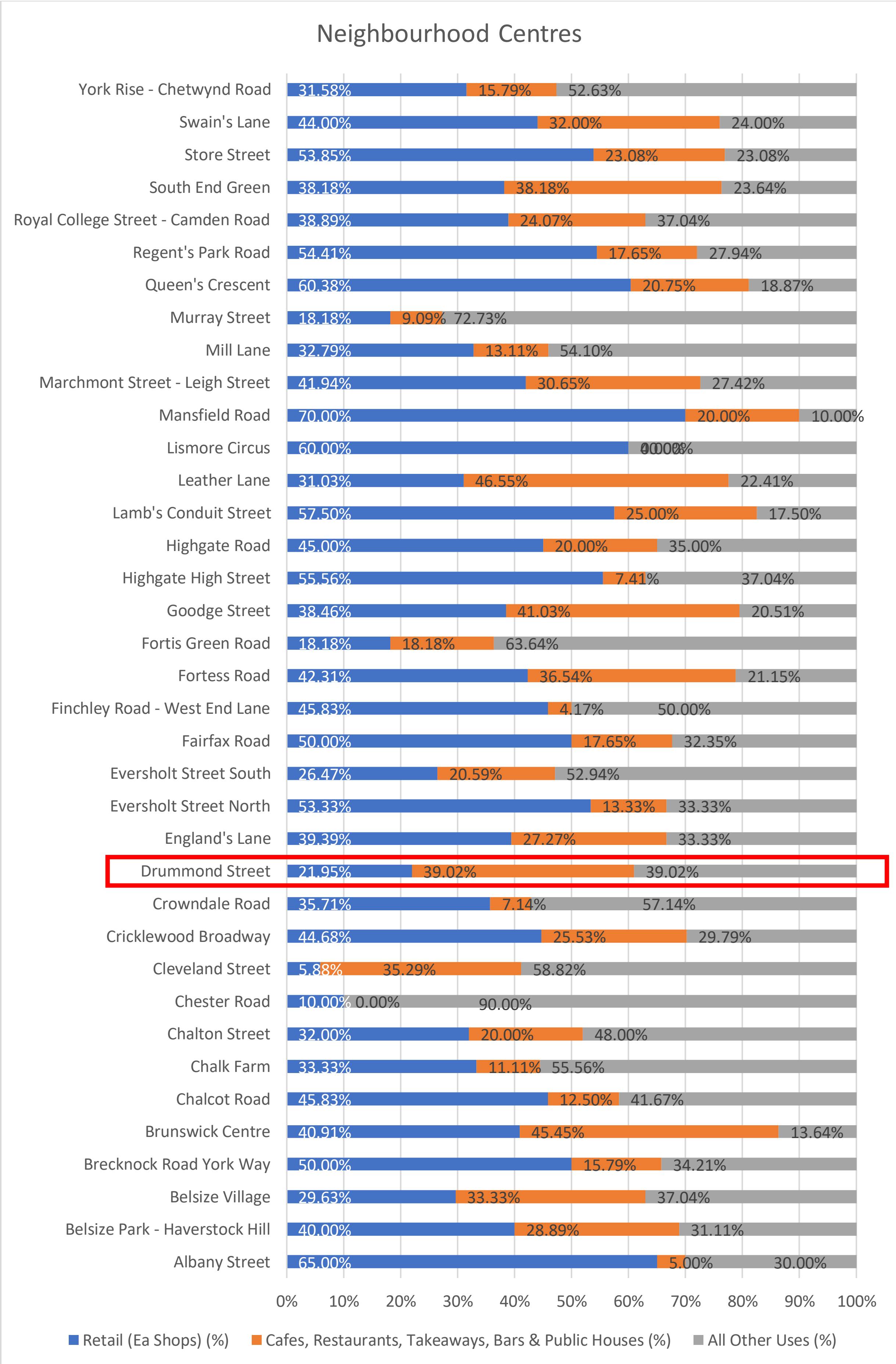
Figure 2: Footfall of Drummond Street (September 2018 – August 2023)



Source: Datscha

Diversity of Uses 2023

Drummond Street	Number	%	Camden Average (%)
Retail (Ea Shops)	9	22.0	41.1
Food & Beverage (F&B)	16	39.0	26.3
All Other Uses	16	39.0	32.6
Total	41	100.0	100.0



Neighbourhood Centres
York Rise - Chetwynd Road
31.58%
15.79%
52.63%
Swain's Lane
44.00%
32.00%
24.00%
Store Street
53.85%
23.08%
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South End Green
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Marchmont Street - Leigh Street
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Mansfield Road
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10.00%
Lismore Circus
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Leather Lane
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Lamb's Conduit Street
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Fortis Green Road
18.18%
18.18%
63.64%
Fortess Road
42.31%
36.54%
21.15%
Finchley Road - West End Lane
45.83%
4.17%
50.00%
Fairfax Road
50.00%
17.65%
32.35%
Eversholt Street South
26.47%
20.59%
52.94%
Eversholt Street North
53.33%
13.33%
33.33%
England's Lane
39.39%
27.27%
33.33%
Drummond Street
21.95%
39.02%
39.02%
Crowndale Road
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Cleveland Street
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58.82%
Chester Road
10.00%
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Chalton Street
32.00%
20.00%
48.00%
Chalk Farm
33.33%
11.11%
55.56%
Chalcot Road
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Belsize Village
29.63%
33.33%
37.04%
Belsize Park - Haverstock Hill
40.00%
28.89%
31.11%
Albany Street
65.00%
5.00%
30.00%
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

Drummond Street	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	2	5.1	3.9%

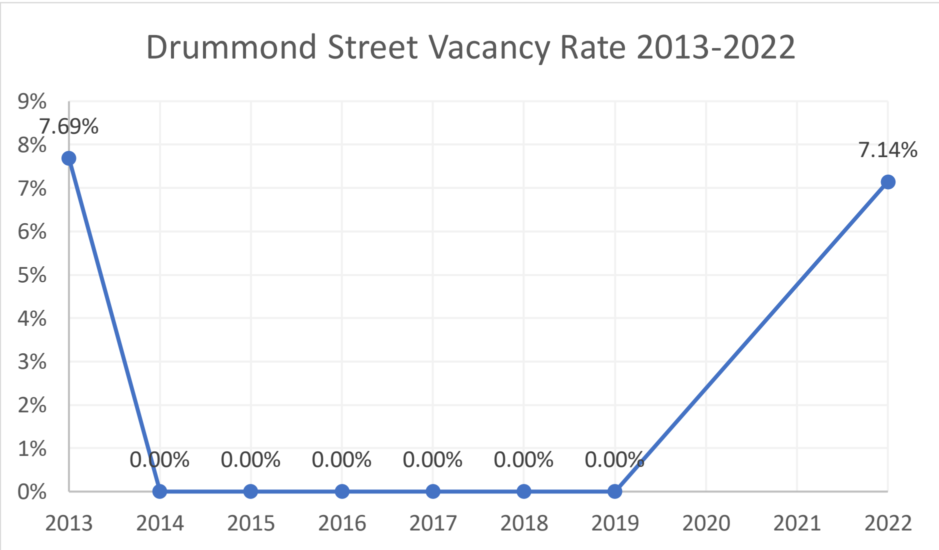
Conclusions on Diversity of Uses:

Non-retail uses are the dominant use categories within the centre, with just 22% (9 units) of the total number of units dedicated to Class E(a) shops – well below the Camden average of 41.1%. This broadly reflects a longer-term trend, with the centre containing only 10 and 11 shops in the monitoring years of 2014 and 2019.

There are 16 F&B units and 16 units occupied by 'other' uses. As a proportion of the centre's total number of units, these uses each account for 39% of provision (above the Camden averages of 26.3% and 32.6% respectively). The centre includes two evening / night time economy units (5.1%) – again above the Camden average (3.9%).

However, within the retail and F&B offer there is a concentration of units providing South Asian food. This has a London-wide appeal.

Vacancies 2013 - 2022



Conclusions

Drummond Street appears to be reasonably healthy and benefits from a well known and popular concentration of outlets specialising in South Asian food, meaning it has a distinctive function. However, the centre's vacancy rate is a concern, notwithstanding that it remains below average levels. This will need to be monitored to see if it is a temporary or more long term issue, potentially related to disruption caused by HS2 construction works.

That said, footfall data shows that pedestrian activity has been strong, with August 2023 seeing the highest figure over the period September 2018 – August 2023 and the Euston Town Bid has developed a vision and strategy for the centre setting out short, medium and longer term actions to support it. Given the popular, specialist offer of the centre and BID support it would be hoped that the recent challenges facing the centre will be successfully overcome. However, the position going forward should be monitored.

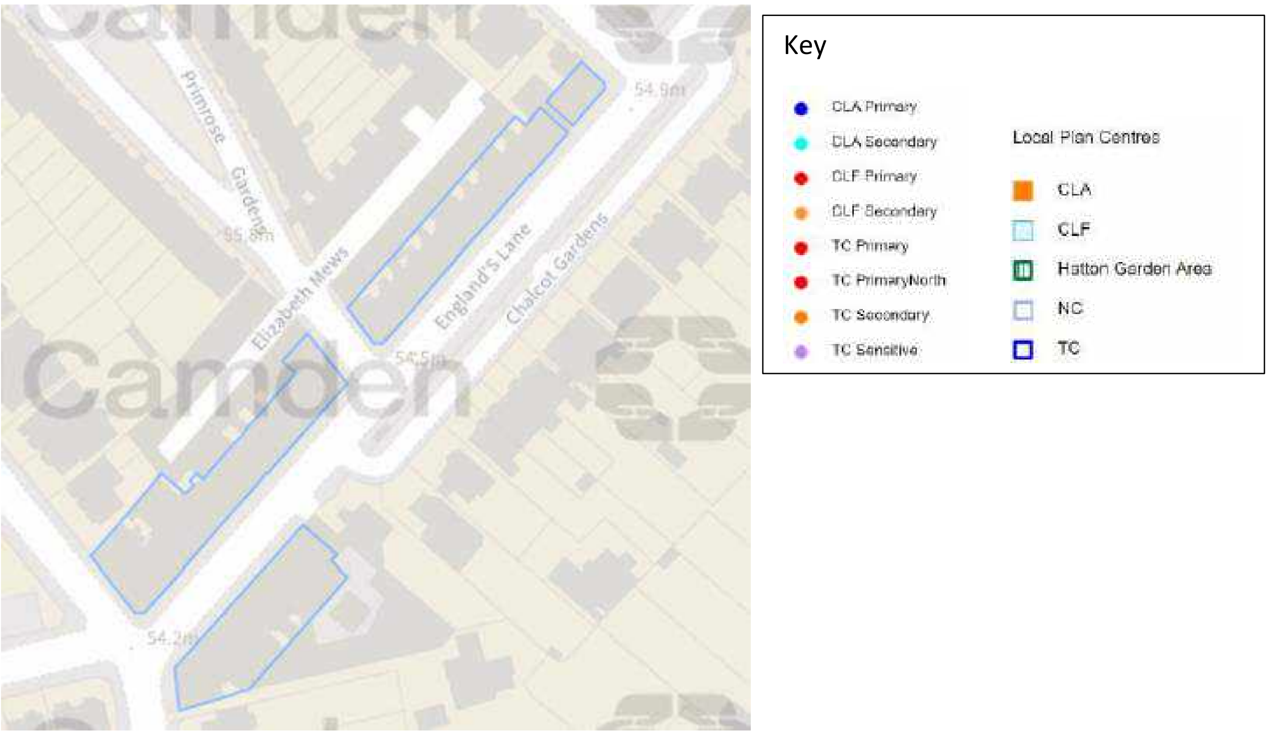
The centre boundary is appropriate considering the composition and distribution of existing uses and the below average vacancy rate.

CAMDEN – TOWN CENTRE HEALTH CHECKS

ENGLAND'S LANE

Description

Current Designation: Neighbourhood Centre in Camden Local Plan 2017



Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden's centres and other shopping areas); and
    - Policy TC4 (Town centre uses).
- The entire centre lies within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage).

Description of Centre:

The centre offers a pleasant shopping environment with 33 occupied units in total. It extends along the north and south sides of England's Lane, between Haverstock Hill (to the east) and Primrose Hill Road / Belsize Park Gardens (to the west). Haverstock Hill is a main arterial route running between Camden Town and the Hampstead area to the northwest.

Camden Town is the nearest Town Centre, approximately 1km to the southeast.

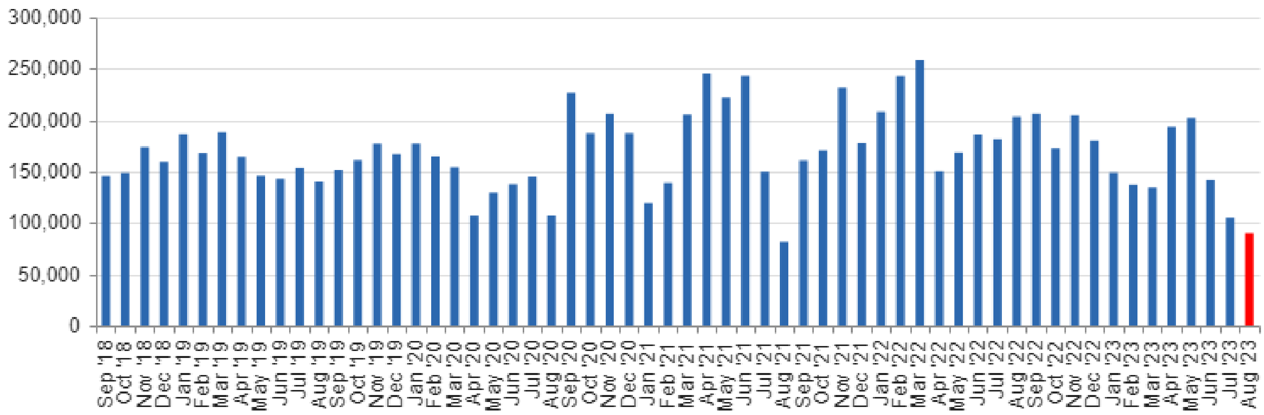
Footfall

A section along England's Lane was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall has been consistent during this time. The impacts of the pandemic cannot be seen as strongly here as with some other centres. In fact, August 2021 and August

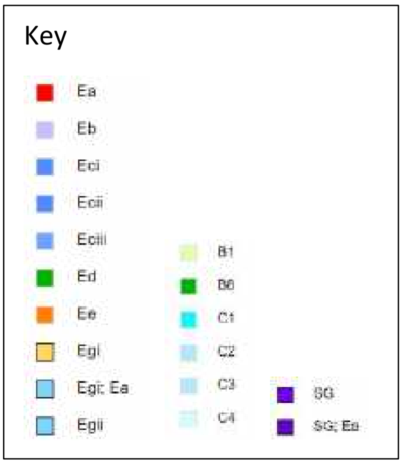
2023 represent lower footfall months than March and April 2020, which would tend to be the record low months in recent times.

Figure 2: Footfall of England's Lane (September 2018 – August 2023)

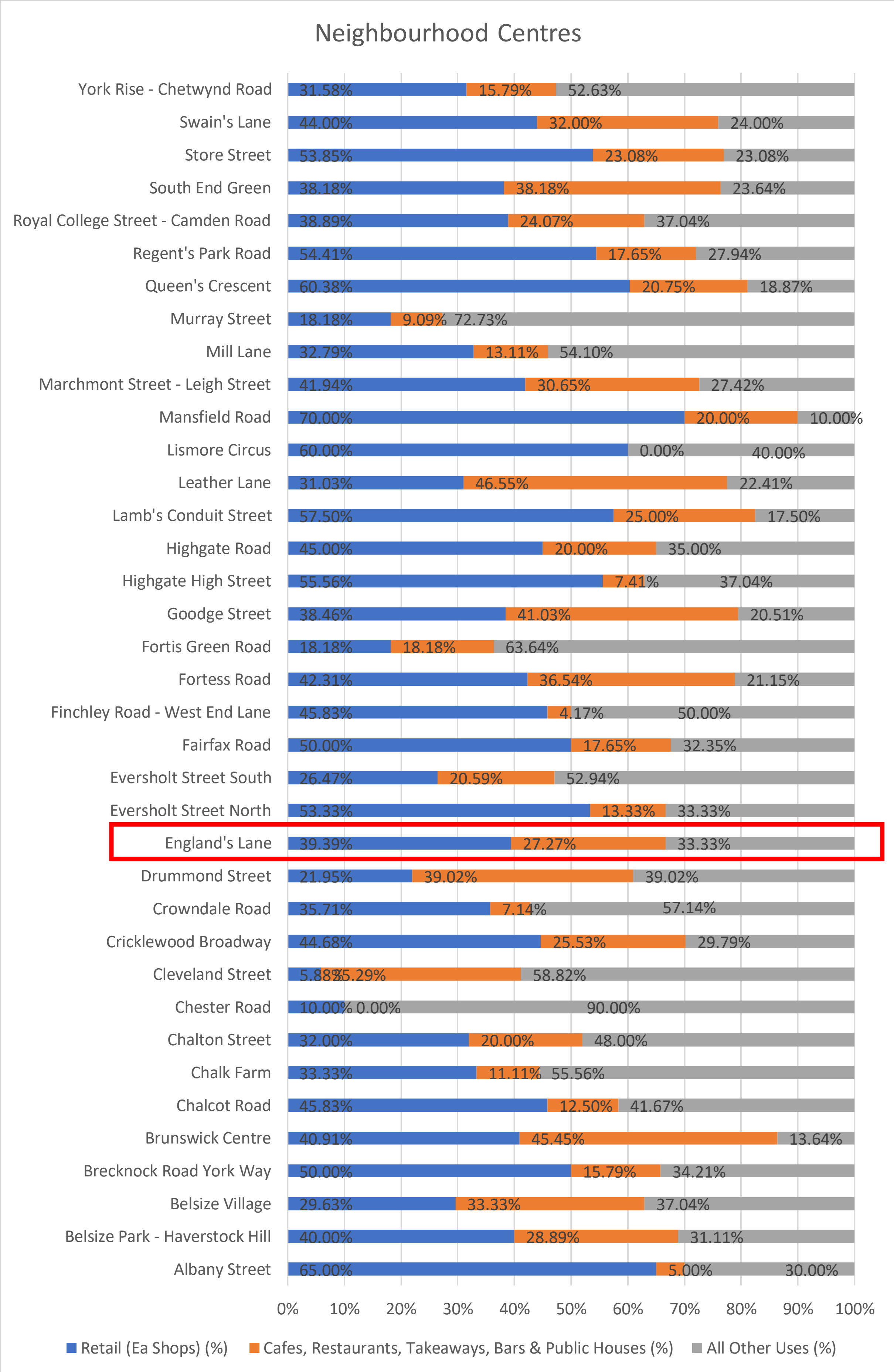


Source: Datscha

Diversity of Uses 2022



England's Lane	Number	%	Camden Average (%)
Retail (Ea Shops)	13	39.4	41.1
Food & Beverage (F&B)	9	27.3	26.3
All Other Uses	11	33.3	32.6
Total	33	100.0	100.0


Neighbourhood Centres
York Rise - Chetwynd Road 31.58% 15.79% 52.63%
Swain's Lane 44.00% 32.00% 24.00%
Store Street 53.85% 23.08% 23.08%
South End Green 38.18% 38.18% 23.64%
Royal College Street - Camden Road 38.89% 24.07% 37.04%
Regent's Park Road 54.41% 17.65% 27.94%
Queen's Crescent 60.38% 20.75% 18.87%
Murray Street 18.18% 9.09% 72.73%
Mill Lane 32.79% 13.11% 54.10%
Marchmont Street - Leigh Street 41.94% 30.65% 27.42%
Mansfield Road 70.00% 20.00% 10.00%
Lismore Circus 60.00% 0.00% 40.00%
Leather Lane 31.03% 46.55% 22.41%
Lamb's Conduit Street 57.50% 25.00% 17.50%
Highgate Road 45.00% 20.00% 35.00%
Highgate High Street 55.56% 7.41% 37.04%
Goodge Street 38.46% 41.03% 20.51%
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Crowndale Road 35.71% 7.14% 57.14%
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Cleveland Street 5.88% 35.29% 58.82%
Chester Road 10.00% 0.00% 90.00%
Chalton Street 32.00% 20.00% 48.00%
Chalk Farm 33.33% 11.11% 55.56%
Chalcot Road 45.83% 12.50% 41.67%
Brunswick Centre 40.91% 45.45% 13.64%
Brecknock Road York Way 50.00% 15.79% 34.21%
Belsize Village 29.63% 33.33% 37.04%
Belsize Park - Haverstock Hill 40.00% 28.89% 31.11%
Albany Street 65.00% 5.00% 30.00%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

England's Lane	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	1	3.2	3.9%

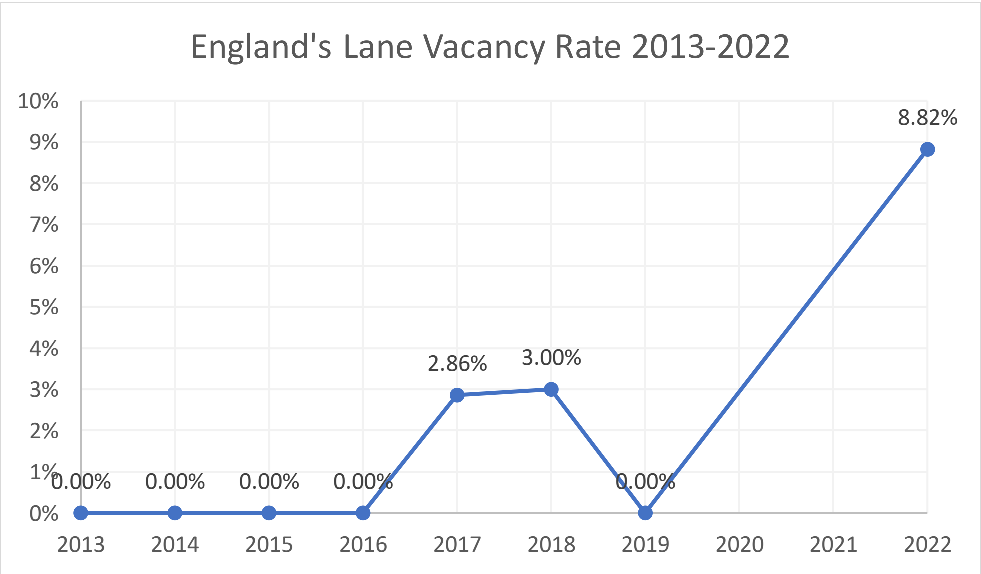
Conclusions on Diversity of Uses:

About 39% (13 units) of the centre's units comprise Class E(a) shops, which is slightly below the Camden average (41.1%). Provision includes a *Tesco Express* convenience store and a limited mix of independent and/or specialist retailers.

There are 9 F&B units (27.3% of the total number of units compared with the Camden average of 26.3%) and 11 'other' uses. These include professional services, medical or health services and Sui Generis uses.

The number of shops within the centre has fallen since 2014 and 2019 (17 and 16 units respectively), while F&B provision has remained relatively stable. The evening / night time economy offer is limited to just one unit.

Vacancies 2013 – 2022



Conclusions

England's Lane is a healthy centre with a balanced mix of uses, including a good quality independent retail and F&B offer. Levels of footfall appear to have remained stable over the period September 2018 – August 2023, including during the pandemic, indicating that the centre performs a strong convenience-based function for its local catchment.

There has been a small increase in vacancies in the centre since 2019 but levels are still below the UK average and this does not present any concerns.

The centre boundary is appropriate considering the distribution and composition of existing uses and the below average vacancy rate.

CAMDEN – TOWN CENTRE HEALTH CHECKS

EVERSHOLT STREET NORTH

Description

Current Designation: Neighbourhood Centre in Camden Local Plan 2017

Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
  - Policy TC1 (Quality and location of retail development);
  - Policy TC2 (Camden's centres and other shopping areas); and
  - Policy TC4 (Town centre uses).
- Part of the centre (north of Lidlington Place) lies within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage).

Description of Centre:

The centre borders the southern end of Camden Town (Town Centre). Mornington Crescent Underground station is therefore nearby, and Euston railway station is approximately 1km to the south.

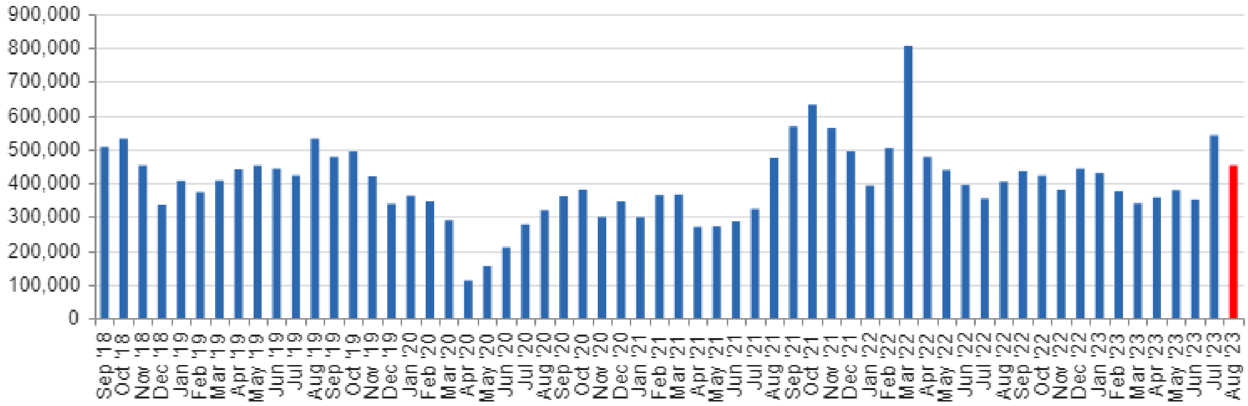
The centre (consisting of just 15 occupied units) is predominantly focused on the west side of Eversholt Street and has distinct commercial areas, separated by Lidlington Place. There is another Neighbourhood Centre – Eversholt Street South – circa 500m to the south.

Footfall

A northern section along Eversholt Street was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

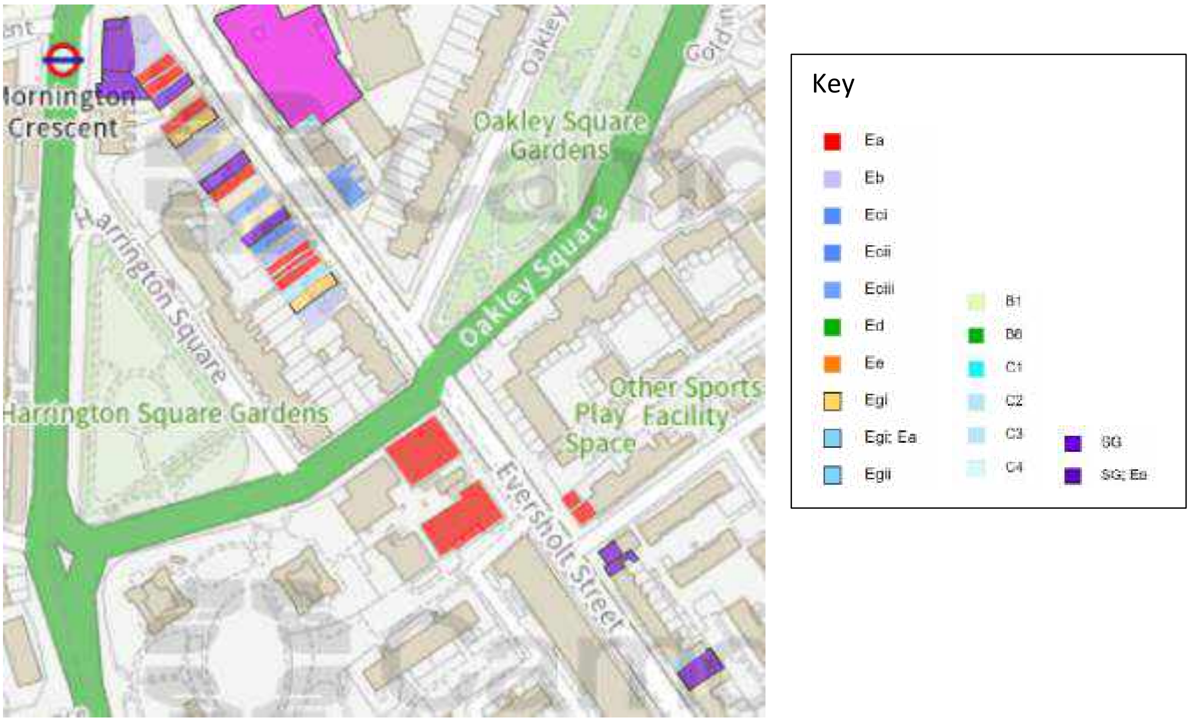
As can be seen in the figure below, footfall has been consistent outside of the April to June period of 2020 when strict restrictions on travel and movement were in place in response to the pandemic and the exceptional peak of March 2022.

Figure 2: Footfall of Eversholt Street North (September 2018 – August 2023)

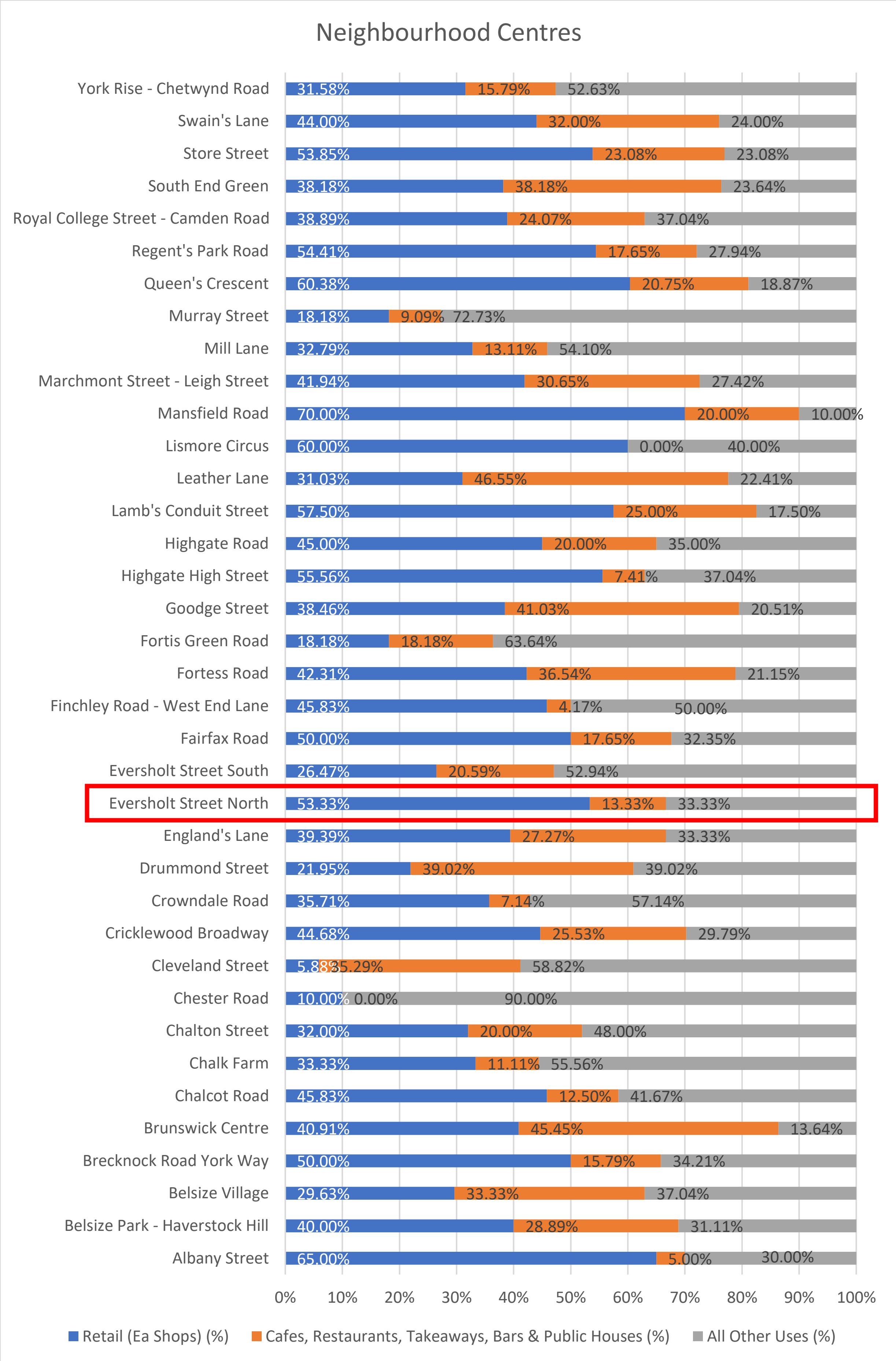


Source: Datscha

Diversity of Uses 2022



Eversholt Street North	Number	%	Camden Average (%)
Retail (Ea Shops)	8	53.33	41.1
Food & Beverage (F&B)	2	13.33	26.3
All Other Uses	5	33.33	32.6
Total	15	100.0	100.0


Neighbourhood Centres
York Rise - Chetwynd Road 31.58% 15.79% 52.63%
Swain's Lane 44.00% 32.00% 24.00%
Store Street 53.85% 23.08% 23.08%
South End Green 38.18% 38.18% 23.64%
Royal College Street - Camden Road 38.89% 24.07% 37.04%
Regent's Park Road 54.41% 17.65% 27.94%
Queen's Crescent 60.38% 20.75% 18.87%
Murray Street 18.18% 9.09% 72.73%
Mill Lane 32.79% 13.11% 54.10%
Marchmont Street - Leigh Street 41.94% 30.65% 27.42%
Mansfield Road 70.00% 20.00% 10.00%
Lismore Circus 60.00% 0.00% 40.00%
Leather Lane 31.03% 46.55% 22.41%
Lamb's Conduit Street 57.50% 25.00% 17.50%
Highgate Road 45.00% 20.00% 35.00%
Highgate High Street 55.56% 7.41% 37.04%
Goodge Street 38.46% 41.03% 20.51%
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Finchley Road - West End Lane 45.83% 4.17% 50.00%
Fairfax Road 50.00% 17.65% 32.35%
Eversholt Street South 26.47% 20.59% 52.94%
Eversholt Street North 53.33% 13.33% 33.33%
England's Lane 39.39% 27.27% 33.33%
Drummond Street 21.95% 39.02% 39.02%
Crowndale Road 35.71% 7.14% 57.14%
Cricklewood Broadway 44.68% 25.53% 29.79%
Cleveland Street 5.88% 35.29% 58.82%
Chester Road 10.00% 0.00% 90.00%
Chalton Street 32.00% 20.00% 48.00%
Chalk Farm 33.33% 11.11% 55.56%
Chalcot Road 45.83% 12.50% 41.67%
Brunswick Centre 40.91% 45.45% 13.64%
Brecknock Road York Way 50.00% 15.79% 34.21%
Belsize Village 29.63% 33.33% 37.04%
Belsize Park - Haverstock Hill 40.00% 28.89% 31.11%
Albany Street 65.00% 5.00% 30.00%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

Eversholt Street North	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	0	0.0	3.9%

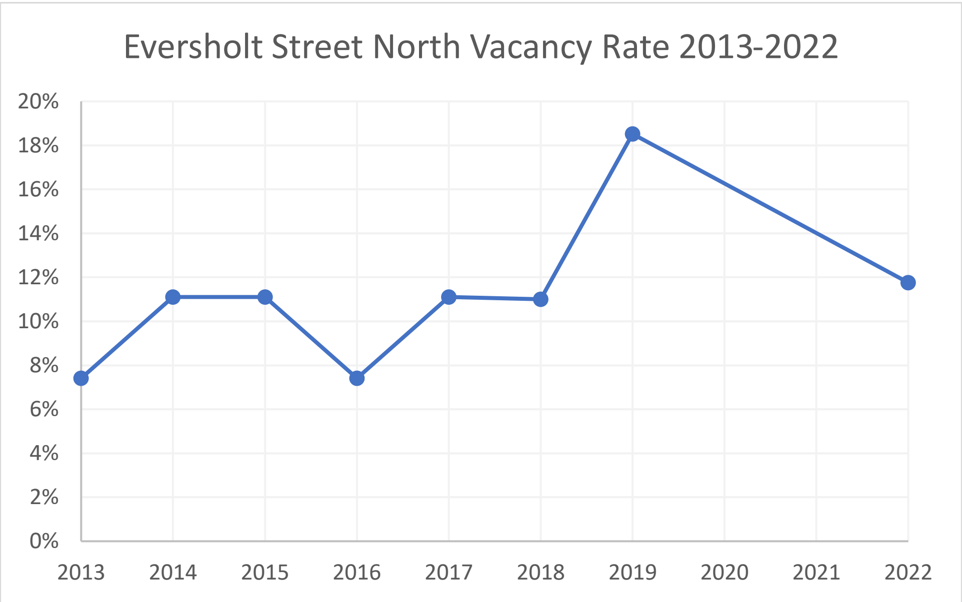
Conclusions on Diversity of Uses:

More than half (53.3% or 8 units) of the centre's 15 units are occupied by Class E(a) shops. This is well above the Camden average (41.1%). In contrast, F&B provision (2 units) accounts for just 13.3% of total units compared with the Camden average of 26.3%. There is no evening / night time economy offer.

The centre includes 5 'other' uses, which occupy a third of the centre's units and include services, offices and Sui Generis uses.

Considering data for the monitoring years of 2014 and 2019, Eversholt Street North has seen a substantial decrease in shop numbers (from 15 and 12 units respectively to 8 units currently) and the centre's F&B offer has also reduced over the same period (from 4 units to 2).

Vacancies 2013 - 2022



Conclusions

Eversholt Street North appears to be reasonably healthy with a high (albeit reducing) proportion of shops and a limited mix of services and other non-retail uses. This is despite the centre's proximity to Camden Town (Town Centre).

Levels of vacancy and footfall appear to have returned to pre-pandemic levels, which is a positive indicator of the centre's overall vitality and viability.

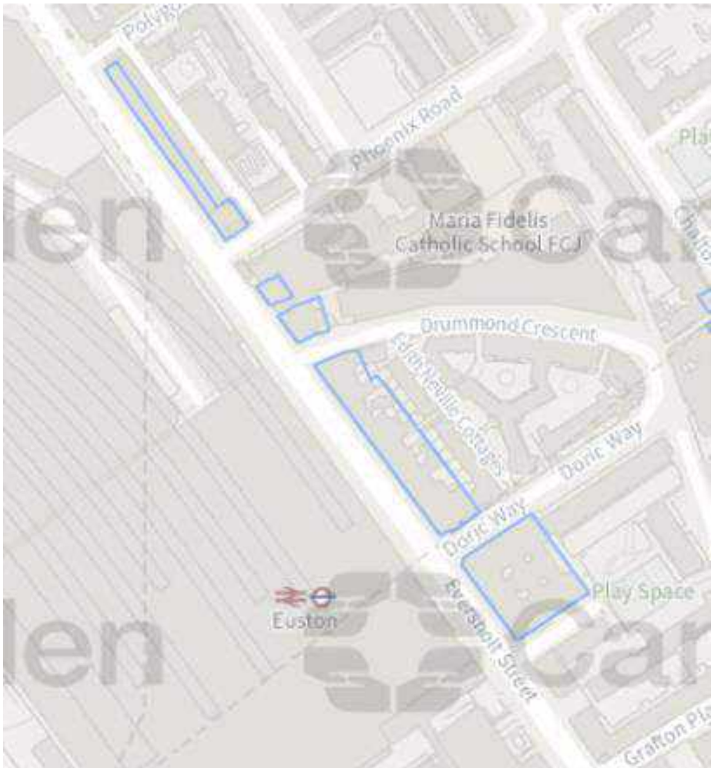
The centre boundary is considered to be appropriate.

CAMDEN – TOWN CENTRE HEALTH CHECKS

EVERSHOLT STREET SOUTH

Description

Current Designation: Neighbourhood Centre in Camden Local Plan 2017



Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
  - Policy TC1 (Quality and location of retail development);
  - Policy TC2 (Camden's centres and other shopping areas); and
  - Policy TC4 (Town centre uses).

Description of Centre:

The centre lies to the immediate east of Euston railway station. It is a long centre with 34 occupied units extending along the east side of Eversholt Street between Polygon Road (to the north) and Lancing Street (to the south).

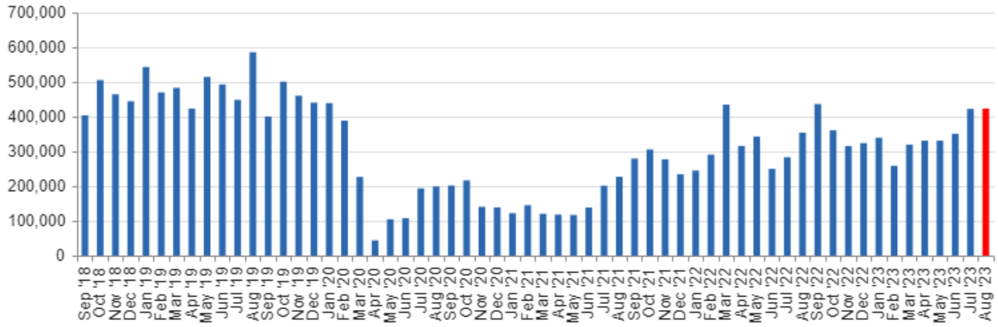
There is another Neighbourhood Centre – Eversholt Street North – circa 500m to the north. The closest Town Centre is Camden Town approximately 1km to the north.

Footfall

A southern section of Eversholt Street was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

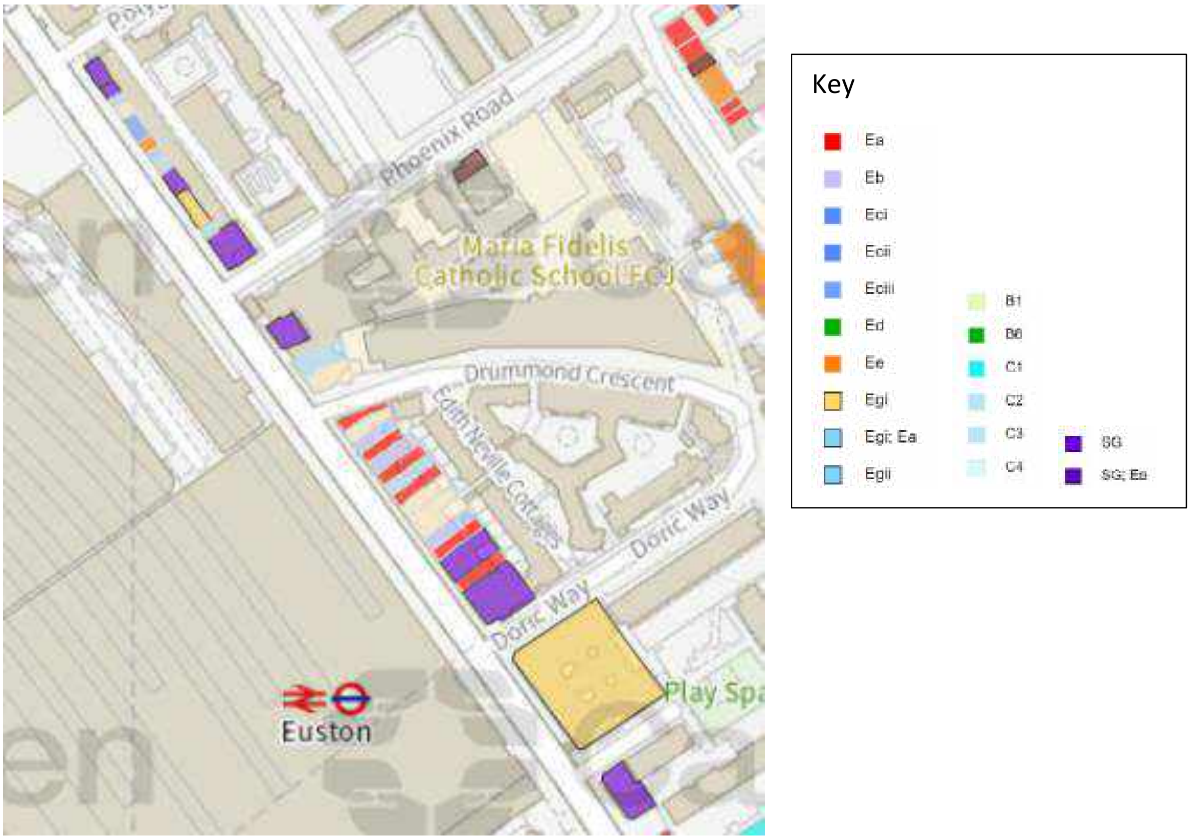
As can be seen in the figure below, footfall along the southern end of Eversholt Street was hit severely in early 2020. With its proximity to Euston station, this is likely to be as a result of restrictions placed on travel and movement during this period of the pandemic. Footfall has been improving since around September 2021, although is remains generally lower than in late 2018 and 2019. However, it does seem to now be rising again.

Footfall of Eversholt Street South (September 2018 – August 2023)

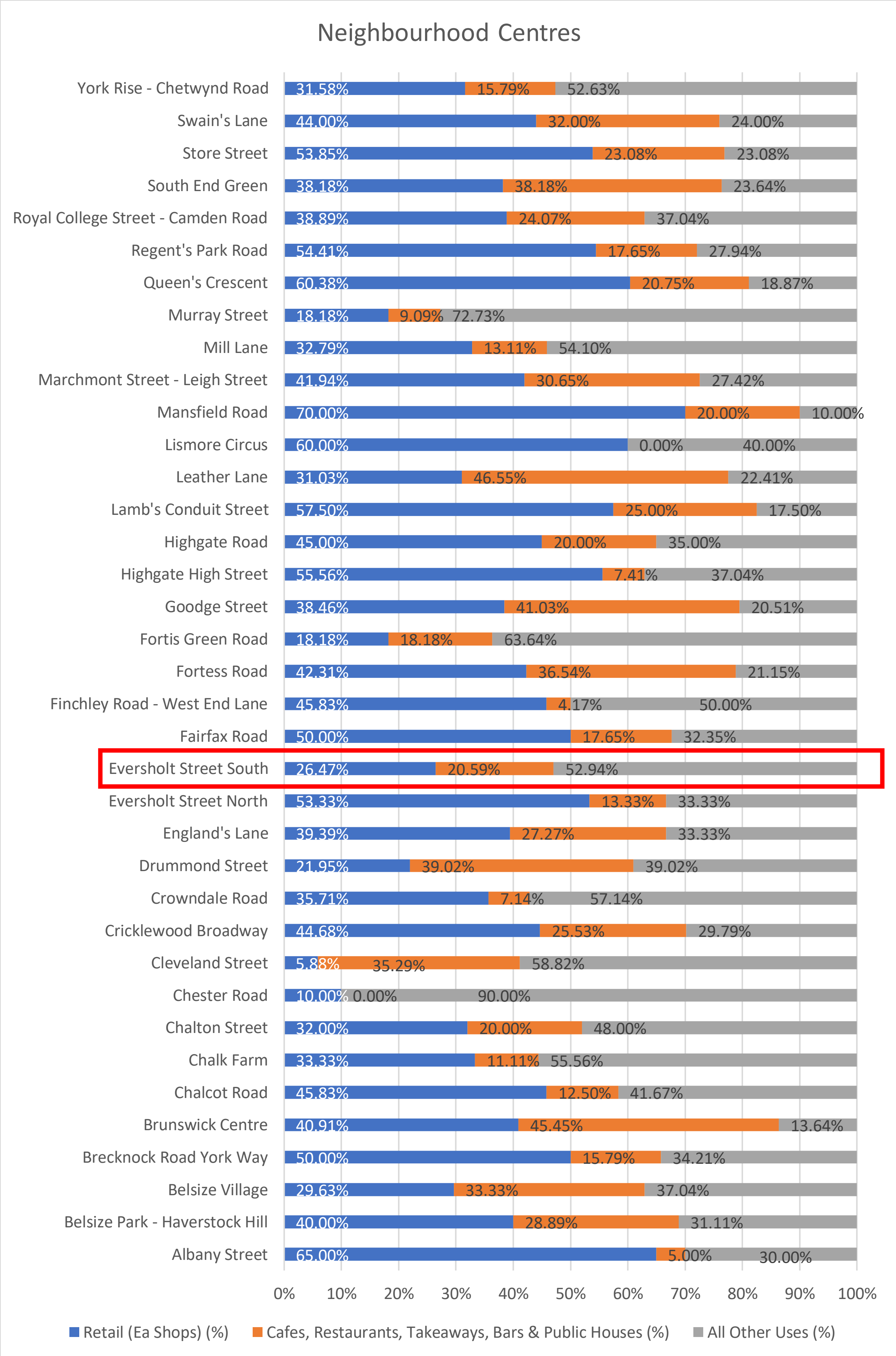


Source: Datscha

Diversity of Uses 2022



Eversholt Street South	Number	%	Camden Average (%)
Retail (Ea Shops)	9	26.5	41.1
Food & Beverage (F&B)	7	20.6	26.3
All Other Uses	18	52.9	32.6
Total	34	100.0	100.0


Neighbourhood Centres
York Rise - Chetwynd Road
31.58%
15.79%
52.63%
Swain's Lane
44.00%
32.00%
24.00%
Store Street
53.85%
23.08%
23.08%
South End Green
38.18%
38.18%
23.64%
Royal College Street - Camden Road
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37.04%
Regent's Park Road
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Queen's Crescent
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Murray Street
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Mill Lane
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Marchmont Street - Leigh Street
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Mansfield Road
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Lismore Circus
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Lamb's Conduit Street
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Fairfax Road
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5.00%
30.00%
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

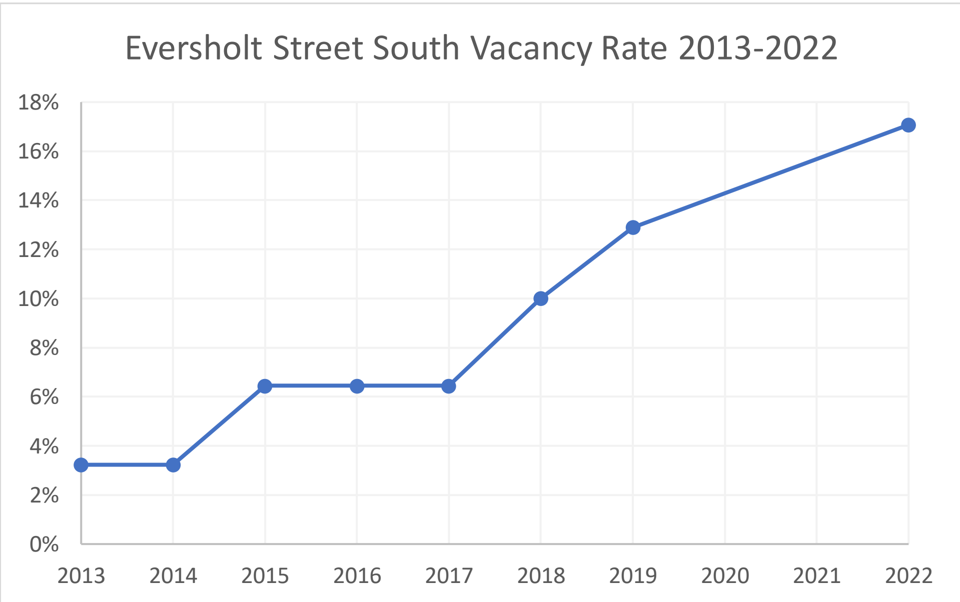
Eversholt Street South	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	2	5.9	3.9%

Conclusions on Diversity of Uses:

Of the centre's 34 occupied units, just over a quarter (26.5% or 9 units) are occupied by Class E(a) shops and about 20% (7 units) are dedicated to F&B provision. These figures are below the Camden averages for such uses (41.1% and 26.3% respectively). Thus, more than half of the total units (52.9% or 18 units) accommodate 'other' uses including hot food takeaways, dry cleaners and other Sui Generis uses. Eversholt Street South also contains two units dedicated to the evening / night time economy offer.

The centre has a strong services-orientated function and increasing levels of F&B and evening activity (e.g. the number of F&B units has broadly doubled since 2014).

Vacancies 2013 - 2022



Vacancy rates in the centre have been increasing over the last decade and are now above average. This is likely to reflect the impact of construction works at Euston linked to HS2.

Conclusions

Eversholt Street South is currently facing a number of issues and challenges as a centre as evidenced by increasing vacancies. It is also an elongated centre and lacks a focus. However, given its location immediately adjacent to Euston Station it is likely to benefit in the longer term from HS2 footfall and the improved connectivity proposed between the station and surrounding communities. The introduction of retail and commercial units on the west side of the street will also assist, as proposed in the Euston Area Plan will also assist in strengthening the centre.

The centre boundary is considered to be appropriate at present but should be expanded to include areas to the west of the street if retail and town centre uses are introduced there.

CAMDEN – TOWN CENTRE HEALTH CHECKS

FAIRFAX ROAD

Description

Current Designation: Neighbourhood Centre in Camden Local Plan 2017

Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden's centres and other shopping areas); and
    - Policy TC4 (Town centre uses).
- Part of the centre (fronting Fairhazel Gardens to the south) lies within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage).

Description of Centre:

Fairfax Road Neighbourhood Centre lies within the South Hampstead area of the borough, less than 0.5km to the west of Finchley Road Town Centre. There is another Town Centre – West Hampstead – situated approximately 1km to the northwest.

The majority of the centre is focused on the west side of Fairfax Road. It further comprises a separate commercial area fronting Fairhazel Gardens to the south.

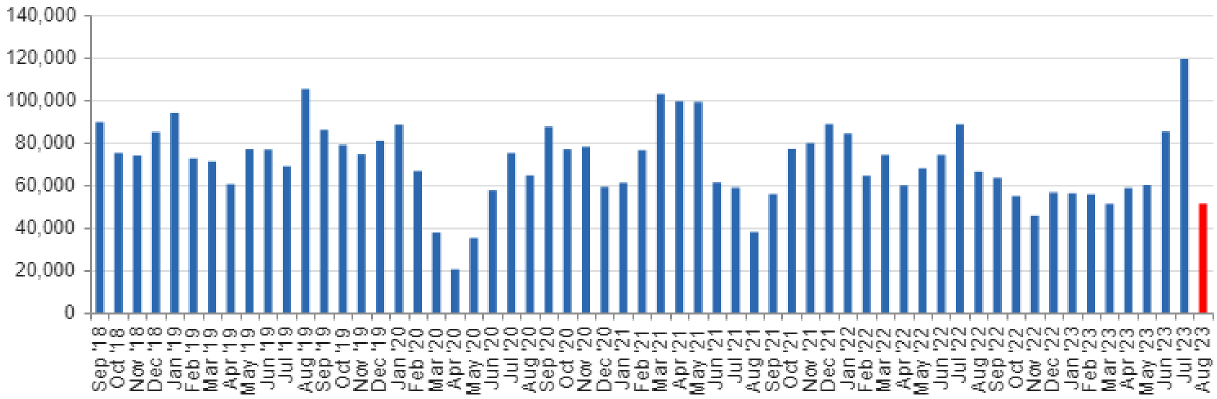
The centre is well connected to the London Underground. South Hampstead overground station is to the immediate south and Swiss Cottage Underground station is to the east (within Finchley Road Town Centre). Fairfax Road has good provision of on-street car parking.

Footfall

A section along Fairfax Road was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

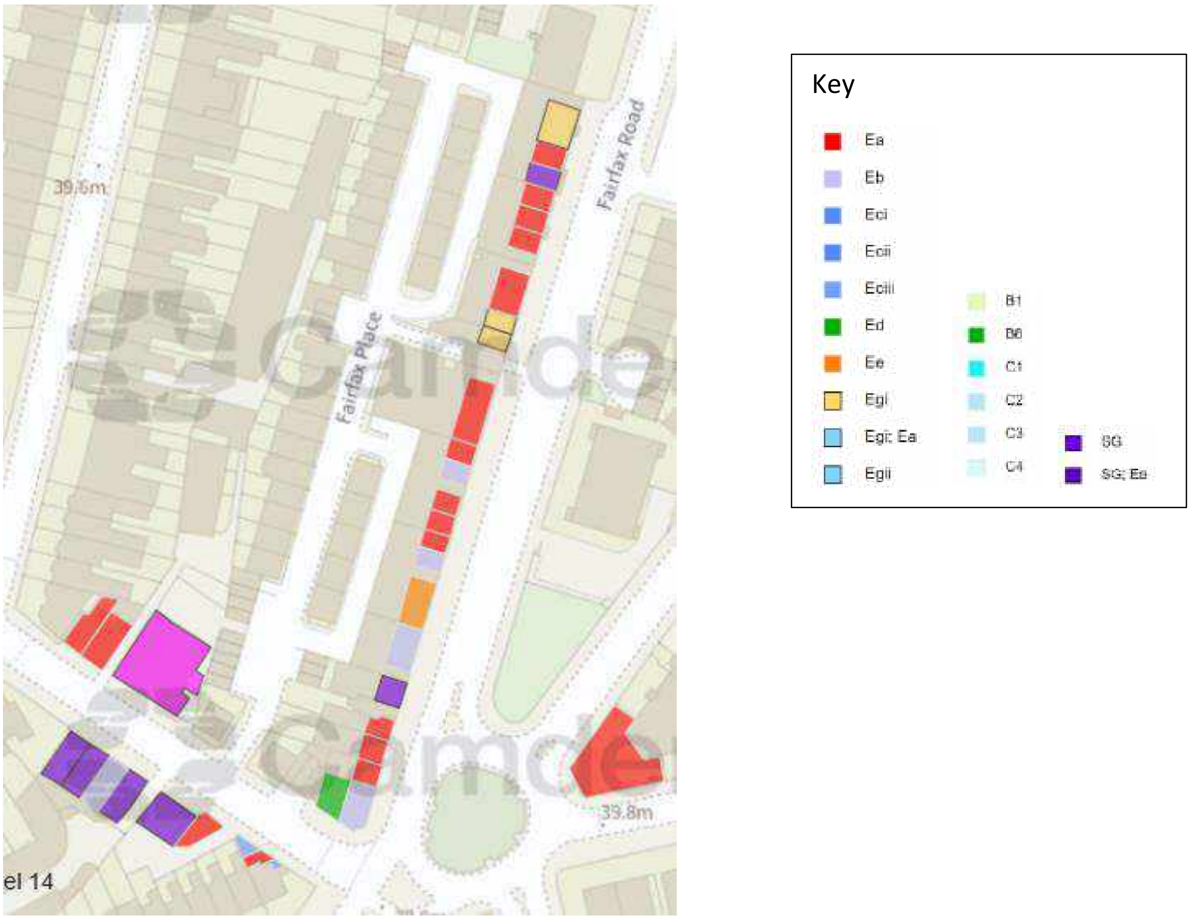
As can be seen in the figure below, footfall has been stable during this period, with the exception of March through to May in 2020 and August of 2021. The pandemic does not look to have had a long-term impact on footfall in the area.

Figure XXX: Footfall of Fairfax Road (September 2018 – August 2023)

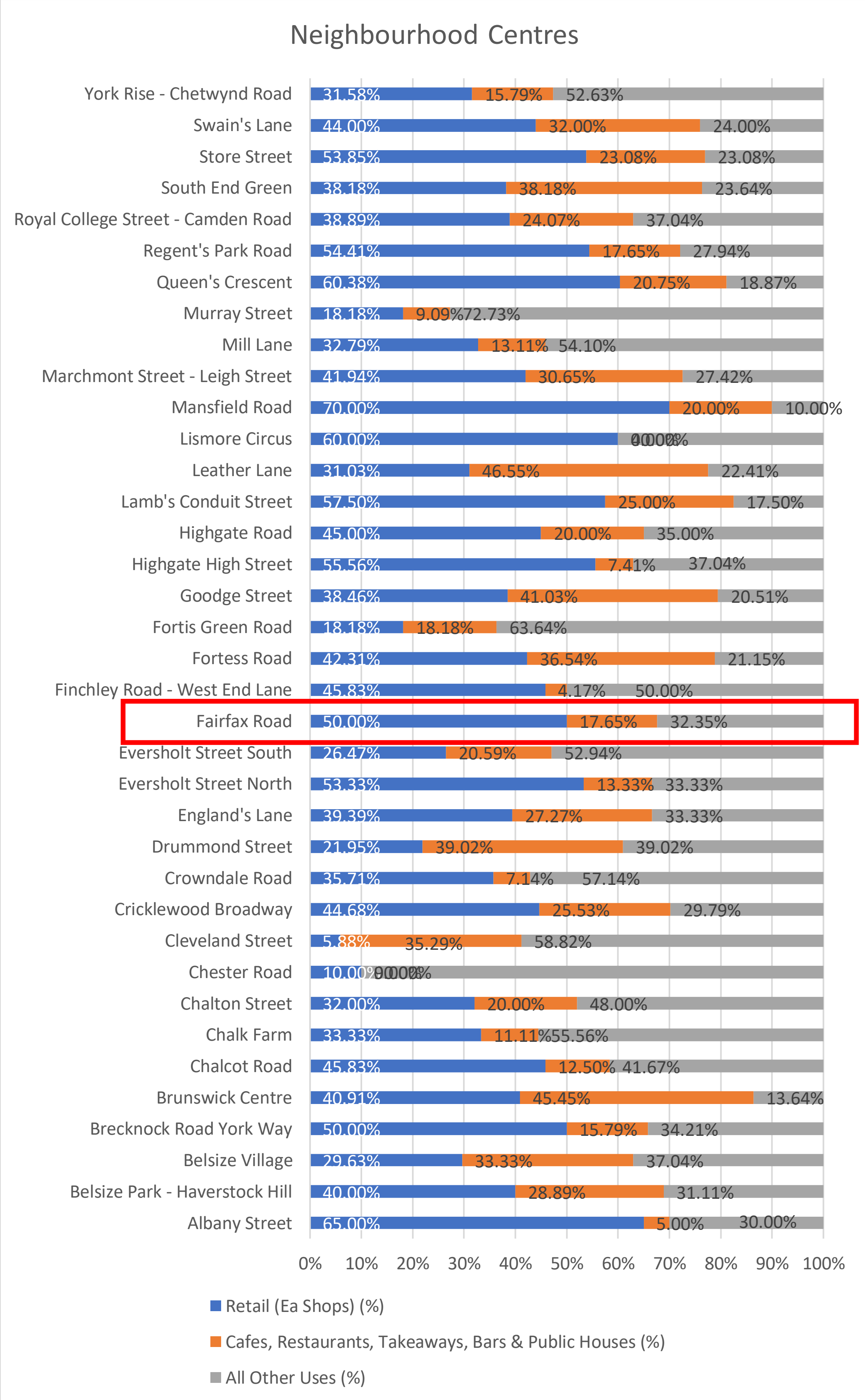


Source: Datscha

Diversity of Uses 2022



Fairfax Road	Number	%	Camden Average (%)
Retail (Ea Shops)	17	50.0	41.1
Food & Beverage (F&B)	6	17.7	26.3
All Other Uses	11	32.3	32.6
Total	34	100.0	100.0


Neighbourhood Centres
York Rise - Chetwynd Road
Swain's Lane
Store Street
South End Green
Royal College Street - Camden Road
Regent's Park Road
Queen's Crescent
Murray Street
Mill Lane
Marchmont Street - Leigh Street
Mansfield Road
Lismore Circus
Leather Lane
Lamb's Conduit Street
Highgate Road
Highgate High Street
Goodge Street
Fortis Green Road
Fortess Road
Finchley Road - West End Lane
Fairfax Road
Eversholt Street South
Eversholt Street North
England's Lane
Drummond Street
Crowndale Road
Cricklewood Broadway
Cleveland Street
Chester Road
Chalton Street
Chalk Farm
Chalcot Road
Brunswick Centre
Brecknock Road York Way
Belsize Village
Belsize Park - Haverstock Hill
Albany Street
31.58% 15.79% 52.63%
44.00% 32.00% 24.00%
53.85% 23.08% 23.08%
38.18% 38.18% 23.64%
38.89% 24.07% 37.04%
54.41% 17.65% 27.94%
60.38% 20.75% 18.87%
18.18% 9.09% 72.73%
32.79% 13.11% 54.10%
41.94% 30.65% 27.42%
70.00% 20.00% 10.00%
60.00%
31.03% 46.55% 22.41%
57.50% 25.00% 17.50%
45.00% 20.00% 35.00%
55.56% 7.41% 37.04%
38.46% 41.03% 20.51%
18.18% 18.18% 63.64%
42.31% 36.54% 21.15%
45.83% 4.17% 50.00%
50.00% 17.65% 32.35%
26.47% 20.59% 52.94%
53.33% 13.33% 33.33%
39.39% 27.27% 33.33%
21.95% 39.02% 39.02%
35.71% 7.14% 57.14%
44.68% 25.53% 29.79%
5.88% 35.29% 58.82%
10.00%
32.00% 20.00% 48.00%
33.33% 11.11% 55.56%
45.83% 12.50% 41.67%
40.91% 45.45% 13.64%
50.00% 15.79% 34.21%
29.63% 33.33% 37.04%
40.00% 28.89% 31.11%
65.00% 5.00% 30.00%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

Fairfax Road	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	1	2.9	3.9%

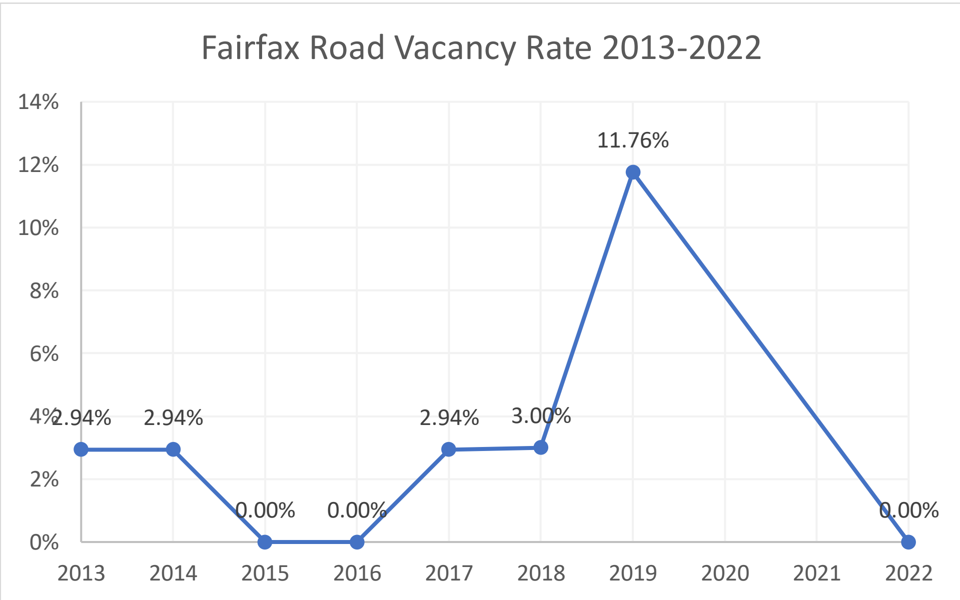
Conclusions on Diversity of Uses:

Half (50%) of the centre's 34 units are occupied by Class E(a) shops – above the Camden average of 41.1%. Notwithstanding this, Fairfax Road has seen a reduction in the number of shops since 2014 (21 units). Provision includes small convenience stores and a number of comparison goods retailers, although the centre appears to have developed a specialist role, with most of these occupied by home improvement and furniture retailers.

The centre contains 6 F&B units which, as a proportion of the total number of units (17.7%), is below the Camden average (26.3%). There is just one unit dedicated to the evening / night time economy offer.

About a third (32.3%) of the centre's units are occupied by 'other' non-retail uses. This is in line with the Camden average (32.6%) and includes a mix of service uses, offices and Sui Generis uses (e.g. dry cleaners).

Vacancies 2013 - 2022



Conclusions

The centre's occupancy rate (100%) and the range of uses, with above-average provision of Class E(a) shops including a specialist furniture /home improvements offer, suggests that Fairfax Road Neighbourhood Centre is healthy and catering well for the shopping needs of local residents and other users of the centre. It further offers a reasonable mix of service uses.

These findings are supported by the footfall data, with the pandemic not appearing to have had a long-term impact on levels of pedestrian activity. The centre is clearly benefitting from a strong 'walk-in' catchment, good provision of on-street car parking, and its proximity to and accessibility via the London overground services.

The centre boundary is appropriate considering the distribution and composition of existing uses and the 0% vacancy rate.

CAMDEN – TOWN CENTRE HEALTH CHECKS

FINCHLEY ROAD – WEST END LANE

Description

Current Designation: Neighbourhood Centre in Camden Local Plan 2017

Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden's centres and other shopping areas); and
    - Policy TC4 (Town centre uses).

Description of Centre:

The centre is situated towards the northern end of West Hampstead Town Centre, on the west side of Finchley Road at its junction with West End Lane. Finchley Road/ Swiss Cottage Town Centre is located less than 0.5km to the southeast.

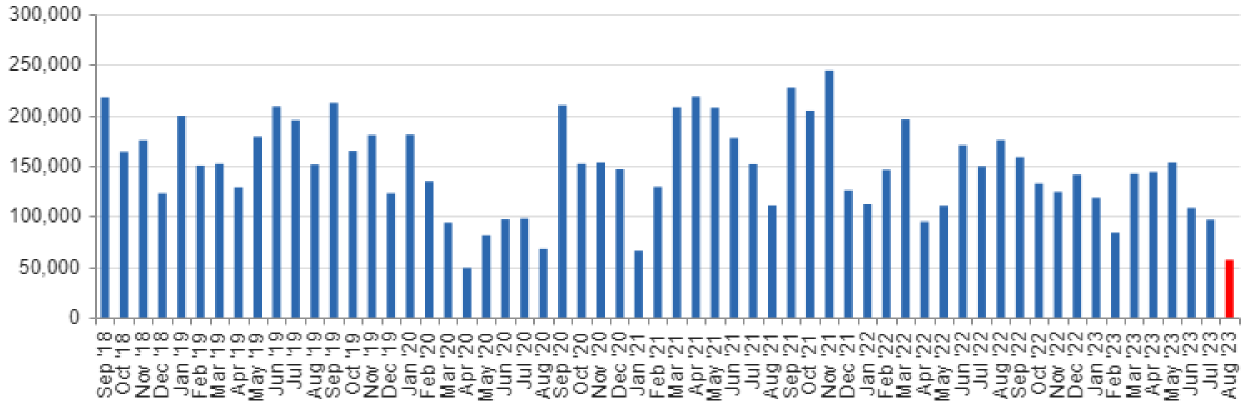
The centre comprises two main commercial areas, consisting of 24 occupied units, either side of West End Lane.

Footfall

A section along Finchley Road, near to the Frognal Lane junction was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall has been consistently erratic over this period, with low months coming during the height of the pandemic in 2020, but also in months of 2021, 2022 and 2023. Record months of pedestrian activity have been seen since the beginning of the pandemic, and so there does not appear to be a lasting impact from COVID-19.

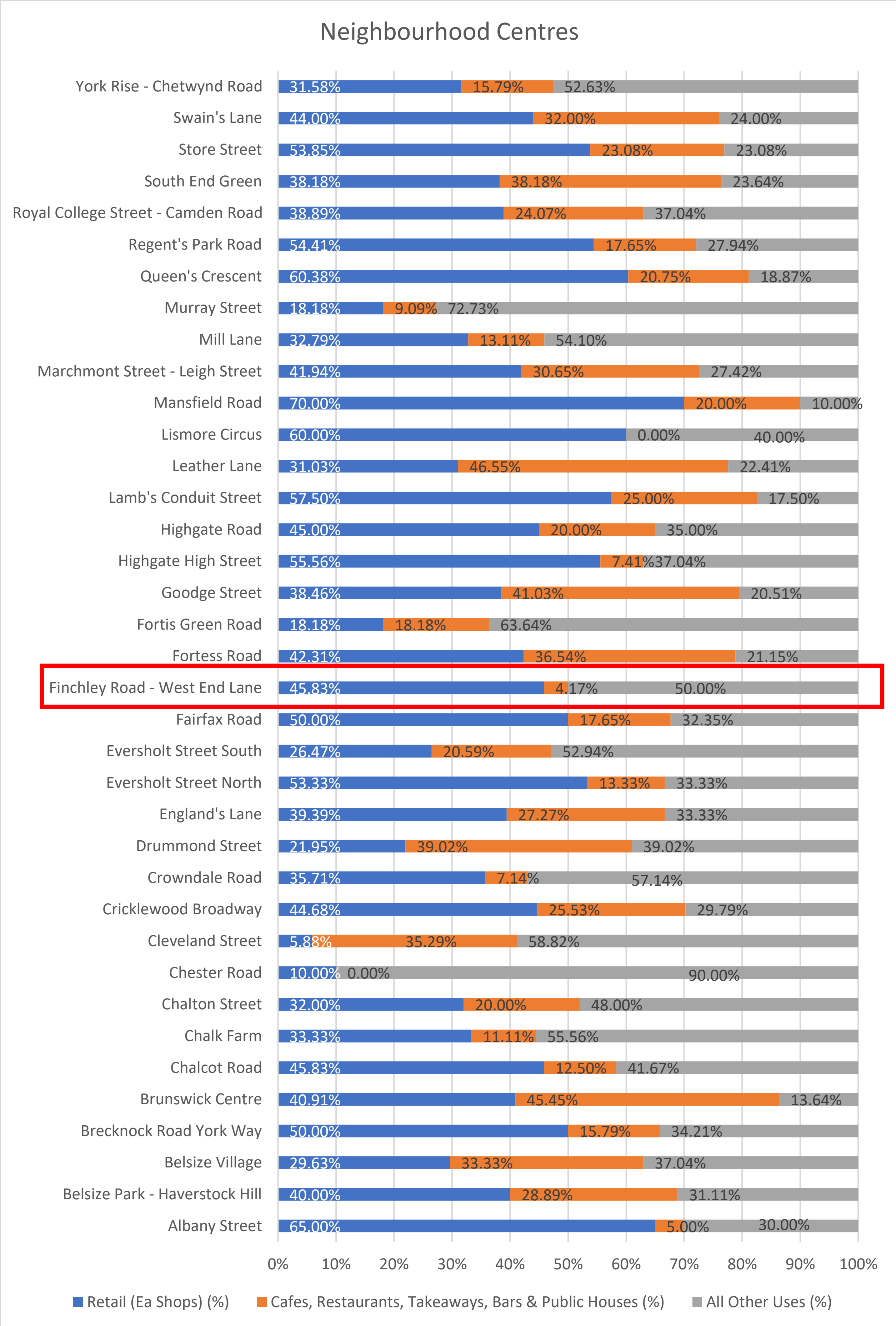
Figure 2: Footfall of Finchley Road (September 2018 – August 2023)



Source: Datscha

Diversity of Uses 2022

Finchley Road – West End Lane	Number	%	Camden Average (%)
Retail (Ea Shops)	11	45.8	41.1
Food & Beverage (F&B)	1	4.2	26.3
All Other Uses	12	50.0	32.6
Total	24	100.0	100.0


Neighbourhood Centres
York Rise - Chetwynd Road 31.58% 15.79% 52.63%
Swain's Lane 44.00% 32.00% 24.00%
Store Street 53.85% 23.08% 23.08%
South End Green 38.18% 38.18% 23.64%
Royal College Street - Camden Road 38.89% 24.07% 37.04%
Regent's Park Road 54.41% 17.65% 27.94%
Queen's Crescent 60.38% 20.75% 18.87%
Murray Street 18.18% 9.09% 72.73%
Mill Lane 32.79% 13.11% 54.10%
Marchmont Street - Leigh Street 41.94% 30.65% 27.42%
Mansfield Road 70.00% 20.00% 10.00%
Lismore Circus 60.00% 0.00% 40.00%
Leather Lane 31.03% 46.55% 22.41%
Lamb's Conduit Street 57.50% 25.00% 17.50%
Highgate Road 45.00% 20.00% 35.00%
Highgate High Street 55.56% 7.41% 37.04%
Goodge Street 38.46% 41.03% 20.51%
Fortis Green Road 18.18% 18.18% 63.64%
Fortess Road 42.31% 36.54% 21.15%
Finchley Road - West End Lane 45.83% 4.17% 50.00%
Fairfax Road 50.00% 17.65% 32.35%
Eversholt Street South 26.47% 20.59% 52.94%
Eversholt Street North 53.33% 13.33% 33.33%
England's Lane 39.39% 27.27% 33.33%
Drummond Street 21.95% 39.02% 39.02%
Crowndale Road 35.71% 7.14% 57.14%
Cricklewood Broadway 44.68% 25.53% 29.79%
Cleveland Street 5.88% 35.29% 58.82%
Chester Road 10.00% 0.00% 90.00%
Chalton Street 32.00% 20.00% 48.00%
Chalk Farm 33.33% 11.11% 55.56%
Chalcot Road 45.83% 12.50% 41.67%
Brunswick Centre 40.91% 45.45% 13.64%
Brecknock Road York Way 50.00% 15.79% 34.21%
Belsize Village 29.63% 33.33% 37.04%
Belsize Park - Haverstock Hill 40.00% 28.89% 31.11%
Albany Street 65.00% 5.00% 30.00%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

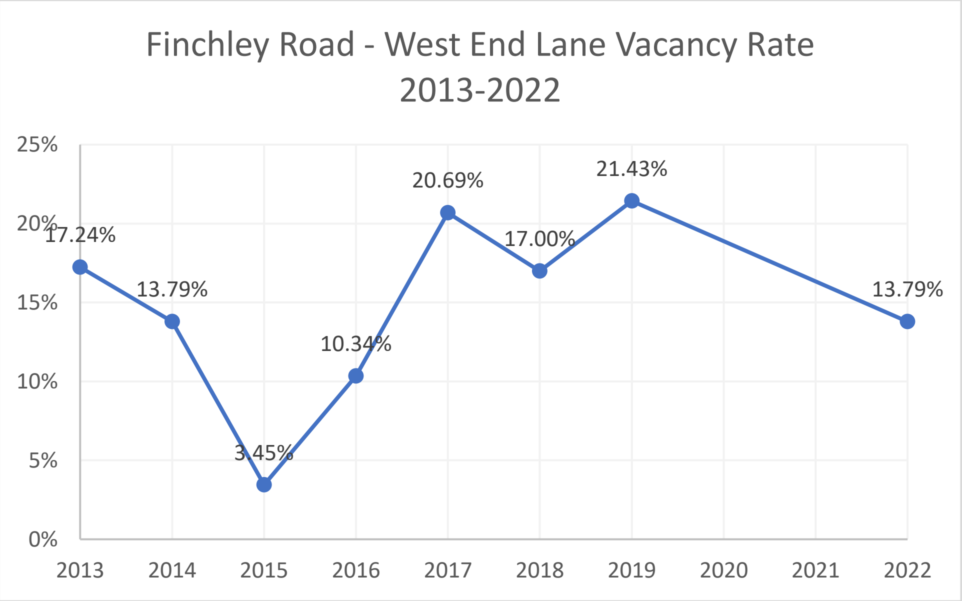
Finchley Road – West End Lane	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	0	0.0	3.9%

Conclusions on Diversity of Uses:

Of the centre's 24 occupied units, almost half (45.8% or 11 units) are occupied by Class E(a) shops – above the Camden average of 41.1%. These are predominantly comparison goods shops selling kitchens, bedroom furniture, bathrooms and tiles; with little in the way of convenience goods provision. The number of shops within the centre has fallen since 2014 (from 14 units to 11).

There is just one F&B unit and no evening / night time economy offer. The other half (50% or 12 units) of the centre's total units are dedicated to 'other' uses including offices, medical or health services, and other service uses.

Vacancies 2013 - 2022



Conclusions

The centre appears to be facing some issues and challenges to its overall health. Its vacancy rate, whilst falling, currently stands at close to 14%. It is also considered that the centre is under-represented by convenience goods provision to serve the basic shopping needs of the local catchment. In this regard, the proximity of both West Hampstead and Finchley Road/ Swiss Cottage Town Centres is likely to be a contributing factor – and perhaps also explains the Neighbourhood Centre's lack of F&B and evening activity.

Notwithstanding the above, the centre includes a modest range of services and some specialist comparison goods retailers which are likely to attract visitors from a wider area. Footfall data for the period September 2018 – August 2023 suggests that pedestrian activity has recovered well following the pandemic.

The centre boundary is considered to be appropriate having regard to the composition and distribution of existing uses.

CAMDEN – TOWN CENTRE HEALTH CHECKS

FORTESS ROAD

Description

Current Designation: Neighbourhood Centre in Camden Local Plan 2017

Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
  - Policy TC1 (Quality and location of retail development);
  - Policy TC2 (Camden's centres and other shopping areas); and
  - Policy TC4 (Town centre uses).
- The entire centre lies within a Neighbourhood Plan Area Boundary.

Description of Centre:

The centre lies on the eastern fringes of the borough, close to Tufnell Park Underground station. Its commercial areas extend along the east and west sides of Fortess Road, between its junctions with Brecknock Road (to the north) and Raveley Street (to the south).

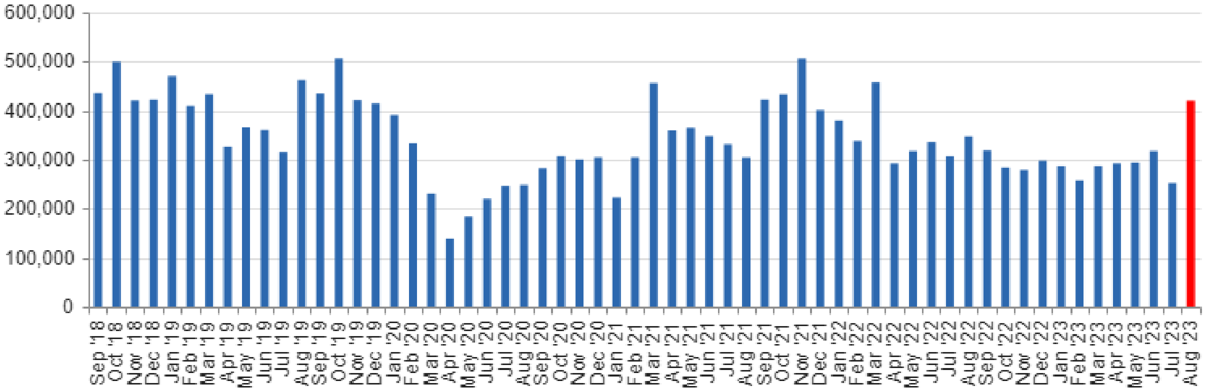
The centre would principally serve a localised 'walk-in' catchment and users of the nearby Underground station. Kentish Town (Town Centre) is situated less than 0.5km to the south.

Footfall

A section along Fortess Road was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall has been stable and consistent during this period. A notable drop in pedestrian activity can be seen at the beginning of the COVID-19 pandemic (March to June 2020), but with a figure of over 500,000 recorded in November 2021 along with some other strong months across 2021, 2022 and 2023, it seems footfall has recovered well from the pandemic.

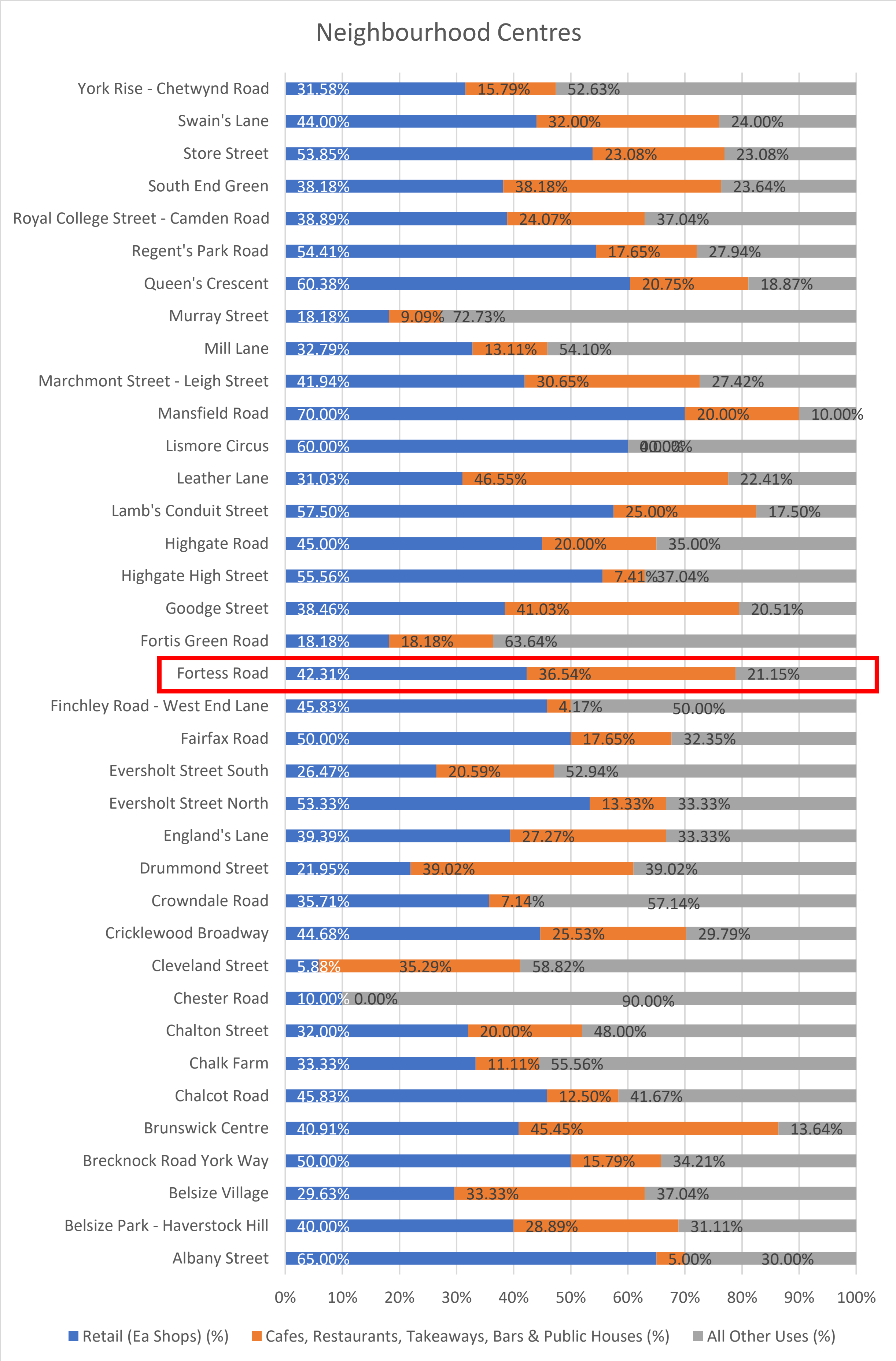
Figure 2: Footfall of Fortess Road (September 2018 – August 2023)



Source: Datscha

Diversity of Uses 2022

Fortess Road	Number	%	Camden Average (%)
Retail (Ea Shops)	22	42.3	41.1
Food & Beverage (F&B)	19	36.5	26.3
All Other Uses	11	21.2	32.6
Total	52	100.0	100.0


Neighbourhood Centres
York Rise - Chetwynd Road 31.58% 15.79% 52.63%
Swain's Lane 44.00% 32.00% 24.00%
Store Street 53.85% 23.08% 23.08%
South End Green 38.18% 38.18% 23.64%
Royal College Street - Camden Road 38.89% 24.07% 37.04%
Regent's Park Road 54.41% 17.65% 27.94%
Queen's Crescent 60.38% 20.75% 18.87%
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Mill Lane 32.79% 13.11% 54.10%
Marchmont Street - Leigh Street 41.94% 30.65% 27.42%
Mansfield Road 70.00% 20.00% 10.00%
Lismore Circus 60.00%
Leather Lane 31.03% 46.55% 22.41%
Lamb's Conduit Street 57.50% 25.00% 17.50%
Highgate Road 45.00% 20.00% 35.00%
Highgate High Street 55.56% 7.41% 37.04%
Goodge Street 38.46% 41.03% 20.51%
Fortis Green Road 18.18% 18.18% 63.64%
Fortess Road 42.31% 36.54% 21.15%
Finchley Road - West End Lane 45.83% 4.17% 50.00%
Fairfax Road 50.00% 17.65% 32.35%
Eversholt Street South 26.47% 20.59% 52.94%
Eversholt Street North 53.33% 13.33% 33.33%
England's Lane 39.39% 27.27% 33.33%
Drummond Street 21.95% 39.02% 39.02%
Crowndale Road 35.71% 7.14% 57.14%
Cricklewood Broadway 44.68% 25.53% 29.79%
Cleveland Street 5.88% 35.29% 58.82%
Chester Road 10.00% 0.00% 90.00%
Chalton Street 32.00% 20.00% 48.00%
Chalk Farm 33.33% 11.11% 55.56%
Chalcot Road 45.83% 12.50% 41.67%
Brunswick Centre 40.91% 45.45% 13.64%
Brecknock Road York Way 50.00% 15.79% 34.21%
Belsize Village 29.63% 33.33% 37.04%
Belsize Park - Haverstock Hill 40.00% 28.89% 31.11%
Albany Street 65.00% 5.00% 30.00%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

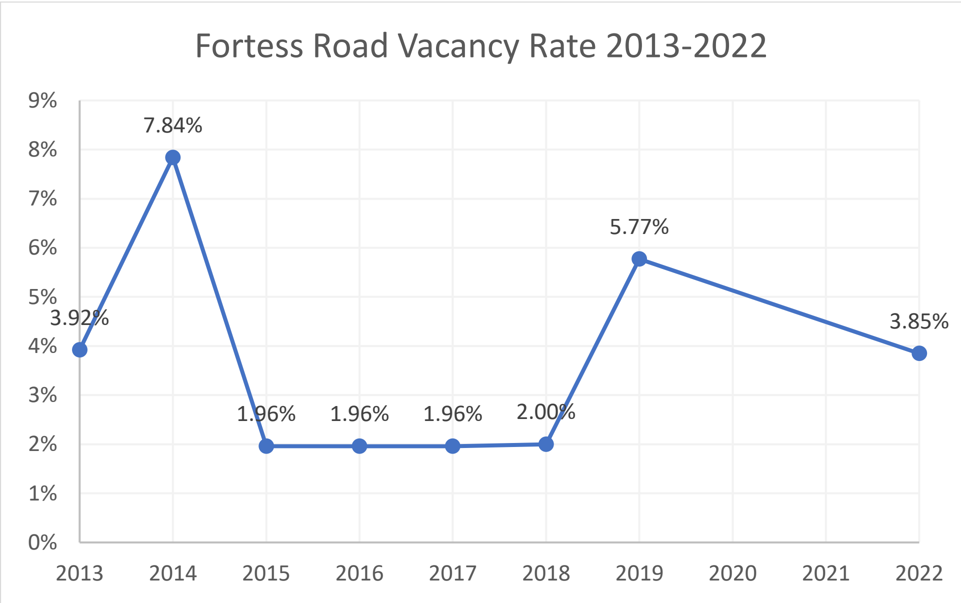
Centre Name	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	1	2.0	3.9%

Conclusions on Diversity of Uses:

The centre comprises 52 occupied units with a balanced mix of uses. Some 42.3% (22 units) of the centre's units accommodate Class E(a) shops – broadly in line with the Camden average of 41.1% and reflecting no material change on levels recorded in the monitoring years of 2014 and 2019.

Over the same period, the number of F&B units has increased slightly (from 17 to 19 units). The current number of F&B units equates to 36.5% of total units, which is well above the Camden average (26.3%). The remaining units (11 units or 21.2%) are dedicated to 'other' uses including services and Sui Generis uses. There is just one evening / night time economy unit.

Vacancies 2013 - 2022



Conclusions

Considering the low vacancy rate (3.85%) and the balanced mix of uses, together with the finding that footfall levels have recovered well following the pandemic, the centre appears to be healthy and performing an important local function.

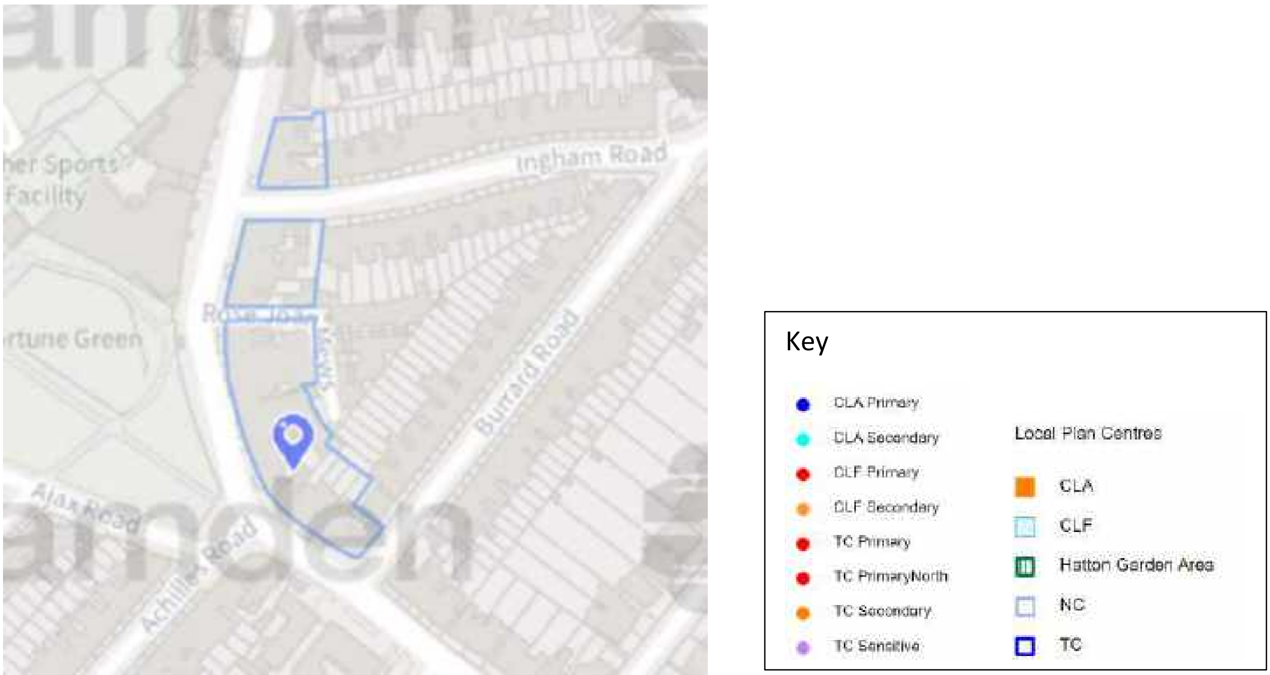
The centre boundary is appropriate considering the distribution and composition of existing uses and the below average vacancy rate.

CAMDEN – TOWN CENTRE HEALTH CHECKS

FORTUNE GREEN ROAD

Description

Current Designation: Neighbourhood Centre in Camden Local Plan 2017



Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden's centres and other shopping areas); and
    - Policy TC4 (Town centre uses).

Description of Centre:

Fortune Green Road Neighbourhood Centre is situated to the west of the borough, approximately 200m to the west of Finchley Road. West Hampstead Town Centre is less than 1km to the south.

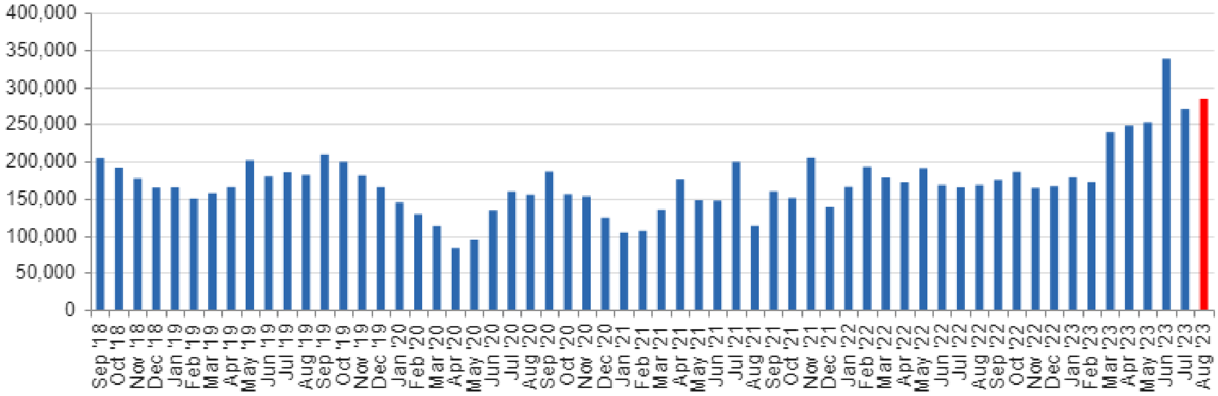
The centre (consisting of 33 occupied units) is focused on the east side of Fortune Green Road and would predominantly serve a localised 'walk-in' catchment.

Footfall

A section along Fortune Green Road was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, pedestrian activity was relatively stable between September 2018 and February 2023, with the exception of lows seen in April and May 2020 (the beginning of the pandemic). March 2023 onwards however has seen a sudden and sustained jump in figures, with a record high for the whole period seen in June 2023.

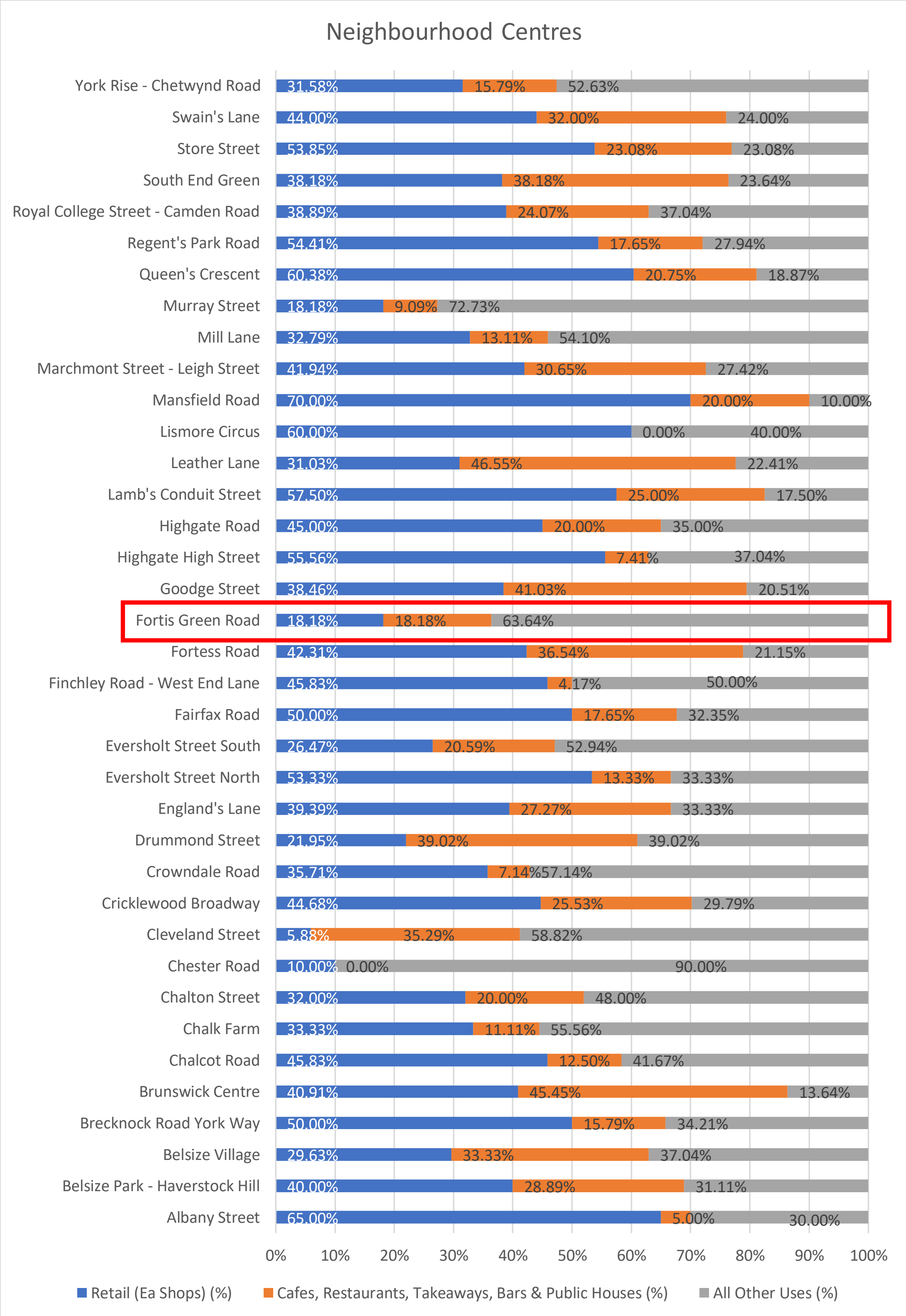
Figure 2: Footfall of Fortune Green Road (September 2018 – August 2023)



Source: Datscha

Diversity of Uses 2022

Fortune Green Road	Number	%	Camden Average (%)
Retail (Ea Shops)	6	18.2	41.1
Food & Beverage (F&B)	6	18.2	26.3
All Other Uses	21	63.6	32.6
Total	33	100.0	100.0


Neighbourhood Centres
York Rise - Chetwynd Road
31.58%
15.79%
52.63%
Swain's Lane
44.00%
32.00%
24.00%
Store Street
53.85%
23.08%
23.08%
South End Green
38.18%
38.18%
23.64%
Royal College Street - Camden Road
38.89%
24.07%
37.04%
Regent's Park Road
54.41%
17.65%
27.94%
Queen's Crescent
60.38%
20.75%
18.87%
Murray Street
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Mill Lane
32.79%
13.11%
54.10%
Marchmont Street - Leigh Street
41.94%
30.65%
27.42%
Mansfield Road
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20.00%
10.00%
Lismore Circus
60.00%
0.00%
40.00%
Leather Lane
31.03%
46.55%
22.41%
Lamb's Conduit Street
57.50%
25.00%
17.50%
Highgate Road
45.00%
20.00%
35.00%
Highgate High Street
55.56%
7.41%
37.04%
Goodge Street
38.46%
41.03%
20.51%
Fortis Green Road
18.18%
18.18%
63.64%
Fortess Road
42.31%
36.54%
21.15%
Finchley Road - West End Lane
45.83%
4.17%
50.00%
Fairfax Road
50.00%
17.65%
32.35%
Eversholt Street South
26.47%
20.59%
52.94%
Eversholt Street North
53.33%
13.33%
33.33%
England's Lane
39.39%
27.27%
33.33%
Drummond Street
21.95%
39.02%
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Crowndale Road
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Cricklewood Broadway
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Cleveland Street
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Chester Road
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0.00%
90.00%
Chalton Street
32.00%
20.00%
48.00%
Chalk Farm
33.33%
11.11%
55.56%
Chalcot Road
45.83%
12.50%
41.67%
Brunswick Centre
40.91%
45.45%
13.64%
Brecknock Road York Way
50.00%
15.79%
34.21%
Belsize Village
29.63%
33.33%
37.04%
Belsize Park - Haverstock Hill
40.00%
28.89%
31.11%
Albany Street
65.00%
5.00%
30.00%
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

Fortune Green Road	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	1	3.0	3.9%

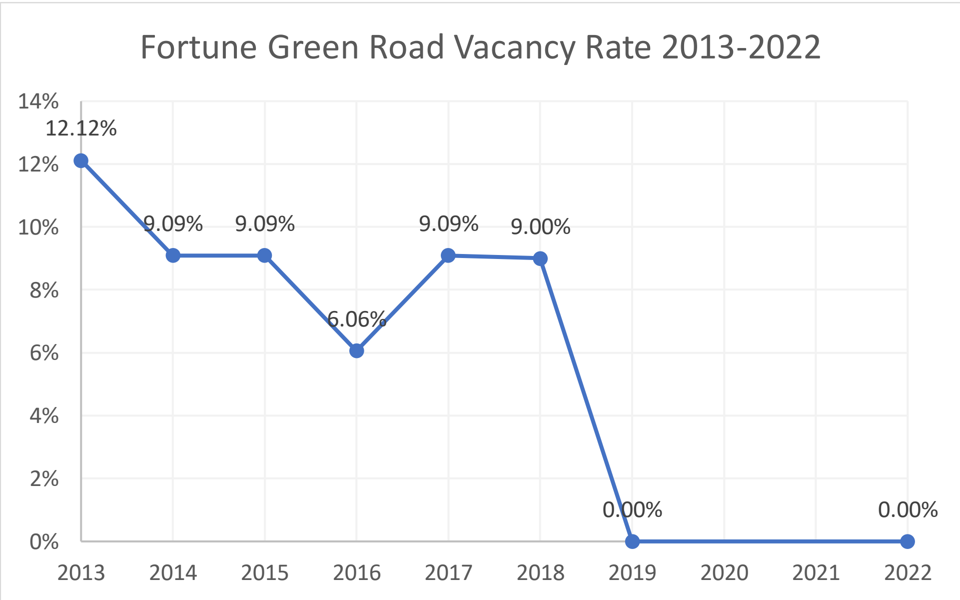
Conclusions on Diversity of Uses:

Nearly two-thirds (63.6% or 21 units) of the centre's occupied units comprise 'other' (i.e. non-retail and non-F&B) uses. This compares with the Camden average of 32.6% for the 'other' uses category. Such uses found within the Neighbourhood Centre include financial and professional services, medical or health services and Sui Generis uses.

The remainder of the total units are split evenly between Class E(a) shops and F&B uses, each with 6 units (or 18.2% as a proportion of the total number of units). The centre therefore has below average retail and F&B provision. It has just one unit dedicated to the evening / night time economy.

Monitoring data for 2014 and 2019 indicates that the centre has had a strong services-orientated function for several years. The number of shops has fallen over this period, from 9 units in 2014 to 6 units in 2022. The number of F&B uses has remained stable (6 units).

Vacancies 2013 - 2022



Conclusions

Fortune Green Road has no vacant units (vacancy levels were circa 9% between 2014 and 2019) and this is a good indication of the centre's overall health. However, it is not the only indicator and the findings suggest the centre is under-represented in terms of retail provision to serve the basic shopping needs of its localised catchment. It also has a very limited F&B offer.

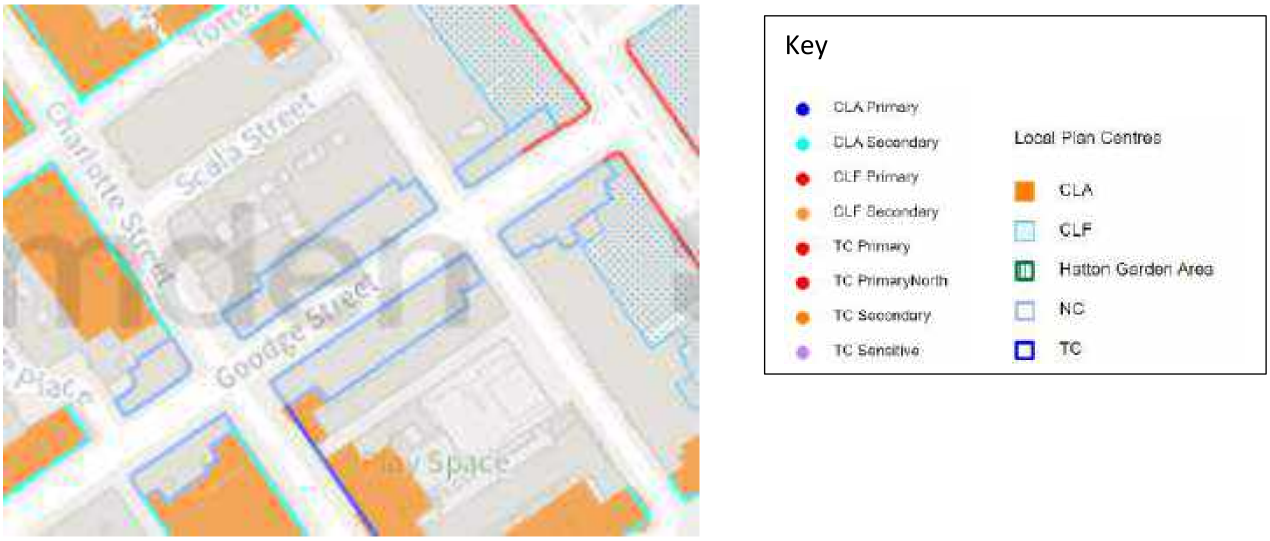
This is likely to be due to the way the centre is defined, with the shops and services on the west side of the road, north of Fortune Green, currently outside of the centre boundary. These units are located in a modern development with residential at upper levels and include a Tesco Express store which is likely to be an important draw for the centre. The modern units also tend to be larger than those to the east of Fortune Green Road and are likely to prove attractive to new occupiers in the future. Given this and the current 0% vacancy rate, we would recommend that the boundary of this centre is expanded.

CAMDEN – TOWN CENTRE HEALTH CHECKS

GOODGE STREET

Description

Current Designation: Neighbourhood Centre in Camden Local Plan 2017



Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
  - Policy TC1 (Quality and location of retail development);
  - Policy TC2 (Camden's centres and other shopping areas); and
  - Policy TC4 (Town centre uses).
- The entire centre lies within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage).

Description of Centre:

The centre extends east-west along Goodge Street, adjacent to Goodge Street Underground station. Its commercial areas are located along both sides of Goodge Street between Tottenham Court Road (to the east) and Goodge Place (to the west).

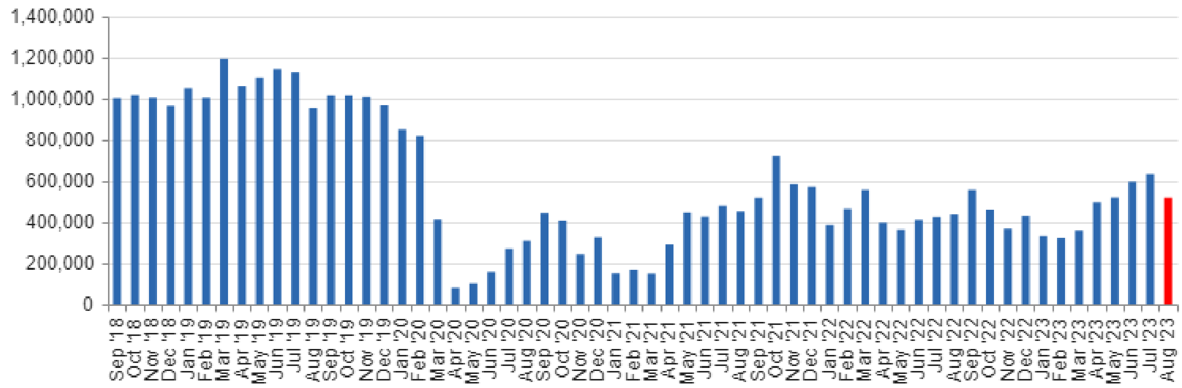
Tottenham Court Road is a main thoroughfare running north towards the Euston area and south towards the Soho area. There are other Neighbourhood Centres within 1km of Goodge Street, including to the east (Store Street) and northwest (Cleveland Street).

Footfall

A section where Goodge Street meets Charlotte Street was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall was impacted significantly by the introduction of restrictions in response to the pandemic. There has been some growth since that time, but pedestrian activity significantly below what was recorded in late 2018, 2019 and early 2020. With a strong office worker population in the area, the prevalence of hybrid working is likely to be at least part of the cause.

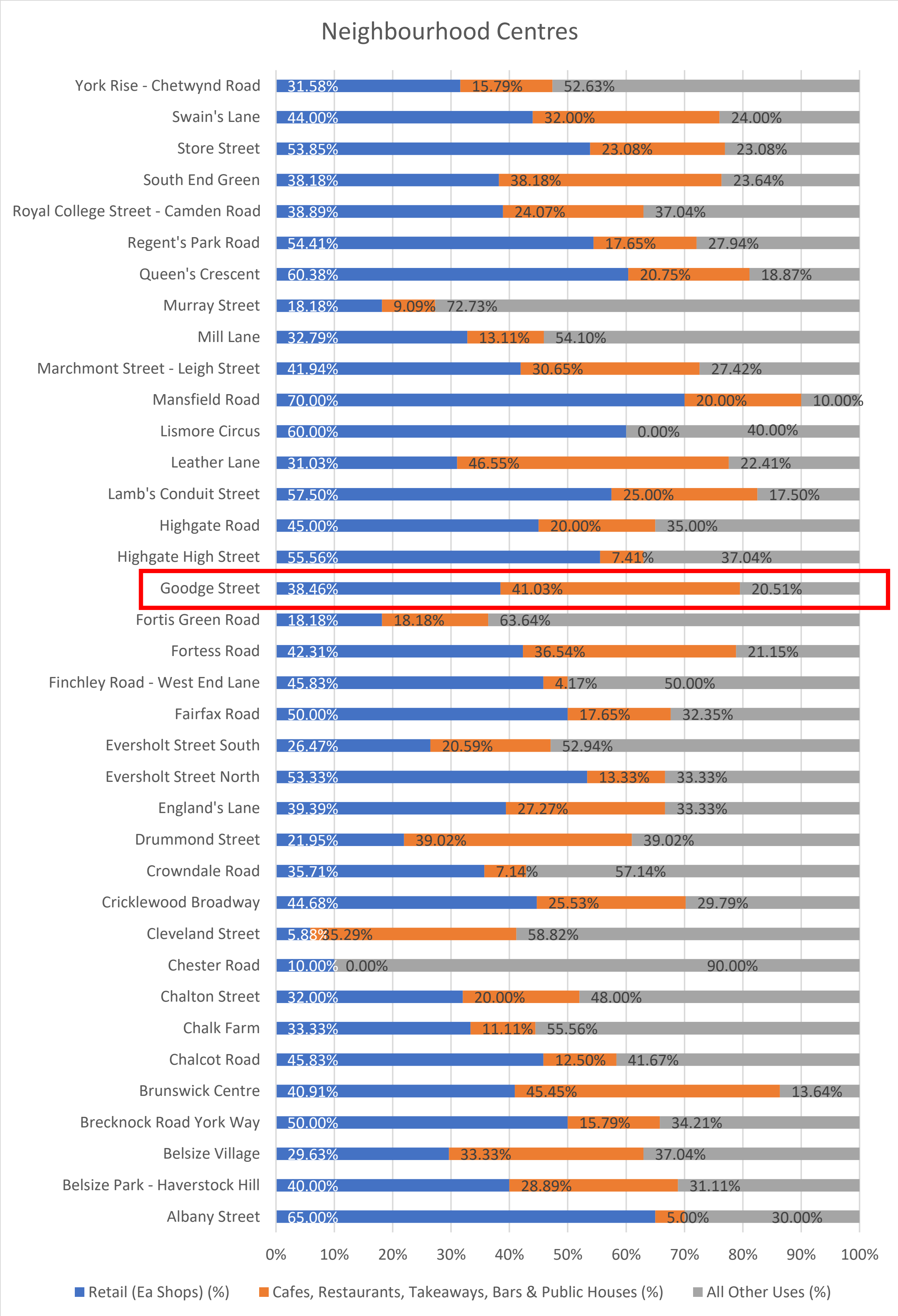
Figure 2: Footfall of Goodge Street (September 2018 – August 2023)



Source: Datscha

Diversity of Uses 2022

Goodge Street	Number	%	Camden Average (%)
Retail (Ea Shops)	15	38.5	41.1
Food & Beverage (F&B)	16	41.0	26.3
All Other Uses	8	20.5	32.6
Total	39	100.0	100.0



Neighbourhood Centres
York Rise - Chetwynd Road 31.58% 15.79% 52.63%
Swain's Lane 44.00% 32.00% 24.00%
Store Street 53.85% 23.08% 23.08%
South End Green 38.18% 38.18% 23.64%
Royal College Street - Camden Road 38.89% 24.07% 37.04%
Regent's Park Road 54.41% 17.65% 27.94%
Queen's Crescent 60.38% 20.75% 18.87%
Murray Street 18.18% 9.09% 72.73%
Mill Lane 32.79% 13.11% 54.10%
Marchmont Street - Leigh Street 41.94% 30.65% 27.42%
Mansfield Road 70.00% 20.00% 10.00%
Lismore Circus 60.00% 0.00% 40.00%
Leather Lane 31.03% 46.55% 22.41%
Lamb's Conduit Street 57.50% 25.00% 17.50%
Highgate Road 45.00% 20.00% 35.00%
Highgate High Street 55.56% 7.41% 37.04%
Goodge Street 38.46% 41.03% 20.51%
Fortis Green Road 18.18% 18.18% 63.64%
Fortess Road 42.31% 36.54% 21.15%
Finchley Road - West End Lane 45.83% 4.17% 50.00%
Fairfax Road 50.00% 17.65% 32.35%
Eversholt Street South 26.47% 20.59% 52.94%
Eversholt Street North 53.33% 13.33% 33.33%
England's Lane 39.39% 27.27% 33.33%
Drummond Street 21.95% 39.02% 39.02%
Crowndale Road 35.71% 7.14% 57.14%
Cricklewood Broadway 44.68% 25.53% 29.79%
Cleveland Street 5.88% 35.29% 58.82%
Chester Road 10.00% 0.00% 90.00%
Chalton Street 32.00% 20.00% 48.00%
Chalk Farm 33.33% 11.11% 55.56%
Chalcot Road 45.83% 12.50% 41.67%
Brunswick Centre 40.91% 45.45% 13.64%
Brecknock Road York Way 50.00% 15.79% 34.21%
Belsize Village 29.63% 33.33% 37.04%
Belsize Park - Haverstock Hill 40.00% 28.89% 31.11%
Albany Street 65.00% 5.00% 30.00%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

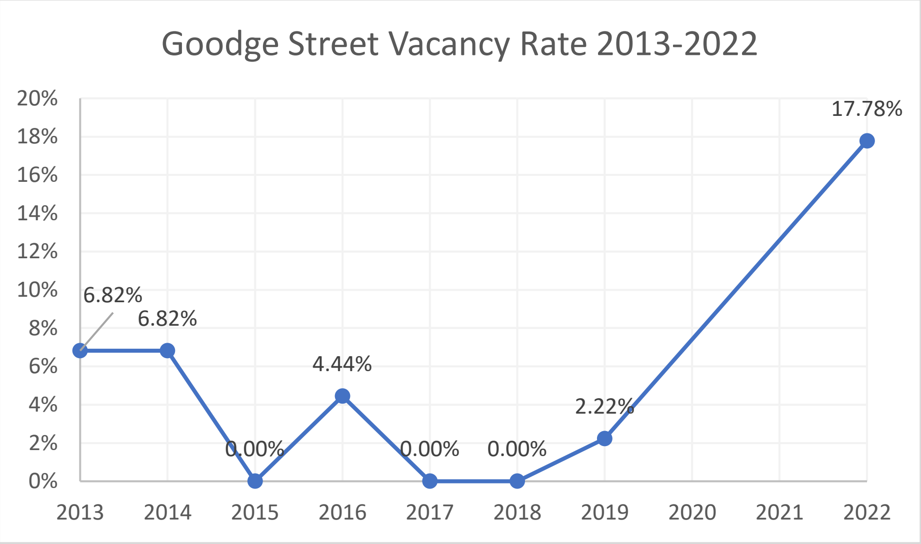
Goodge Street	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	2	5.4	3.9%

Conclusions on Diversity of Uses:

The centre includes 39 occupied units, 15 of which (38.5%) are occupied by Class E(a) shops – compared with a Camden average of 41.1%. The centre has an above average proportion of F&B units (16 units or 41%) and two evening / night time economy units. The remaining 8 units (about 20%) accommodate 'other' uses including hot food takeaways, bookmakers and other services.

Comparing the above findings with data for the monitoring years of 2014 and 2019, Goodge Street has seen a significant reduction in the number of shops (from 25 units in 2014, to 19 in 2019 and 15 in 2022). Over this period, the centre has evolved to include more F&B and other service uses.

Vacancies 2013 - 2022



Conclusions

The centre contains a reasonably balanced mix of uses including retail, services and an increasing F&B offer. However, there are other indicators which suggest the centre is not as healthy as it could be.

Footfall in the centre has failed to recover to pre-pandemic levels which, considering the area's substantial office worker population, is likely to be attributable (at least in part) to the prevalence of hybrid working. Other reasons for the decline could be the decreasing retail offer and independent offer, reducing the overall draw of the centre.

In addition, the vacancy rate has increased significantly since 2019 – from about 2% to almost 18% (i.e. above average).

The centre immediately adjoins the Fitzrovia SSA and we note that the Goodge Street area west of Charlotte Street is currently defined as being within the SSA. As there does not seem to be a clear difference in the types of businesses operating in the area, we would recommend that the two areas are combined and allocated to the NC.

CAMDEN – TOWN CENTRE HEALTH CHECKS

HIGHGATE HIGH STREET

Description

Current Designation: Neighbourhood Centre in the Camden Local Plan 2017

Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden's centres and other shopping areas); and
    - Policy TC4 (Town centre uses).
- The entire centre lies within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage).

Description of Centre:

The centre is situated on the borough's northern edge, between Waterlow Park (to the immediate southeast) and Parliament Hill (to the west). It extends east-west along Highgate High Street and straddles two borough boundaries: the southern side is the Camden side and the focus of this healthcheck.

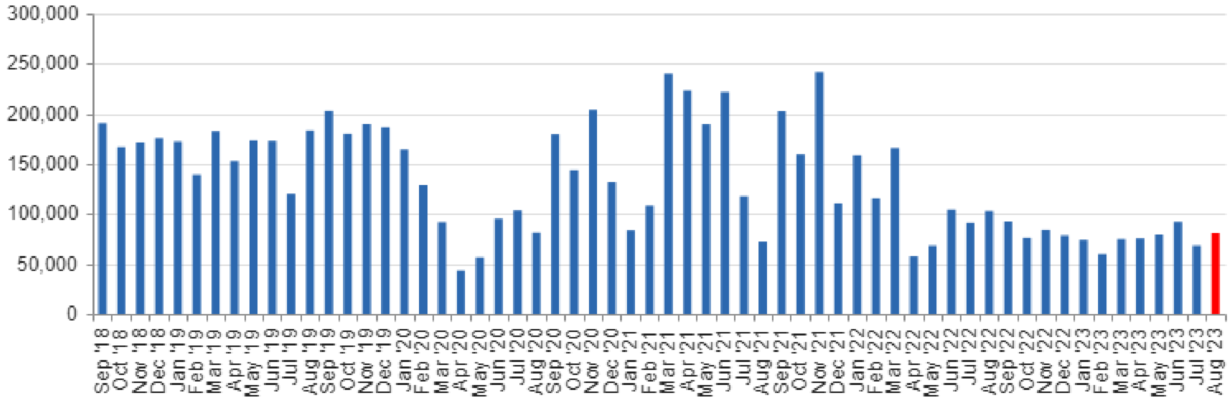
Highgate High Street is a long, linear centre and the south (Camden) side consists of 27 occupied units. Kentish Town (Town Centre) is approximately 2km to the south.

Footfall

A section along Highgate High Street was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall initially bounced back from the lows of the pandemic period well. Since April 2022 however, pedestrian activity has dropped back down, regularly falling below 100,000, compared to many months across 2018, 2019, 2020 and 2021 that saw figures of 150,000 and above.

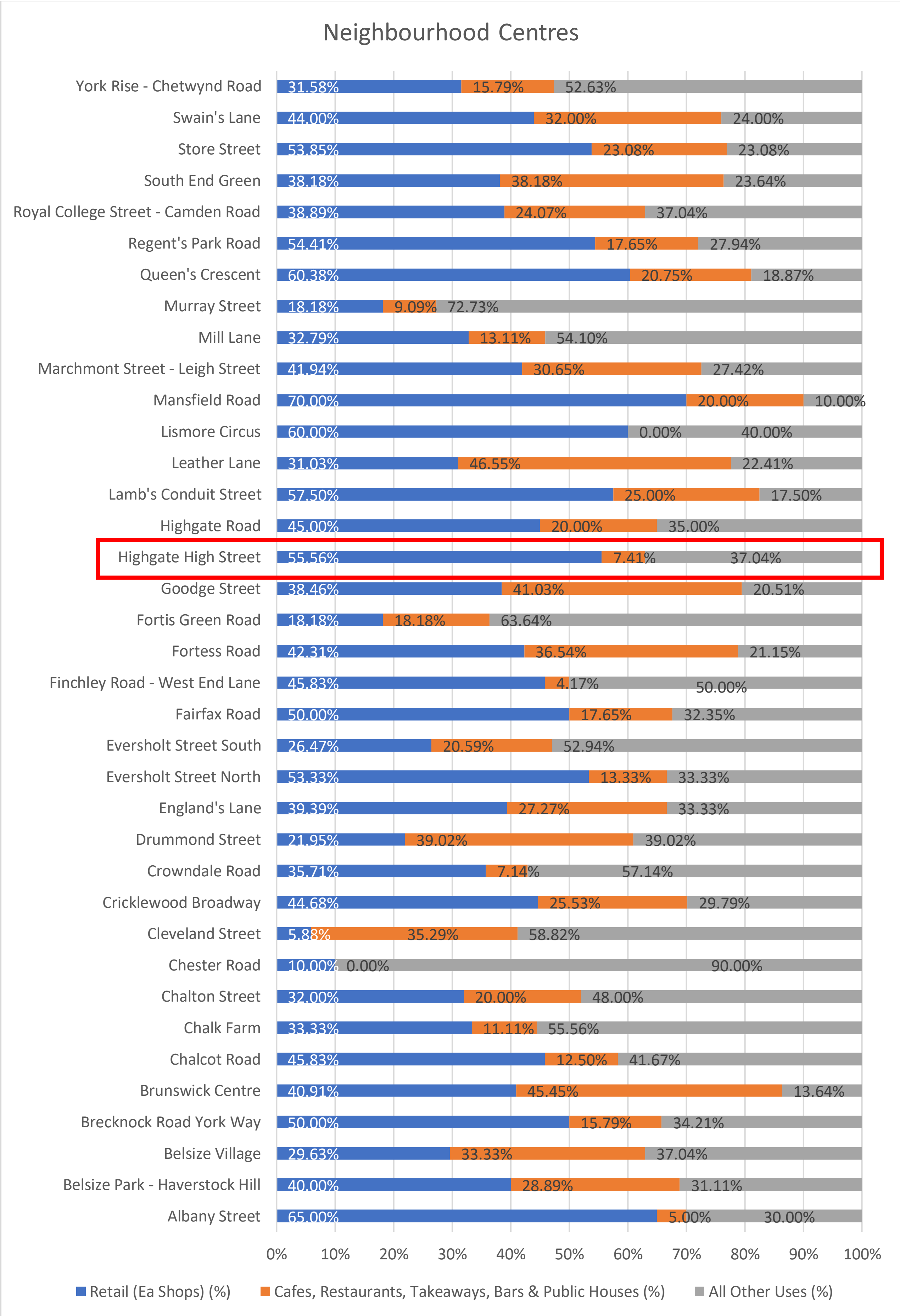
Figure 2: Footfall of Highgate High Street (September 2018 – August 2023)



Source: Datscha

Diversity of Uses 2022

Highgate High Street	Number	%	Camden Average (%)
Retail (Ea Shops)	15	55.6	41.1
Food & Beverage (F&B)	2	7.4	26.3
All Other Uses	10	37.0	32.6
Total	27	100.0	100.0


Neighbourhood Centres
York Rise - Chetwynd Road
31.58%
15.79%
52.63%
Swain's Lane
44.00%
32.00%
24.00%
Store Street
53.85%
23.08%
23.08%
South End Green
38.18%
38.18%
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Royal College Street - Camden Road
38.89%
24.07%
37.04%
Regent's Park Road
54.41%
17.65%
27.94%
Queen's Crescent
60.38%
20.75%
18.87%
Murray Street
18.18%
9.09%
72.73%
Mill Lane
32.79%
13.11%
54.10%
Marchmont Street - Leigh Street
41.94%
30.65%
27.42%
Mansfield Road
70.00%
20.00%
10.00%
Lismore Circus
60.00%
0.00%
40.00%
Leather Lane
31.03%
46.55%
22.41%
Lamb's Conduit Street
57.50%
25.00%
17.50%
Highgate Road
45.00%
20.00%
35.00%
Highgate High Street
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7.41%
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Goodge Street
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Fortis Green Road
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Fortess Road
42.31%
36.54%
21.15%
Finchley Road - West End Lane
45.83%
4.17%
50.00%
Fairfax Road
50.00%
17.65%
32.35%
Eversholt Street South
26.47%
20.59%
52.94%
Eversholt Street North
53.33%
13.33%
33.33%
England's Lane
39.39%
27.27%
33.33%
Drummond Street
21.95%
39.02%
39.02%
Crowndale Road
35.71%
7.14%
57.14%
Cricklewood Broadway
44.68%
25.53%
29.79%
Cleveland Street
5.88%
35.29%
58.82%
Chester Road
10.00%
0.00%
90.00%
Chalton Street
32.00%
20.00%
48.00%
Chalk Farm
33.33%
11.11%
55.56%
Chalcot Road
45.83%
12.50%
41.67%
Brunswick Centre
40.91%
45.45%
13.64%
Brecknock Road York Way
50.00%
15.79%
34.21%
Belsize Village
29.63%
33.33%
37.04%
Belsize Park - Haverstock Hill
40.00%
28.89%
31.11%
Albany Street
65.00%
5.00%
30.00%
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

Highgate High Street	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	2	7.4	3.9%

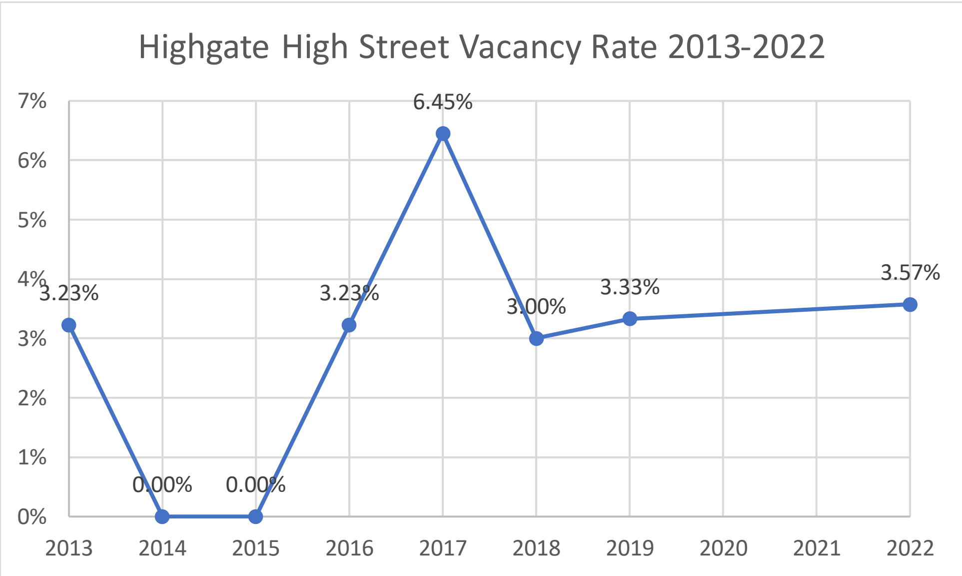
Conclusions on Diversity of Uses:

More than half (55.6% or 15 units) of the total units are occupied by Class E(a) shops, which is well above the Camden average (41.1%). This is despite the centre seeing a reduction in the number of shops over the period since 2014, down from 18 shops to 16 in 2019 and 15 in 2022.

There are just two F&B uses (7.4% compared to a Camden average of 26.3%) in addition to two evening / night time economy uses.

The remainder of the units (10) accommodate 'other' uses including professional services, medical or health services and Sui Generis uses.

Vacancies 2013 - 2022



Conclusions

The centre is reasonably well served by a range of retail and non-retail uses and has a strong convenience-based function. As currently defined, it is slightly lacking in terms of F&B / evening activity but nonetheless, appears to be healthy and catering for the day-to-day needs of the local catchment. However, there are a number of F&B and bar uses located immediately adjoining the centre along Hampstead Lane and South Grove.

The very low vacancy rate (circa 3.6%) indicates the centre is healthy, although the footfall data suggests that pedestrian activity within the centre has struggled to recover to pre-pandemic levels. This is perhaps surprising given the centre's localised, convenience-based function and the prevalence of home/hybrid working in suburban locations such as this.

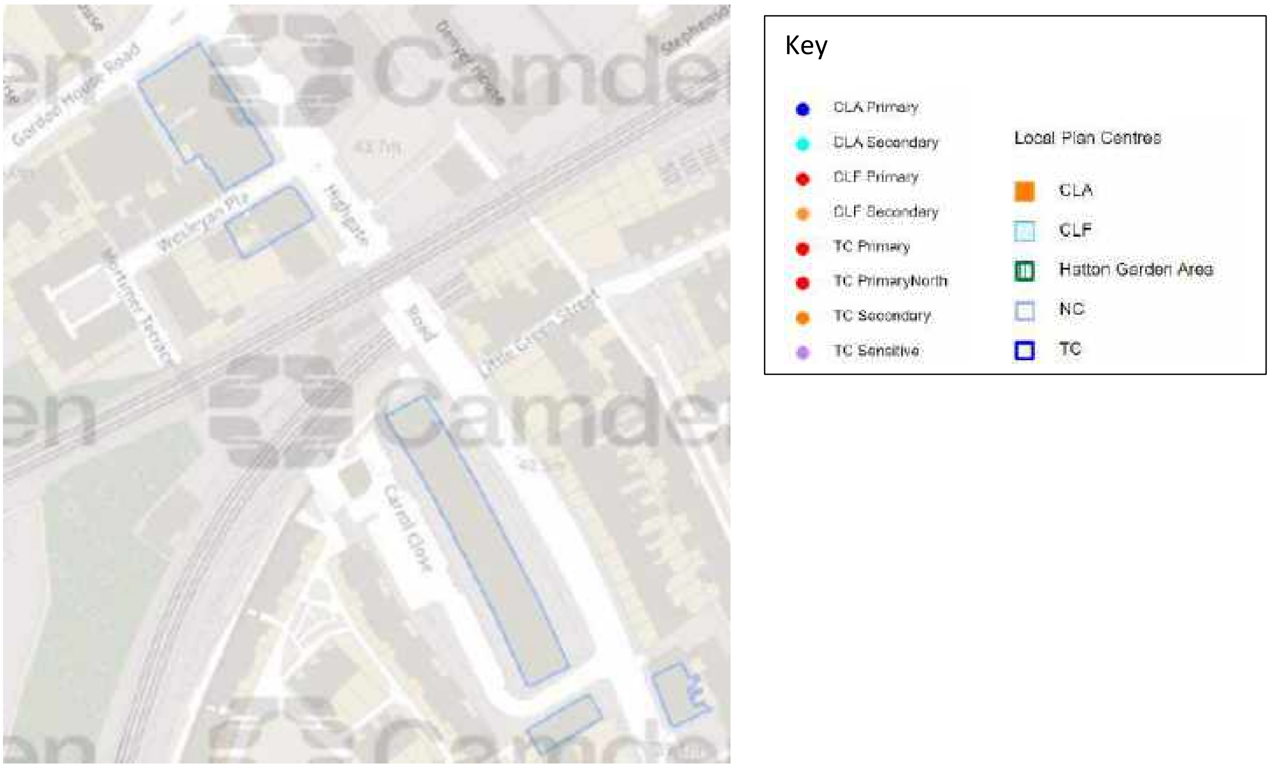
However, the slight expansion of the centre to include the town centre uses that are already present at Hampstead Lane and South Grove is recommended, both to better reflect the current offer in the centre and provide greater flexibility in the future given the low vacancy rates.

CAMDEN – TOWN CENTRE HEALTH CHECKS

HIGHGATE ROAD

Description

Current Designation: Neighbourhood Centre in Camden Local Plan 2017



Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
  - Policy TC1 (Quality and location of retail development);
  - Policy TC2 (Camden's centres and other shopping areas); and
  - Policy TC4 (Town centre uses).
- The northern end of the centre (beyond the railway lines) is situated within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage).

Description of Centre:

The centre is situated to the southeast of Parliament Hill, approximately 0.5km to the east of Gospel Oak railway station. Kentish Town (Town Centre) is located less than 1km to the south. The nearest other Neighbourhood Centre is York Rise / Chetwynd Road (approximately 0.5km to the east).

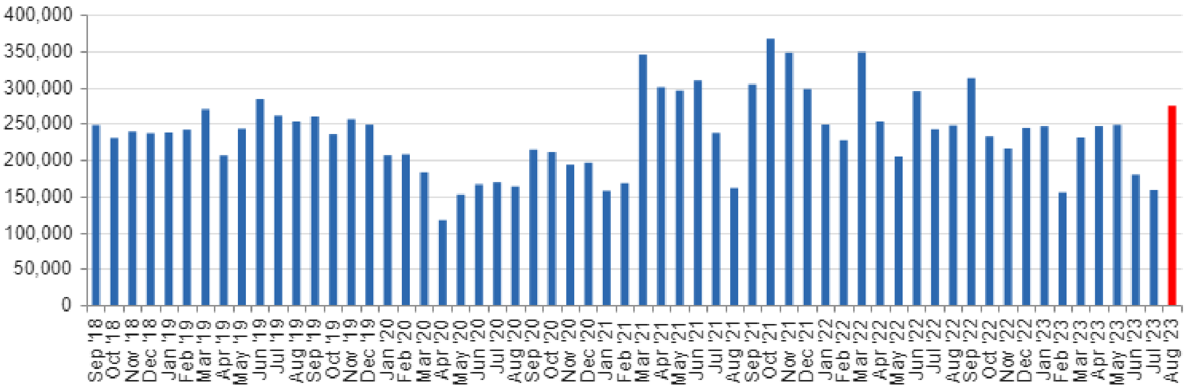
The centre's commercial areas are predominantly focused on the west side of Highgate Road, separated by the railway lines (at higher level). Highgate Road is a main thoroughfare running south towards Kentish Town and north towards the Parliament Hill and Highgate areas.

Footfall

A section along Highgate Road was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

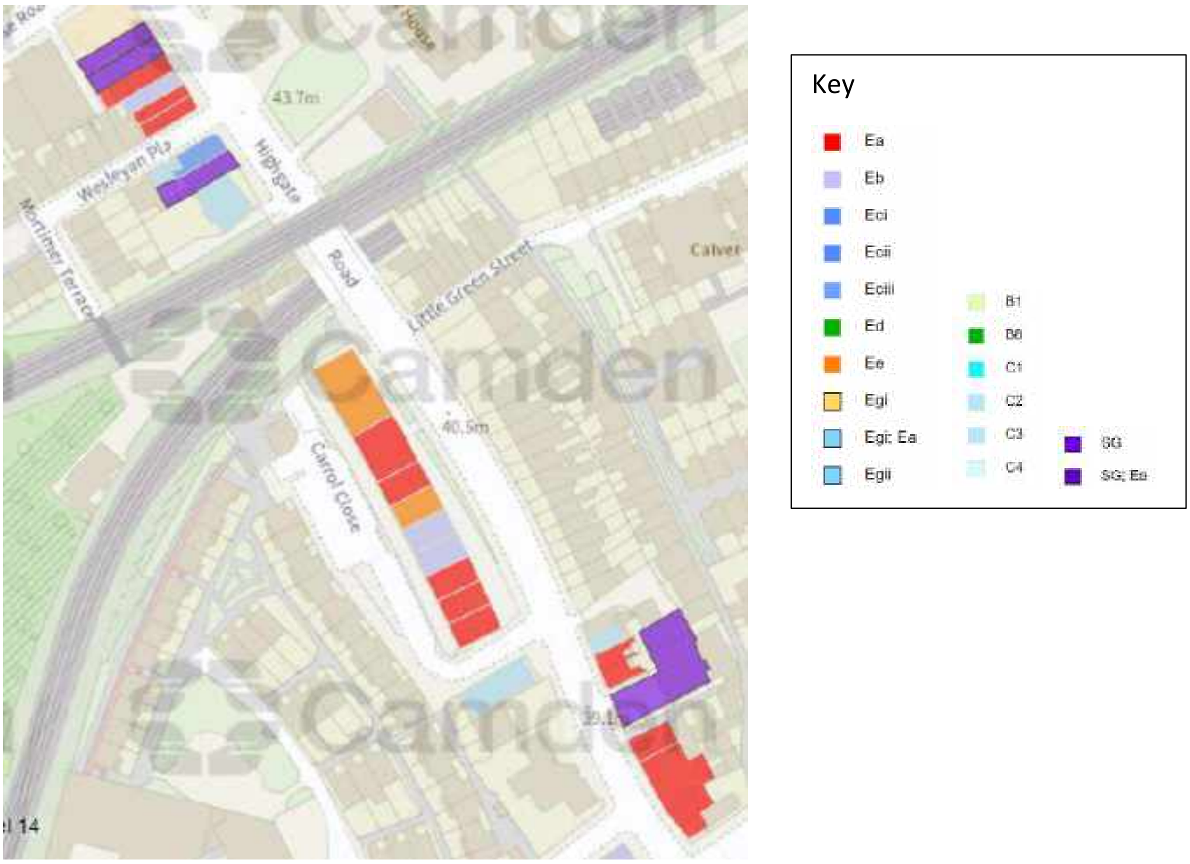
As can be seen in the figure below, footfall appears to have recovered from the low levels at the time of pandemic restrictions (March 2020 onwards) but footfall appears to be more variable in 2023 than pre-pandemic.

Figure 2: Footfall of Highgate Road (September 2018 – August 2023)

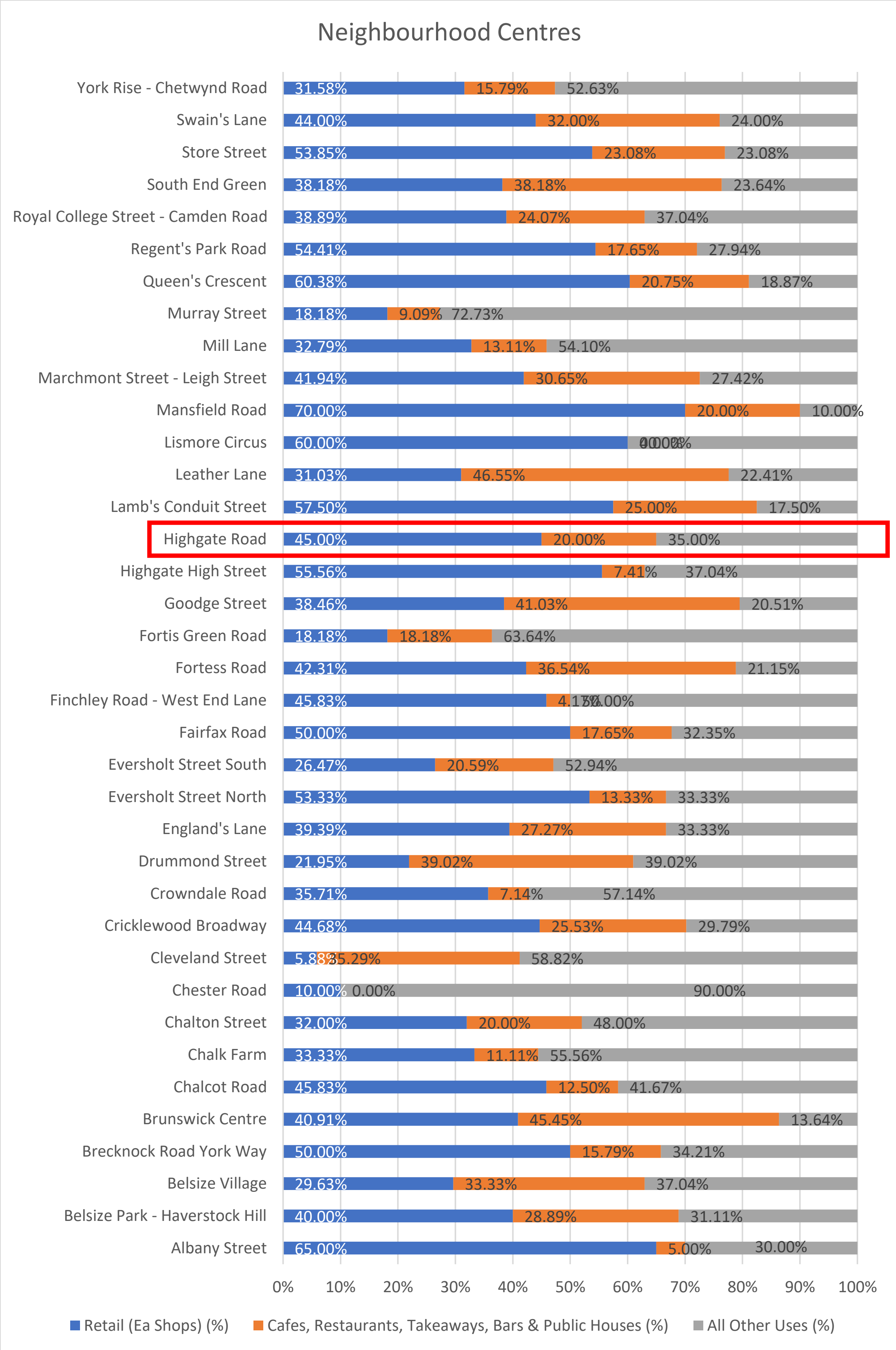


Source: Datscha

Diversity of Uses 2023



Highgate Road	Number	%	Camden Average (%)
Retail (Ea Shops)	9	45.0	41.1
Food & Beverage (F&B)	4	20.0	26.3
All Other Uses	7	35.0	32.6
Total	20	100.0	100.0



Neighbourhood Centres
York Rise - Chetwynd Road
31.58%
15.79%
52.63%
Swain's Lane
44.00%
32.00%
24.00%
Store Street
53.85%
23.08%
23.08%
South End Green
38.18%
38.18%
23.64%
Royal College Street - Camden Road
38.89%
24.07%
37.04%
Regent's Park Road
54.41%
17.65%
27.94%
Queen's Crescent
60.38%
20.75%
18.87%
Murray Street
18.18%
9.09%
72.73%
Mill Lane
32.79%
13.11%
54.10%
Marchmont Street - Leigh Street
41.94%
30.65%
27.42%
Mansfield Road
70.00%
20.00%
10.00%
Lismore Circus
60.00%
Leather Lane
31.03%
46.55%
22.41%
Lamb's Conduit Street
57.50%
25.00%
17.50%
Highgate Road
45.00%
20.00%
35.00%
Highgate High Street
55.56%
7.41%
37.04%
Goodge Street
38.46%
41.03%
20.51%
Fortis Green Road
18.18%
18.18%
63.64%
Fortess Road
42.31%
36.54%
21.15%
Finchley Road - West End Lane
45.83%
Fairfax Road
50.00%
17.65%
32.35%
Eversholt Street South
26.47%
20.59%
52.94%
Eversholt Street North
53.33%
13.33%
33.33%
England's Lane
39.39%
27.27%
33.33%
Drummond Street
21.95%
39.02%
39.02%
Crowndale Road
35.71%
7.14%
57.14%
Cricklewood Broadway
44.68%
25.53%
29.79%
Cleveland Street
35.29%
58.82%
Chester Road
10.00%
0.00%
90.00%
Chalton Street
32.00%
20.00%
48.00%
Chalk Farm
33.33%
11.11%
55.56%
Chalcot Road
45.83%
12.50%
41.67%
Brunswick Centre
40.91%
45.45%
13.64%
Brecknock Road York Way
50.00%
15.79%
34.21%
Belsize Village
29.63%
33.33%
37.04%
Belsize Park - Haverstock Hill
40.00%
28.89%
31.11%
Albany Street
65.00%
5.00%
30.00%
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

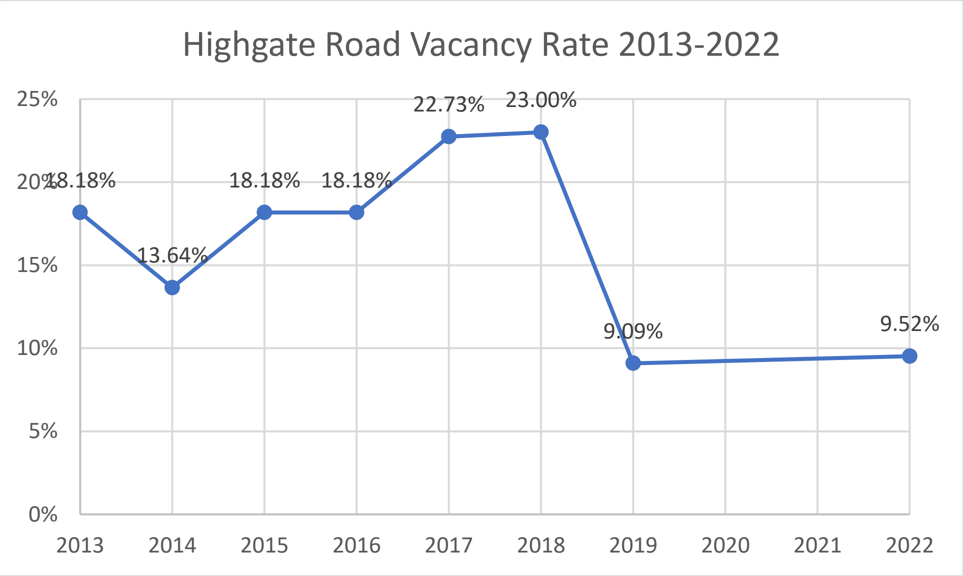
Highgate Road	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	1	5.3	3.9%

Conclusions on Diversity of Uses:

Class E(a) shops are the dominant use class with 9 units, accounting for 45% of the total number of units within the centre (above the Camden average of 41.1%). The number of shops has remained relatively stable since 2014 and 2019, when 10 units were recorded.

Highgate Road contains 4 F&B units which, as a proportion of the total number of units (20%), is below the Camden average (26.3%) and represents no change since 2019 (although 3 units were recorded in 2014). The centre has one evening / night time economy use. The remaining 7 units (35%) are occupied by 'other' uses including medical or health services and Sui Generis uses.

Vacancies 2014 - 2022



Conclusions

The centre has a reasonably stable and balanced range of uses, with good provision of shops (within the limitations of the centre's small scale and localised function) to serve the basic needs of its catchment. The F&B / evening offer is relatively modest.

The footfall data suggests that pedestrian activity within the centre has increased in recent times, while the vacancy rate appears to have stabilised at about 9-10% following a high of 23% in 2018. Overall, the centre seems to be relevant to local needs and generally healthy.

The centre currently consists of three main areas of commercial uses, two on the west side of Highgate Road, but separated from each other by the railway line. There are also three units defined as being within the centre to the east of the main road. This results in a disjointed centre.

It is also not clear why the part of the centre to the east of Highgate Road only includes three units (90-94 Highgate Road) and not the similar uses immediately to the south (74-80 plus The Vine public house). We would suggest these additional units should be included within the centre, or the centre be redefined to only include areas to the west.

CAMDEN – TOWN CENTRE HEALTH CHECKS

LAMB'S CONDUIT STREET

Description

Current Designation: Neighbourhood Centre in Camden Local Plan 2017

Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden's centres and other shopping areas); and
    - Policy TC4 (Town centre uses).
- The entire centre lies within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage).

Description of Centre:

The centre is situated broadly equidistance between Hatton Garden (to the east) and Central Bloomsbury (to the west). Great Ormond Street Hospital lies to the immediate northwest.

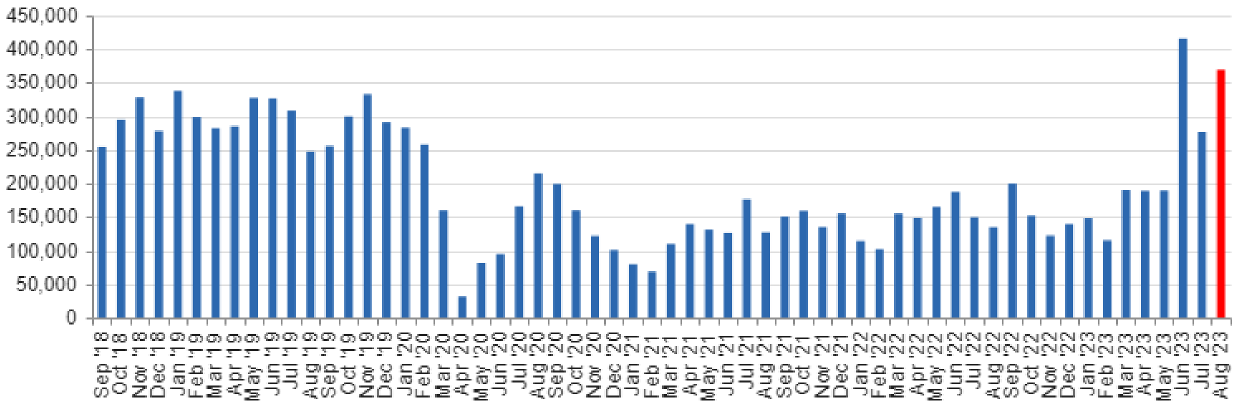
The centre has an attractive, semi-pedestrianised shopping environment and includes 40 occupied units focused along both sides of Lamb's Conduit Street. There is another Neighbourhood Centre (Brunswick Centre) less than 1km to the northwest.

Footfall

A section along Lambs Conduit Street was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall has been impacted significantly by the pandemic. Pedestrian activity reached a low point in March 2020, and although it has increased since then, it has remained generally below the pre-pandemic figures. The most recent figures for 2023 however have seen a spike of footfall, with June and August 2023 surpassing pre-pandemic figures.

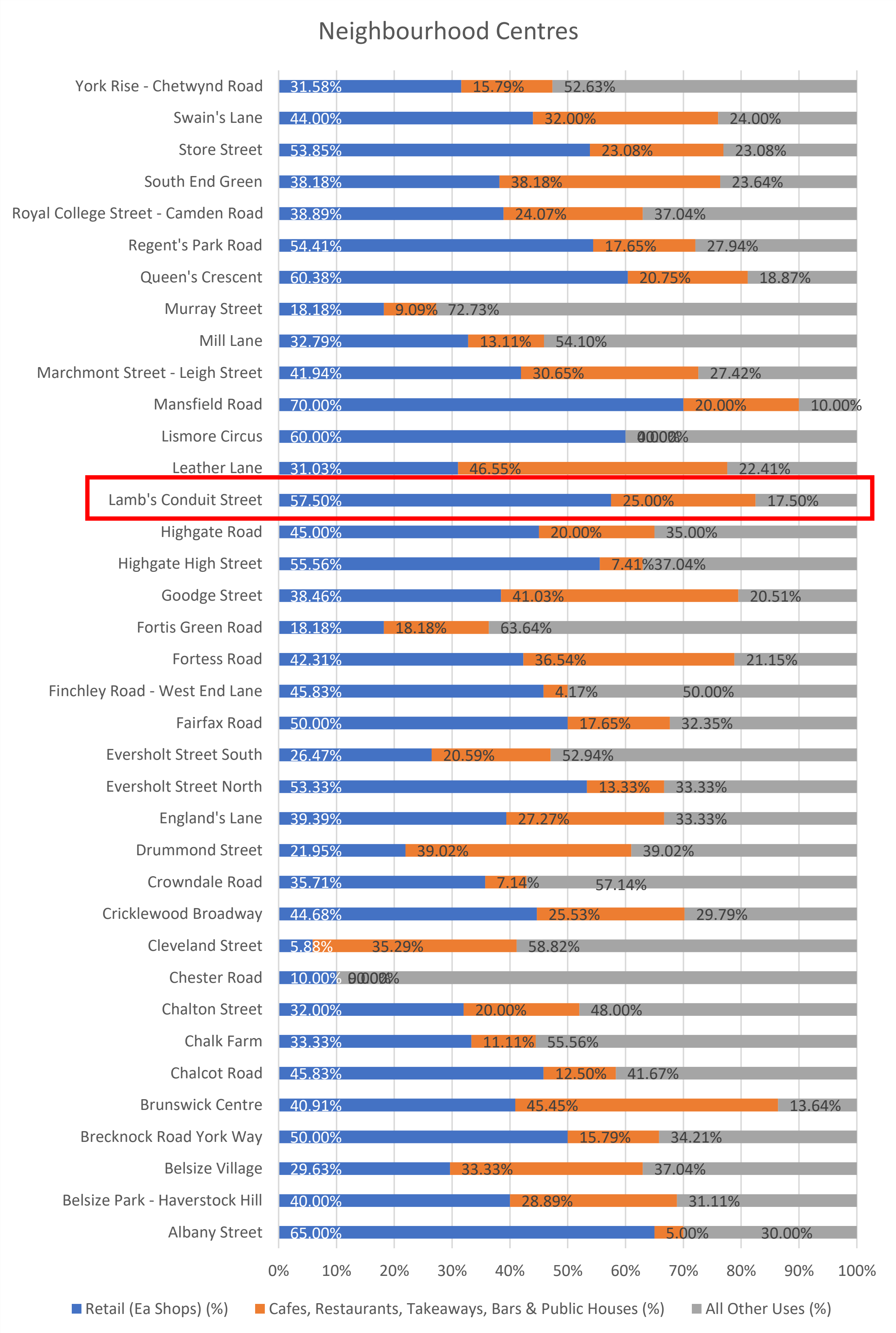
Figure XXX: Footfall of Lambs Conduit Street (September 2018 – August 2023)



Source: Datscha

Diversity of Uses 2022

Lamb's Conduit Street	Number	%	Camden Average (%)
Retail (Ea Shops)	23	57.5	41.1
Food & Beverage (F&B)	10	25.0	26.3
All Other Uses	7	17.5	32.6
Total	40	100.0	100.0


Neighbourhood Centres
York Rise - Chetwynd Road
31.58%
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Store Street
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South End Green
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Regent's Park Road
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Queen's Crescent
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18.87%
Murray Street
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72.73%
Mill Lane
32.79%
13.11%
54.10%
Marchmont Street - Leigh Street
41.94%
30.65%
27.42%
Mansfield Road
70.00%
20.00%
10.00%
Lismore Circus
60.00%
Leather Lane
31.03%
46.55%
22.41%
Lamb's Conduit Street
57.50%
25.00%
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Highgate Road
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Finchley Road - West End Lane
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Fairfax Road
50.00%
17.65%
32.35%
Eversholt Street South
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20.59%
52.94%
Eversholt Street North
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13.33%
33.33%
England's Lane
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27.27%
33.33%
Drummond Street
21.95%
39.02%
39.02%
Crowndale Road
35.71%
7.14%
57.14%
Cricklewood Broadway
44.68%
25.53%
29.79%
Cleveland Street
5.88%
35.29%
58.82%
Chester Road
10.00%
Chalton Street
32.00%
20.00%
48.00%
Chalk Farm
33.33%
11.11%
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Chalcot Road
45.83%
12.50%
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Brunswick Centre
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Brecknock Road York Way
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Belsize Village
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40.00%
28.89%
31.11%
Albany Street
65.00%
5.00%
30.00%
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

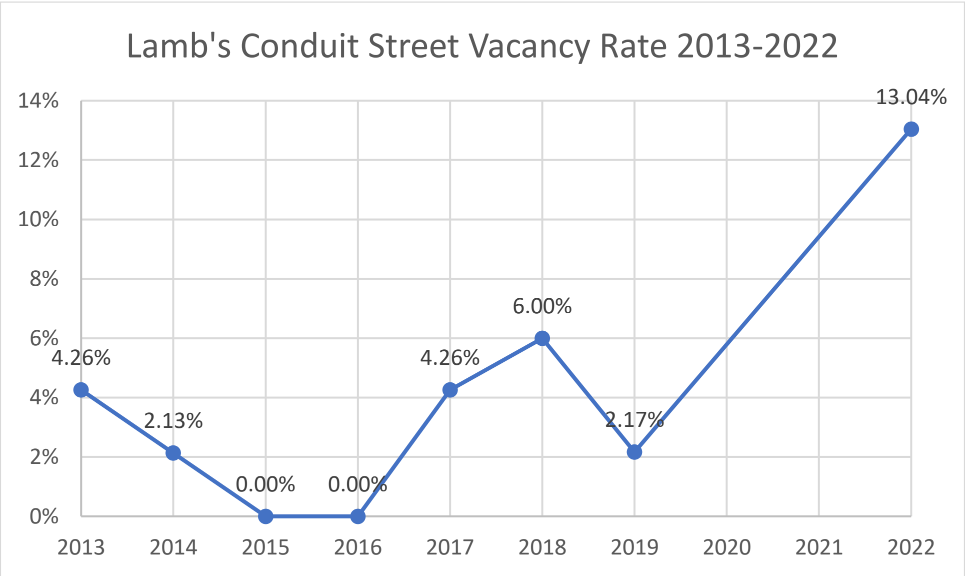
Lamb's Conduit Street	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	2	5.0	3.9%

Conclusions on Diversity of Uses:

Some 57.5% (23 units) of the centre's total number of occupied units comprise Class E(a) shops, which remains well above the Camden average (41.1%) despite the shop 'closures' evident from the monitoring data for 2014 and 2019. To that end, the centre has seen a considerable reduction in the number of shops from 32 units in 2014, to 30 in 2019 and 23 in 2022. The current retail offer includes a selection of high-end clothing and footwear shops.

A quarter of the centre's units (10) are dedicated to F&B provision – broadly in line with the Camden average (26.3%) and there are two evening / night time economy units. The remaining 7 units are occupied by 'other' uses including offices and services.

Vacancies 2013 - 2022



Conclusions

The centre's environmental quality and range of uses, including a strong specialist retail offer and good F&B provision, are an indication that the centre is healthy. This is supported by footfall data for the period September 2018 – August 2023, which suggests that pedestrian activity within the centre has recently surpassed pre-pandemic levels.

However, the rising vacancy rate (from about 2% in 2019 to above 13% in 2022) would be a cause for concern, if it is sustained and continues despite the recent improvement in footfall. Vacancy levels should therefore continue to be monitored.

The centre boundary is appropriate considering the distribution and composition of existing uses.

CAMDEN – TOWN CENTRE HEALTH CHECKS

LEATHER LANE

Description

Current Designation: Neighbourhood Centre in Camden Local Plan 2017. The Centre is also covered by the Hatton Garden Area designation.

Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
  - Policy TC1 (Quality and location of retail development);
  - Policy TC2 (Camden's centres and other shopping areas); and
  - Policy TC4 (Town centre uses).
- The centre is covered by the Hatton Garden Area designation, where Policy E2 (Employment premises and sites) seeks to secure and retain premises suitable for use as jewellery workshops and related uses.
- The entire centre lies within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage).

Description of Centre:

Leather Lane Neighbourhood Centre sits in the southeast corner of the borough, to the immediate west of Hatton Garden. To the north of the centre is the busy Clerkenwell Road which runs east-west between Old Street and the West End. Chancery Lane Underground station lies 200-300m to the southwest.

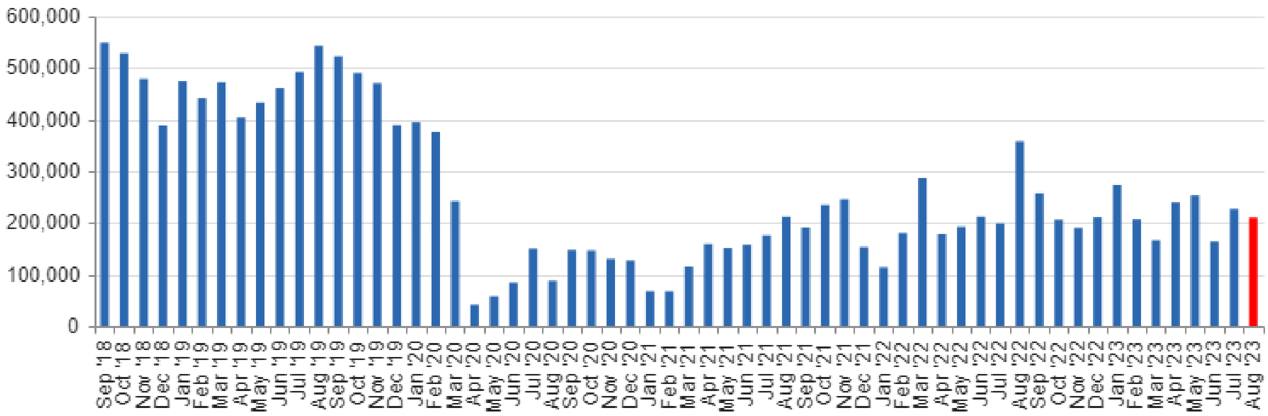
The centre (consisting of 58 occupied units) extends along both sides of Leather Lane, although the majority of shops and services are focused on the west side.

Footfall

A section along Leather Lane was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

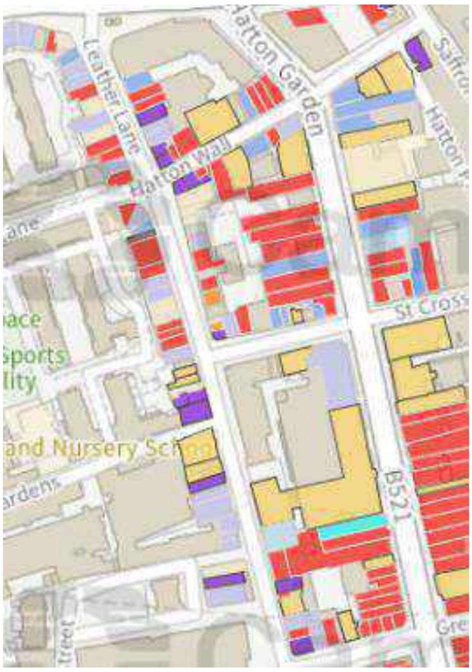
As can be seen in the figure below, footfall has dropped since the beginning of the pandemic and struggled to recover to anywhere near the levels seen in late 2018, 2019 and early 2020.

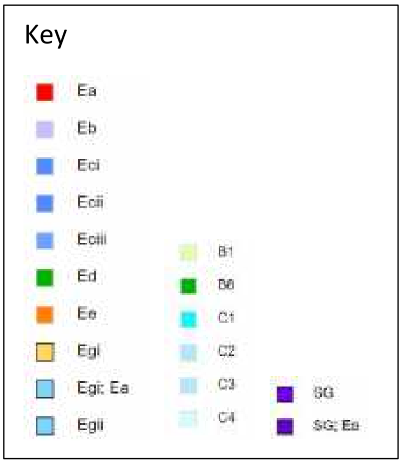
Figure 2: Footfall of Leather Lane (September 2018 – August 2023)



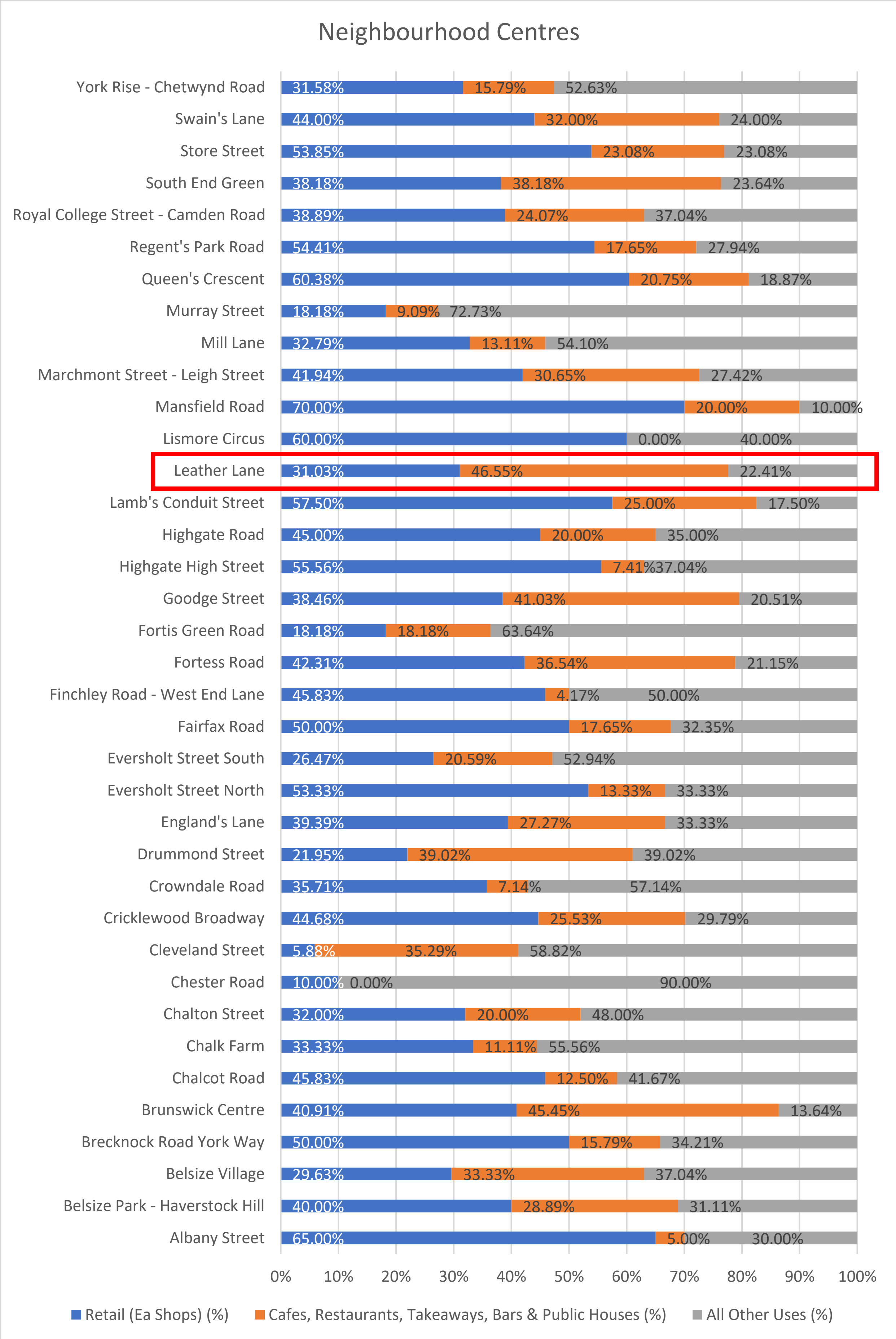
Source: Datscha

Diversity of Uses 2022





Leather Lane	Number	%	Camden Average (%)
Retail (Ea Shops)	18	31.0	41.1
Food & Beverage (F&B)	27	46.6	26.3
All Other Uses	13	22.4	32.6
Total	58	100.0	100.0


Neighbourhood Centres
York Rise - Chetwynd Road 31.58% 15.79% 52.63%
Swain's Lane 44.00% 32.00% 24.00%
Store Street 53.85% 23.08% 23.08%
South End Green 38.18% 38.18% 23.64%
Royal College Street - Camden Road 38.89% 24.07% 37.04%
Regent's Park Road 54.41% 17.65% 27.94%
Queen's Crescent 60.38% 20.75% 18.87%
Murray Street 18.18% 9.09% 72.73%
Mill Lane 32.79% 13.11% 54.10%
Marchmont Street - Leigh Street 41.94% 30.65% 27.42%
Mansfield Road 70.00% 20.00% 10.00%
Lismore Circus 60.00% 0.00% 40.00%
Leather Lane 31.03% 46.55% 22.41%
Lamb's Conduit Street 57.50% 25.00% 17.50%
Highgate Road 45.00% 20.00% 35.00%
Highgate High Street 55.56% 7.41% 37.04%
Goodge Street 38.46% 41.03% 20.51%
Fortis Green Road 18.18% 18.18% 63.64%
Fortess Road 42.31% 36.54% 21.15%
Finchley Road - West End Lane 45.83% 4.17% 50.00%
Fairfax Road 50.00% 17.65% 32.35%
Eversholt Street South 26.47% 20.59% 52.94%
Eversholt Street North 53.33% 13.33% 33.33%
England's Lane 39.39% 27.27% 33.33%
Drummond Street 21.95% 39.02% 39.02%
Crowndale Road 35.71% 7.14% 57.14%
Cricklewood Broadway 44.68% 25.53% 29.79%
Cleveland Street 5.88% 35.29% 58.82%
Chester Road 10.00% 0.00% 90.00%
Chalton Street 32.00% 20.00% 48.00%
Chalk Farm 33.33% 11.11% 55.56%
Chalcot Road 45.83% 12.50% 41.67%
Brunswick Centre 40.91% 45.45% 13.64%
Brecknock Road York Way 50.00% 15.79% 34.21%
Belsize Village 29.63% 33.33% 37.04%
Belsize Park - Haverstock Hill 40.00% 28.89% 31.11%
Albany Street 65.00% 5.00% 30.00%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

Leather Lane	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	1	1.9	3.9%

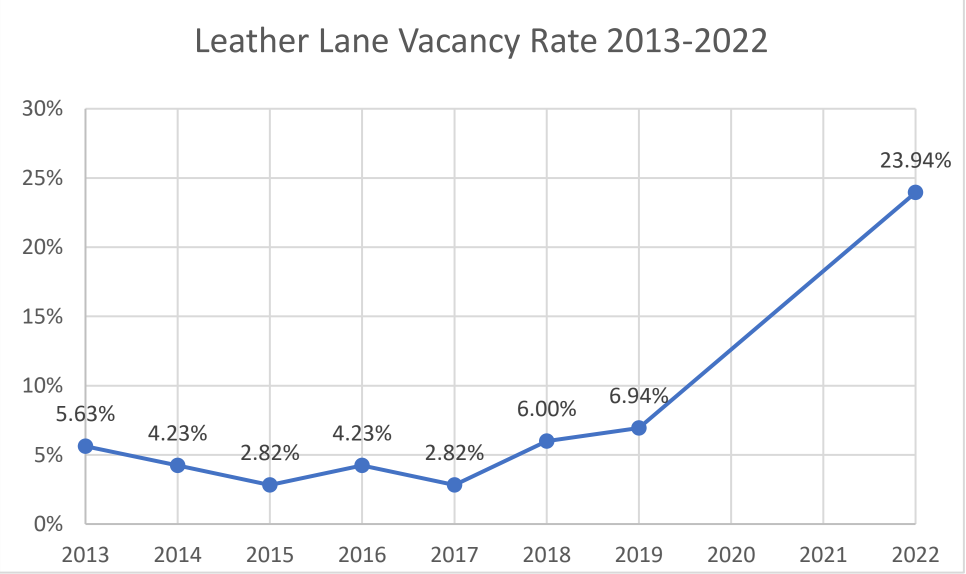
Conclusions on Diversity of Uses:

Nearly half of the centre's occupied units (46.6% or 27 units) are dedicated to F&B provision – well above the Camden average (26.3%) and representing an increase on the levels previously recorded in 2014 and 2019 (22 and 23 units respectively). The centre has just one evening / night time economy use.

Almost a third (31% or 18 units) of the units comprise Class E(a) shops, which is below the Camden average of 41.1%. Leather Lane has seen its retail offer contract significantly since 2014, when the centre was represented by 36 shops. However, the centre is also home to a street food market that operates 5 days a week (Monday to Friday). This has 103 trading spaces and is primarily a lunch market with street food from around the world. Stall holders also sell cut flowers, fresh fruit and vegetables, fashion, and homeware.

The combined retail offer is therefore likely to be similar to the Camden average, whilst the high F&B offer is likely to reflect the limited provision in the adjoining Hatton Garden area. The remaining 13 units are occupied by 'other' uses – predominantly offices and Sui Generis uses.

Vacancies 2013 - 2022



Conclusions

The combined shop and market offer in Leather Lane provides a varied offer for visitors and complements the specialist retail offer in Hatton Garden. However, use of the centre has declined significantly since the pandemic and vacancies have increased significantly.

The narrowness of Leather Lane leads to conflict between pedestrians and the market stalls and a balance is needed between encouraging higher footfall and maintaining a pleasant environment for pedestrians. This is recognised in the draft Holborn Vision and Urban Strategy which identifies a key action being to improve the quality of public realm, including decluttering and provision of seating to support the ongoing success of the Leather Lane food market. The strategy also proposes the resurfacing of Leather Lane South using high quality paving, de-cluttering the area by removing planters and rationalising seating and other street furniture to provide a better quality space for outdoor dining and on-going support for the successful market stalls.

The current neighbourhood boundary appears to continue to be appropriate, but further consideration should be given to whether it should also be included within the Hatton Garden Area, which has a very different purpose and function.

CAMDEN – TOWN CENTRE HEALTH CHECKS

LISMORE CIRCUS

Description

Current Designation: Neighbourhood Centre in the Camden Local Plan 2017

Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden's centres and other shopping areas); and
    - Policy TC4 (Town centre uses).

Description of Centre:

Lismore Circus Neighbourhood Centre is located in the borough's Gospel Oak area, broadly equidistance between Hampstead Heath (to the west) and Kentish Town (to the east).

Lismore Circus lies to the immediate south of Mansfield Road, which runs east-west and includes another Neighbourhood Centre (Mansfield Road) directly to the north of Lismore Circus. The nearest Town Centre is Kentish Town approximately 1km to the east.

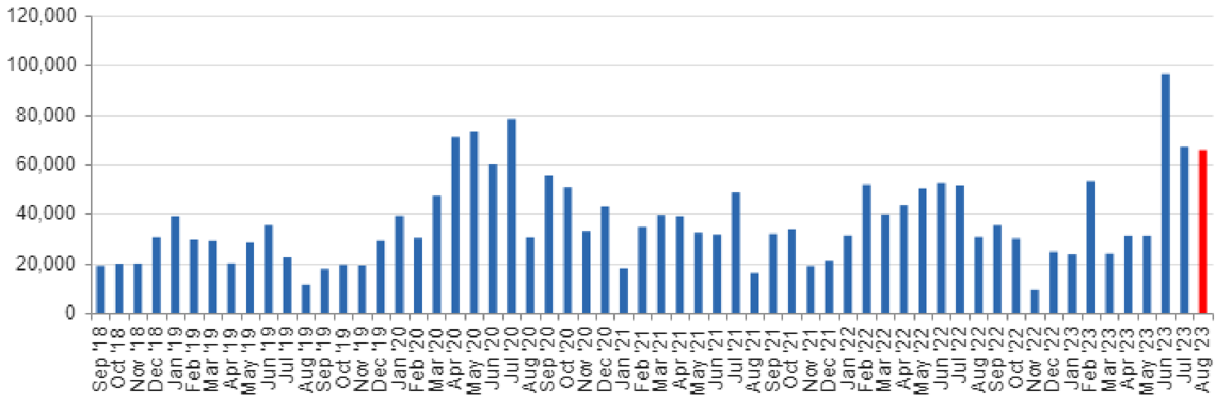
The centre itself comprises a small parade of shops and services fronting onto landscaped open space.

Footfall

A section to the west of Lamble Street by Lismore Circus was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

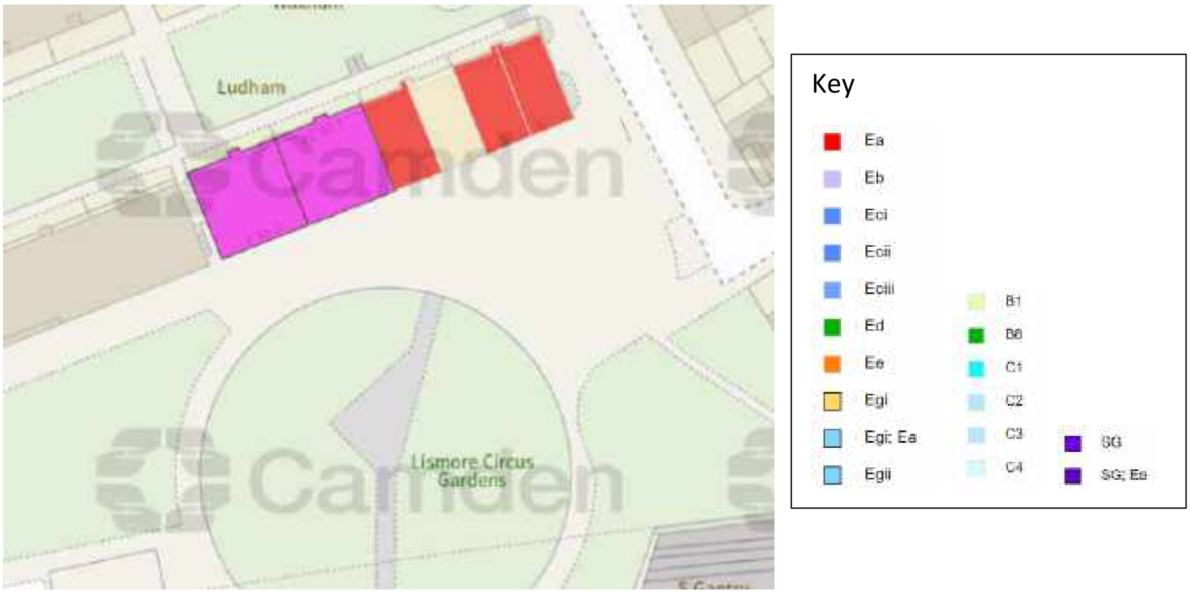
As can be seen in the figure below, footfall has been very variable during this period. March through to July 2020 represented a strong period, despite the restrictions in place as a result of the pandemic and the most recent three months recorded (June, July and August 2023) have seen some of the strongest pedestrian activity in recent years.

Figure 2: Footfall of Lismore Circus (September 2018 – August 2023)

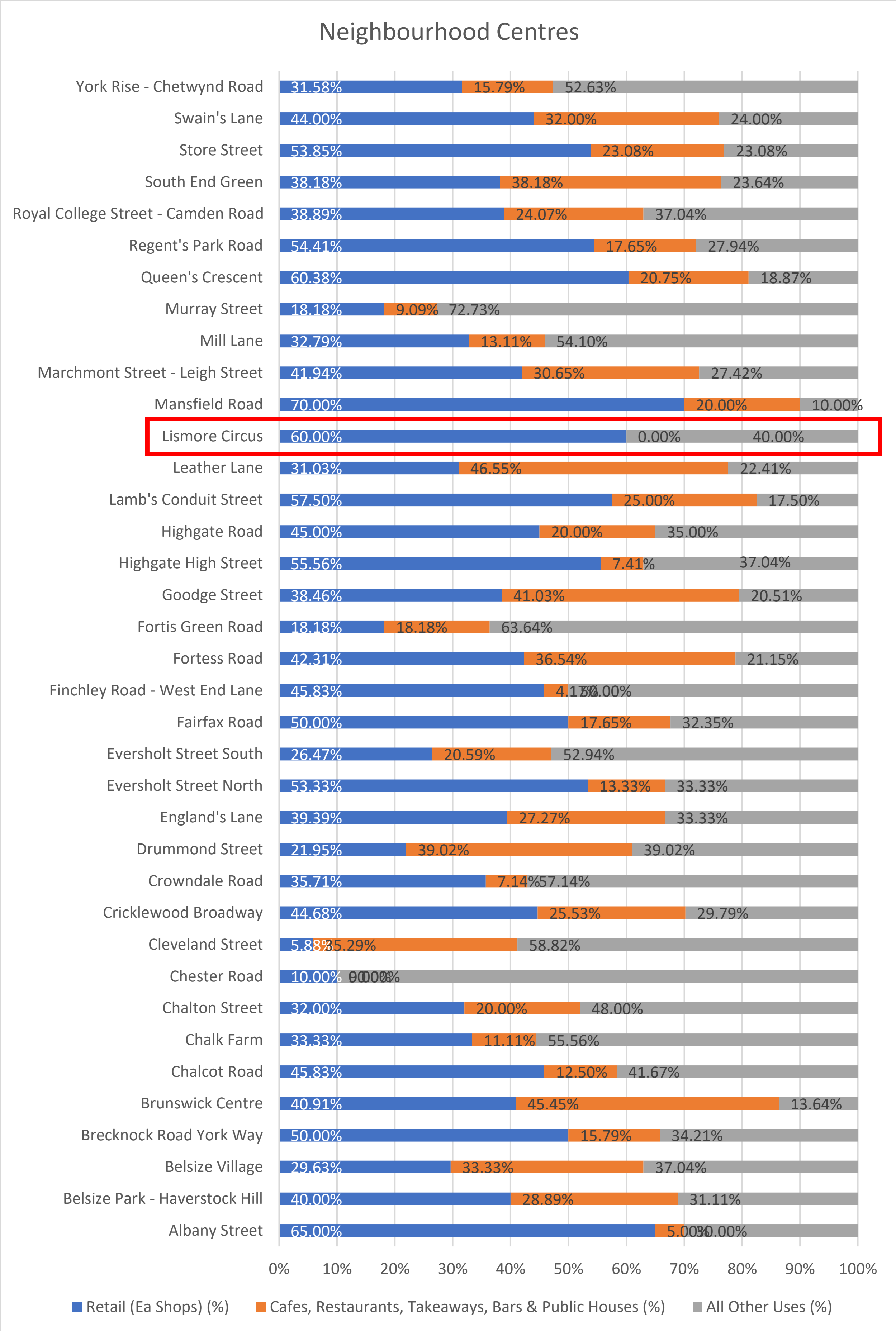


Source: Datscha

Diversity of Uses 2022



Lismore Circus	Number	%	Camden Average (%)
Retail (Ea Shops)	3	60.0	41.1
Food & Beverage (F&B)	0	0.0	26.3
All Other Uses	2	40.0	32.6
Total	5	100.0	100.0


Neighbourhood Centres
York Rise - Chetwynd Road
Swain's Lane
Store Street
South End Green
Royal College Street - Camden Road
Regent's Park Road
Queen's Crescent
Murray Street
Mill Lane
Marchmont Street - Leigh Street
Mansfield Road
Lismore Circus
Leather Lane
Lamb's Conduit Street
Highgate Road
Highgate High Street
Goodge Street
Fortis Green Road
Fortess Road
Finchley Road - West End Lane
Fairfax Road
Eversholt Street South
Eversholt Street North
England's Lane
Drummond Street
Crowndale Road
Cricklewood Broadway
Cleveland Street
Chester Road
Chalton Street
Chalk Farm
Chalcot Road
Brunswick Centre
Brecknock Road York Way
Belsize Village
Belsize Park - Haverstock Hill
Albany Street
31.58% 15.79% 52.63%
44.00% 32.00% 24.00%
53.85% 23.08% 23.08%
38.18% 38.18% 23.64%
38.89% 24.07% 37.04%
54.41% 17.65% 27.94%
60.38% 20.75% 18.87%
18.18% 9.09% 72.73%
32.79% 13.11% 54.10%
41.94% 30.65% 27.42%
70.00% 20.00% 10.00%
60.00% 0.00% 40.00%
31.03% 46.55% 22.41%
57.50% 25.00% 17.50%
45.00% 20.00% 35.00%
55.56% 7.41% 37.04%
38.46% 41.03% 20.51%
18.18% 18.18% 63.64%
42.31% 36.54% 21.15%
45.83% 4.17% 50.00%
50.00% 17.65% 32.35%
26.47% 20.59% 52.94%
53.33% 13.33% 33.33%
39.39% 27.27% 33.33%
21.95% 39.02% 39.02%
35.71% 7.14% 57.14%
44.68% 25.53% 29.79%
5.88% 35.29% 58.82%
10.00% 0.00% 90.00%
32.00% 20.00% 48.00%
33.33% 11.11% 55.56%
45.83% 12.50% 41.67%
40.91% 45.45% 13.64%
50.00% 15.79% 34.21%
29.63% 33.33% 37.04%
40.00% 28.89% 31.11%
65.00% 5.00% 30.00%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

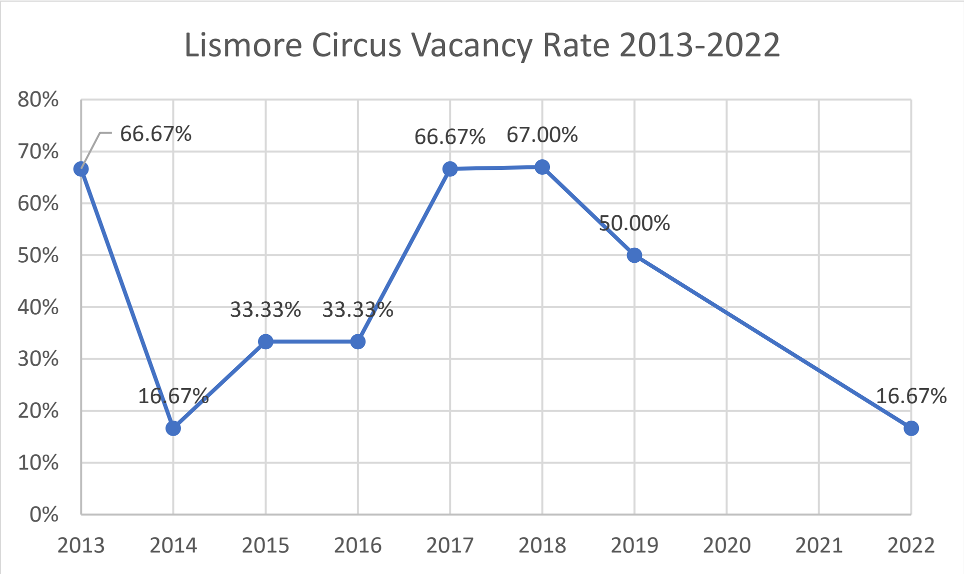
Lismore Circus	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	0	0.0	3.9%

Conclusions on Diversity of Uses:

Lismore Circus comprises just 5 occupied units: 3 Class E(a) shops and 2 'other' non-retail uses. Monitoring data suggests the centre was represented by even fewer shops in 2014 (2 units) in addition to 4 'other' uses.

The centre has no F&B or evening economy offer – consistent with earlier monitoring years.

Vacancies 2013 - 2022



Conclusions

Lismore Circus lacks scale and has a very limited range of uses. It appears not to function well as a Neighbourhood Centre and therefore consideration should be given to its re-classification as a local parade.

Notwithstanding, footfall levels have remained relatively strong and the centre's vacancy rate has fallen from 67% in 2018 to about 17% in 2022.

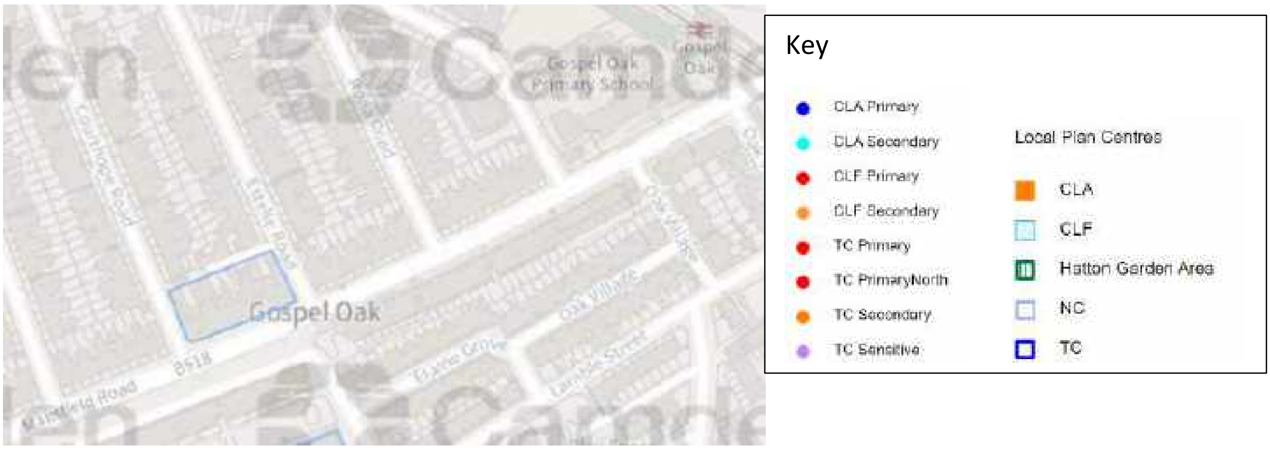
The centre (or local parade) boundary is considered to be appropriate.

CAMDEN – TOWN CENTRE HEALTH CHECKS

MANSFIELD ROAD

Description

Current Designation: Neighbourhood Centre in the Camden Local Plan 2017



Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
  - Policy TC1 (Quality and location of retail development);
  - Policy TC2 (Camden's centres and other shopping areas); and
  - Policy TC4 (Town centre uses).
- The entire centre lies within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage).

Description of Centre:

Mansfield Road Neighbourhood Centre is located in the borough's Gospel Oak area, broadly equidistance between Hampstead Heath (to the west) and Kentish Town (to the east).

The centre comprises a small commercial area with 10 occupied units, focused on the north side of Mansfield Road between its junctions with Courthope Road and Estelle Road.

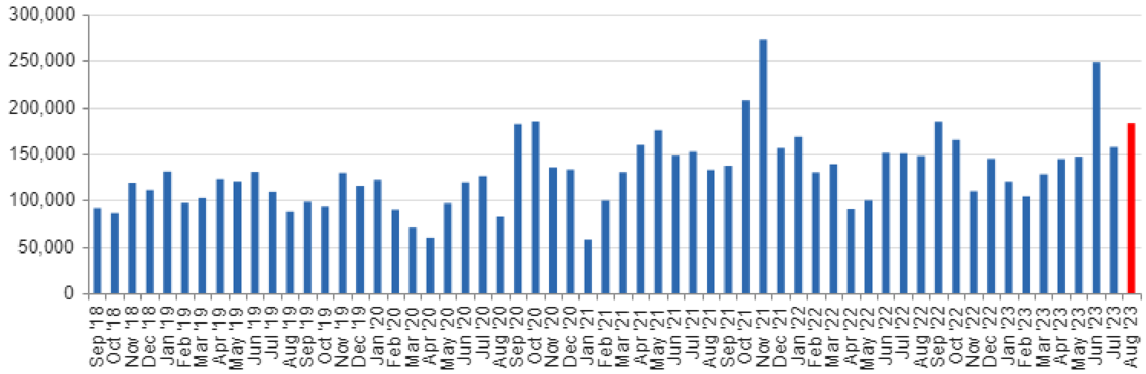
There is another Neighbourhood Centre (Lismore Circus) directly to the south of Mansfield Road. The nearest Town Centre is Kentish Town approximately 1km to the east.

Footfall

A section along Mansfield Road was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall has steadily grown during this period, with November 2021 and June 2023 standing out as strong months with 250,000+ recordings. The impact of the pandemic in March and April 2020 can be seen but was not significant.

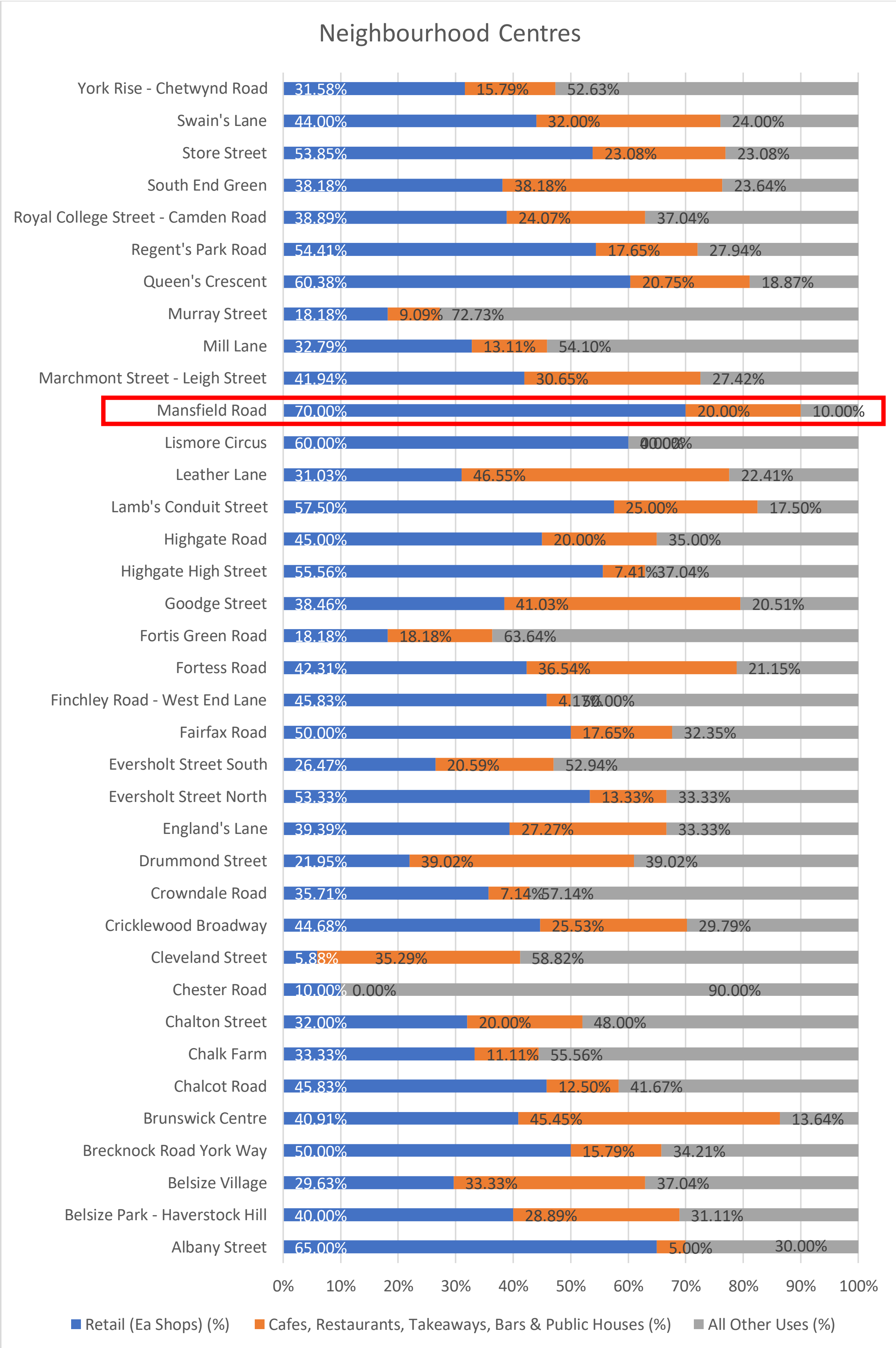
Figure 2: Footfall of Mansfield Road (September 2018 – August 2023)



Source: Datscha

Diversity of Uses 2022

Mansfield Road	Number	%	Camden Average (%)
Retail (Ea Shops)	7	70.0	41.1
Food & Beverage (F&B)	2	20.0	26.3
All Other Uses	1	10.0	32.6
Total	10	100.0	100.0



Neighbourhood Centres
York Rise - Chetwynd Road 31.58% 15.79% 52.63%
Swain's Lane 44.00% 32.00% 24.00%
Store Street 53.85% 23.08% 23.08%
South End Green 38.18% 38.18% 23.64%
Royal College Street - Camden Road 38.89% 24.07% 37.04%
Regent's Park Road 54.41% 17.65% 27.94%
Queen's Crescent 60.38% 20.75% 18.87%
Murray Street 18.18% 9.09% 72.73%
Mill Lane 32.79% 13.11% 54.10%
Marchmont Street - Leigh Street 41.94% 30.65% 27.42%
Mansfield Road 70.00% 20.00% 10.00%
Lismore Circus 60.00%
Leather Lane 31.03% 46.55% 22.41%
Lamb's Conduit Street 57.50% 25.00% 17.50%
Highgate Road 45.00% 20.00% 35.00%
Highgate High Street 55.56% 7.41% 37.04%
Goodge Street 38.46% 41.03% 20.51%
Fortis Green Road 18.18% 18.18% 63.64%
Fortess Road 42.31% 36.54% 21.15%
Finchley Road - West End Lane 45.83%
Fairfax Road 50.00% 17.65% 32.35%
Eversholt Street South 26.47% 20.59% 52.94%
Eversholt Street North 53.33% 13.33% 33.33%
England's Lane 39.39% 27.27% 33.33%
Drummond Street 21.95% 39.02% 39.02%
Crowndale Road 35.71% 7.14% 57.14%
Cricklewood Broadway 44.68% 25.53% 29.79%
Cleveland Street 5.88% 35.29% 58.82%
Chester Road 10.00% 0.00% 90.00%
Chalton Street 32.00% 20.00% 48.00%
Chalk Farm 33.33% 11.11% 55.56%
Chalcot Road 45.83% 12.50% 41.67%
Brunswick Centre 40.91% 45.45% 13.64%
Brecknock Road York Way 50.00% 15.79% 34.21%
Belsize Village 29.63% 33.33% 37.04%
Belsize Park - Haverstock Hill 40.00% 28.89% 31.11%
Albany Street 65.00% 5.00% 30.00%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

Mansfield Road	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	0	0.0	3.9%

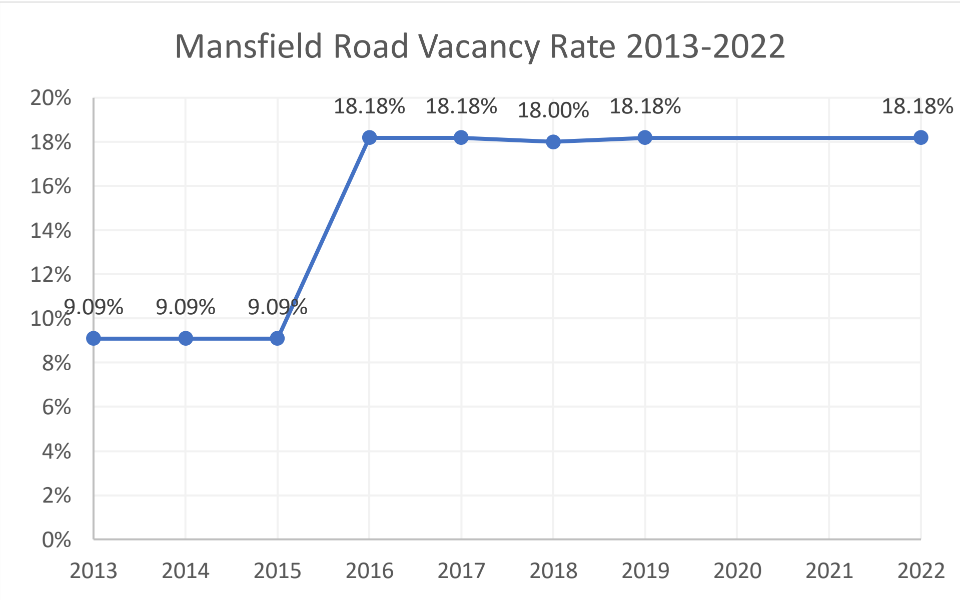
Conclusions on Diversity of Uses:

Mansfield Road Neighbourhood Centre comprises just 10 occupied units, the majority of which (7 units or 70%) accommodate Class E(a) shops – compared with a Camden average of 41.1%. The centre has just 2 F&B units and a launderette.

These findings are broadly unchanged since 2014 and 2019.

The current retail offer includes two small grocery stores and a chemist.

Vacancies 2013 - 2022



Conclusions

Mansfield Road is a small centre and has a limited range of uses. The vacancy rate has remained stable for several years but at circa 18% is above the average level. Opportunities to maximise occupancy levels and introduce a wider mix of uses should be a key focus to ensure the centre's future health.

Perhaps highlighting the centre's localised and convenience-based function, the footfall data suggests that the impact of the pandemic on pedestrian activity was not significant.

The centre boundary is considered to be appropriate.

CAMDEN – TOWN CENTRE HEALTH CHECKS

MARCHMONT STREET - LEIGH STREET

Description

Current Designation: Neighbourhood Centre in the Camden Local Plan 2017. It abuts the Brunswick Neighbourhood Centre.

Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
  - Policy TC1 (Quality and location of retail development);
  - Policy TC2 (Camden's centres and other shopping areas); and
  - Policy TC4 (Town centre uses).
- The entire centre lies within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage).

Description of Centre:

The centre is located in Bloomsbury, extending north and south of Tavistock Place along both sides of Marchmont Street and onto Leigh Street. The Brunswick Centre (Neighbourhood Centre) abuts the centre to the south and there are several other Neighbourhood Centres in the Bloomsbury area.

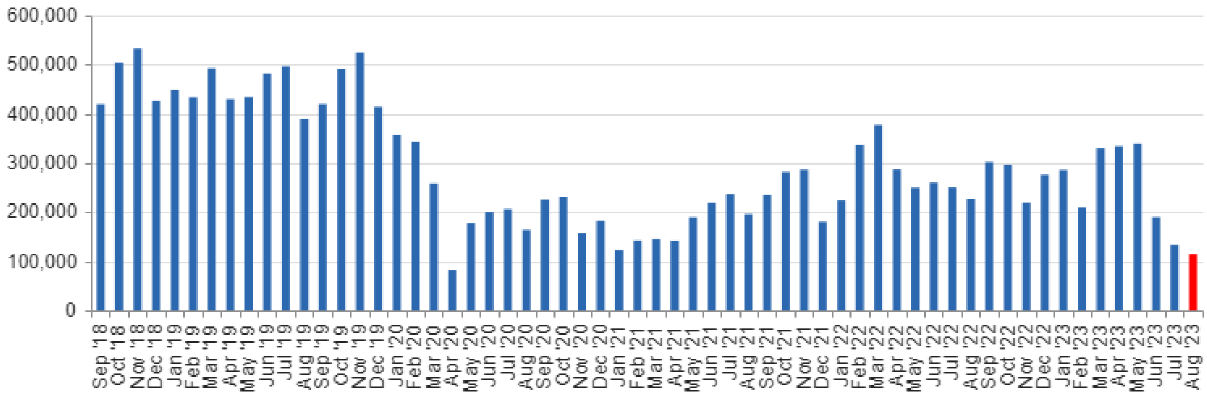
Camden Town is the nearest Town Centre (circa 2km to the northwest). Russell Square Underground station is less than 0.5km to the south and King's Cross railway station is less than 1km to the north.

Footfall

A section along Marchmont Street was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

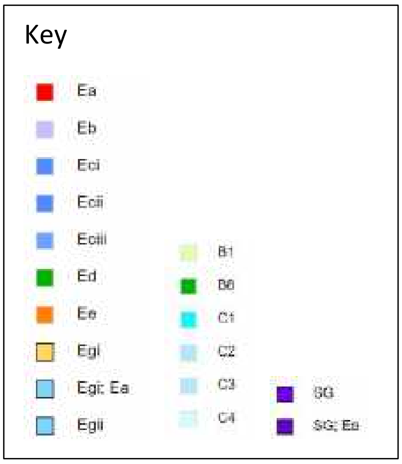
As can be seen in the figure below, footfall dropped significantly at the beginning of the pandemic (April 2020 in particular) and has struggled to recover fully. Recent months have also seen a further decline.

Figure 2: Footfall of Marchmont Street (September 2018 – August 2023)

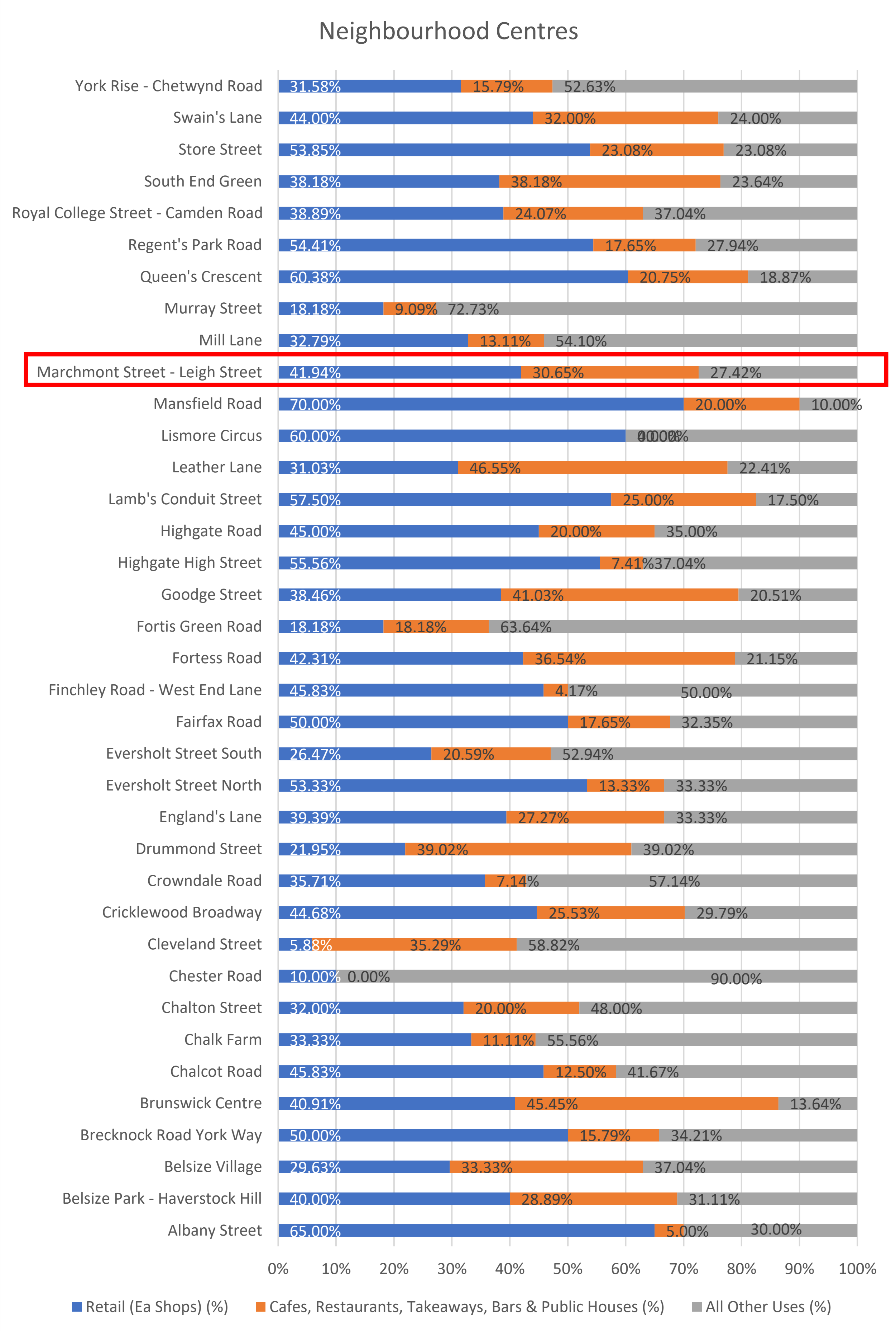


Source: Datscha

Diversity of Uses 2022



Marchmont Street – Leigh Road	Number	%	Camden Average (%)
Retail (Ea Shops)	26	41.9	41.1
Food & Beverage (F&B)	19	30.7	26.3
All Other Uses	17	27.4	32.6
Total	62		100.0


Neighbourhood Centres
York Rise - Chetwynd Road
Swain's Lane
Store Street
South End Green
Royal College Street - Camden Road
Regent's Park Road
Queen's Crescent
Murray Street
Mill Lane
Marchmont Street - Leigh Street
Mansfield Road
Lismore Circus
Leather Lane
Lamb's Conduit Street
Highgate Road
Highgate High Street
Goodge Street
Fortis Green Road
Fortess Road
Finchley Road - West End Lane
Fairfax Road
Eversholt Street South
Eversholt Street North
England's Lane
Drummond Street
Crowndale Road
Cricklewood Broadway
Cleveland Street
Chester Road
Chalton Street
Chalk Farm
Chalcot Road
Brunswick Centre
Brecknock Road York Way
Belsize Village
Belsize Park - Haverstock Hill
Albany Street
31.58% 15.79% 52.63%
44.00% 32.00% 24.00%
53.85% 23.08% 23.08%
38.18% 38.18% 23.64%
38.89% 24.07% 37.04%
54.41% 17.65% 27.94%
60.38% 20.75% 18.87%
18.18% 9.09% 72.73%
32.79% 13.11% 54.10%
41.94% 30.65% 27.42%
70.00% 20.00% 10.00%
60.00% 0.00% 40.00%
31.03% 46.55% 22.41%
57.50% 25.00% 17.50%
45.00% 20.00% 35.00%
55.56% 7.41% 37.04%
38.46% 41.03% 20.51%
18.18% 18.18% 63.64%
42.31% 36.54% 21.15%
45.83% 4.17% 50.00%
50.00% 17.65% 32.35%
26.47% 20.59% 52.94%
53.33% 13.33% 33.33%
39.39% 27.27% 33.33%
21.95% 39.02% 39.02%
35.71% 7.14% 57.14%
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10.00% 0.00% 90.00%
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45.83% 12.50% 41.67%
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50.00% 15.79% 34.21%
29.63% 33.33% 37.04%
40.00% 28.89% 31.11%
65.00% 5.00% 30.00%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

Marchmont Street – Leigh Road	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	3	4.8	3.9%

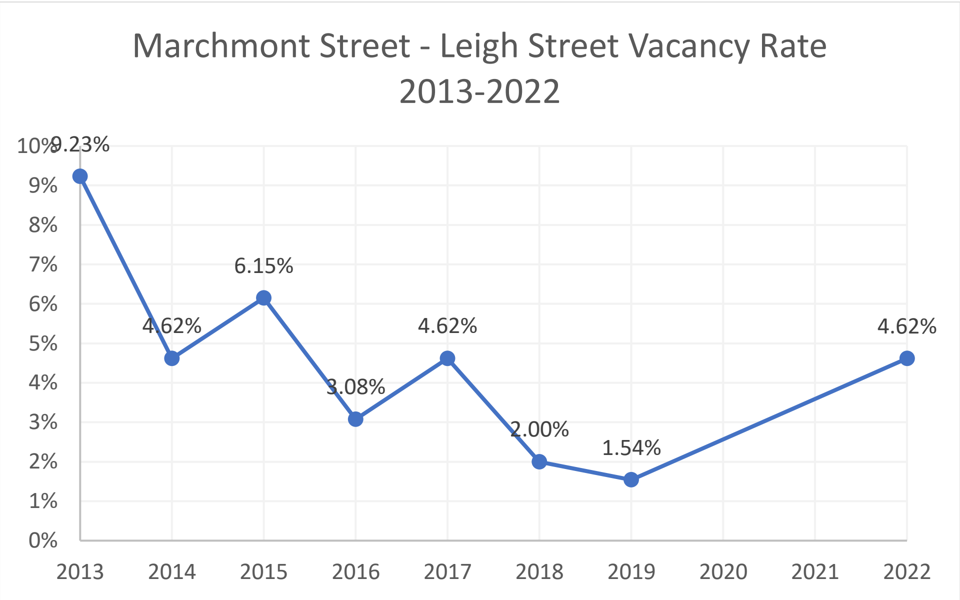
Conclusions on Diversity of Uses:

The centre's proportion of Class E(a) shops – 41.9% or 26 units – is in line with the Camden average (41.1%). The total number of shops has fallen since 2014 and 2019 (33 and 31 units respectively).

There are 19 F&B units (30.7% of the total number of units compared with the Camden average of 26.3%) and two evening / night time economy uses. Levels of F&B provision within the centre have remained stable since 2014.

The remaining 17 units are occupied by 'other' uses including professional services and Sui Generis uses (e.g. dry cleaners, hot food takeaways), and these account for more than a quarter of the total number of units yet below the Camden average for 'other' uses (32.6%).

Vacancies 2013 - 2022



Conclusions

The Neighbourhood Centre has a balanced mix of uses with good representation of retail, F&B and other non-retail services to cater for the day-to-day needs of its local catchment and other users of the centre. It has a below average vacancy rate (circa 4.6%) although vacancy levels have increased since 2019 and the footfall data suggests that pedestrian activity has struggled to bounce back fully following the pandemic. The picture is therefore somewhat mixed but, overall, the centre appears to be healthy and performing a relevant function.

The centre boundary is appropriate considering the distribution and composition of existing uses and the below average vacancy rate.

A further consideration relevant to the centre's future health is the proximity of the Brunswick Centre (Neighbourhood Centre). The centres have very different characters and the Brunswick Centre has a less varied F&B and retail offer – but includes key attractions in the form of Waitrose and a Curzon cinema. The centre at Marchmont Street / Leigh Street does not have comparable competitive facilities, and it seems plausible that the centres can remain separate and complementary.

CAMDEN – TOWN CENTRE HEALTH CHECKS

MILL LANE

Description

Current Designation: Neighbourhood Centre in the Camden Local Plan 2017

Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden's centres and other shopping areas); and
    - Policy TC4 (Town centre uses).

Description of Centre:

Mill Lane Neighbourhood Centre is situated less than 0.5km to the west of West Hampstead Town Centre. It predominantly extends along the south side of Mill Lane, although its commercial area to the east (closest to West Hampstead Town Centre) is focused on the north side.

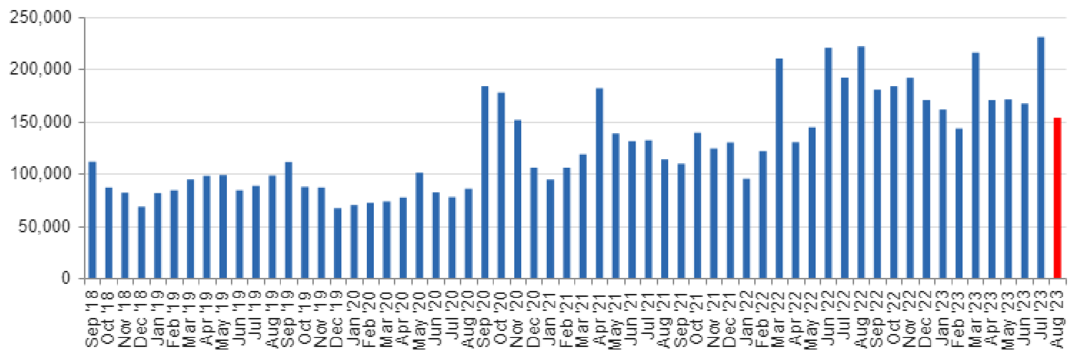
The centre consists of 61 occupied units and would principally serve the large 'walk-in' catchment in the surrounding West Hampstead area and other passers-by.

Footfall

A section along Mill Lane was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall has grown strongly during this period. The impact of the pandemic cannot really be seen here, and pedestrian activity has been on a strong upward trajectory since March 2020, with footfall surpassing 200,000 on a number of occasions through 2022 and 2023 and now regularly exceeding 150,000 compared with under 100,000 pre-pandemic.

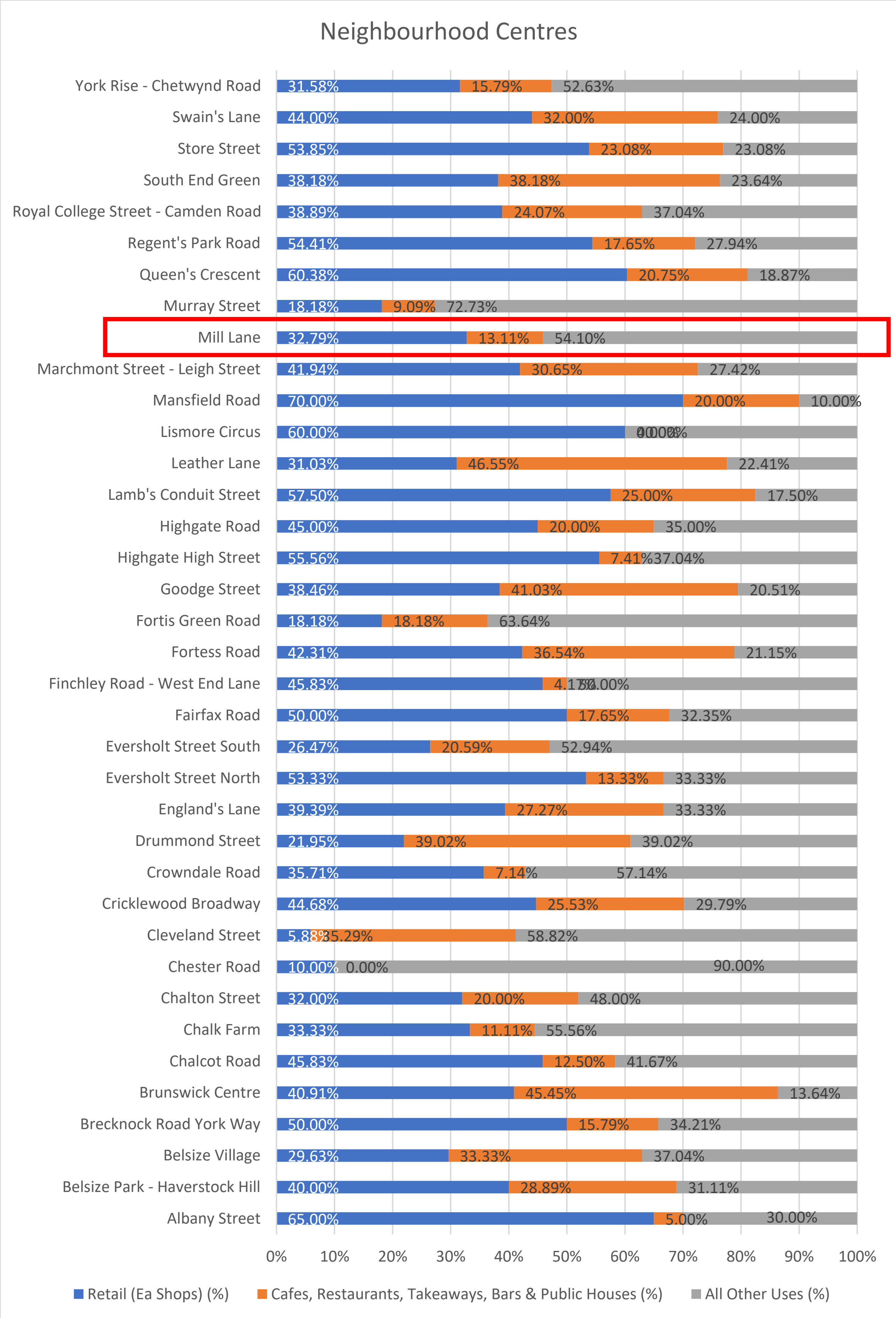
Figure 2: Footfall of Mill Lane (September 2018 – August 2023)



Source: Datscha

Diversity of Uses 2022

Mill Lane	Number	%	Camden Average (%)
Retail (Ea Shops)	20	32.8	41.1
Food & Beverage (F&B)	8	13.1	26.3
All Other Uses	33	54.1	32.6
Total	61	100.0	100.0


Neighbourhood Centres
York Rise - Chetwynd Road 31.58% 15.79% 52.63%
Swain's Lane 44.00% 32.00% 24.00%
Store Street 53.85% 23.08% 23.08%
South End Green 38.18% 38.18% 23.64%
Royal College Street - Camden Road 38.89% 24.07% 37.04%
Regent's Park Road 54.41% 17.65% 27.94%
Queen's Crescent 60.38% 20.75% 18.87%
Murray Street 18.18% 9.09% 72.73%
Mill Lane 32.79% 13.11% 54.10%
Marchmont Street - Leigh Street 41.94% 30.65% 27.42%
Mansfield Road 70.00% 20.00% 10.00%
Lismore Circus 60.00%
Leather Lane 31.03% 46.55% 22.41%
Lamb's Conduit Street 57.50% 25.00% 17.50%
Highgate Road 45.00% 20.00% 35.00%
Highgate High Street 55.56% 7.41% 37.04%
Goodge Street 38.46% 41.03% 20.51%
Fortis Green Road 18.18% 18.18% 63.64%
Fortess Road 42.31% 36.54% 21.15%
Finchley Road - West End Lane 45.83%
Fairfax Road 50.00% 17.65% 32.35%
Eversholt Street South 26.47% 20.59% 52.94%
Eversholt Street North 53.33% 13.33% 33.33%
England's Lane 39.39% 27.27% 33.33%
Drummond Street 21.95% 39.02% 39.02%
Crowndale Road 35.71% 7.14% 57.14%
Cricklewood Broadway 44.68% 25.53% 29.79%
Cleveland Street 35.29% 58.82%
Chester Road 10.00% 0.00% 90.00%
Chalton Street 32.00% 20.00% 48.00%
Chalk Farm 33.33% 11.11% 55.56%
Chalcot Road 45.83% 12.50% 41.67%
Brunswick Centre 40.91% 45.45% 13.64%
Brecknock Road York Way 50.00% 15.79% 34.21%
Belsize Village 29.63% 33.33% 37.04%
Belsize Park - Haverstock Hill 40.00% 28.89% 31.11%
Albany Street 65.00% 5.00% 30.00%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

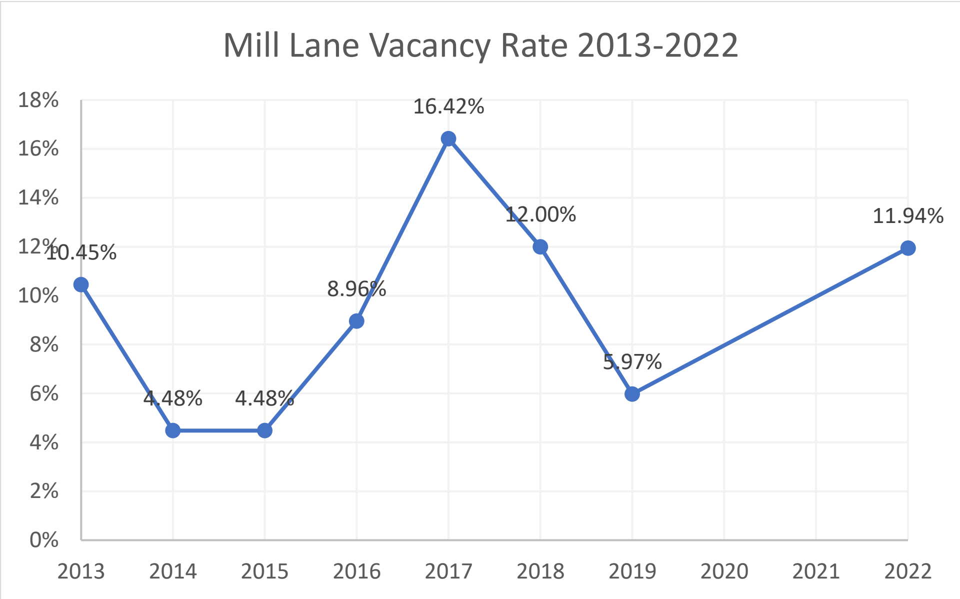
Mill Lane	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	2	3.4	3.9%

Conclusions on Diversity of Uses:

About a third (32.8% or 20 units) of the centre's occupied units are occupied by Class E(a) shops, which is below the Camden average (41.1%). Indeed, based on monitoring data, the number of shops within the centre has fallen significantly since 2014 (32 units).

There are only 8 F&B units (about 13% compared to the Camden average of 26.3%) and two units dedicated to the evening / night time economy offer. All 'other' uses (33 units), including services and Sui Generis uses, account for 54.1% of the total number of units.

Vacancies 2013 - 2022



Conclusions

The increasing levels of pedestrian activity through 2022 and 2023, on the face of it, serve as an indication that Mill Lane Neighbourhood Centre is performing well. The centre has a strong services-orientated function but below average retail and F&B provision (in terms of unit numbers relative to the total number of units).

It is a long and somewhat disjointed centre. The vacancy rate is a further concern, having doubled between 2019 and 2022, suggesting the centre's recovery from the pandemic is not as strong as the footfall data perhaps implies.

The centre boundary is appropriate considering the composition and distribution of existing uses.

CAMDEN – TOWN CENTRE HEALTH CHECKS

MURRAY STREET

Description

Current Designation: [Neighbourhood Centre in the Camden Local Plan 2017

Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
  - Policy TC1 (Quality and location of retail development);
  - Policy TC2 (Camden's centres and other shopping areas); and
  - Policy TC4 (Town centre uses).
- The entire centre lies within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage).

Description of Centre:

Murray Street is situated to the east of the borough, approximately 1km to the east of the Town Centres of Camden Town and Kentish Town.

It is a very small centre (consisting of just 11 occupied units) focused on the south side of Murray Street, close to its junction with Agar Grove.

The nearest other Neighbourhood Centre is Royal College Street less than 1km to the west in the direction of Camden Town.

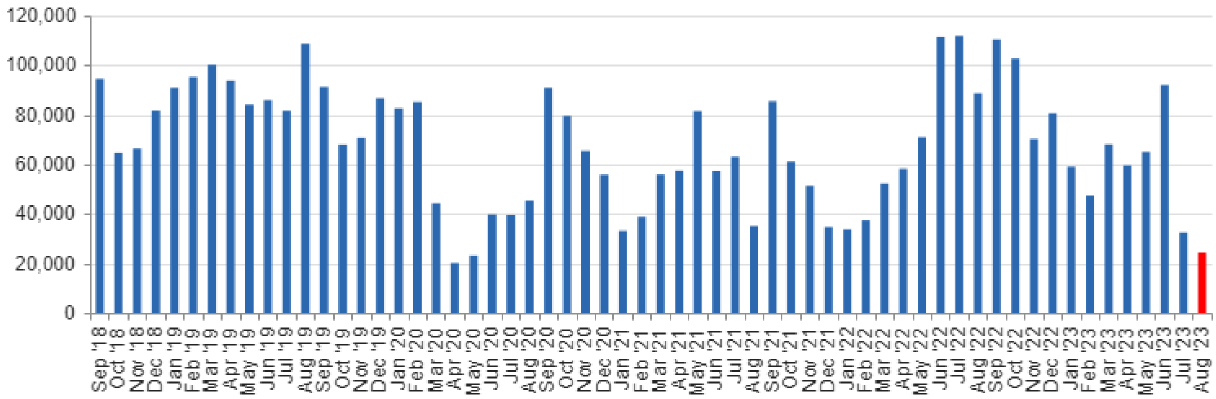
Footfall

A section along Murray Street was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall has been variable during this period, with highs coming in August 2019 and June through to October 2022 and lows in March and April 2020, January and

February 2021, December 2021 through to February 2022 and July and August 2023. Pedestrian activity appeared to have recovered from the pandemic in mid 2022 but appears to be falling during 2023.

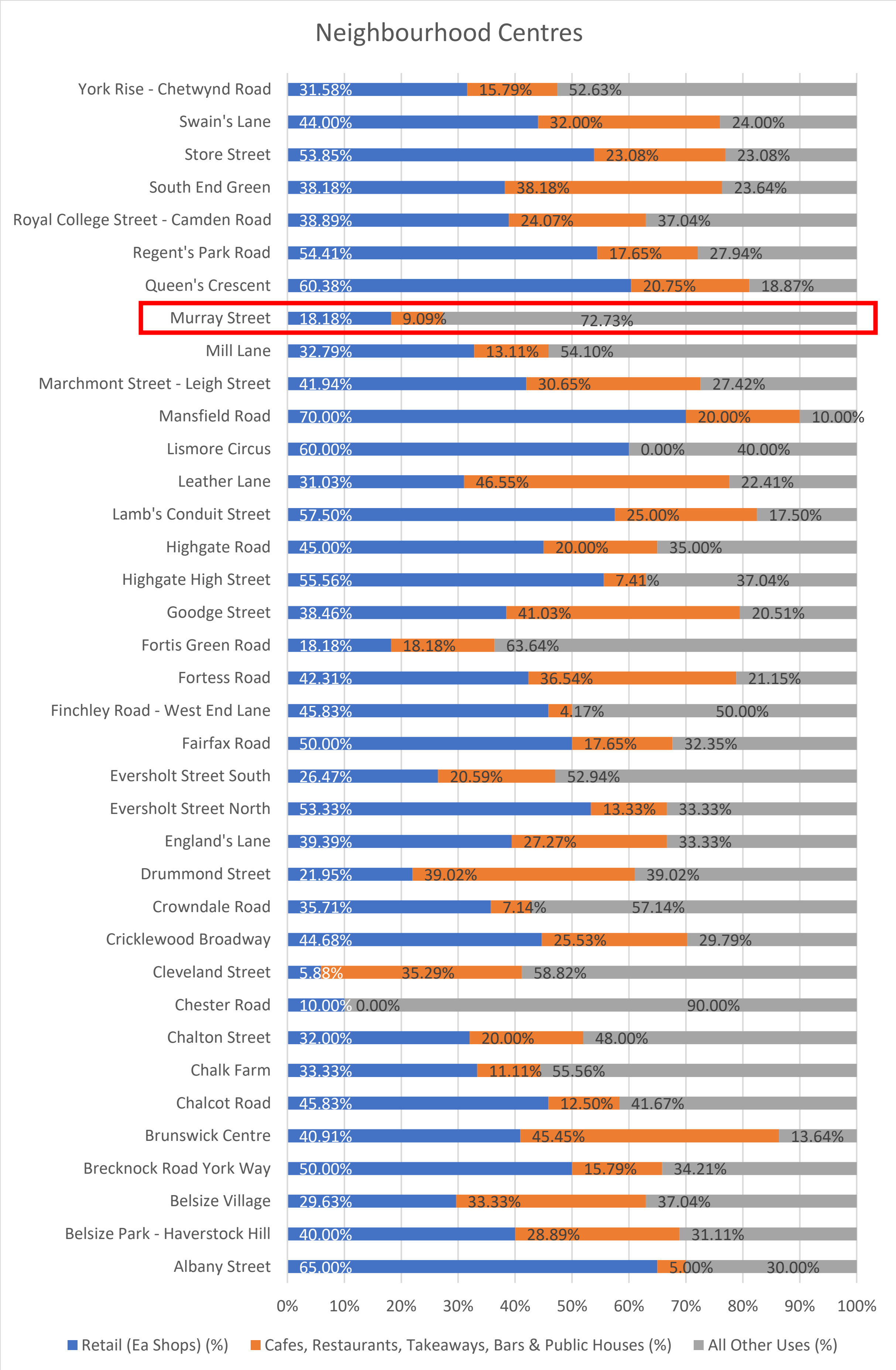
Figure 2: Footfall of Murray Street (September 2018 – August 2023)



Source: Datscha

Diversity of Uses 2022

Murray Street	Number	%	Camden Average (%)
Retail (Ea Shops)	2	18.2	41.1
Food & Beverage (F&B)	1	9.1	26.3
All Other Uses	8	72.7	32.6
Total	11	100.0	100.0



Neighbourhood Centres
York Rise - Chetwynd Road 31.58% 15.79% 52.63%
Swain's Lane 44.00% 32.00% 24.00%
Store Street 53.85% 23.08% 23.08%
South End Green 38.18% 38.18% 23.64%
Royal College Street - Camden Road 38.89% 24.07% 37.04%
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Marchmont Street - Leigh Street 41.94% 30.65% 27.42%
Mansfield Road 70.00% 20.00% 10.00%
Lismore Circus 60.00% 0.00% 40.00%
Leather Lane 31.03% 46.55% 22.41%
Lamb's Conduit Street 57.50% 25.00% 17.50%
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Chalton Street 32.00% 20.00% 48.00%
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Belsize Park - Haverstock Hill 40.00% 28.89% 31.11%
Albany Street 65.00% 5.00% 30.00%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

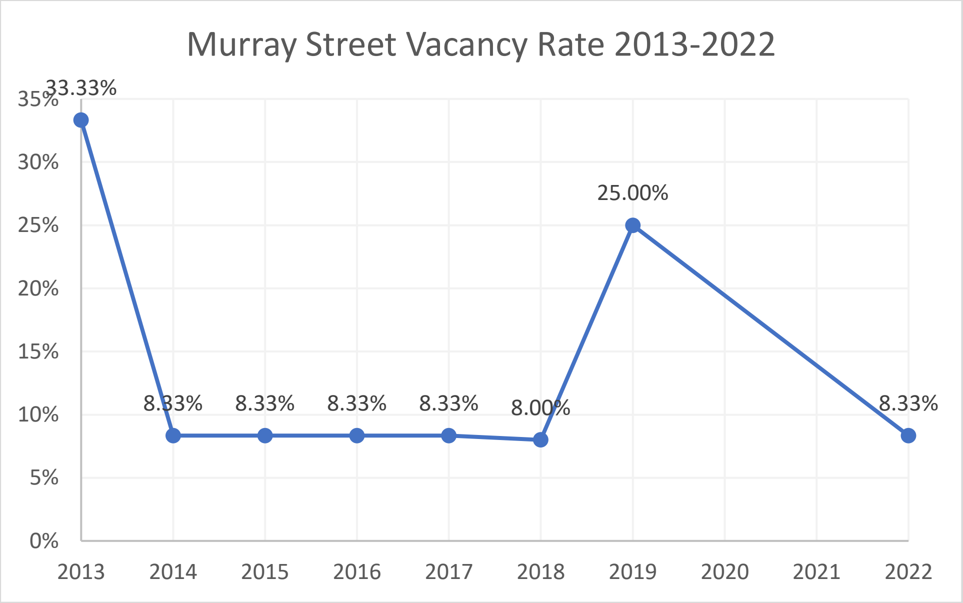
Murray Street	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	0	0.0	3.9%

Conclusions on Diversity of Uses:

Murray Street Neighbourhood Centre comprises just 11 occupied units, only 2 of which (18.2%) accommodate Class E(a) shops – namely a *Nisa* convenience store and one other, smaller convenience store. The centre has just one F&B unit and no evening / night time economy offer. The remaining 8 units are occupied by 'other' uses, particularly offices.

Overall, therefore, the centre has below average retail and F&B provision. The number of shops has halved since 2014. Murray Street also has a limited range of services.

Vacancies 2013 - 2022



Conclusions

Murray Street is not situated in a busy, prominent location and this is reflected in the centre's very limited range of uses. However, it is relatively well served by convenience goods provision in the form of two small convenience stores, which are capable of meeting the basic food shopping needs of the centre's localised catchment.

It is further encouraging that the centre's vacancy rate has fallen since the pandemic, from 25% in 2019 to about 8% in 2022. This finding is supported by the footfall data, which suggests that pedestrian activity within the centre recovered well in 2022. However, the recent decline may need further monitoring.

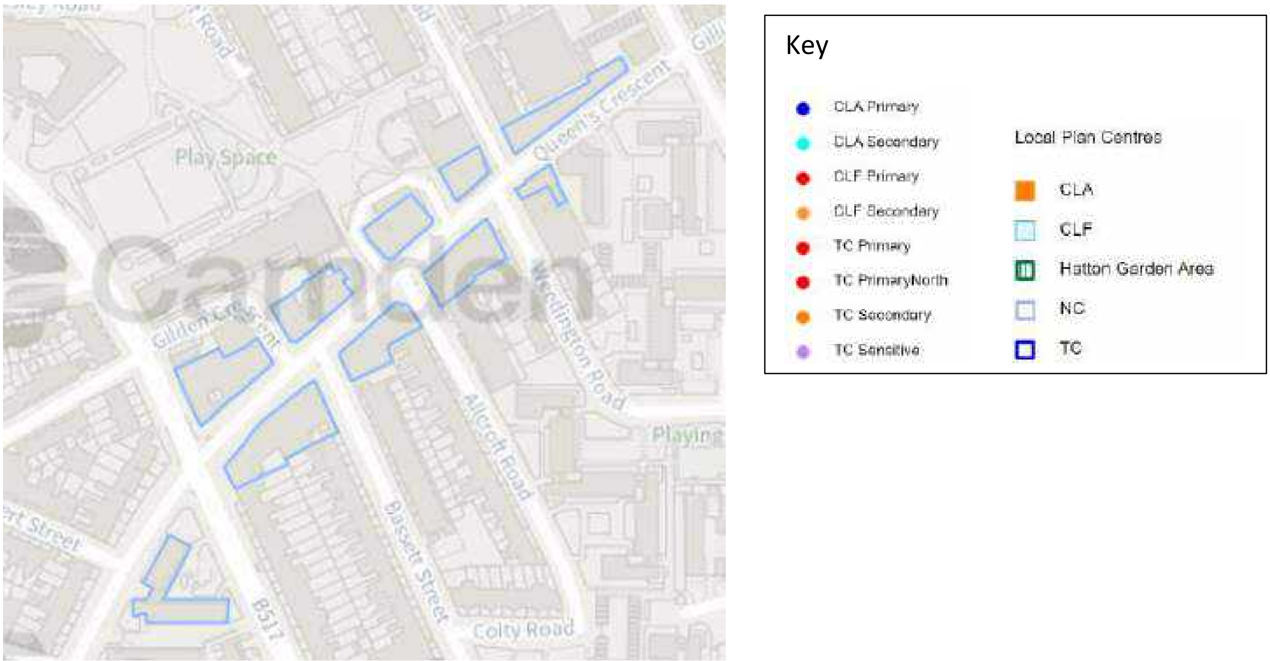
The centre boundary is appropriate considering the composition and distribution of existing uses and the below average vacancy rate.

CAMDEN – TOWN CENTRE HEALTH CHECKS

QUEEN'S CRESCENT

Description

Current Designation: Neighbourhood Centre in the Camden Local Plan 2017



Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
  - Policy TC1 (Quality and location of retail development);
  - Policy TC2 (Camden's centres and other shopping areas); and
  - Policy TC4 (Town centre uses).
- A small section of the centre (limited to the south-east corner building at the Queens Crescent / Malden Road junction) lies within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage).

Description of Centre:

Queens Crescent Neighbourhood Centre lies to the west of Kentish Town Town Centre and to north of Camden Town Town Centre and approximately 500m south of Lismore Circus Neighbourhood Centre. It extends along both sides of Queens Crescent, between Grafton Road to the east and Herbert Street to the west.

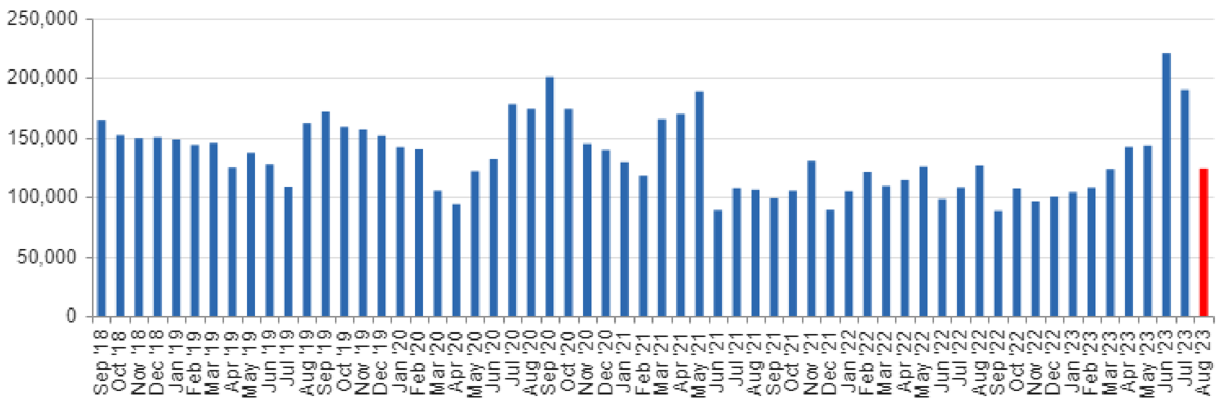
On-street car parking is available yet the centre is likely to have a localised catchment commensurate with its scale and function.

Footfall

A section along Queens Crescent was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall has been relatively stable throughout this period with the impacts of the pandemic much less evident here than in other areas. June 2021 through to March 2023 was a prolonged somewhat low patch for pedestrian activity, but more recent months have shown strong levels, particularly June 2023, although footfall is not consistently back to the level it was pre-pandemic.

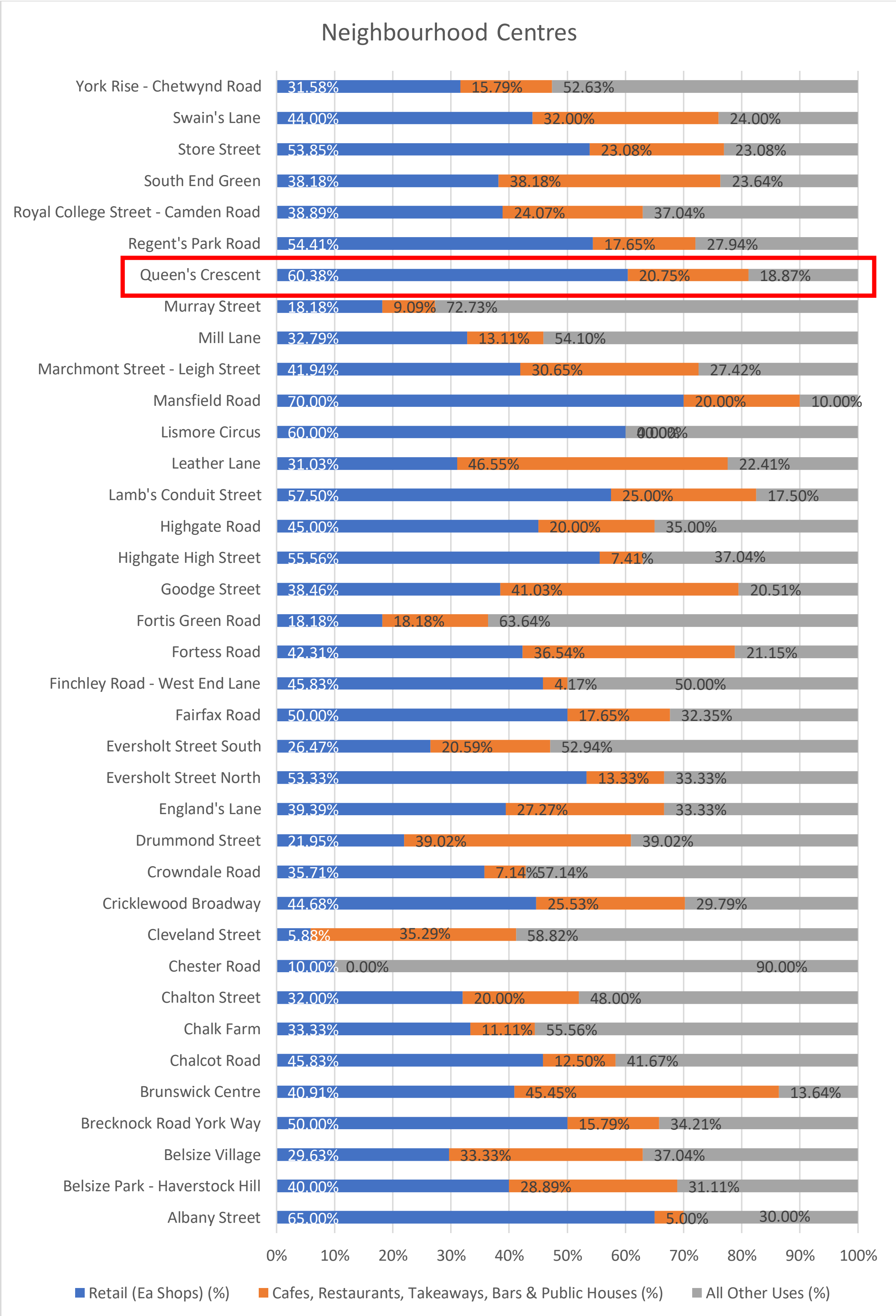
Figure 2: Footfall of Queens Crescent (September 2018 – August 2023)



Source: Datscha

Diversity of Uses 2022

Queen's Crescent	Number	%	Camden Average (%)
Retail (Ea Shops)	32	60.4	41.1
Food & Beverage (F&B)	11	20.7	26.3
All Other Uses	10	18.9	32.6
Total	53	100.0	100.0



Neighbourhood Centres
York Rise - Chetwynd Road 31.58% 15.79% 52.63%
Swain's Lane 44.00% 32.00% 24.00%
Store Street 53.85% 23.08% 23.08%
South End Green 38.18% 38.18% 23.64%
Royal College Street - Camden Road 38.89% 24.07% 37.04%
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Marchmont Street - Leigh Street 41.94% 30.65% 27.42%
Mansfield Road 70.00% 20.00% 10.00%
Lismore Circus 60.00%
Leather Lane 31.03% 46.55% 22.41%
Lamb's Conduit Street 57.50% 25.00% 17.50%
Highgate Road 45.00% 20.00% 35.00%
Highgate High Street 55.56% 7.41% 37.04%
Goodge Street 38.46% 41.03% 20.51%
Fortis Green Road 18.18% 18.18% 63.64%
Fortess Road 42.31% 36.54% 21.15%
Finchley Road - West End Lane 45.83% 4.17% 50.00%
Fairfax Road 50.00% 17.65% 32.35%
Eversholt Street South 26.47% 20.59% 52.94%
Eversholt Street North 53.33% 13.33% 33.33%
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Drummond Street 21.95% 39.02% 39.02%
Crowndale Road 35.71% 7.14% 57.14%
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Cleveland Street 5.88% 35.29% 58.82%
Chester Road 10.00% 0.00% 90.00%
Chalton Street 32.00% 20.00% 48.00%
Chalk Farm 33.33% 11.11% 55.56%
Chalcot Road 45.83% 12.50% 41.67%
Brunswick Centre 40.91% 45.45% 13.64%
Brecknock Road York Way 50.00% 15.79% 34.21%
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Belsize Park - Haverstock Hill 40.00% 28.89% 31.11%
Albany Street 65.00% 5.00% 30.00%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

Queen's Crescent	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	1	1.9	3.9%

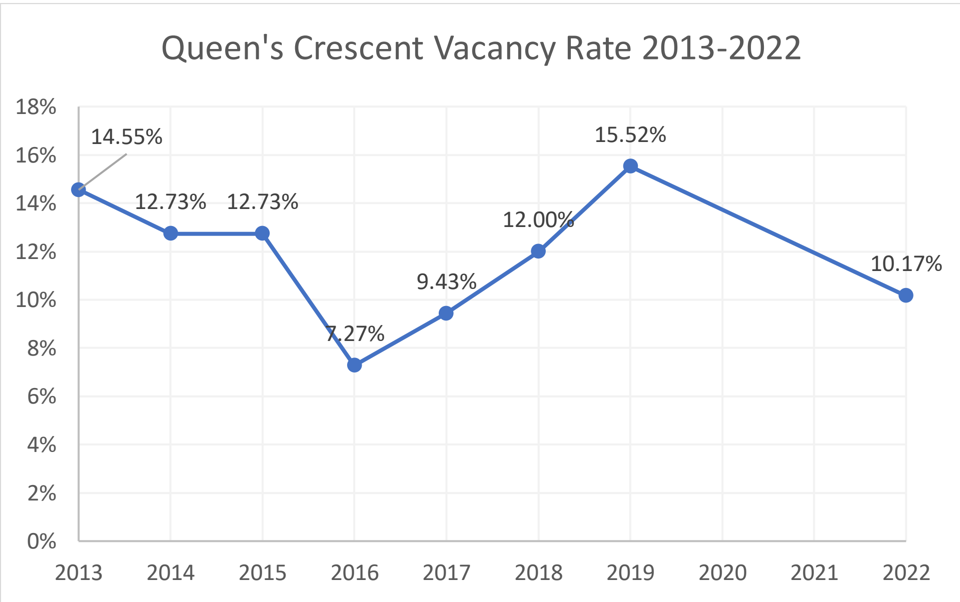
Conclusions on Diversity of Uses:

Retail is the dominant use category, with 60.4% (32 units) of the centre's total number of units dedicated to Class E(a) shops – well above the Camden average of 41.1%. Yet the number of shops has fallen slightly, from 36 units, since 2014. Existing provision largely comprises small grocery stores and off-licenses.

There are 11 F&B units (20.7% as a proportion of the centre's total units) which is more than double the number recorded in 2014 (5 units), but still below the Camden average of 26.3%. The centre includes one evening / night time economy use.

The remaining 10 units (18.9%) are occupied by 'other' uses including services and Sui Generis uses (e.g. hot food takeaways, bookmakers, dry cleaners).

Vacancies 2013 - 2022



Conclusions

The centre has a strong convenience-based function and appears to cater well for the day-to-day shopping (and service) needs of the local catchment. Footfall levels are relatively strong. It is also encouraging that the vacancy rate has fallen since the pandemic, from about 15.5% in 2019 to just over 10% in 2022.

Funding has been secured to undertake a number of environmental improvements in the centre, including public realm improvements, greening and traffic changes to reduce through traffic. A trial pedestrianisation scheme in 2021 has since been made permanent between Bassett Street and Weedington Road. These improvements are likely to help continue the rise in footfall, which in turn is likely to lead to a further reduction in vacancies.

The centre boundary is appropriate considering the composition and distribution of existing uses and the below average vacancy rate.

CAMDEN – TOWN CENTRE HEALTH CHECKS

REGENT'S PARK ROAD

Description

Current Designation: Neighbourhood Centre in the Camden Local Plan 2017

Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden's centres and other shopping areas); and
    - Policy TC4 (Town centre uses).
- The entire centre lies within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage).
- The eastern end of the centre falls within the 'HS2 Phase 1 Safeguarding' area.

Description of Centre:

Regent's Park Road is situated to the immediate northeast of Primrose Hill. Railway lines separate the centre from Camden Town (Town Centre) less than 0.5km to the east.

Chalcot Road Neighbourhood Centre lies approximately 300-400m to the southeast.

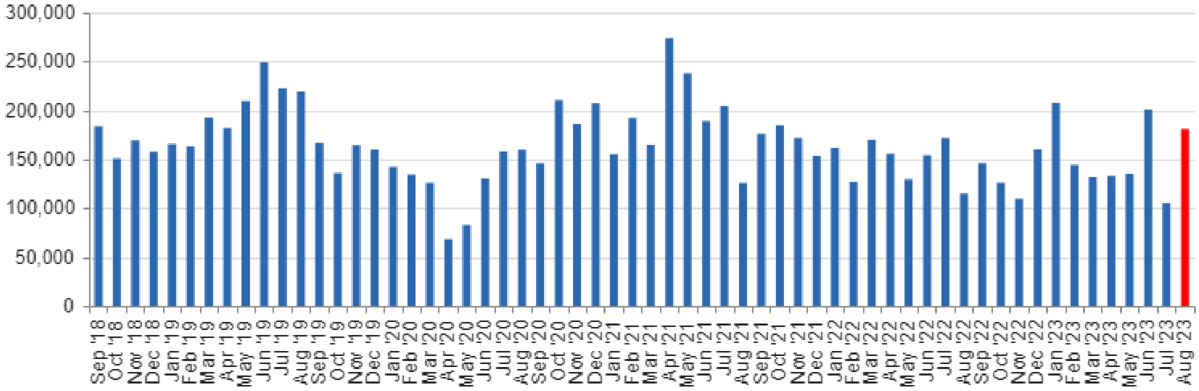
The centre includes 68 occupied units, extending along both sides of Regent's Park Road and onto the eastern side of Gloucester Avenue.

Footfall

A section along Regents Park Road was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall dropped to particularly low levels at the beginning of the pandemic response (April and May 2020), but has recovered well with a record high month coming in April 2021.

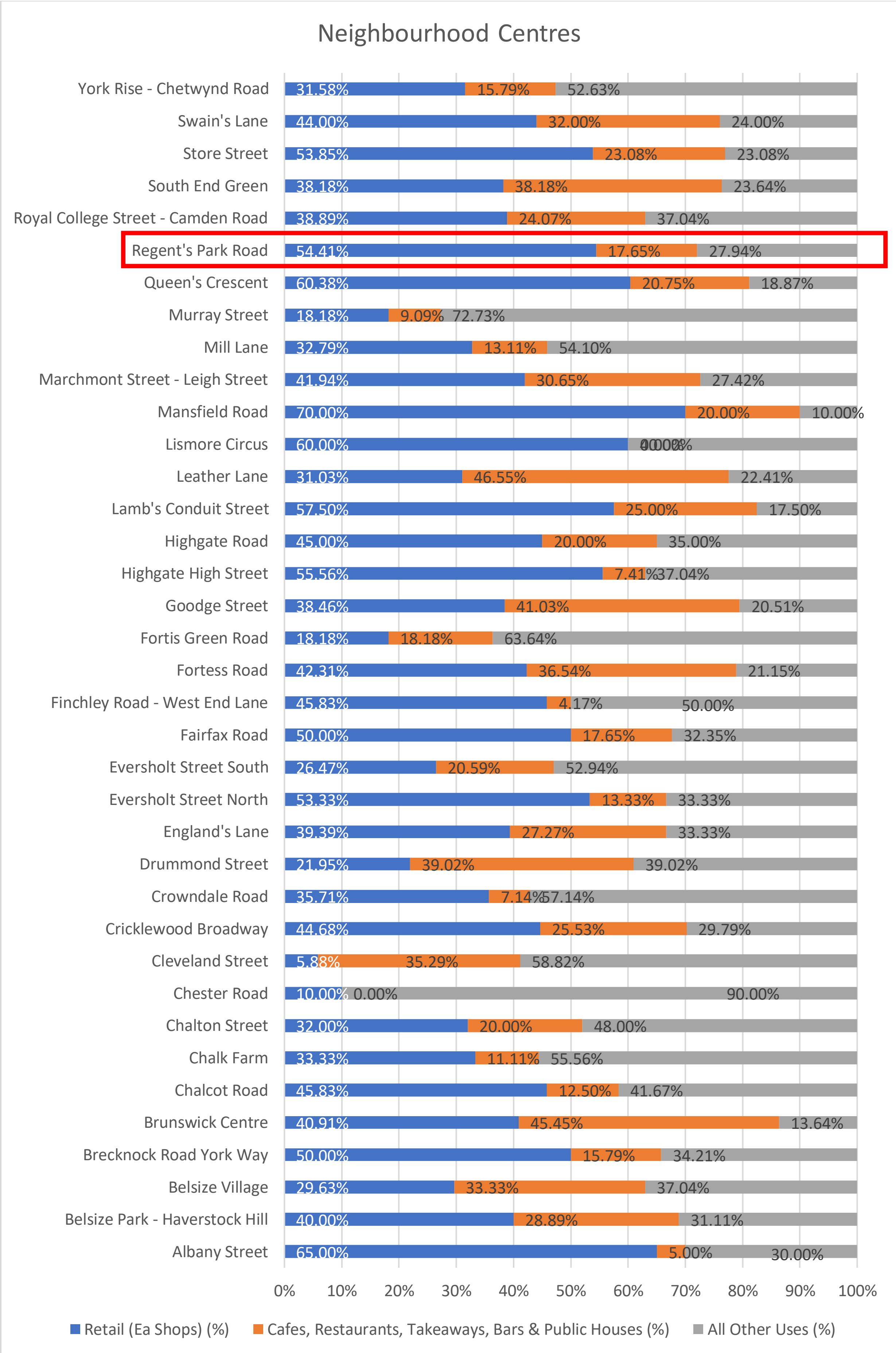
Figure 2: Footfall of Regents Park Road (September 2018 – August 2023)



Source: Datscha

Diversity of Uses 2022

Regent's Park Road	Number	%	Camden Average (%)
Retail (Ea Shops)	37	54.4	41.1
Food & Beverage (F&B)	12	17.7	26.3
All Other Uses	19	27.9	32.6
Total	68	100.0	100.0



Neighbourhood Centres
York Rise - Chetwynd Road
31.58%
15.79%
52.63%
Swain's Lane
44.00%
32.00%
24.00%
Store Street
53.85%
23.08%
23.08%
South End Green
38.18%
38.18%
23.64%
Royal College Street - Camden Road
38.89%
24.07%
37.04%
Regent's Park Road
54.41%
17.65%
27.94%
Queen's Crescent
60.38%
20.75%
18.87%
Murray Street
18.18%
9.09%
72.73%
Mill Lane
32.79%
13.11%
54.10%
Marchmont Street - Leigh Street
41.94%
30.65%
27.42%
Mansfield Road
70.00%
20.00%
10.00%
Lismore Circus
60.00%
Leather Lane
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Lamb's Conduit Street
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25.00%
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Highgate Road
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Fortis Green Road
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Fortess Road
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Finchley Road - West End Lane
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Fairfax Road
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Eversholt Street North
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England's Lane
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Drummond Street
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Brunswick Centre
40.91%
45.45%
13.64%
Brecknock Road York Way
50.00%
15.79%
34.21%
Belsize Village
29.63%
33.33%
37.04%
Belsize Park - Haverstock Hill
40.00%
28.89%
31.11%
Albany Street
65.00%
5.00%
30.00%
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

Regent's Park Road	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	1	1.5	3.9%

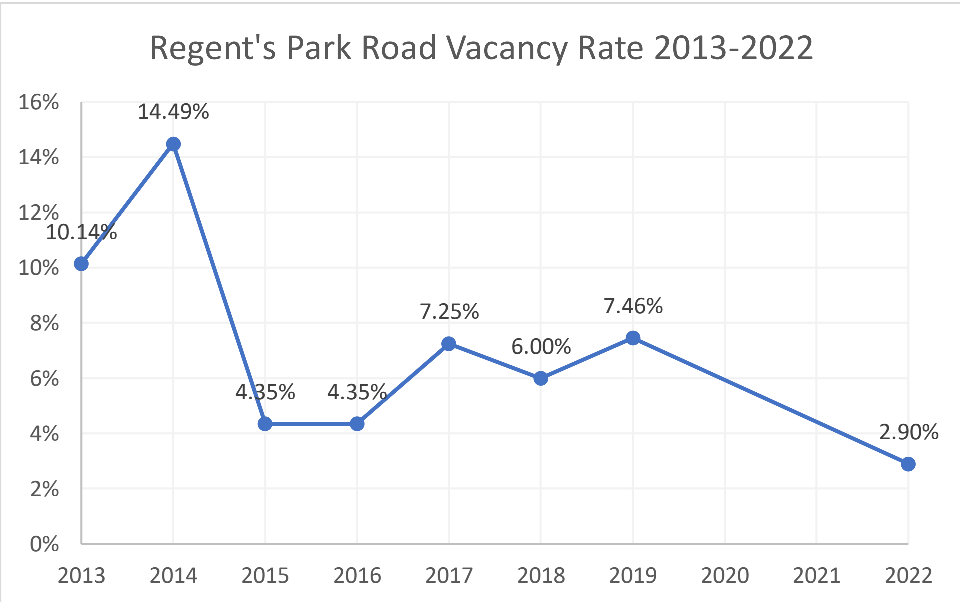
Conclusions on Diversity of Uses:

More than half (54.4% or 37 units) of the centre's 68 occupied units are dedicated to Class E(a) shops. This is higher than the Camden average (41.1%) and broadly consistent with the number of shops recorded in 2014.

The centre is under-represented by F&B provision (17.7% of total units) relative to the Camden average (26.3%). Notwithstanding, the centre contains 12 F&B units in addition to one evening / night time economy unit. Having regard to previous monitoring data, the number of F&B units increased from 9 to 14 between 2014 and 2019, before falling to 12 in 2022.

The remaining 19 units are occupied by 'other' uses including professional services, medical or health services and Sui Generis uses.

Vacancies 2013 - 2022



Conclusions

Regent's Park Road Neighbourhood Centre has a good range of retail and non-retail uses to meet the day-to-day shopping and service needs of its local catchment and other users of the centre. It has a generally attractive shopping environment. The centre has a declining vacancy rate, which has fallen from about 7.5% in 2019 to just under 3% in 2022, while footfall levels have recovered well following the pandemic.

Overall, therefore, the centre appears to be healthy and performing an important role.

The centre boundary is generally appropriate considering the composition and distribution of existing uses and the below average vacancy rate but we would suggest it could be extended to include the Queens public house immediately north of St George's Terrace.

CAMDEN – TOWN CENTRE HEALTH CHECKS

ROYAL COLLEGE STREET – CAMDEN ROAD

Description

Current Designation: Neighbourhood Centre as defined in Camden Local Plan 2017

Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
  - Policy TC1 (Quality and location of retail development);
  - Policy TC2 (Camden's centres and other shopping areas); and
  - Policy TC4 (Town centre uses).
- The entire centre lies within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage).

Description of Centre:

The centre is situated on the eastern edge of Camden Town (Town Centre), focused around the junction of Camden Road and Royal College Street, to the immediate east of Camden Road railway station.

Camden Road connects Camden Town with Holloway Road and Finsbury Park in the northeast, and Royal College Street extends from Kentish Town (Town Centre) – less than 1km to the northwest – towards the St Pancras / King's Cross area in the south. The centre is therefore situated on a prominent, arterial thoroughfare. It comprises several distinct commercial areas that are separated by the main roads and the railway line (at higher level).

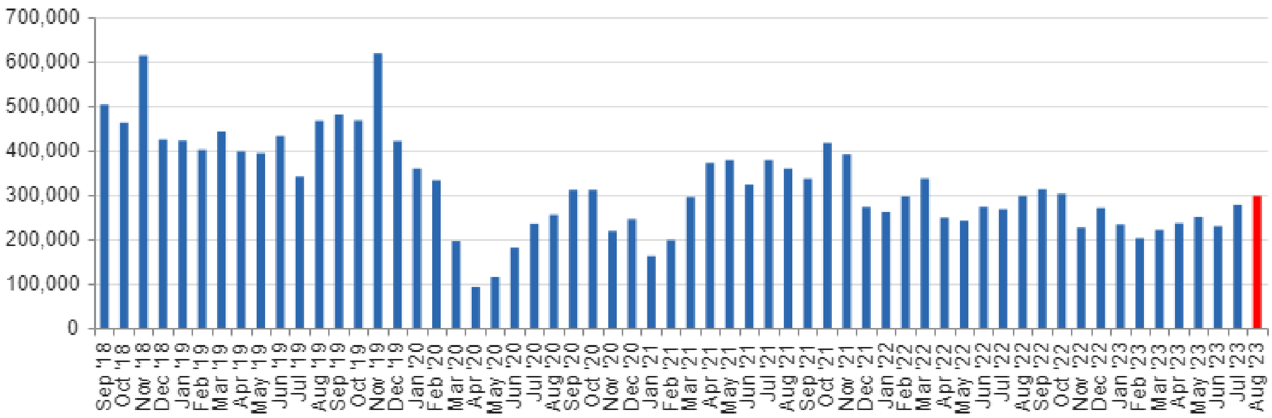
The proximity of Camden Town and Kentish Town (Town Centres) would serve to limit its catchment area, notwithstanding the centre (comprising 54 occupied units) is likely to have a relatively localised function catering for local residents, workers and other passers-by and/or occasional users.

Footfall

A section along Royal College Street was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

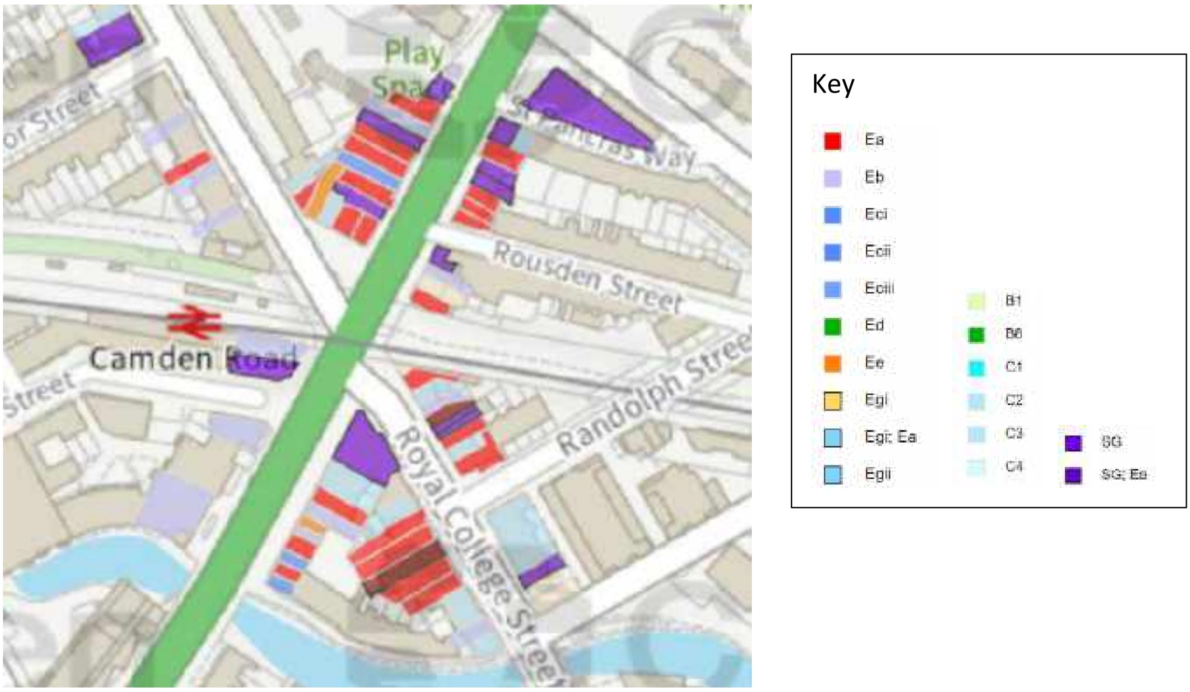
As can be seen in the figure below, footfall has been steadily declining during this period. There was a significant fall at the beginning of the pandemic (April 2020), and whilst pedestrian activity has increased since, it still lags the figures seen in late 2018, 2019 and early 2020.

Figure 2: Footfall of Royal College Street (September 2018 – August 2023)

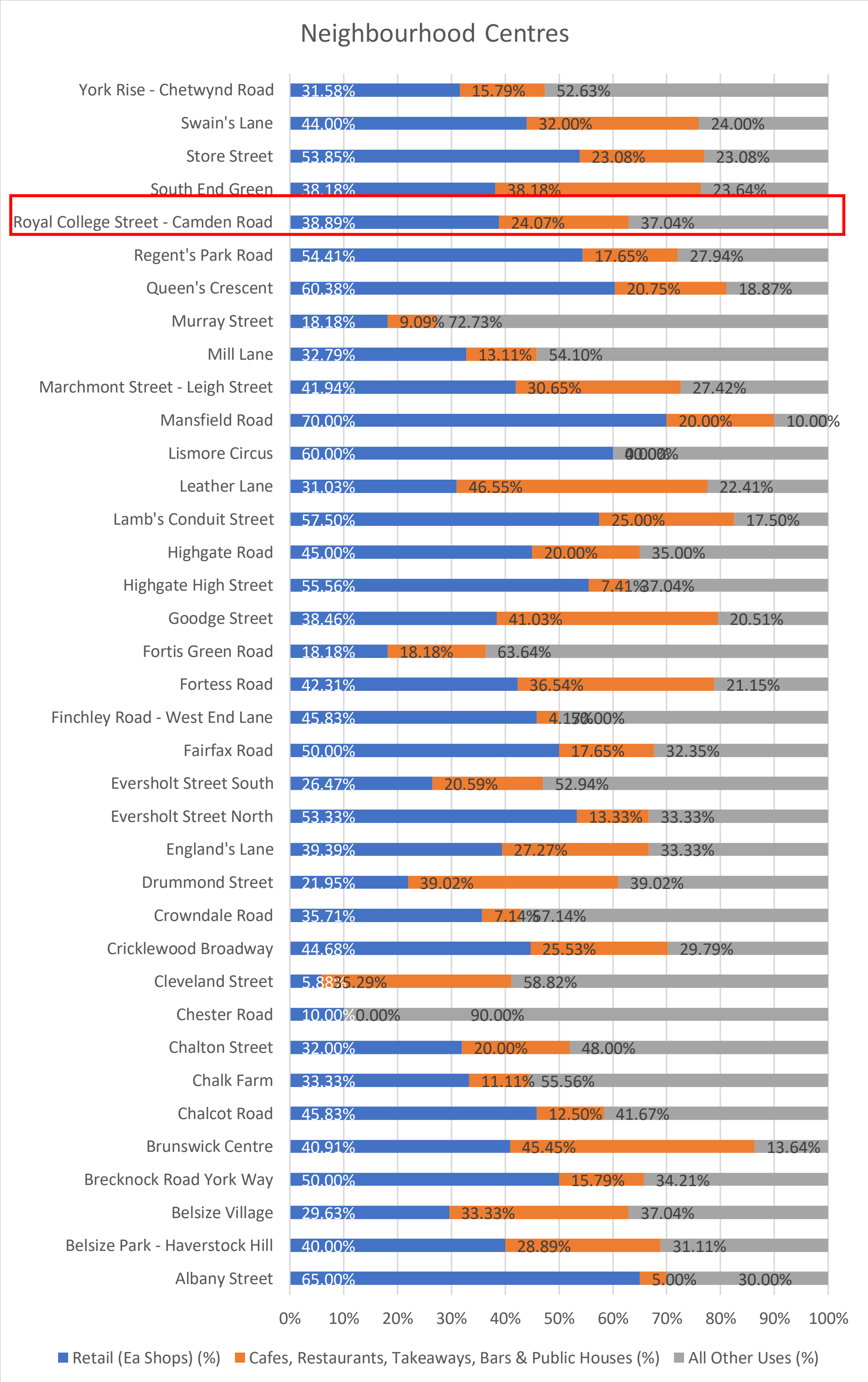


Source: Datscha

Diversity of Uses 2022



Royal College Street	Number	%	Camden Average (%)
Retail (Ea Shops)	21	38.9	41.1
Food & Beverage (F&B)	13	24.1	26.3
All Other Uses	20	37.0	32.6
Total	54	100.0	100.0


Neighbourhood Centres
York Rise - Chetwynd Road 31.58% 15.79% 52.63%
Swain's Lane 44.00% 32.00% 24.00%
Store Street 53.85% 23.08% 23.08%
South End Green 38.18% 38.18% 23.64%
Royal College Street - Camden Road 38.89% 24.07% 37.04%
Regent's Park Road 54.41% 17.65% 27.94%
Queen's Crescent 60.38% 20.75% 18.87%
Murray Street 18.18% 9.09% 72.73%
Mill Lane 32.79% 13.11% 54.10%
Marchmont Street - Leigh Street 41.94% 30.65% 27.42%
Mansfield Road 70.00% 20.00% 10.00%
Lismore Circus 60.00%
Leather Lane 31.03% 46.55% 22.41%
Lamb's Conduit Street 57.50% 25.00% 17.50%
Highgate Road 45.00% 20.00% 35.00%
Highgate High Street 55.56% 7.41% 37.04%
Goodge Street 38.46% 41.03% 20.51%
Fortis Green Road 18.18% 18.18% 63.64%
Fortess Road 42.31% 36.54% 21.15%
Finchley Road - West End Lane 45.83%
Fairfax Road 50.00% 17.65% 32.35%
Eversholt Street South 26.47% 20.59% 52.94%
Eversholt Street North 53.33% 13.33% 33.33%
England's Lane 39.39% 27.27% 33.33%
Drummond Street 21.95% 39.02% 39.02%
Crowndale Road 35.71%
Cricklewood Broadway 44.68% 25.53% 29.79%
Cleveland Street 58.82%
Chester Road 10.00% 0.00% 90.00%
Chalton Street 32.00% 20.00% 48.00%
Chalk Farm 33.33% 11.11% 55.56%
Chalcot Road 45.83% 12.50% 41.67%
Brunswick Centre 40.91% 45.45% 13.64%
Brecknock Road York Way 50.00% 15.79% 34.21%
Belsize Village 29.63% 33.33% 37.04%
Belsize Park - Haverstock Hill 40.00% 28.89% 31.11%
Albany Street 65.00% 5.00% 30.00%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

Centre Name	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	2	3.7	3.9%

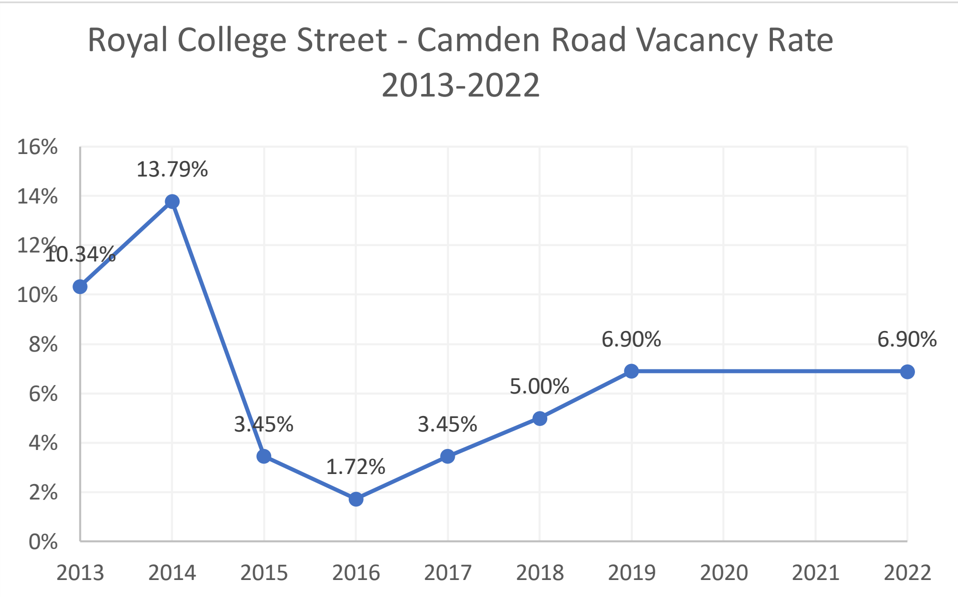
Conclusions on Diversity of Uses:

About 39% (21 units) of the centre's units comprise Class E(a) shops, which is only slightly below the Camden average (41.1%). There are 13 F&B units (24.1% of the total number of units compared with the Camden average of 26.3%) and 20 'other' uses. These include a mix of financial, professional and medical services and Sui Generis uses.

This composition of uses has remained relatively stable since 2014 and 2019, based on headline monitoring data for those years.

The centre includes 2 units dedicated to the evening / night time economy (3.7% of the total number of units compared with the Camden average of 3.9%). Overall, therefore, the centre appears to comprise a balanced mix of uses.

Vacancies 2013 - 2022



Conclusions

The low vacancy rate (less than 7%) and the balanced mix of uses suggests the centre is healthy and performing a relevant function. Perhaps reflecting its proximity to Camden Town (Town Centre), the centre's proportion of shops and F&B is below the Camden averages for such provision – albeit only slightly. It is also to be noted that footfall still lags the levels recorded in late 2018, 2019 and early 2020.

The centre comprises several distinct commercial areas that are separated by the main roads and the railway line (at higher level) and this offers potential for different uses to be encouraged and provided for, although Camden Town is likely to be the preferred location for new/innovative uses. However, some redevelopment has already resulted in a loss of retail uses in the south of the centre.

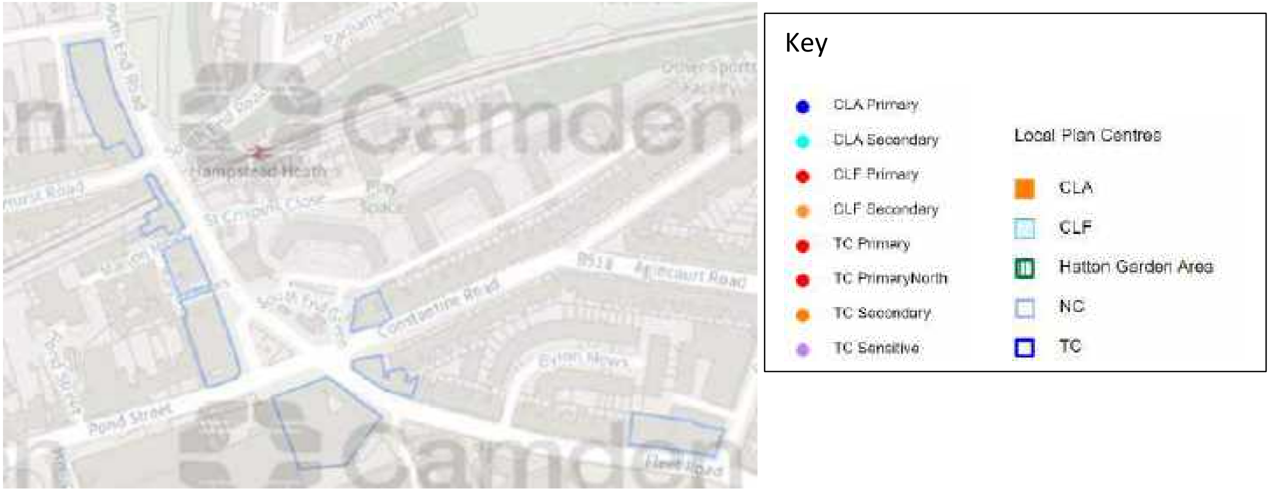
We would therefore suggest that the centre boundary should be amended to remove 152 – 160 Royal College Street from the centre, given previous and proposed redevelopment plans. We would also suggest that 195 Royal College Street could be removed as it is detached from the rest of the centre.

CAMDEN – TOWN CENTRE HEALTH CHECKS

SOUTH END GREEN

Description

Current Designation: Neighbourhood Centre in the Camden Local Plan 2017



Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden's centres and other shopping areas); and
    - Policy TC4 (Town centre uses).
- The majority of the centre (excluding the corner buildings at the Pond Street / Fleet Road junction) lies within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage).

Description of Centre:

The centre lies adjacent to Hampstead Heath (Overground) railway station. It is bookended by Parliament Hill in the north and the Royal Free Hospital in the south.

Hampstead Town Centre is situated approximately 1km to the west.

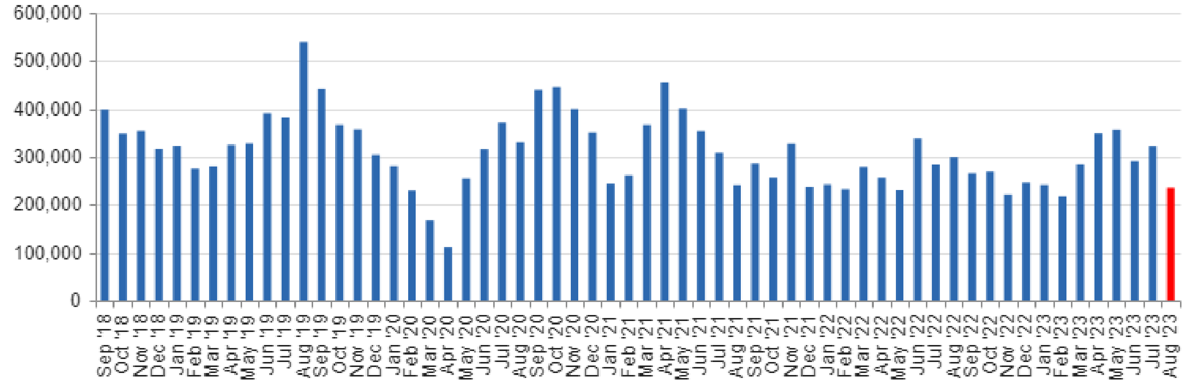
The centre comprises 55 occupied units in total, predominantly extending along the west side of South Hill Road with smaller, separate commercial areas focused to the south on Elm Terrace and Fleet Road. These areas were included within the defined centre following the adoption of the Hampstead Neighbourhood Plan.

Footfall

A section along South End Road was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

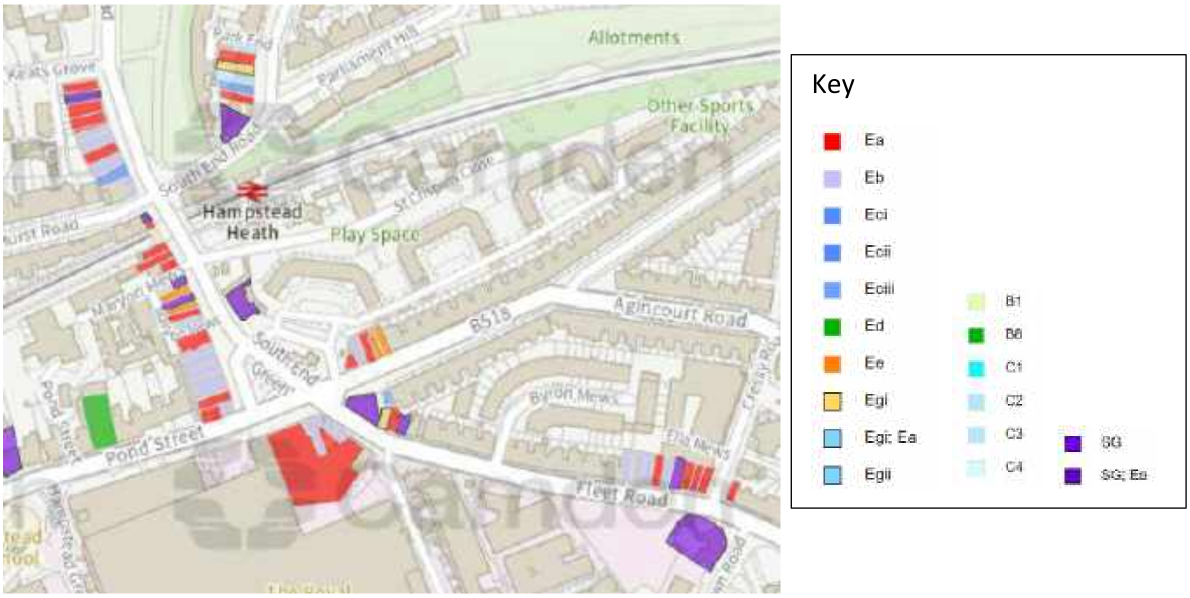
As can be seen in the figure below, footfall has been consistent during this period. Pedestrian activity on the whole looks to be lower post-pandemic than pre-pandemic, but not to the extent that can be seen in other areas.

Figure 2: Footfall of South End Road, South End Green (September 2018 – August 2023)

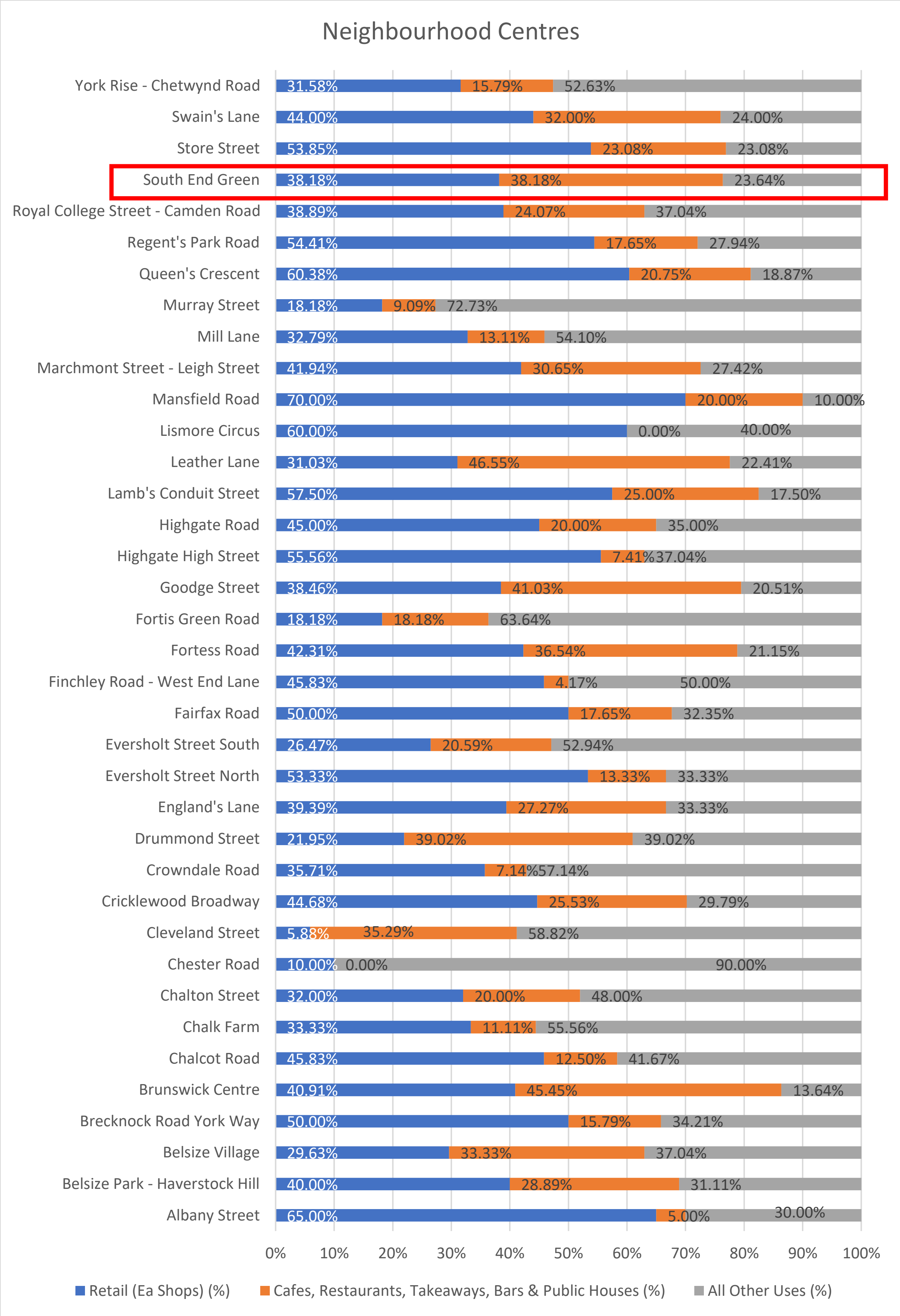


Source: Datscha

Diversity of Uses 2022



South End Green	Number	%	Camden Average (%)
Retail (Ea Shops)	21	38.2	41.1
Food & Beverage (F&B)	21	38.2	26.3
All Other Uses	13	23.6	32.6
Total	55	100.0	100.0



Neighbourhood Centres
York Rise - Chetwynd Road 31.58% 15.79% 52.63%
Swain's Lane 44.00% 32.00% 24.00%
Store Street 53.85% 23.08% 23.08%
South End Green 38.18% 38.18% 23.64%
Royal College Street - Camden Road 38.89% 24.07% 37.04%
Regent's Park Road 54.41% 17.65% 27.94%
Queen's Crescent 60.38% 20.75% 18.87%
Murray Street 18.18% 9.09% 72.73%
Mill Lane 32.79% 13.11% 54.10%
Marchmont Street - Leigh Street 41.94% 30.65% 27.42%
Mansfield Road 70.00% 20.00% 10.00%
Lismore Circus 60.00% 0.00% 40.00%
Leather Lane 31.03% 46.55% 22.41%
Lamb's Conduit Street 57.50% 25.00% 17.50%
Highgate Road 45.00% 20.00% 35.00%
Highgate High Street 55.56% 7.41% 37.04%
Goodge Street 38.46% 41.03% 20.51%
Fortis Green Road 18.18% 18.18% 63.64%
Fortess Road 42.31% 36.54% 21.15%
Finchley Road - West End Lane 45.83% 4.17% 50.00%
Fairfax Road 50.00% 17.65% 32.35%
Eversholt Street South 26.47% 20.59% 52.94%
Eversholt Street North 53.33% 13.33% 33.33%
England's Lane 39.39% 27.27% 33.33%
Drummond Street 21.95% 39.02% 39.02%
Crowndale Road 35.71% 7.14% 57.14%
Cricklewood Broadway 44.68% 25.53% 29.79%
Cleveland Street 5.88% 35.29% 58.82%
Chester Road 10.00% 0.00% 90.00%
Chalton Street 32.00% 20.00% 48.00%
Chalk Farm 33.33% 11.11% 55.56%
Chalcot Road 45.83% 12.50% 41.67%
Brunswick Centre 40.91% 45.45% 13.64%
Brecknock Road York Way 50.00% 15.79% 34.21%
Belsize Village 29.63% 33.33% 37.04%
Belsize Park - Haverstock Hill 40.00% 28.89% 31.11%
Albany Street 65.00% 5.00% 30.00%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

South End Green	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	1	1.9	3.9%

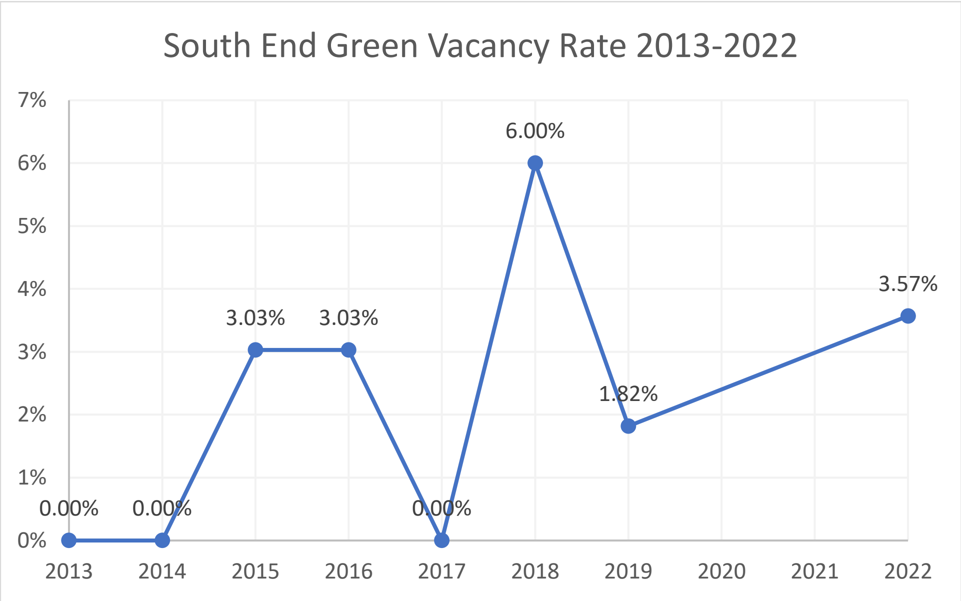
Conclusions on Diversity of Uses:

Of the centre's 55 occupied units, 38.2% (21 units) are occupied by Class E(a) shops – slightly below the Camden average of 41.1%. M&S Simply Food underpins the centre's convenience goods retail offer.

South End Green is also represented by 21 F&B uses which, as a proportion of the total number of units (38.2%), is well above the Camden average (26.3%). There is just one unit dedicated to the evening / night time economy offer. Almost a quarter (23.6%) of the centre's units are occupied by 'other' uses including services and Sui Generis uses.

The current number of shops within the centre (21) is comparable to the number recorded in 2014 (22). However, over this period, South End Green Neighbourhood Centre has seen a significant increase in the number of F&B units (from just 8 in 2014 to 21 in 2022). During this period th extent of the centre has been increased to include additional units to the south.

Vacancies 2013 - 2022



Conclusions

The centre has a good range of uses including main convenience goods provision in the form of M&S Simply Food. It also has a reasonably strong F&B offer in terms of the number of units dedicated to such uses. The vacancy rate remains low at circa 3.5% which is an improvement on the level recorded in 2018 (6%).

Although pedestrian activity within the centre appears to be slightly lower than pre-pandemic, the above findings suggest the centre is healthy and catering well for the day-to-day shopping and service needs of local residents and other users of the centre.

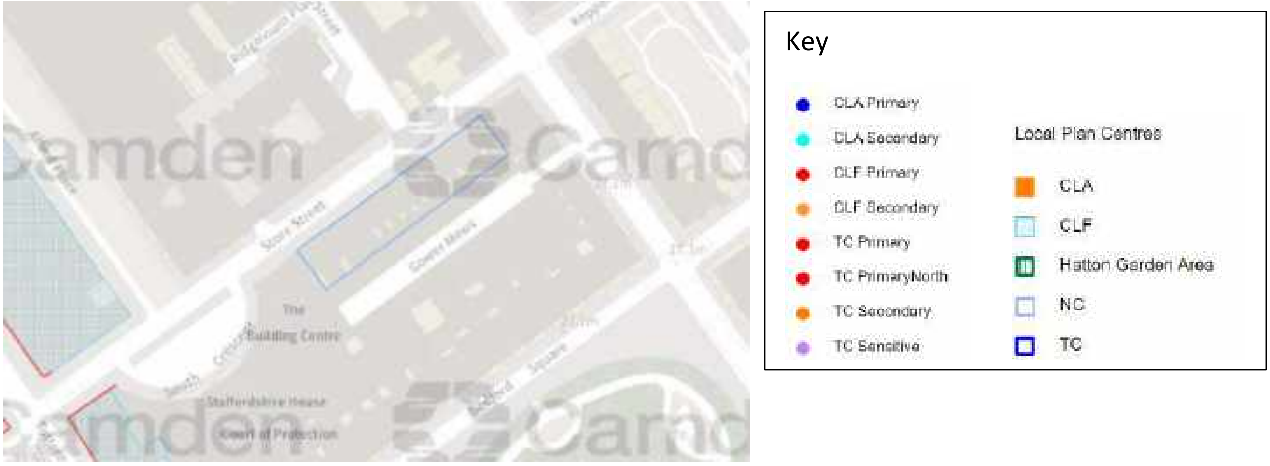
As regards the centre boundary this is considered appropriate, given it has recently been reviewed and revised as part of the Hampstead Neighbourhood Plan.

CAMDEN – TOWN CENTRE HEALTH CHECKS

STORE STREET

Description

Current Designation: Neighbourhood Centre in the Camden Local Plan 2017



Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
  - Policy TC1 (Quality and location of retail development);
  - Policy TC2 (Camden's centres and other shopping areas); and
  - Policy TC4 (Town centre uses).
- The entire centre lies within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage).
- The centre is also within the Fitzrovia Action Area Plan areas.

Description of Centre:

The centre (consisting of just 13 occupied units) extends along the south side of Store Street in the borough's Bloomsbury area. Less than 0.5km to the west, off Tottenham Court Road, is Goodge Street Underground station and Goodge Street Neighbourhood Centre.

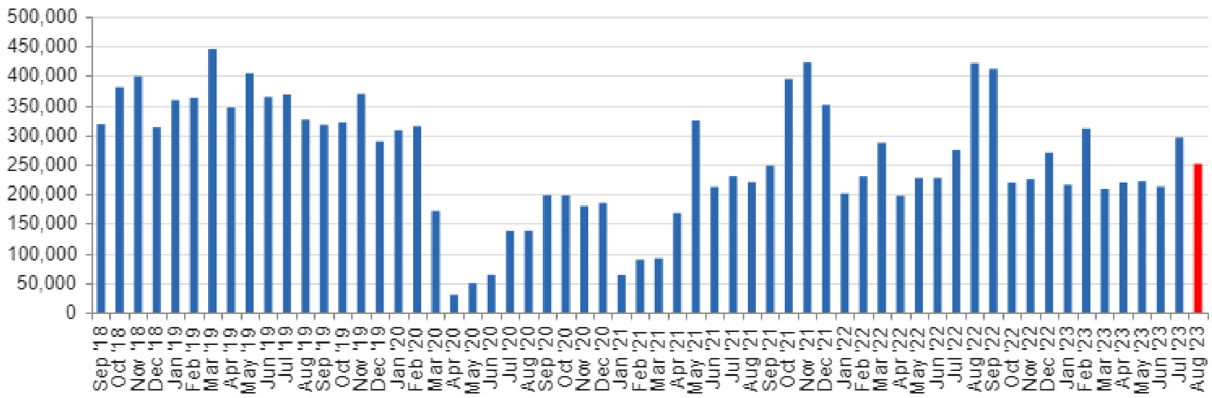
Tottenham Court Road is a main thoroughfare running north towards the Euston area and south towards the Soho area.

Footfall

A section along Store Street was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

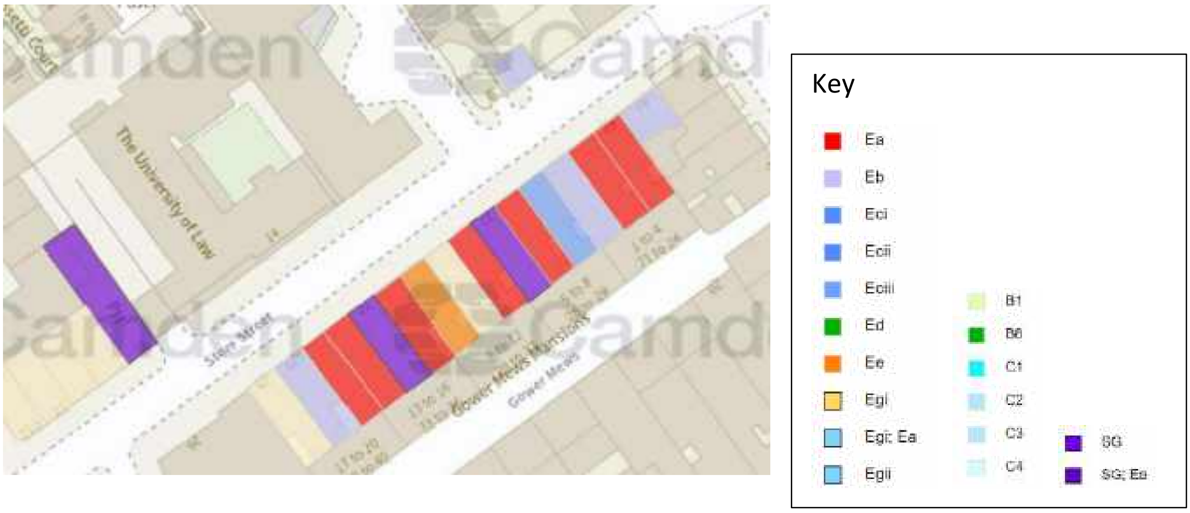
As can be seen in the figure below, footfall was severely impacted at the beginning of the pandemic (April 2020). Although there have been some particularly strong months since then (October and November 2021 and August and September 2022), pedestrian activity in the main has been lower than pre-pandemic levels.

Figure 2: Footfall of Store Street (September 2018 – August 2023)

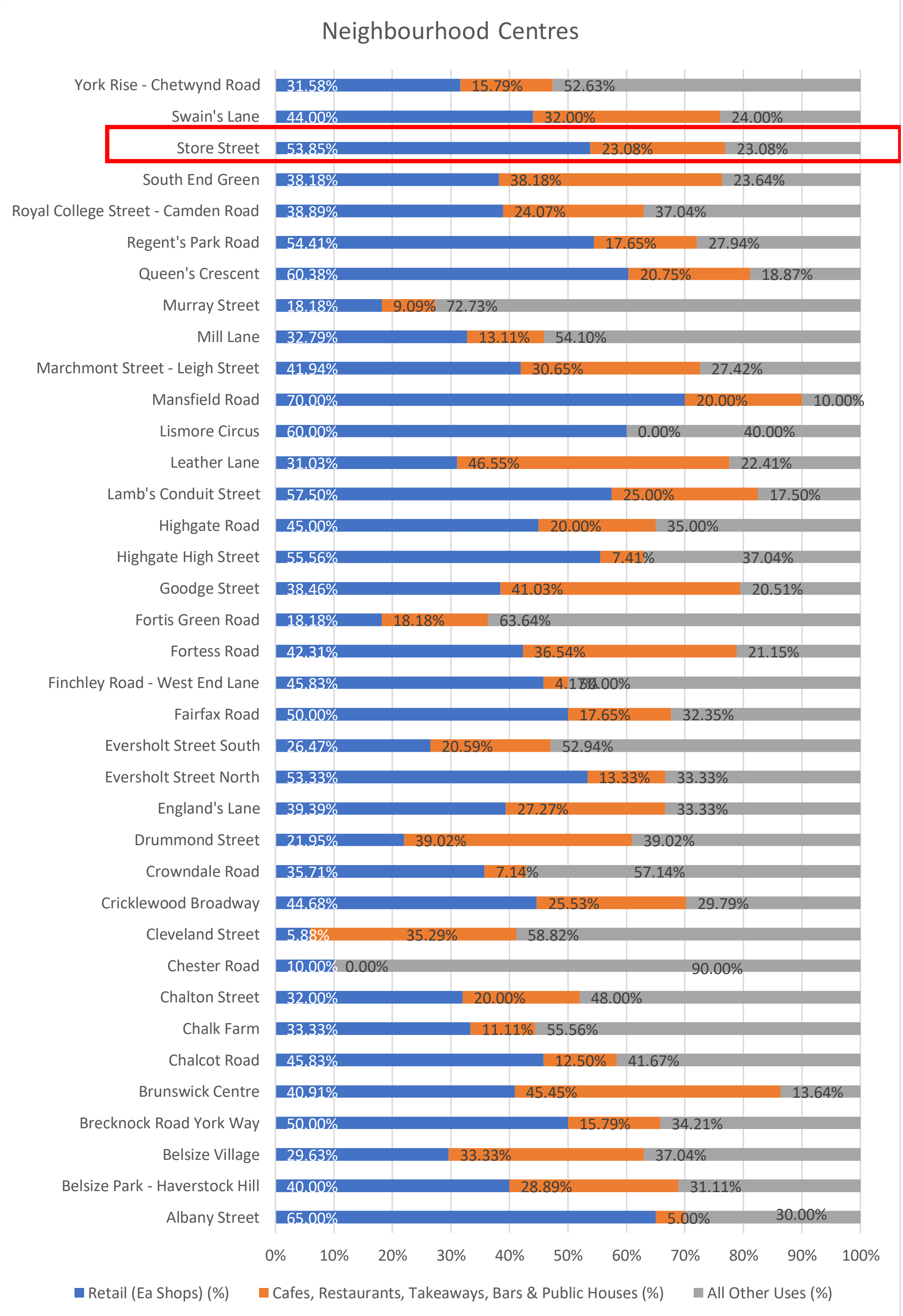


Source: Datscha

Diversity of Uses 2022



Store Street	Number	%	Camden Average (%)
Retail (Ea Shops)	7	53.8	41.1
Food & Beverage (F&B)	3	23.1	26.3
All Other Uses	3	23.1	32.6
Total	13	100.0	100.0


Neighbourhood Centres
York Rise - Chetwynd Road 31.58% 15.79% 52.63%
Swain's Lane 44.00% 32.00% 24.00%
Store Street 53.85% 23.08% 23.08%
South End Green 38.18% 38.18% 23.64%
Royal College Street - Camden Road 38.89% 24.07% 37.04%
Regent's Park Road 54.41% 17.65% 27.94%
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Lismore Circus 60.00% 0.00% 40.00%
Leather Lane 31.03% 46.55% 22.41%
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Highgate Road 45.00% 20.00% 35.00%
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Albany Street 65.00% 5.00% 30.00%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

Store Street	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	1	7.7	3.9%

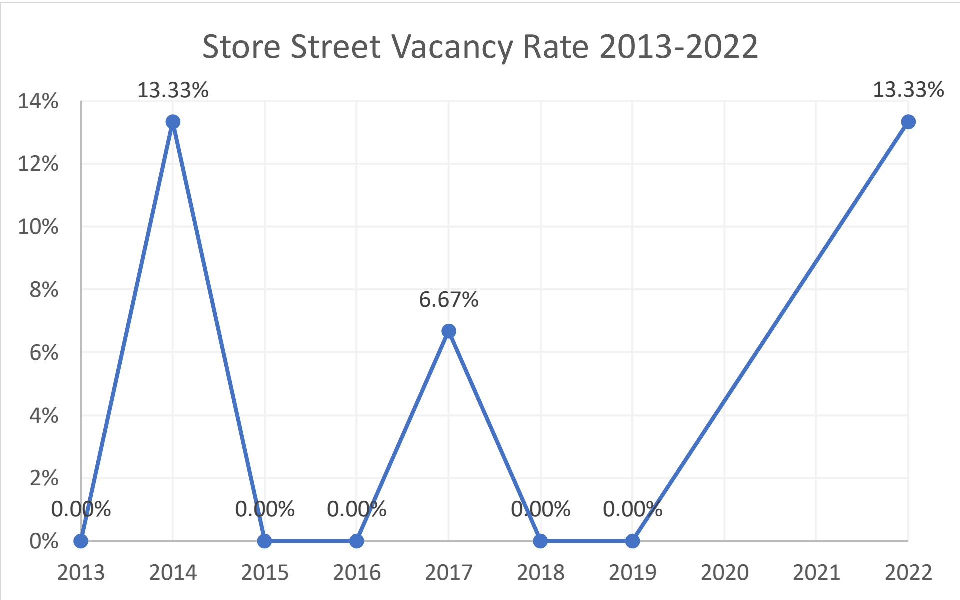
Conclusions on Diversity of Uses:

The centre includes 13 occupied units, of which just over half (53.8% or 7 units) are occupied by Class E(a) shops – compared to a Camden average of 41.1%. These include specialist independent shops such as a music shop, a bike shop and a picture framing shop. Convenience goods provision is limited to a delicatessen and a wine shop.

The centre has just 3 F&B units (amounting to 23.1% of the total number of units) and one unit dedicated to the evening / night time economy.

Almost a quarter (23.1% or 3 units) of the total units accommodate 'other' uses comprising services and Sui Generis uses.

Vacancies 2013 - 2022



Conclusions

Store Street Neighbourhood Centre is a small but relatively specialist shopping area with a limited number of F&B and service uses.

The centre appears to be in good health although since the pandemic, its vacancy rate has increased from 0% to 13.3% (equating to 2 units); while the footfall data suggests that pedestrian activity has generally been lower than pre-pandemic levels. Given the area's substantial office worker population, this 'decline' is likely to be attributable (at least in part) to the prevalence of hybrid working.

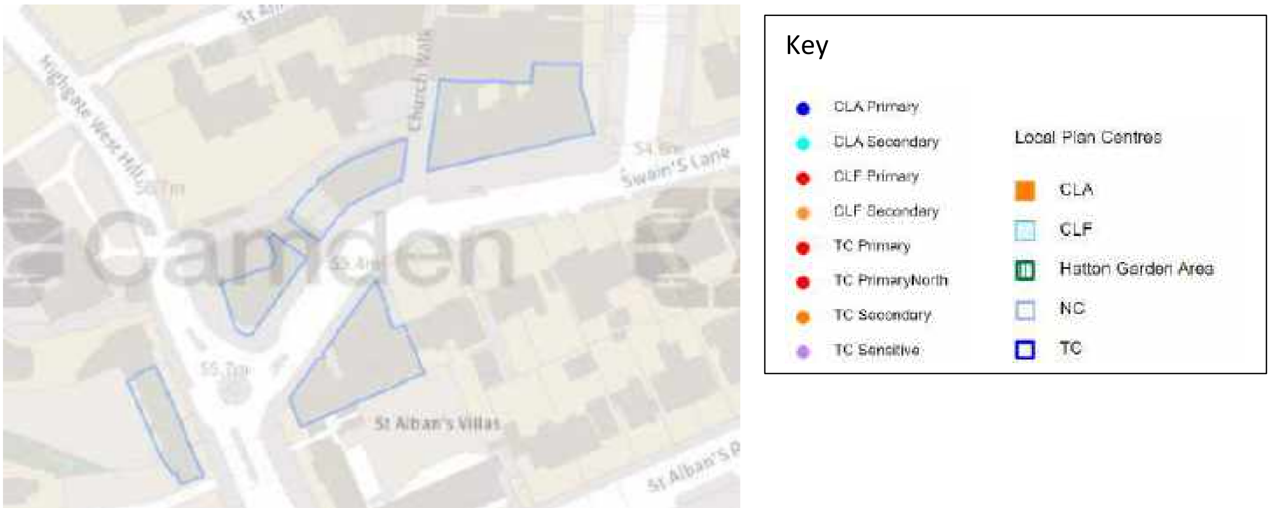
The centre boundary is considered to be generally appropriate, although we would suggest it should be extended to the east with the inclusion of No. 43 Store Street. We note that there is also a unit in restaurant use on the north side of Store Street. However, given it would be the only unit on this side of the road we do not consider that it is necessary for this to be included.

CAMDEN – TOWN CENTRE HEALTH CHECKS

SWAIN'S LANE

Description

Current Designation: Neighbourhood Centre in the Camden Local Plan 2017



Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
  - Policy TC1 (Quality and location of retail development);
  - Policy TC2 (Camden's centres and other shopping areas); and
  - Policy TC4 (Town centre uses).
- The entire centre lies within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage).

Description of Centre:

The centre lies to the northeast of the borough, to the immediate east of Parliament Hill. Its shops and services extend along the north and south sides of Swain's Lane, with part of the centre fronting Highgate Road to the west.

The centre consists of 25 occupied units, and would serve a localised 'walk-in' catchment and passers-by along the adjacent Highgate Road. Kentish Town (Town Centre) is situated approximately 2km to the south and the closest other Neighbourhood Centre is York Rise / Chetwynd Road (less than 1km to the southeast).

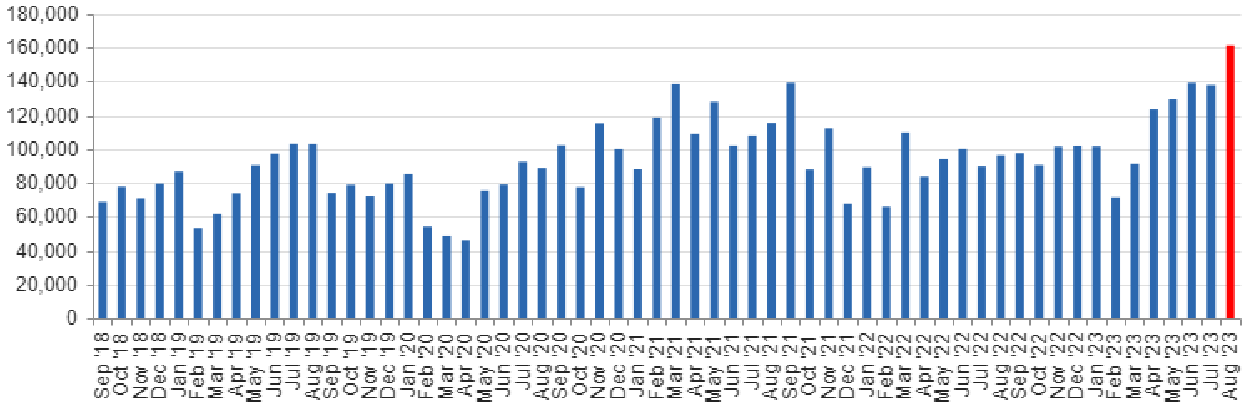
It has seen substantial changes in recent years with the land between Highgate West Hill to Church Walk benefitting from comprehensive redevelopment.

Footfall

A section along Swains Lane was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

As can be seen in the figure below, footfall has been growing well during this period. The impact of the pandemic can be seen in early 2020, but the impact was not severe, nor was it prolonged. Since then, pedestrian activity levels have surpassed pre-pandemic figures. The most recent recorded month (August 2023) represents a peak during this timeframe and provides optimism that the growth trend in recent years will continue.

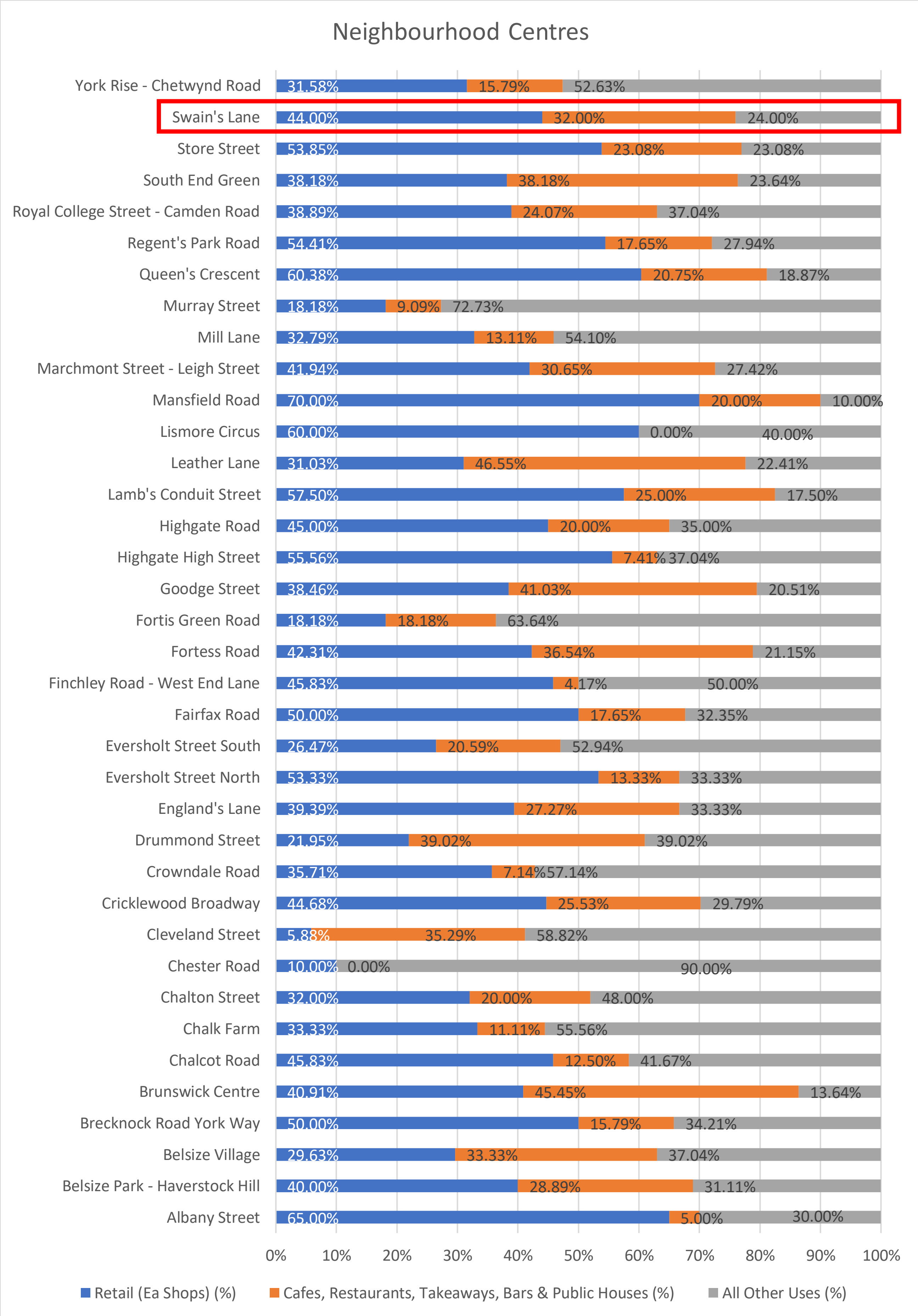
Figure 2: Footfall of Swains Lane (September 2018 – August 2023)



Source: Datscha

Diversity of Uses 2023

Swain's Lane	Number	%	Camden Average (%)
Retail (Ea Shops)	11	44.0	41.1
Food & Beverage (F&B)	8	32.0	26.3
All Other Uses	6	24.0	32.6
Total	25	100.0	100.0


Neighbourhood Centres
York Rise - Chetwynd Road
31.58%
15.79%
52.63%
Swain's Lane
44.00%
32.00%
24.00%
Store Street
53.85%
23.08%
23.08%
South End Green
38.18%
38.18%
23.64%
Royal College Street - Camden Road
38.89%
24.07%
37.04%
Regent's Park Road
54.41%
17.65%
27.94%
Queen's Crescent
60.38%
20.75%
18.87%
Murray Street
18.18%
9.09%
72.73%
Mill Lane
32.79%
13.11%
54.10%
Marchmont Street - Leigh Street
41.94%
30.65%
27.42%
Mansfield Road
70.00%
20.00%
10.00%
Lismore Circus
60.00%
0.00%
40.00%
Leather Lane
31.03%
46.55%
22.41%
Lamb's Conduit Street
57.50%
25.00%
17.50%
Highgate Road
45.00%
20.00%
35.00%
Highgate High Street
55.56%
7.41%
37.04%
Goodge Street
38.46%
41.03%
20.51%
Fortis Green Road
18.18%
18.18%
63.64%
Fortess Road
42.31%
36.54%
21.15%
Finchley Road - West End Lane
45.83%
4.17%
50.00%
Fairfax Road
50.00%
17.65%
32.35%
Eversholt Street South
26.47%
20.59%
52.94%
Eversholt Street North
53.33%
13.33%
33.33%
England's Lane
39.39%
27.27%
33.33%
Drummond Street
21.95%
39.02%
39.02%
Crowndale Road
35.71%
7.14%
57.14%
Cricklewood Broadway
44.68%
25.53%
29.79%
Cleveland Street
5.88%
35.29%
58.82%
Chester Road
10.00%
0.00%
90.00%
Chalton Street
32.00%
20.00%
48.00%
Chalk Farm
33.33%
11.11%
55.56%
Chalcot Road
45.83%
12.50%
41.67%
Brunswick Centre
40.91%
45.45%
13.64%
Brecknock Road York Way
50.00%
15.79%
34.21%
Belsize Village
29.63%
33.33%
37.04%
Belsize Park - Haverstock Hill
40.00%
28.89%
31.11%
Albany Street
65.00%
5.00%
30.00%
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

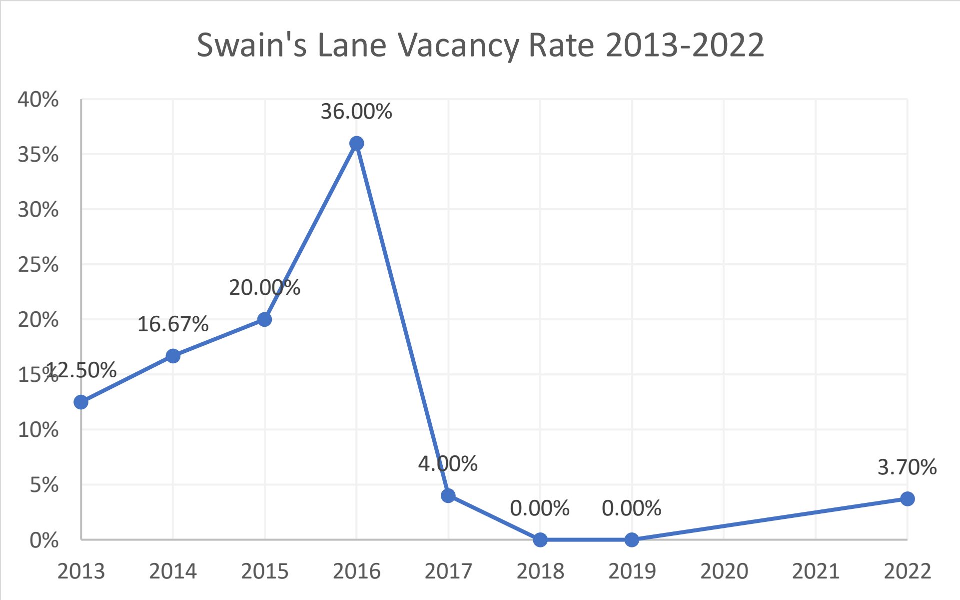
Swain's Lane	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	1	3.9	3.9%

Conclusions on Diversity of Uses:

Some 44% (11 units) of the centre's occupied units comprise Class E(a) shops, which is slightly above the Camden average of 41.1% and represents an increase since 2019 (only 6 shops). There is a *Tesco Express* convenience store and some good quality independents (e.g. bakery, fishmongers, greengrocers, butchers).

Around a third of the units (32% or 8 units) are dedicated to F&B provision, which is also above the Camden average (26.3%), and there is one evening / night time economy use. The remaining 6 units are occupied by 'other' uses including professional services and Sui Generis uses.

Vacancies 2013 - 2022



Conclusions

Swain's Lane Neighbourhood Centre has a good quality and reasonably varied retail (predominantly convenience retail) and F&B offer within the limitations of its scale and localised function. The centre's vacancy rate has fallen since the high (36%) of 2016, and now stands at 3.7% – well below average levels. This would have coincided with the redevelopment of the Highgate West Hill to Church Walk site.

The footfall data also suggests that pedestrian activity has recovered well within the centre and is now surpassing pre-pandemic levels.

Overall, therefore, the centre appears to be healthy and performing well.

The centre boundary is generally appropriate considering the distribution and composition of existing uses and the below average vacancy rate but needs minor amendments to reflect the new development. This includes extending the centre to include the new development on Highgate West Hill and amending it to reflect the building footprints. No. 4 Highgate West Hill should be removed from the centre as it is now in residential use.

CAMDEN – TOWN CENTRE HEALTH CHECKS

YORK RISE – CHETWYND ROAD

Description

Current Designation: Neighbourhood Centre in the Camden Local Plan 2017

Current Planning Policies / Designations:

- As a Neighbourhood Centre, the following policies of the Camden Local Plan apply to the centre:
    - Policy TC1 (Quality and location of retail development);
    - Policy TC2 (Camden's centres and other shopping areas); and
    - Policy TC4 (Town centre uses).
- The entire centre lies within a designated Conservation Area and is therefore subject to the provisions of Policy D2 (Heritage).
- The entire centre lies within a Neighbourhood Plan Area Boundary.

Description of Centre:

The centre lies on the eastern fringes of the borough, less than 0.5km to the northwest of Tufnell Park Underground station (and Fortress Road Neighbourhood Centre). Its shops and services are focused on both sides of York Rise, separated by Chetwynd Road.

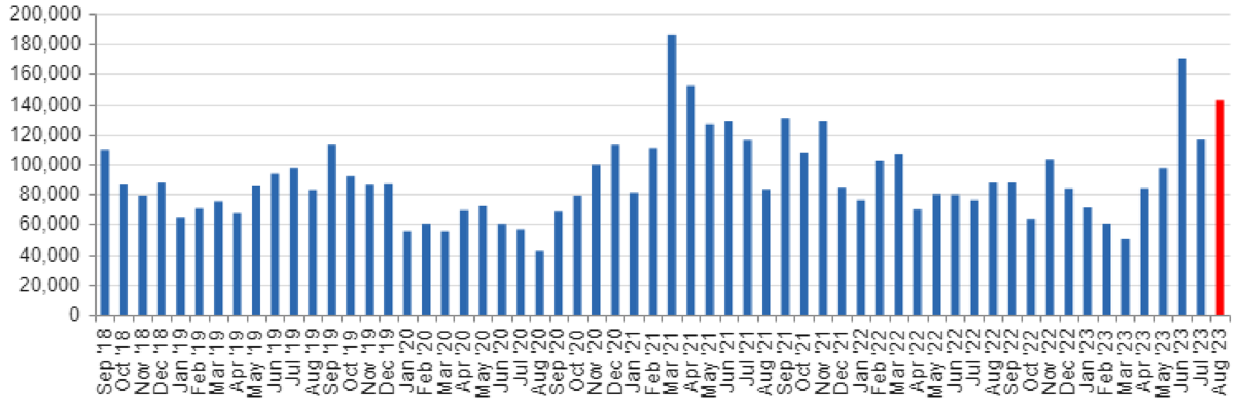
The centre would principally serve a localised 'walk-in' catchment. Kentish Town (Town Centre) is situated approximately 1.5km to the south.

Footfall

A section along York Rise was sampled to obtain information on how footfall levels have changed between September 2018 and August 2023.

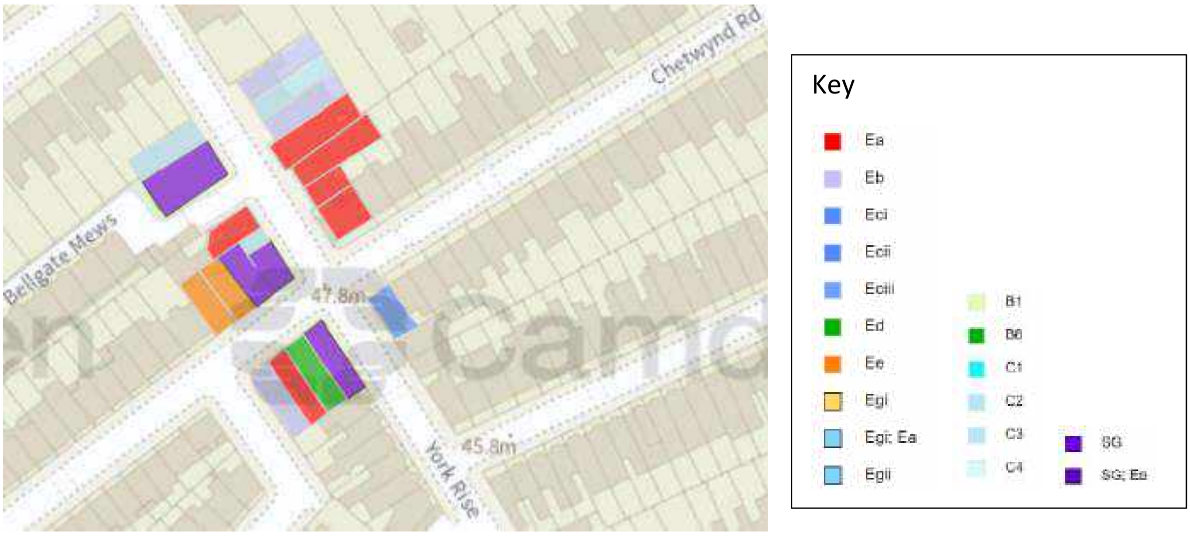
As can be seen in the figure below, footfall has grown in recent years, with March 2021 and June 2023 representing high months. There is minimal evidence that the pandemic had any impact on pedestrian activity along York Rise.

Figure 2: Footfall of York Rise (September 2018 – August 2023)

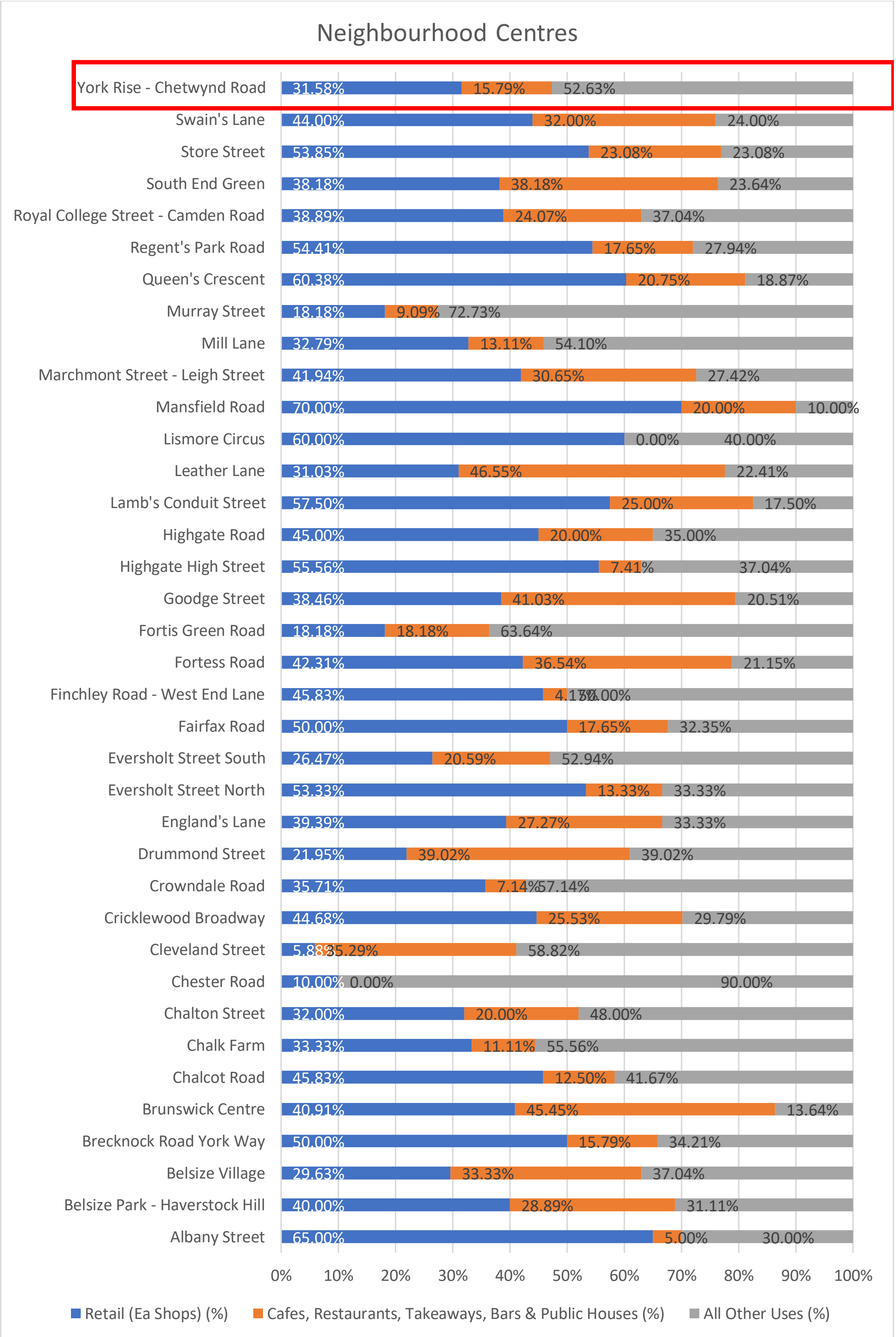


Source: Datscha

Diversity of Uses 2022



York Rise – Chetwynd Road	Number	%	Camden Average (%)
Retail (Ea Shops)	6	31.6	41.1
Food & Beverage (F&B)	3	15.8	26.3
All Other Uses	10	52.6	32.6
Total	19	100.0	100.0


Neighbourhood Centres
York Rise - Chetwynd Road 31.58% 15.79% 52.63%
Swain's Lane 44.00% 32.00% 24.00%
Store Street 53.85% 23.08% 23.08%
South End Green 38.18% 38.18% 23.64%
Royal College Street - Camden Road 38.89% 24.07% 37.04%
Regent's Park Road 54.41% 17.65% 27.94%
Queen's Crescent 60.38% 20.75% 18.87%
Murray Street 18.18% 9.09% 72.73%
Mill Lane 32.79% 13.11% 54.10%
Marchmont Street - Leigh Street 41.94% 30.65% 27.42%
Mansfield Road 70.00% 20.00% 10.00%
Lismore Circus 60.00% 0.00% 40.00%
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Lamb's Conduit Street 57.50% 25.00% 17.50%
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Fortis Green Road 18.18% 18.18% 63.64%
Fortess Road 42.31% 36.54% 21.15%
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Eversholt Street South 26.47% 20.59% 52.94%
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Drummond Street 21.95% 39.02% 39.02%
Crowndale Road 35.71% 7.14% 57.14%
Cricklewood Broadway 44.68% 25.53% 29.79%
Cleveland Street 5.88% 35.29% 58.82%
Chester Road 10.00% 0.00% 90.00%
Chalton Street 32.00% 20.00% 48.00%
Chalk Farm 33.33% 11.11% 55.56%
Chalcot Road 45.83% 12.50% 41.67%
Brunswick Centre 40.91% 45.45% 13.64%
Brecknock Road York Way 50.00% 15.79% 34.21%
Belsize Village 29.63% 33.33% 37.04%
Belsize Park - Haverstock Hill 40.00% 28.89% 31.11%
Albany Street 65.00% 5.00% 30.00%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Retail (Ea Shops) (%)
Cafes, Restaurants, Takeaways, Bars & Public Houses (%)
All Other Uses (%)

EVENING / NIGHT TIME ECONOMY

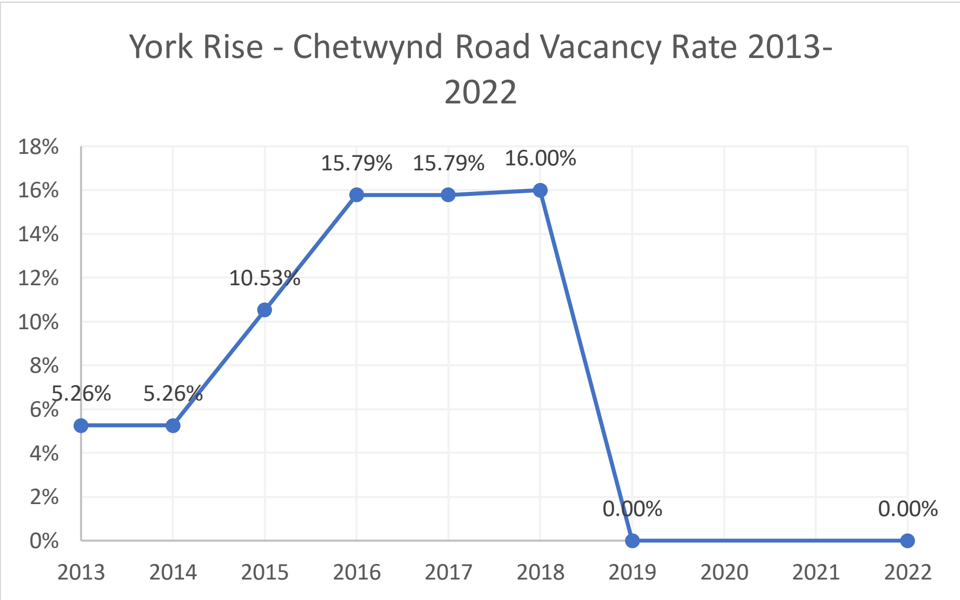
Centre Name	Number	%	Camden Average (%)
Bars, Nightclubs & Public Houses	1	5.3	3.9%

Conclusions on Diversity of Uses:

Of the centre's 19 occupied units, almost a third (31.6% or 6 units) comprise Class E(a) shops – below the Camden average (41.1%). The centre has 3 F&B units (15.8% compared to the Camden average of 26.3%) and one unit dedicated to the evening / night time economy. The remaining 10 units are occupied by 'other' uses including medical or health services and Sui Generis uses.

Based on the monitoring data available, the centre's diversity of uses has remained stable and relatively unchanged since 2014 and 2019.

Vacancies 2013 - 2022



Conclusions

The centre has reasonably good provision of shops and services within the limitations of its scale and function as a Neighbourhood Centre. It lacks F&B / evening activity but this is perhaps unsurprising given its localised catchment and proximity to Kentish Town.

The centre has a stable composition of uses looking back over the period to 2014. It further has no vacant units (vacancy levels were as high as 16% before 2019) and this is a good indicator of the centre's overall health. Footfall levels have continued to perform well with minimal evidence that the pandemic had any impact on pedestrian activity within the centre.

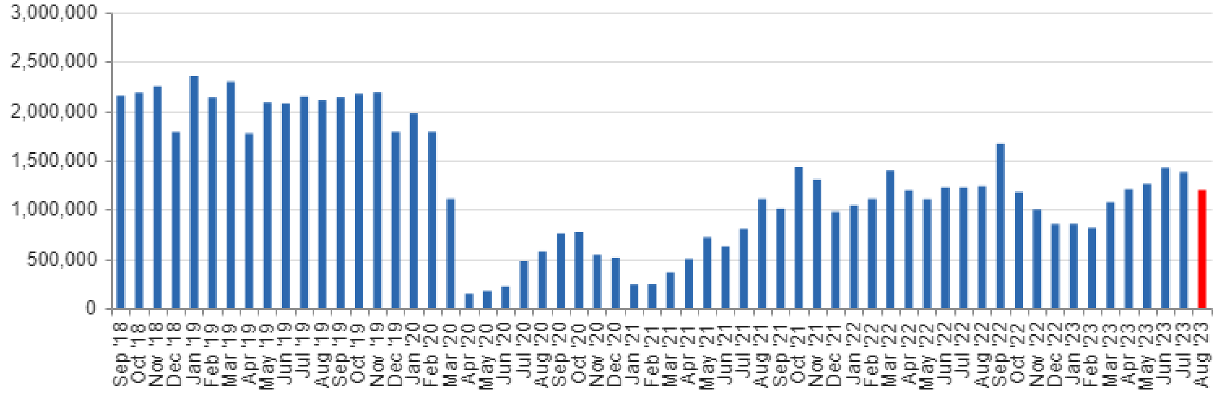
The centre boundary is appropriate considering the distribution and composition of existing uses and the 0% vacancy rate.

VOLUME C5: SUMMARY FOOTFALL DATA

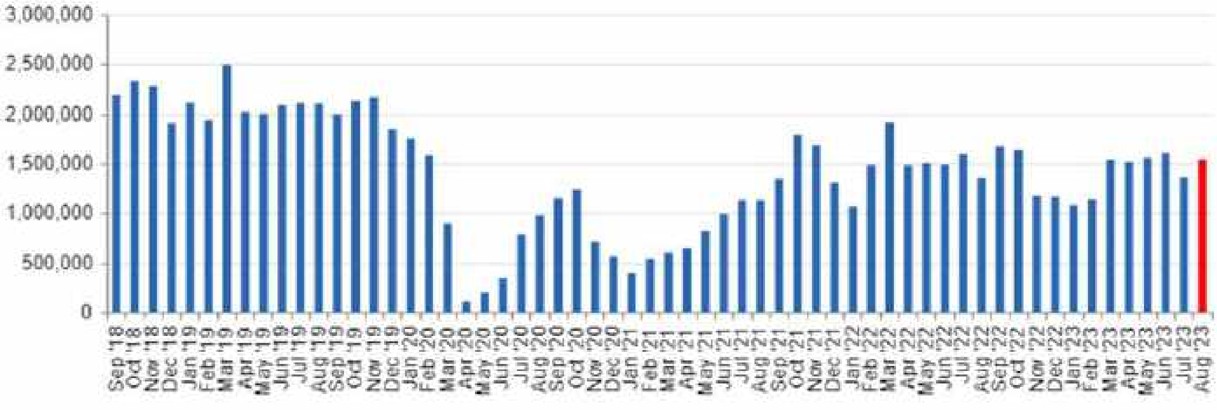
(Source: Datscha)

CENTRAL LONDON FRONTAGES

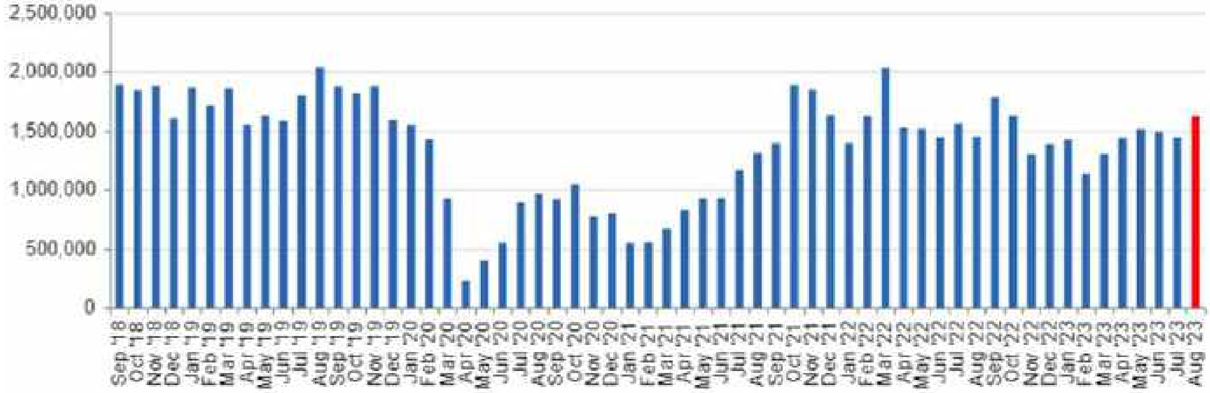
High Holborn / Kingsway



King's Cross

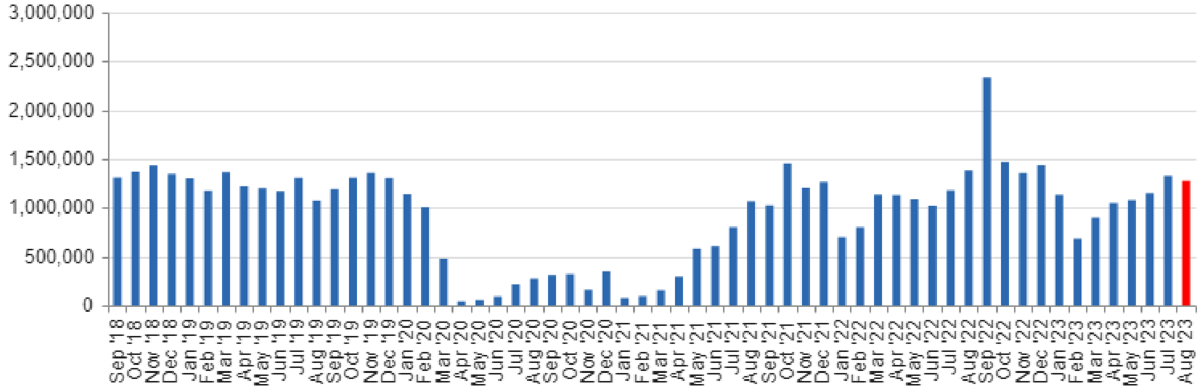


Tottenham Court Road

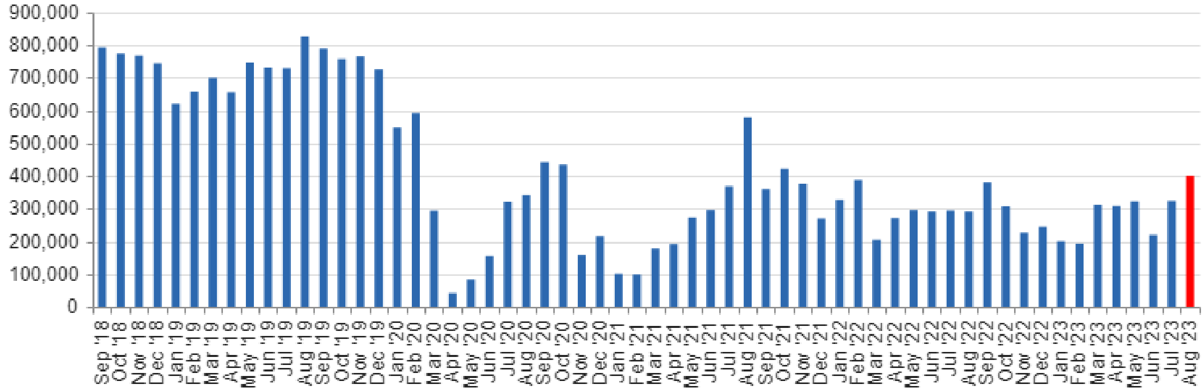


SPECIALIST SHOPPING AREAS

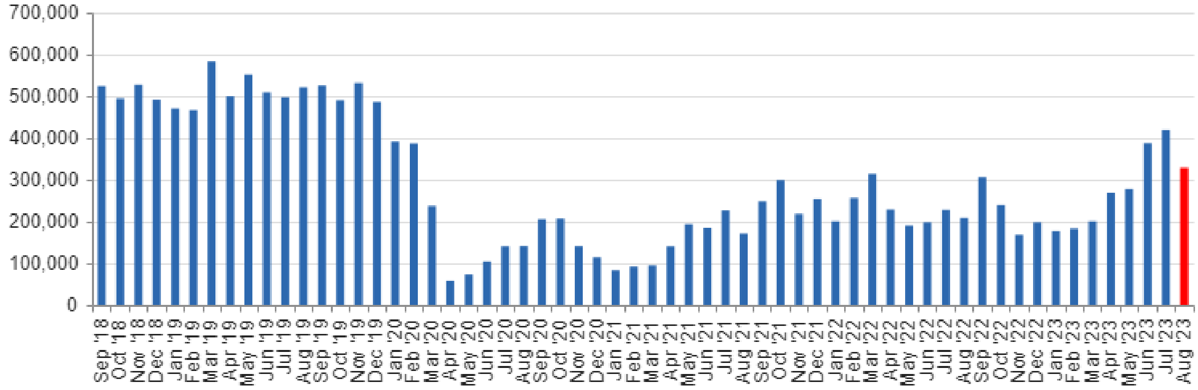
Covent Garden (Seven Dials)



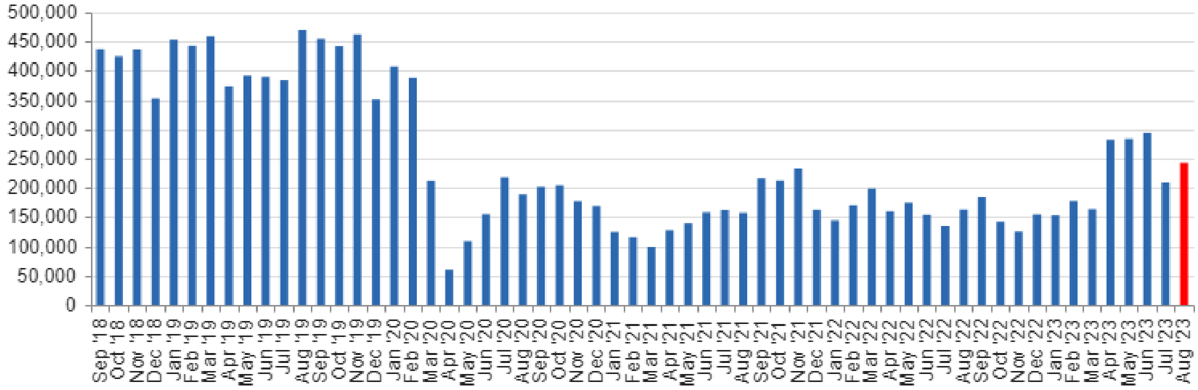
Denmark Street



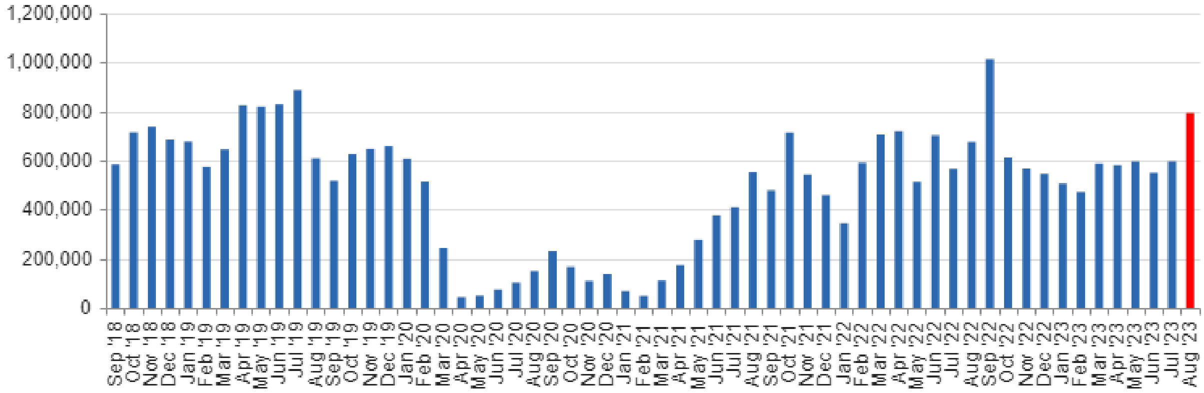
Fitzrovia



Hatton Garden

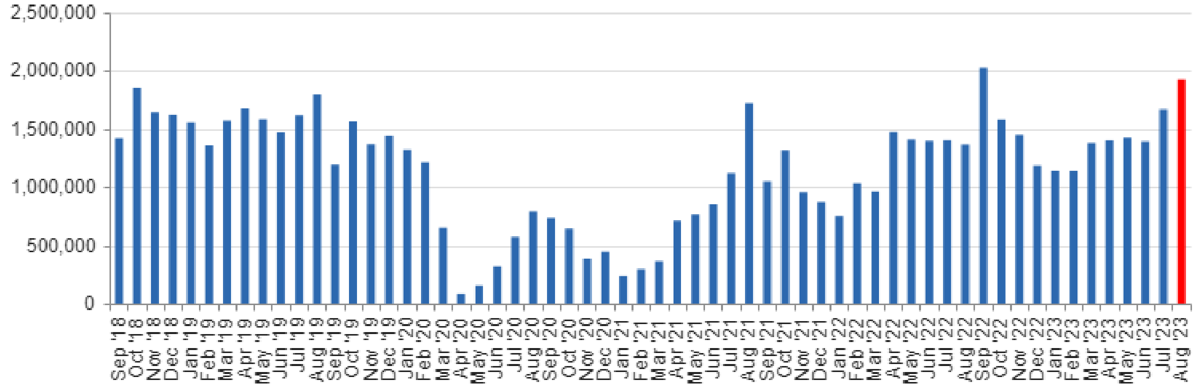


Museum Street

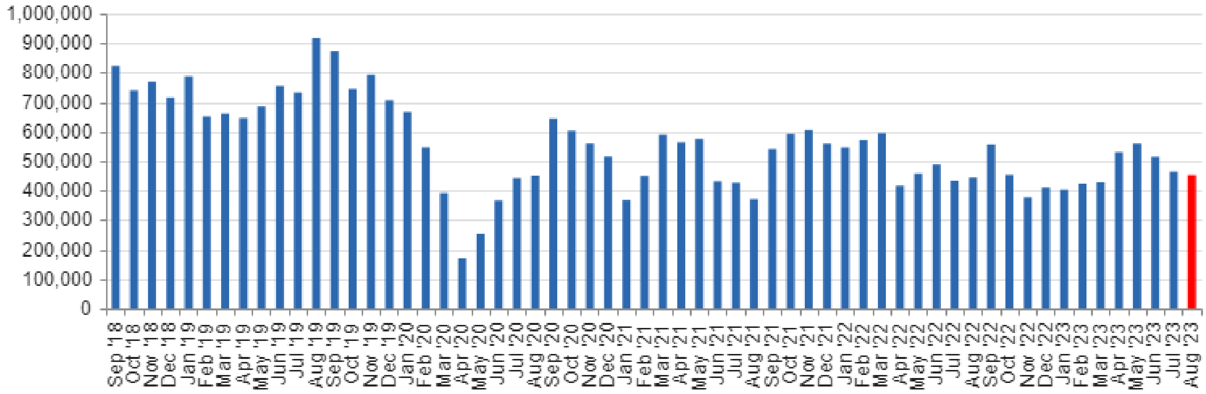


TOWN CENTRES

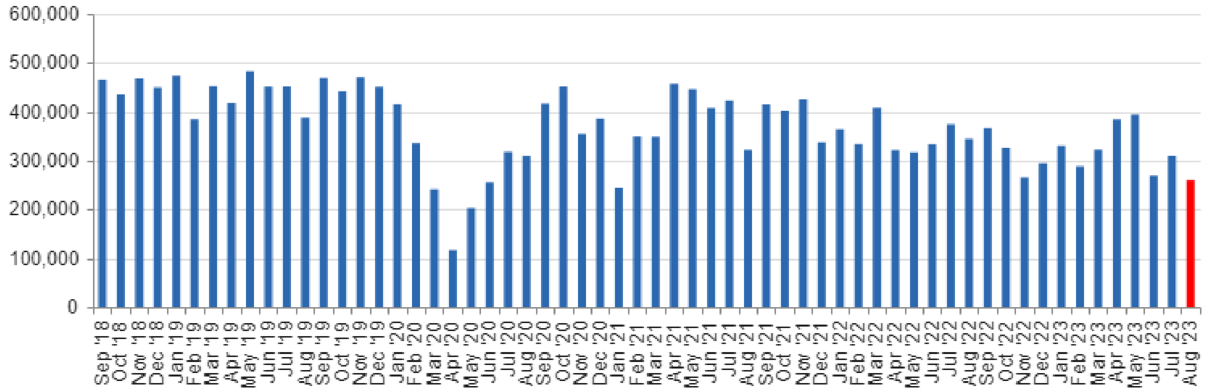
Camden Town



Finchley Road / Swiss Cottage



Hampstead



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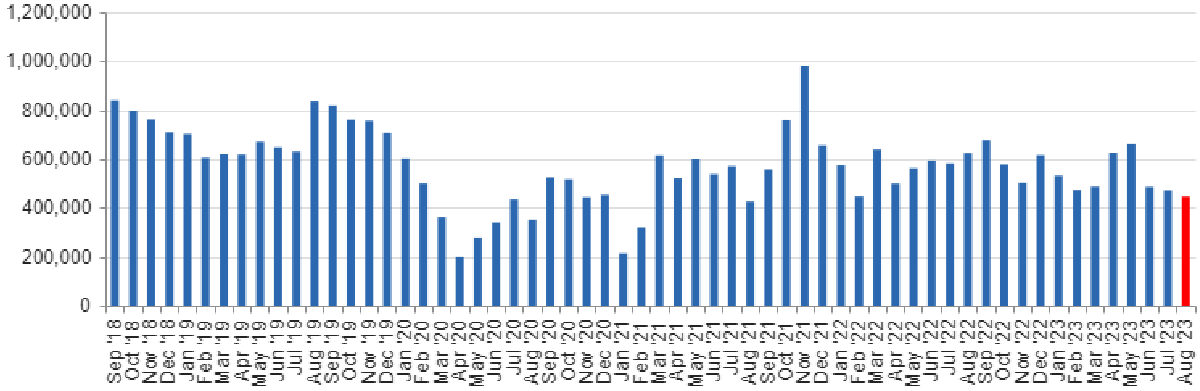
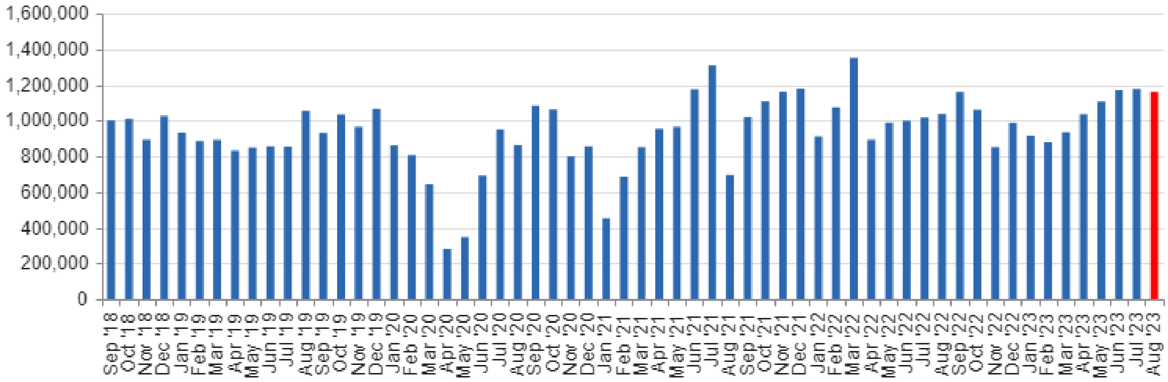
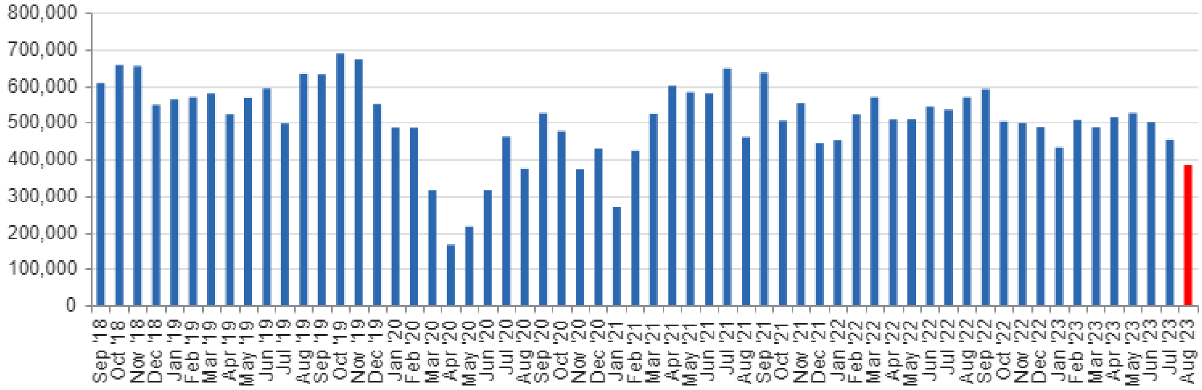
Kentish Town



Kilburn High Road

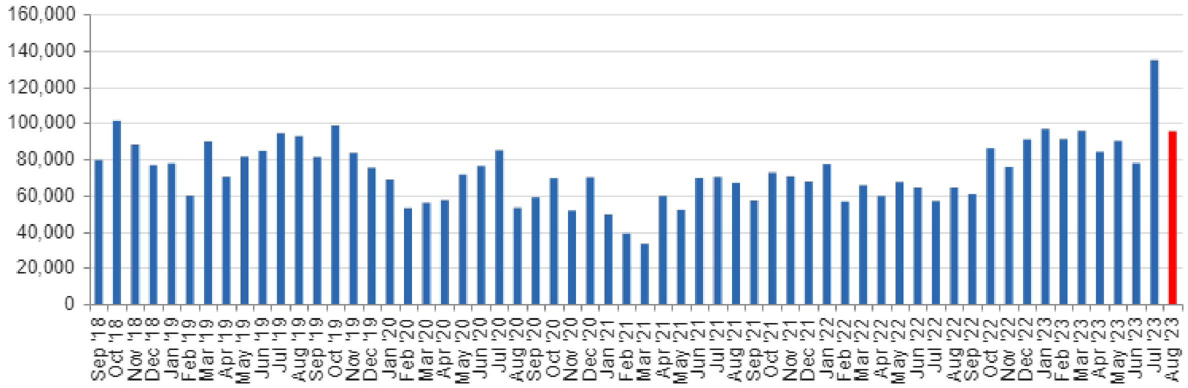


West Hampstead

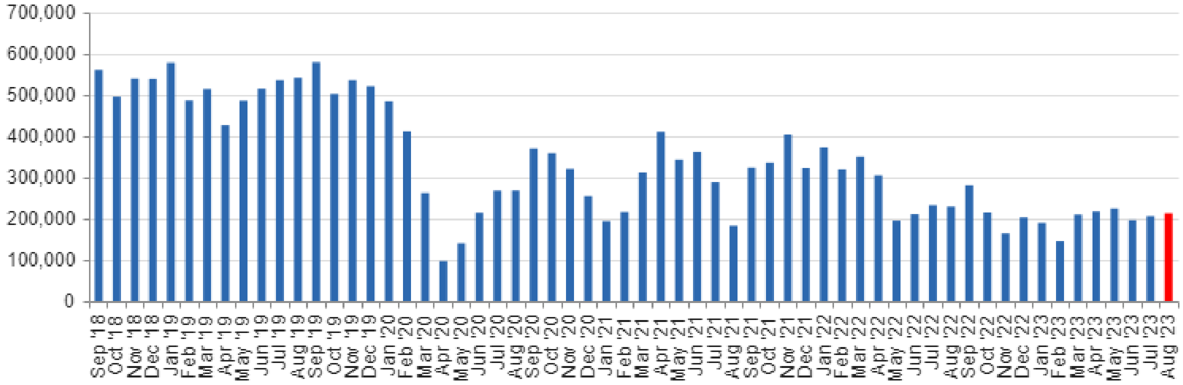


NEIGHBOURHOOD CENTRES

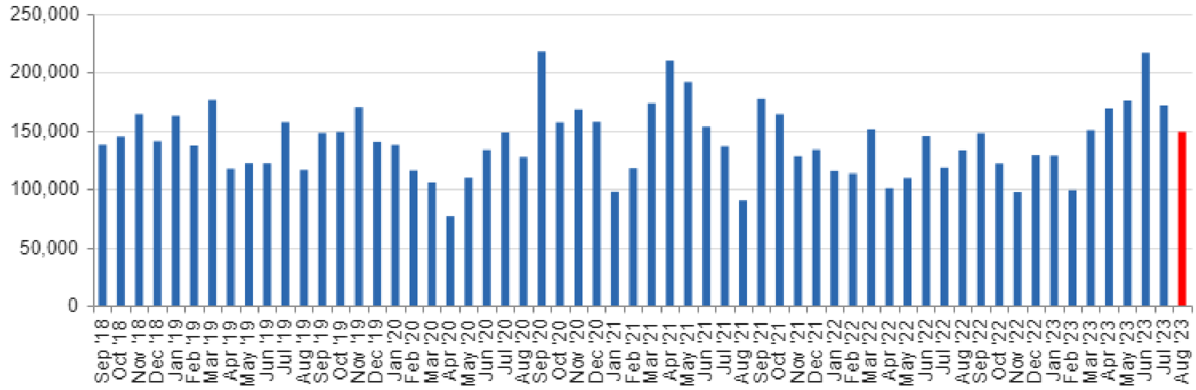
Albany Street



Belsize Park - Haverstock Hill



Belsize Village



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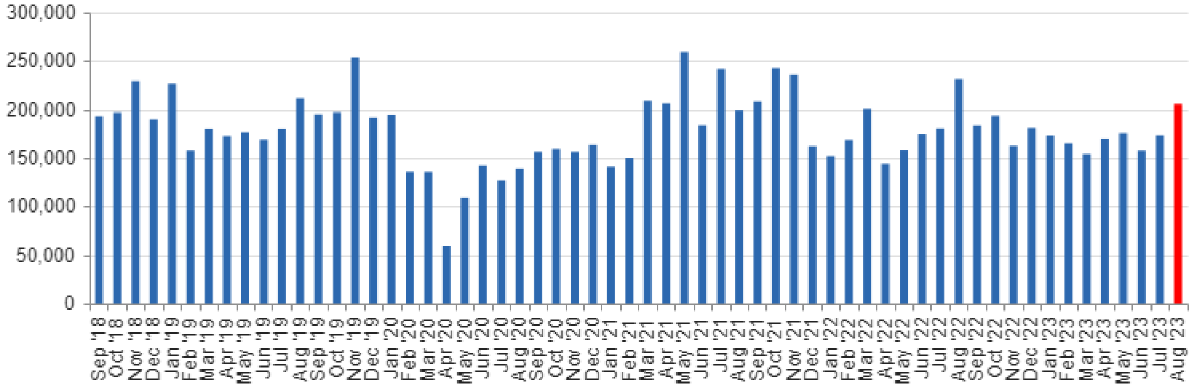
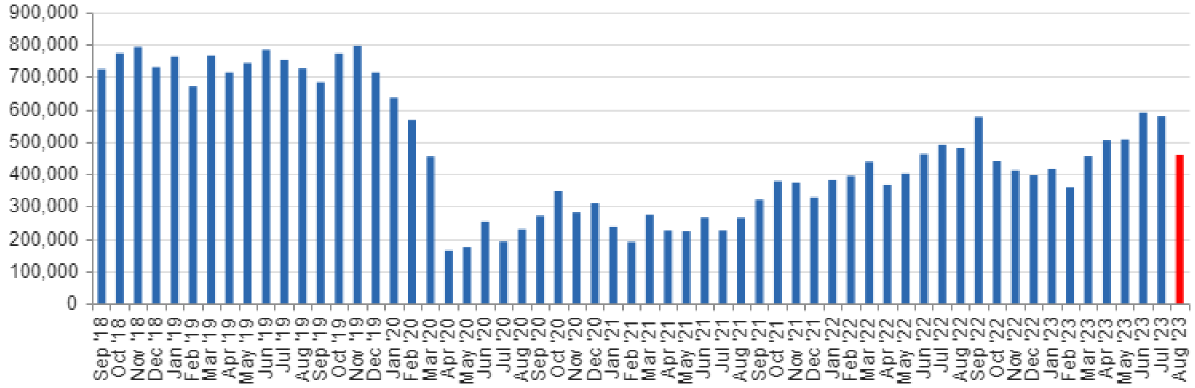
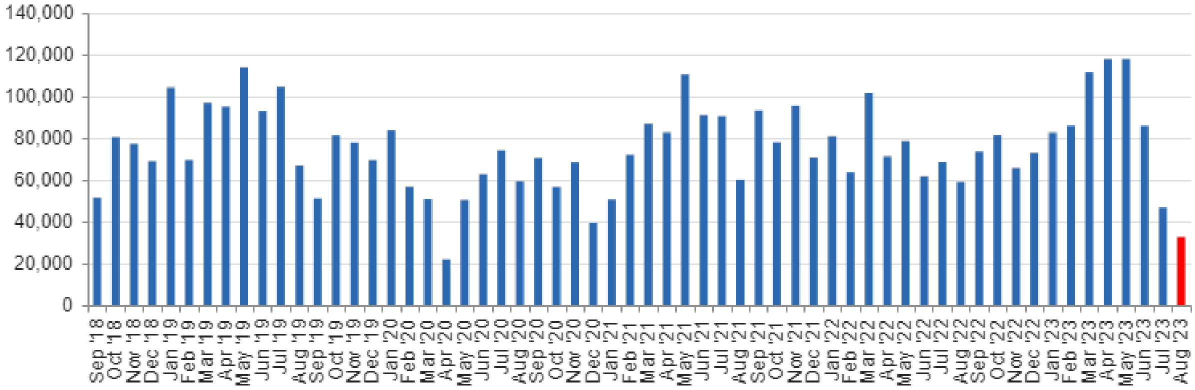
Brecknock Road



Brunswick Centre

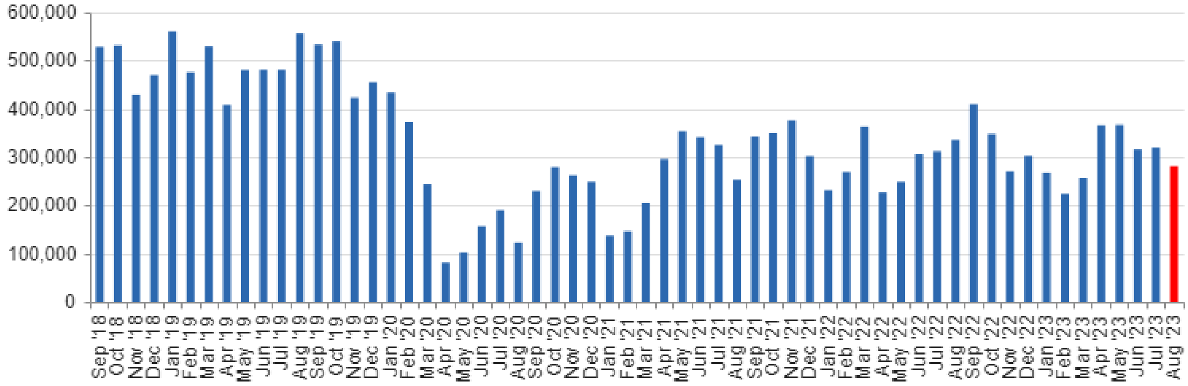


Chalcot Road

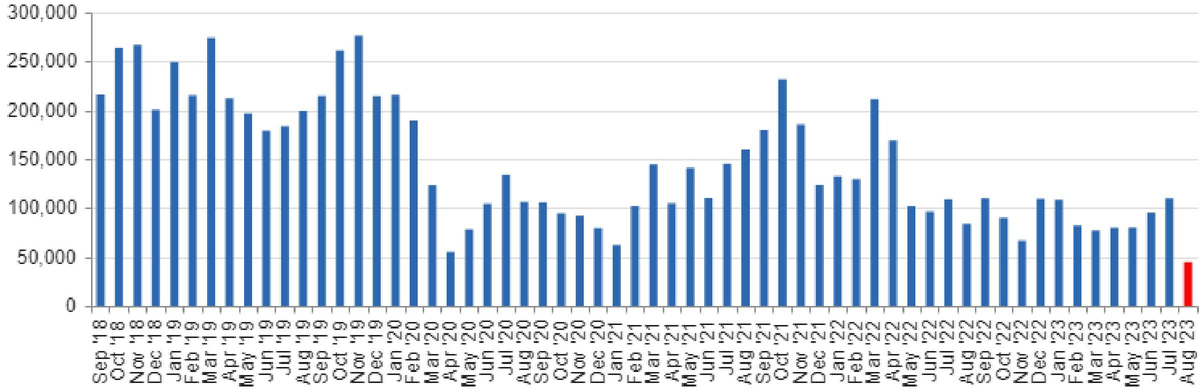


Lambert Smith Hampton

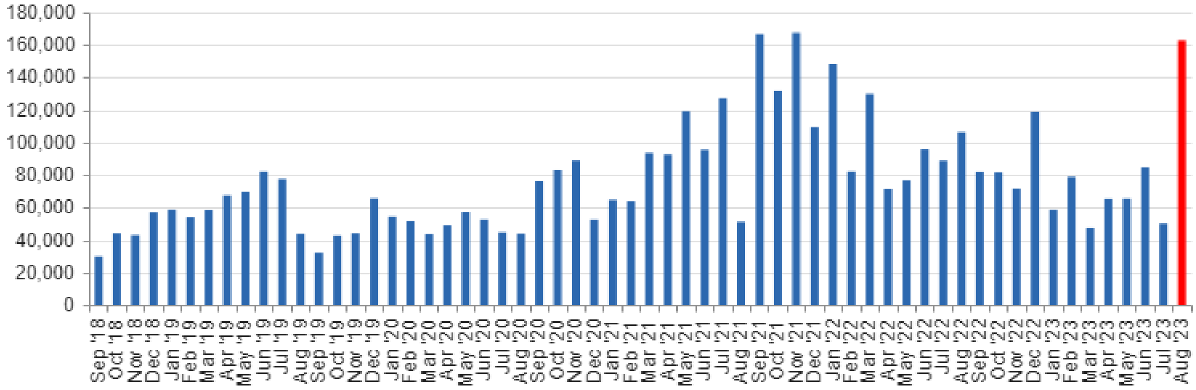
Chalk Farm



Chalton Street

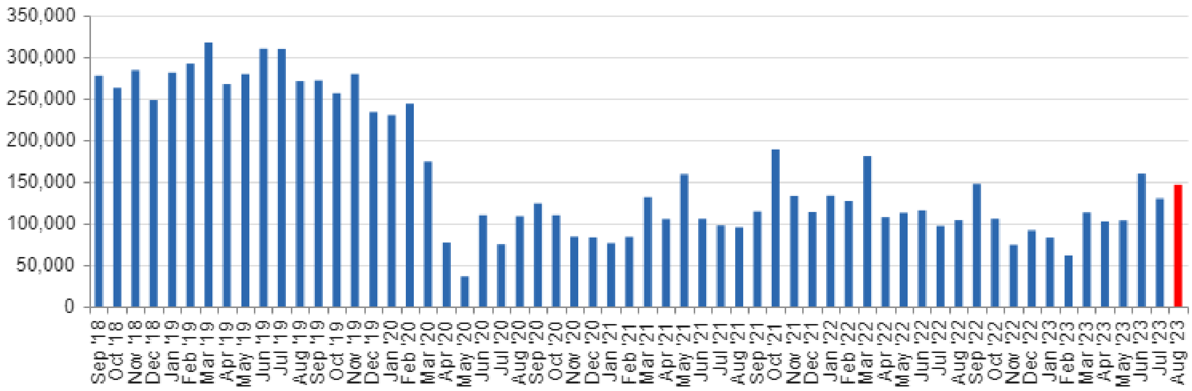


Chester Road

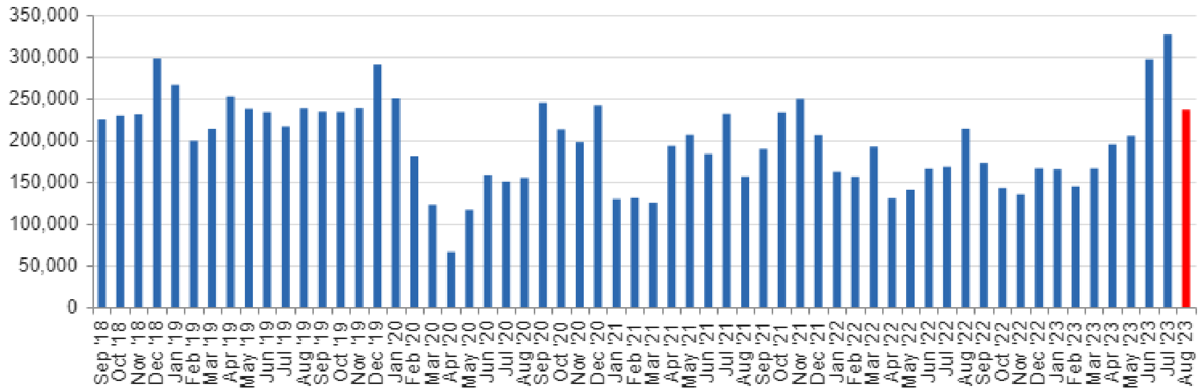


Lambert Smith Hampton

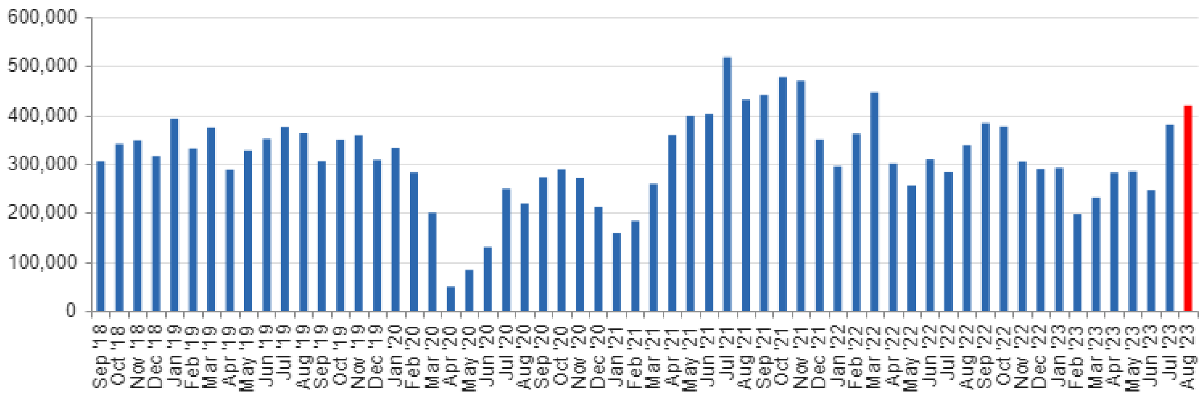
Cleveland Street



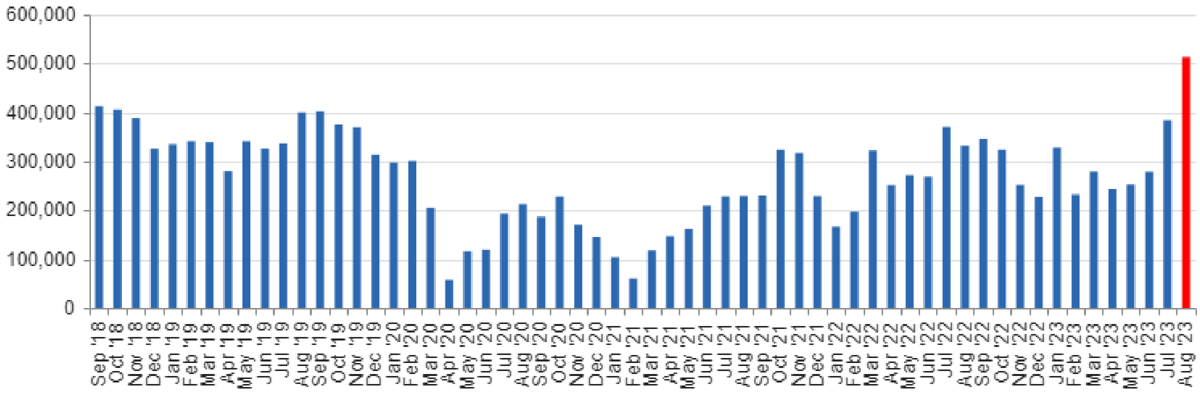
Cricklewood Broadway



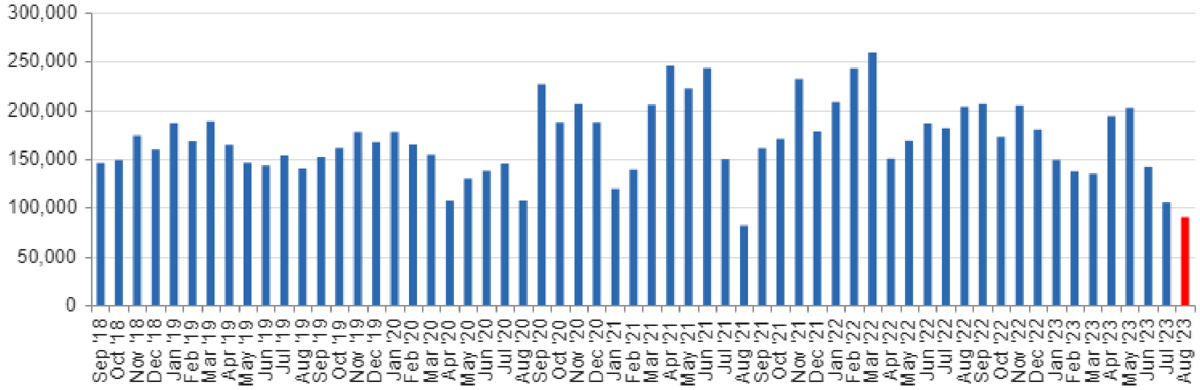
Crowndale Road



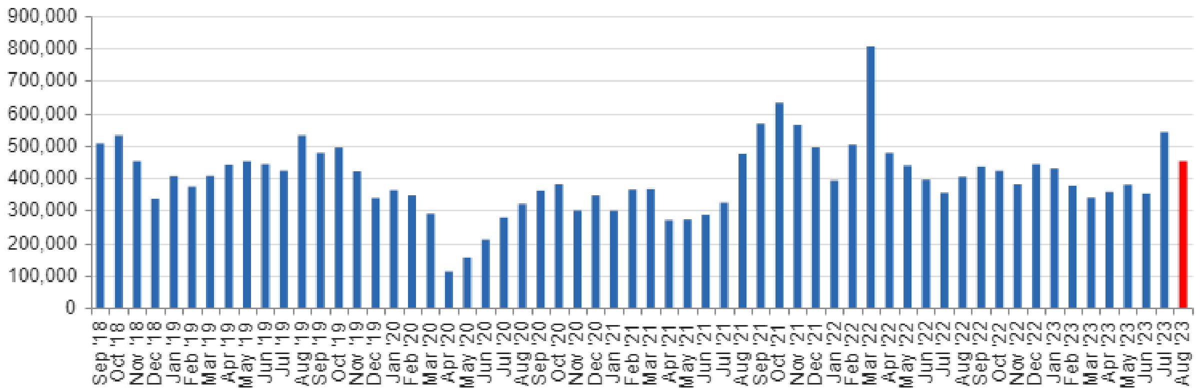
Drummond Street



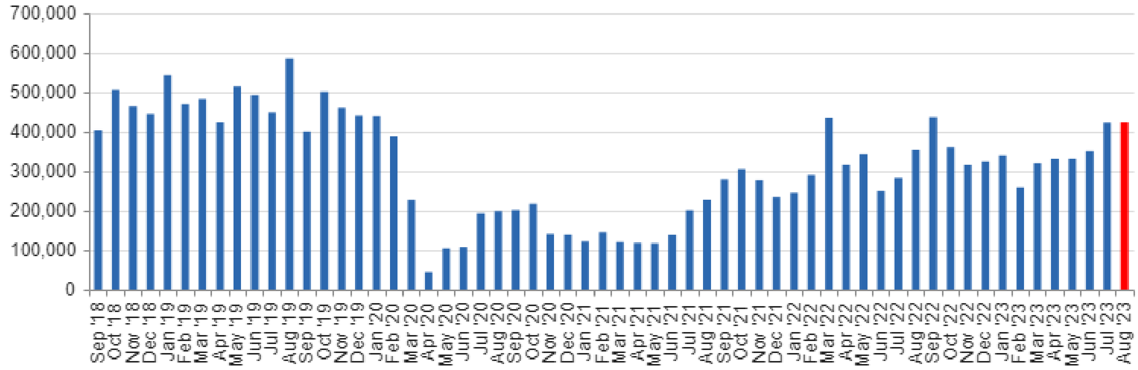
England's Lane



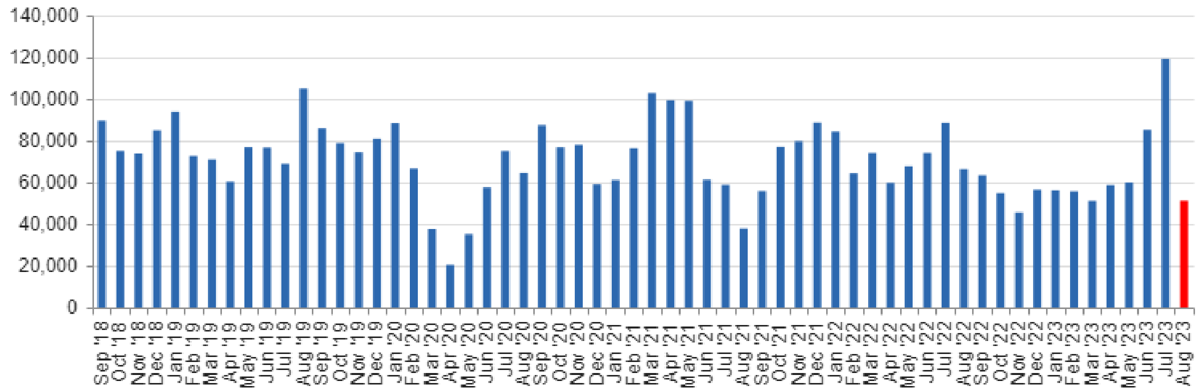
Eversholt Street North



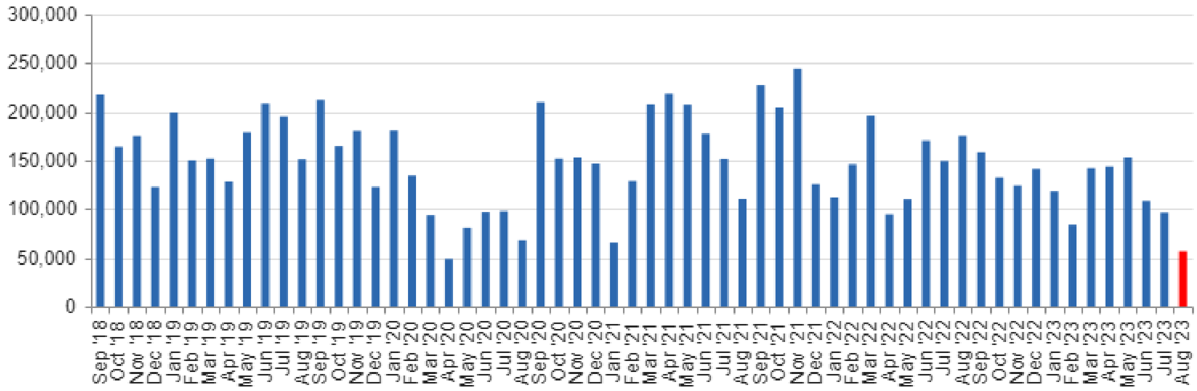
Eversholt Street South



Fairfax Road

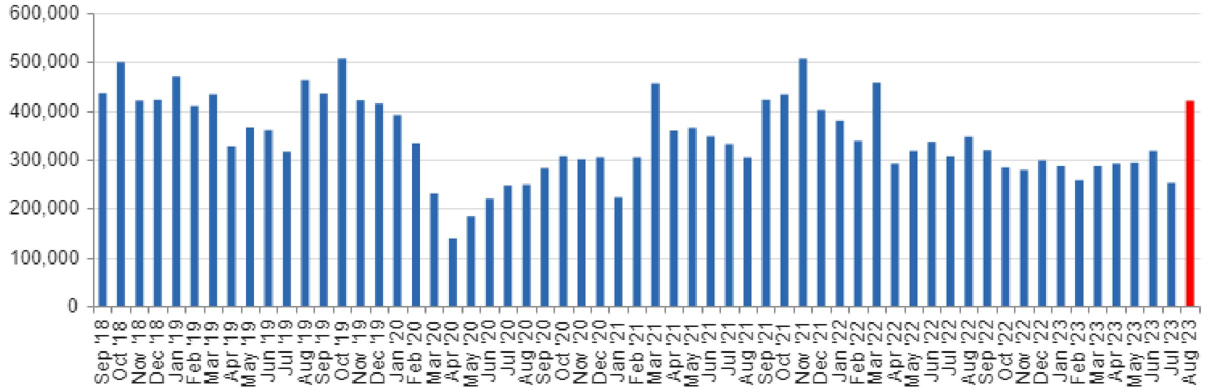


Finchley Road – West End Lane

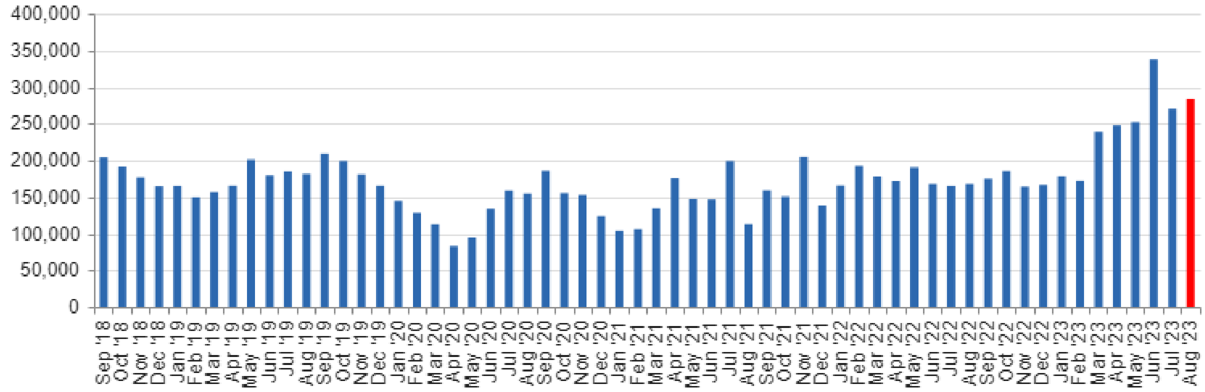


Lambert Smith Hampton

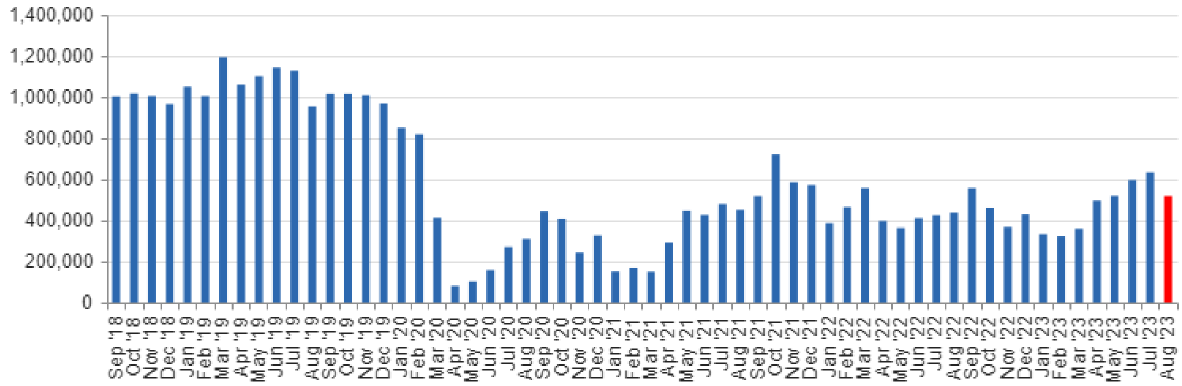
Fortress Road



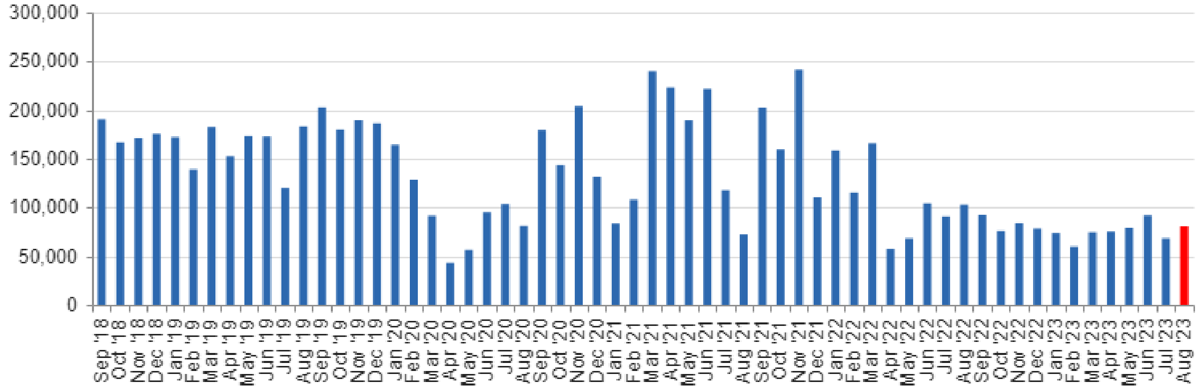
Fortune Green Road



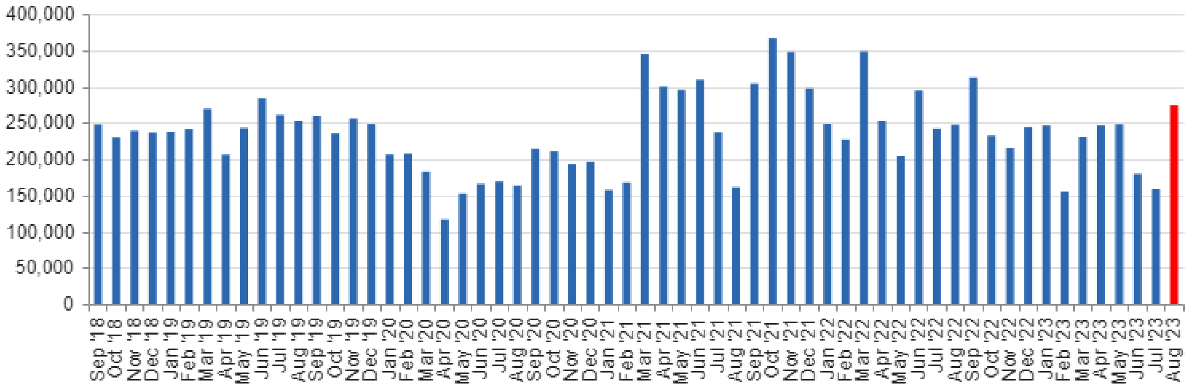
Goodge Street



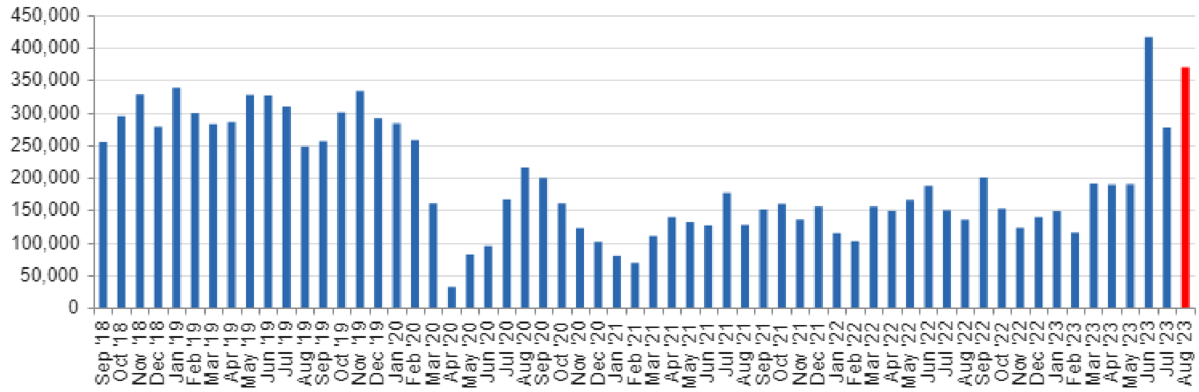
Highgate High Street



Highgate Road

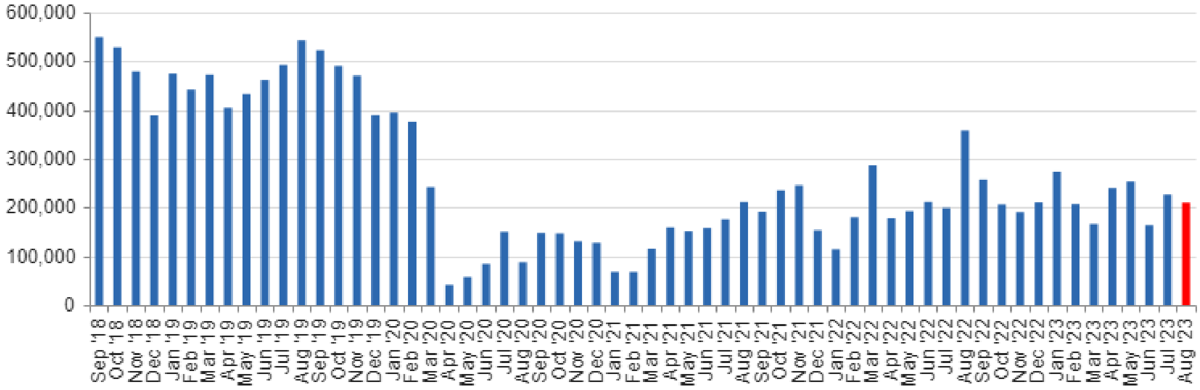


Lamb’s Conduit Street

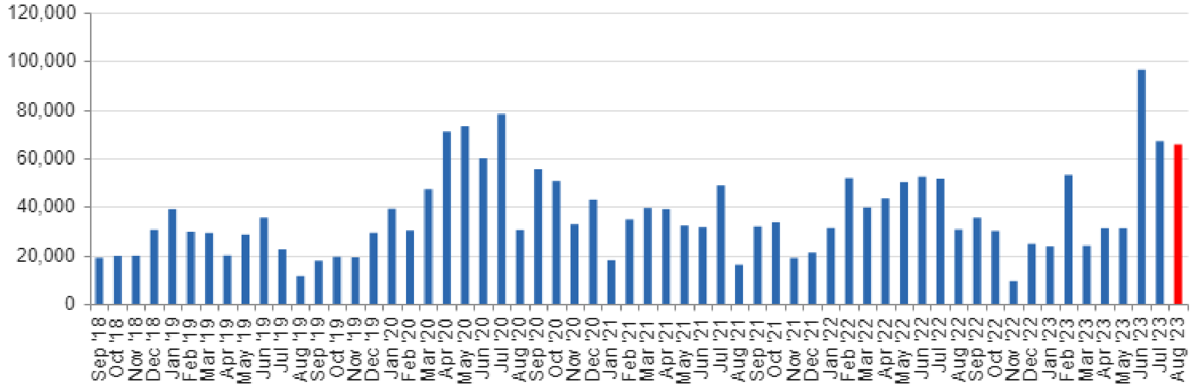


Lambert Smith Hampton

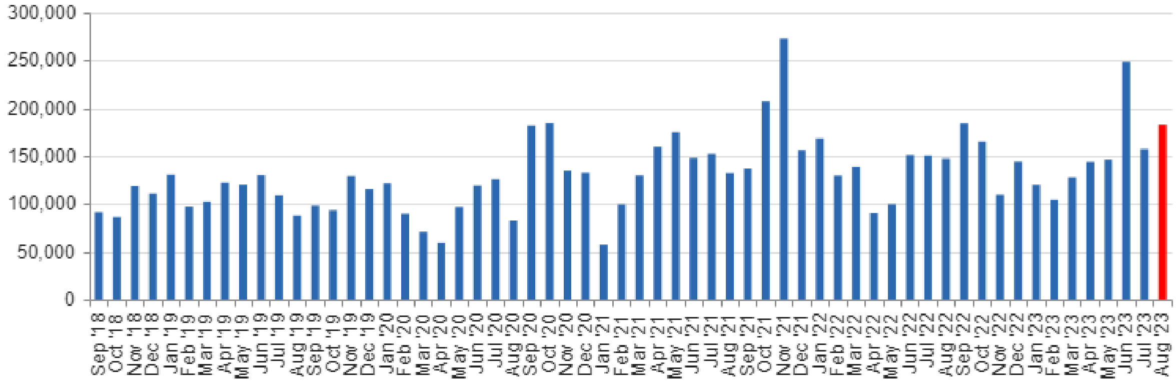
Leather Lane



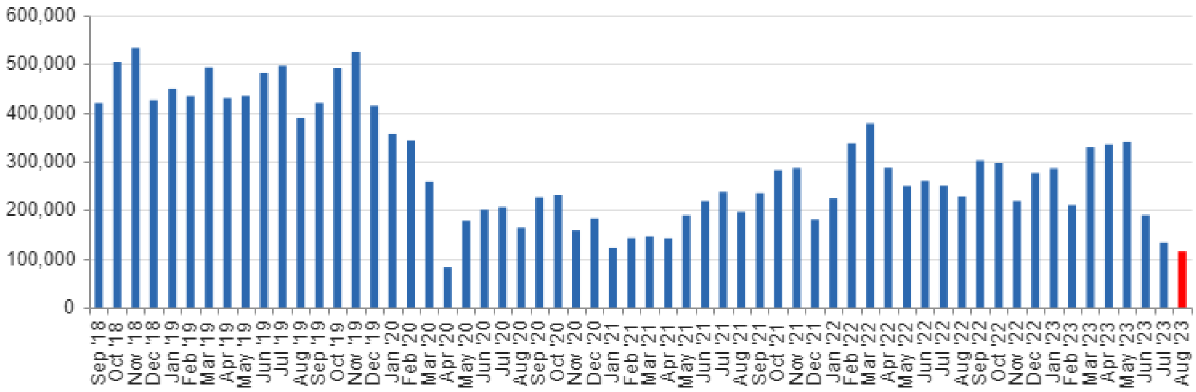
Lismore Circus



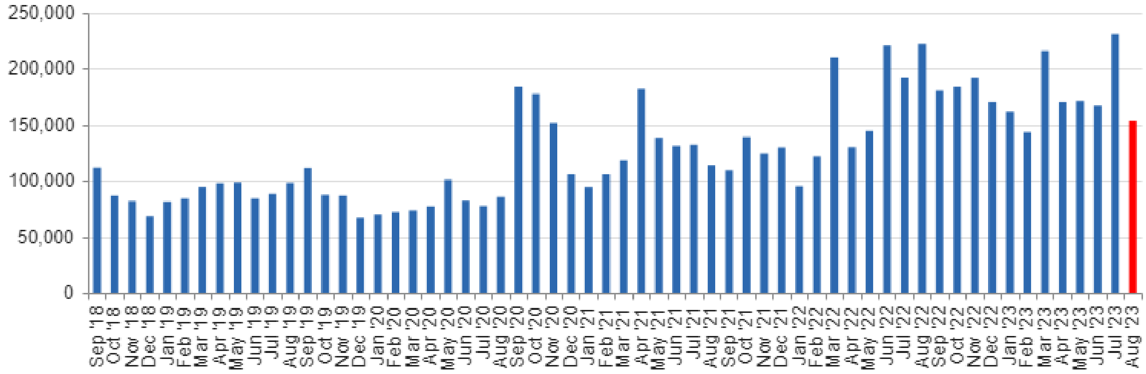
Mansfield Road



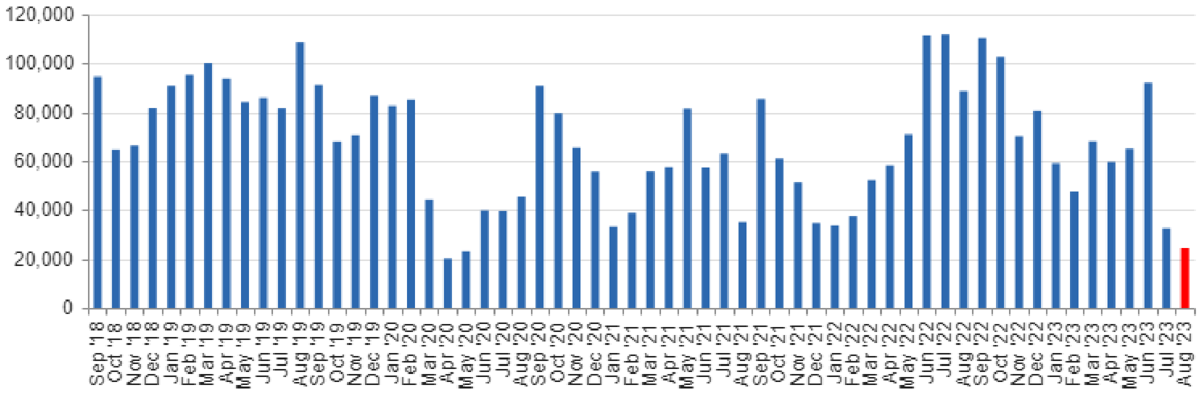
Marchmont Street



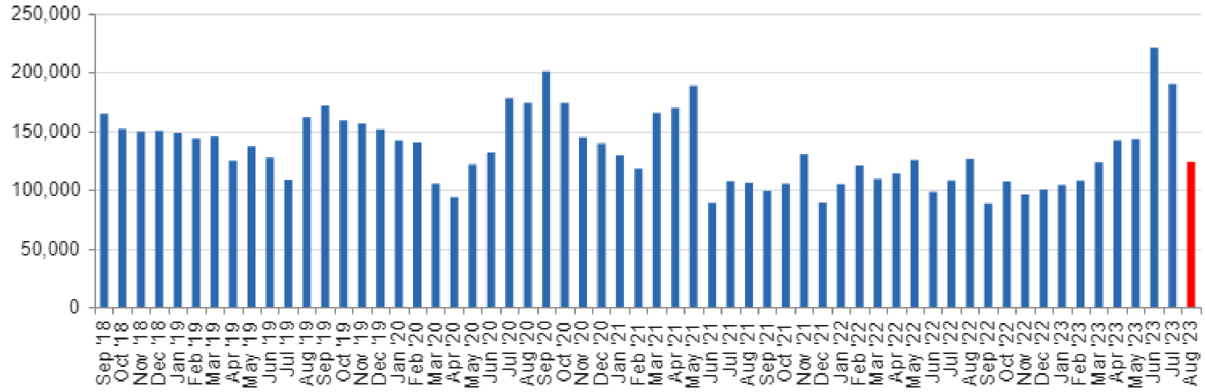
Mill Lane



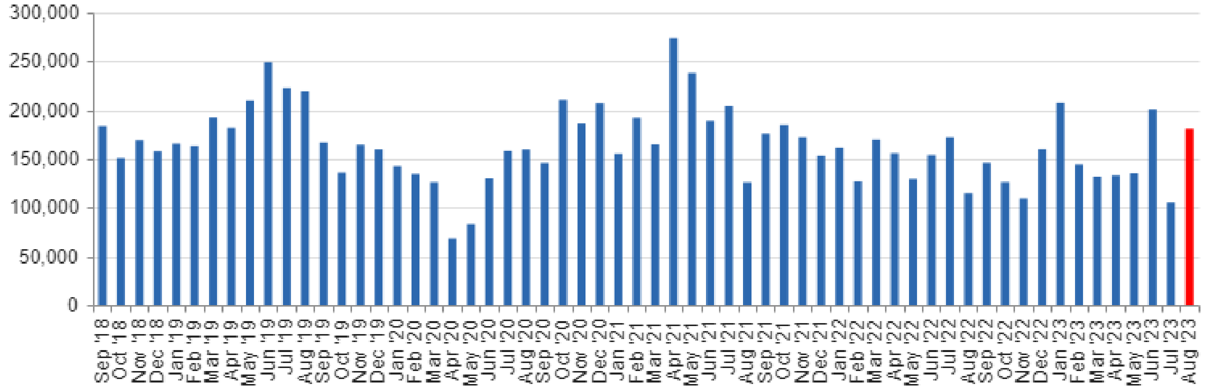
Murray Street



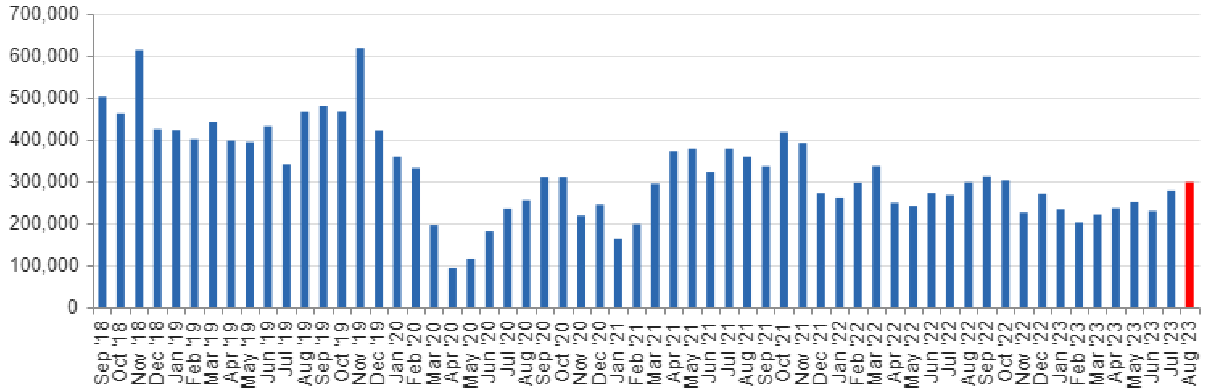
Queens Crescent



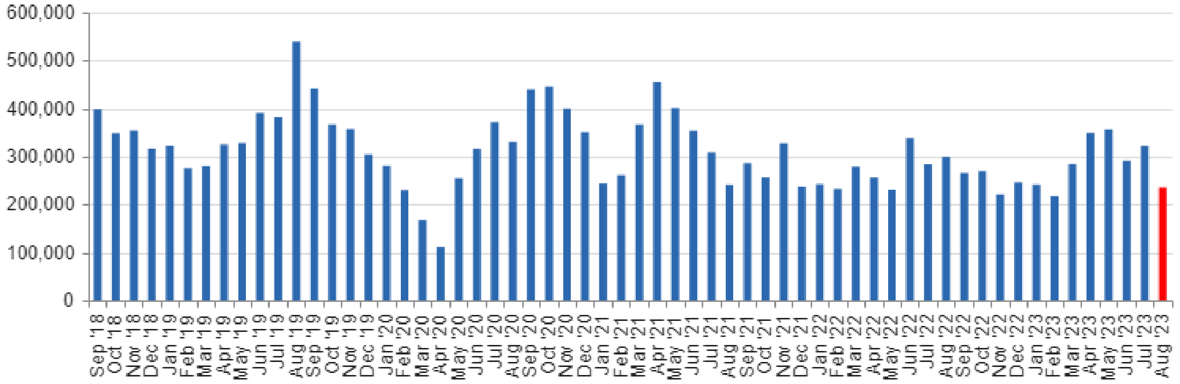
Regent’s Park Road



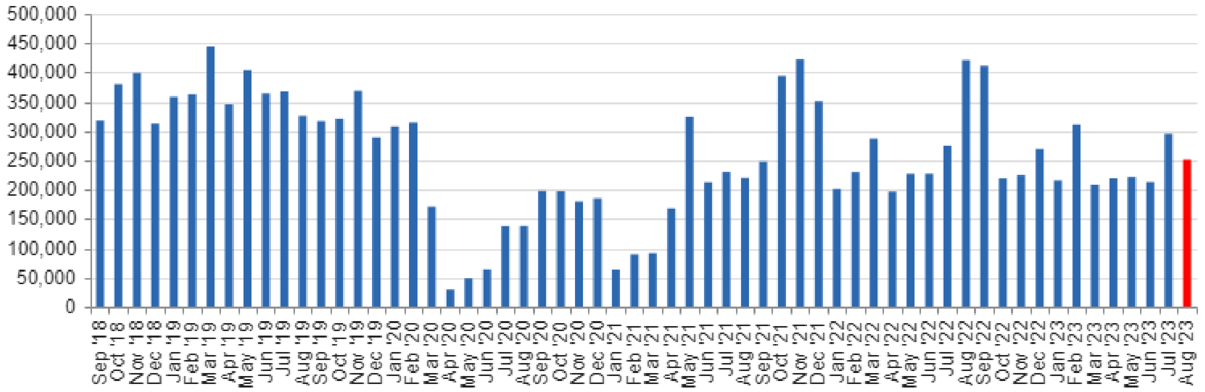
Royal College Street



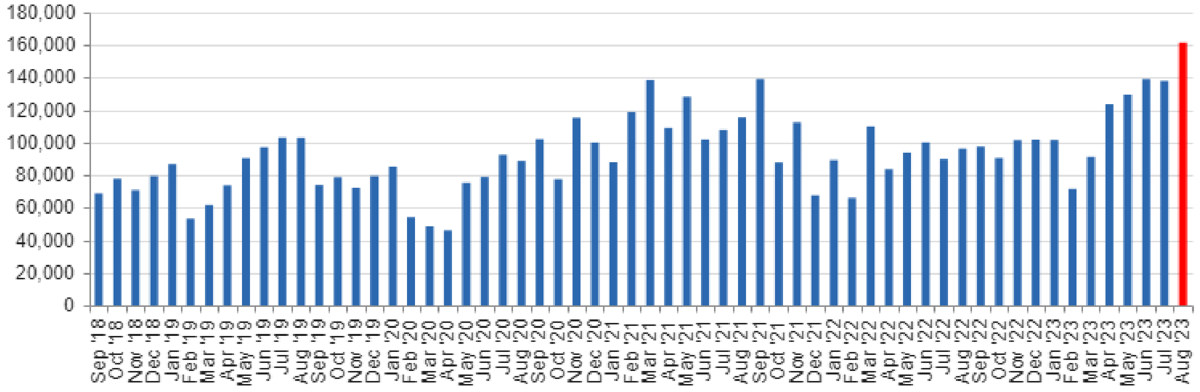
South End Green



Store Street



Swain's Lane



York Rise – Chetwynd Rise