

London Borough of Camden CAMDEN RETAIL STUDY



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Final Report
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1 INTRODUCTION

Background

- 1.1 In August 2003 the London Borough of Camden commissioned Roger Tym & Partners to carry out a retail study for the Borough to inform the review of the retail/town centre policies and strategies contained within the Camden UDP 2000. The study was published in November 2004. Following the adoption of a replacement UDP in June 2006, the Council has begun preparation of its Local Development Framework (LDF), with the Core Strategy the first priority.
- 1.2 Although much of the research in the November 2004 study remains valid, London Borough of Camden wishes to ensure that the evidence which informs the Core Strategy and other DPDs is robust and credible, in order to ensure their soundness¹. It has therefore commissioned Roger Tym & Partners to prepare a new retail study, drawing in part on the research undertaken for the 2004 study.

Study Aims and Approach

Study Aims

- 1.3 This study aims to update much of the work undertaken for the 2004 retail study, to provide part of the evidence base for the London Borough of Camden LDF. In particular it aims to:
- Provide an up to date summary of the planning policy context and research, particularly that published since the 2004 report;
 - Provide Borough-wide quantitative estimates of existing and future floorspace need for retail, based on the surveys of retail patterns undertaken for the 2004 and on up to date projections of expenditure, floorspace efficiency, e-tailing and pipeline retail development schemes;
 - Compare the quantitative projections with those prepared for the GLA, and seeks to provide a general explanation of any discrepancies, to assess whether this might suggest a need for a strategy which diverges from that set out in the London Plan;
 - Appraise the vitality and viability and function of the Borough's centres, including analysis of the appropriateness of the current retail hierarchy;
 - Consider of the implications of the quantitative analysis and healthchecks for each of the centres;
 - Consider the extent to which the situation has changed since the completion of the 2004 study, and consequently the extent to which the strategy for retail/town centres set out in the adopted UDP remains adequate, though it stops short of making specific recommendations.
- 1.4 Unlike the 2004 study, this report does not address the *impact* of development at King's Cross in detail, as planning permission for this scheme, which includes a substantial retail element, has now been secured. It is, however, included as a commitment in the retail modelling exercise.
- 1.5 The updated work is set out in this report, which replaces the 2004 report. It draws on the data and information which informed the 2004 study where it remains valid

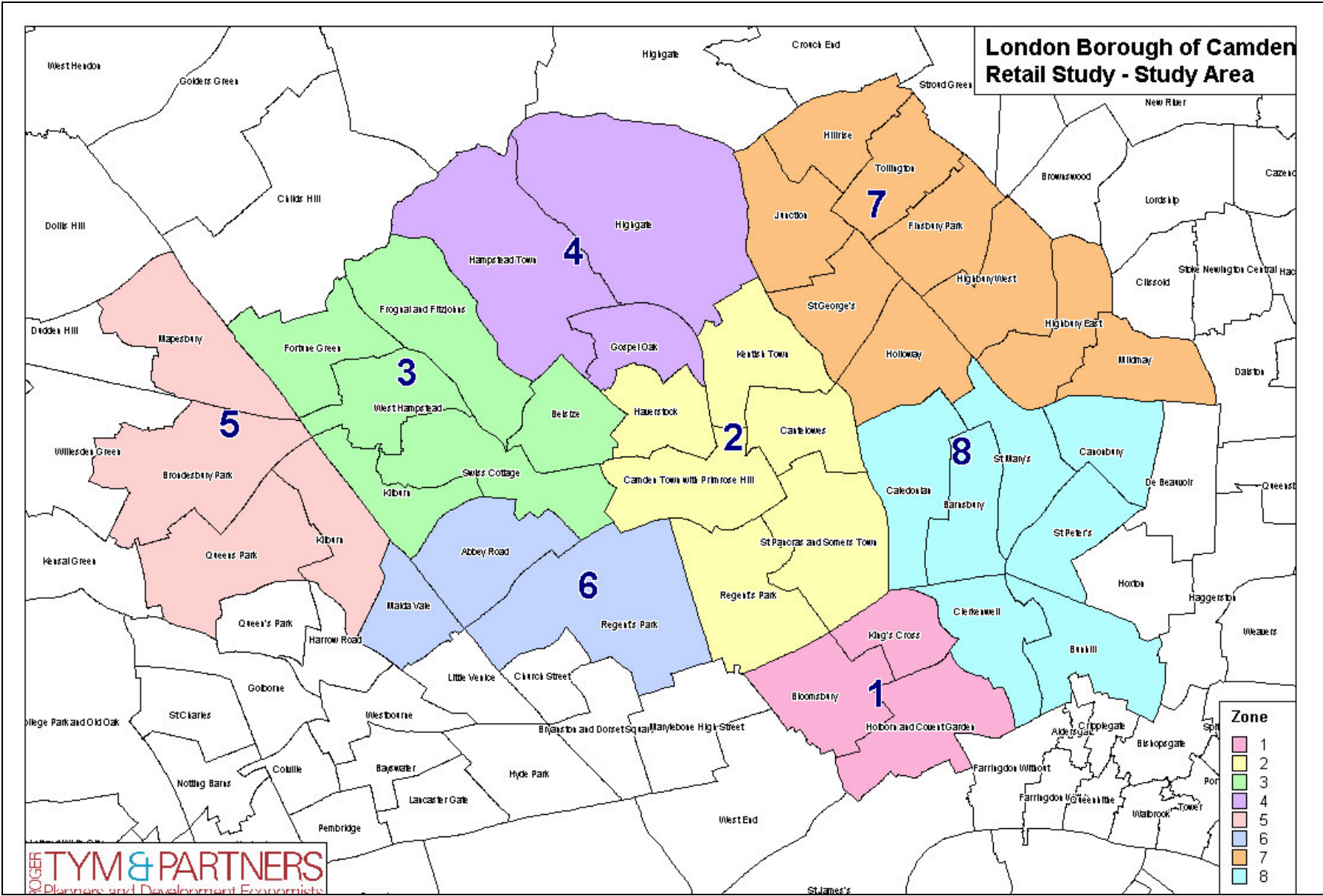
¹ 'Planning Policy Statement 12: Local Development Frameworks' makes clear that local development documents must be soundly based in terms of their content and the process by which they are produced, and that they should be based upon a robust, credible evidence base.

and up to date. Accordingly, some parts of the 2004 report are reproduced in this report.

Study Approach

- 1.6 Our first step is to review relevant planning policy and research, including that published since the 2004 report. Our review is set out at **section 2**. We then reproduce at **section 3** our assessment of shopping and leisure patterns in the London Borough of Camden and adjacent areas in 2004. Our starting point for this assessment was to define a Study Area. We did so by identifying the area from which we considered London Borough of Camden centres to draw the vast majority of their locally generated trade. Shopping patterns do not generally coincide with local authority boundaries and so it was necessary to cast the Study Area boundary beyond London Borough of Camden to fully understand the shopping flows to centres such as Kilburn on the western side of the borough and Camden Town to the east. The Study Area is therefore formed of all of London Borough of Camden and London Borough of Islington, plus a small number of wards in London Borough of Brent and the City of Westminster. The Study Area is illustrated at Figure 1.1.

Figure 1.1



- 1.7 A survey of a representative sample of households in the defined Study Area was then undertaken. The survey was telephone based and sampled 1,000 households across the Study Area in eight Study Area zones (125 in each). The survey asked a series of structured questions to determine where households undertake their shopping (separately for comparison and convenience goods²), their leisure activities (separately for A3³ and D2 type activity) and also asked questions relating to mode of travel, trip frequency and sought qualitative views on the existing provision (a full explanation of the method employed in the survey is set out in section 3).
- 1.8 The information provides market share data for the town centres in and outside of the Study Area, which is essential background for the need and impact assessment work streams that follow-on. The survey data identify which particular centres households in the Study Area are visiting for their shopping needs, and crucially where these centres are not within London Borough of Camden, provides useful insight of the reasons why households are being drawn to centres elsewhere.
- 1.9 In **section 4** of the report we reproduce the profile of visitors to centres in London Borough of Camden and London Borough of Islington centres from the 2004 report. This provides a picture of how each of the centres functions and the role they play for the resident population. This task was achieved through face-to-face surveys of visitors in a number of the centres in London Borough of Camden and London Borough of Islington centres. A full explanation of the method and the centres surveyed is set out in Section 4). Not all the LB Camden centres were surveyed and the principal criterion used to determine which were surveyed was anticipation of visitor draw from beyond the borough.
- 1.10 The key information drawn from the survey concerns the type of visitors present in the centres - that is the proportions of visitors that are local to the area, from elsewhere in London, the UK or from abroad, along with the reasons for their visit and the amount of expenditure made on comparison and convenience goods. This data is important in establishing how much turnover in the centres is drawn from beyond the Study Area. The survey also provides a qualitative review of facilities in each centre.
- 1.11 We then turn to assess the need for additional retail floorspace (separately for comparison and convenience goods) in the Study Area. We set out both the detailed methodology and our findings at **section 5**. In summary, the exercise involves a modelling exercise drawing on data from the two surveys referred to above, together with population growth data and expenditure data (both current and forecasts of growth).
- 1.12 The modelling exercise produces total expenditure forecasts incorporating growth to 2012, 2017 and 2022 and 2027 from which claims on the expenditure are deducted, and the residual expenditure totals are converted to a floorspace requirement across the Study Area. We also compare our findings to recent research for the Mayor of London on comparison and convenience goods floorspace need in the capital.

² Convenience goods are: food and non-alcoholic beverages; alcoholic drink (off-licence sales); tobacco; non-durable household goods; and newspapers and magazines. Comparison goods are: books; clothing and footwear; furniture, floor coverings and household textiles; audio-visual equipment and other durable goods; hardware and DIY supplies; chemists' goods; jewellery, watches and clocks; bicycles; and recreational and other miscellaneous goods. These definitions are based on the classification of individual consumption by purpose (COICOP) categories cited in MapInfo Information Brief 06/2.

³ Since the household survey was undertaken the Town and Country Planning (Use Classes) (Amendment) (England) Order 2005 has introduced additional classes so that the former A3 use (food and drink) defined in the Town and Country Planning (Use Classes) Order 1987 is now split into three, A3 (restaurants and cafes), A4 (drinking establishments) and A5 (hot food take away).

- 1.13 In **section 6** we review the town centres in London Borough of Camden (and two Islington centres) to assess how each functions and the role it performs. These 'healthchecks' are undertaken through the assessment of key performance indicators (KPIs) of town centre vitality and viability. The assessment therefore involves gathering primary and secondary information from a wide range of sources to inform assessment of the KPIs. No one KPI will demonstrate on its own how a town centre is performing, but taken together the ten indicators will provide a sound barometer of performance and point to each centre's general outlook. The healthcheck review therefore provides the context for establishing where any identified need for future floorspace growth should be located within the Borough's centres.
- 1.14 The report concludes at section 7 by considering of the implications of the quantitative analysis and healthchecks for each of the centres, before examining the extent to which the situation has changed since the completion of the 2004 study, and consequently the extent to which the strategy for retail/town centres set out in the adopted UDP remains adequate.

2 POLICY CONTEXT AND RECENT RESEARCH

Policy Context

National Planning Policy and Guidance

- 2.1 At the time of the original report, PPG6 provided guidance on retail and town centres. It has now been superseded by PPS6 which, together with PPS1 and PPG13, establishes fourteen fundamental principles for retail and town centres, as follows:
- i) the Government's primary objective is to promote, sustain and enhance the vitality and viability of existing town, district and local centres as part of a package of initiatives to promote sustainable development;
 - ii) the need 'to focus development, especially retail development, in locations where the proximity of businesses facilitates competition from which all consumers are able to benefit and maximises the opportunity to use means of transport other than the car';
 - iii) the objective of 'concentrating development for uses which generate a large number of trips in places well served by public transport, especially town centres, rather than in out-of-centre locations';
 - iv) the need 'to maintain an efficient, competitive and innovative retail sector';
 - v) the need 'to ensure the availability of a wide range of shops, employment, services and facilities to which people have easy access by a choice of means of transport';
 - vi) the need for plans to establish a hierarchy of centres and a strategy for the location of employment, shopping, leisure, hospital, education and other uses which generate many trips so as to identify the preferred locations for major retail and leisure investment in particular and ensure that all significant generators of travel are well served by public transport;
 - vii) the need to adopt a plan-led approach to the promotion of all types of new development which generate many trips so as to ensure that they are well served by public transport;
 - viii) the need to adopt a sequential approach to selecting sites for new retail and leisure development and other town centre uses - in areas where there is a need and capacity for such development - which is an approach which requires flexibility on the part of local planning authorities, developers and retailers;
 - ix) the need to incorporate the principle of 'disaggregation' in applying the sequential approach, so that large retail and leisure development proposals are broken down into their constituent parts in seeking to fit them into existing town, district and local centres;
 - x) the need to reduce overall travel and the demand for car travel in particular;
 - xi) the need to resist applications for retail development on land designated for other uses in an approved development plan;
 - xii) the twin requirements that 'new retail developments should support the Government's objectives for sustaining and enhancing existing centres and should be in accord with the strategy for retail development set out in the development plan';
 - xiii) the need to promote mixed-use developments, especially within town centres, and maximise the use of previously developed brownfield land; and

xiv) the need to improve access to leisure, retail and other services - particularly in local centres - for residents of deprived areas as part of the drive to promote social inclusion.

- 2.2 These represent a rigorous set of principles which confirm the preference for town centre locations for all types of new development which generate many trips. Edge-of-centre and out-of-centre retail and leisure developments represent, respectively, the less favoured and last resort options; such retail and leisure developments can only be justified by exceptional circumstances where they pass each of the six key national policy tests, as follows:
- the 'need' test;
 - the sequential approach;
 - the likely impact on the development plan's strategy;
 - the likely impact on the vitality and viability of existing centres;
 - accessibility by a choice of means of transport, including the by foot and bicycle modes; and
 - the likely effect on travel and car use.
- 2.3 However, the White Paper 'Planning for a Sustainable Future', published in May 2007, indicates that the Government intends to review the current approach in PPS6, and that it will replace the need and impact tests with a new test. This new test, it indicates, will focus on the 'town centre first' approach, but will avoid the 'unintended effects' of the needs test which restrict competition and limit consumer choice. Draft proposals were published in Summer 2008.
- 2.4 PPS6 indicates that guidance on assessing need and impact of new retail and leisure development, applying the sequential approach, and strategies for smaller centres will be published separately. These documents have not yet been published in draft or final form, and we suspect their publication will be further delayed pending the publication of a new or revised PPS6.
- 2.5 With regard to town centre health, PPS6 sets out the key indicators which local authorities should collect information on in order to measure the vitality and viability of their centres. These are as follows:
- Diversity of uses
 - Amount of floorspace in edge-of-centre and out-of-centre locations
 - Potential capacity
 - Retailer representation
 - Shopping rents
 - Proportion of vacant property
 - Commercial yields
 - Pedestrian flows
 - Accessibility
 - Customer and residents views
 - Crime and safety
 - Environmental quality

The London Plan

Background

- 2.6 A new version of the London Plan was published in February 2008. It reflects all changes made to the Plan since 2004 and forms the Spatial Development Strategy for Greater London. It places London Borough of Camden in 'North London', one of five sub-regions. The borough was previously located in the Central London Sub-Region, which has now been split between new sub-regions, though to counter this the Plan places a far greater emphasis on the Central Activities Zone, which lies at the intersection of a number of boroughs and sub-regions, including Camden.
- 2.7 In terms of overall retail/town centre policy, **Policy 2A.8** of the Plan commits the Mayor, and requires boroughs, to using the network of town centres shown on Map 3D.1 as the basis for policy development and delivery within them. Within the London Borough of Camden, Map 3D.1 identifies Camden Town and Kilburn⁴ as 'Major Centres', together with four district centres. These district centres are identified in Annex 1, Table A1.1 of the Plan as Swiss Cottage/Finchley Road, Kentish Town, Hampstead and West Hampstead. The same table further notes that Camden Town and Swiss Cottage/Finchley Road, Kentish Town and Hampstead include clusters of night time activities of more than local importance.
- 2.8 The map also shows that the Central Activities Zone covers the southern part of the borough, but Policy 2A.8 makes clear that although the CAZ is of key economic importance, the Mayor will work with sub-regional partnerships and other agencies to implement a polycentric strategy for London's development. It further notes that this will be achieved by:
- sustaining and enhancing the vitality and viability of town centres including community and civic activities and facilities;
 - accommodating economic and housing growth through intensification and selective expansion;
 - reducing delivery, servicing and road user conflict;
 - meeting the needs of Londoners and improving the sustainability of London's development;
 - taking account of the relationship with town centres in adjoining sub-regions and in the regions adjoining London, to provide strategic direction for the development of the network of centres.
- 2.9 Policy 2A.8 goes on to emphasise importance of a competitive retail sector, highlighting the need to engage with developers and operators to find sites which fulfil the requirements of the sequential test. It further notes that DPD policies should:
- identify future levels of retail and other needs in light of integrated local and strategic assessments and enable the supply of capacity to meet these;
 - develop and enhance the network of International, Metropolitan, Major, District and specialist centres as shown on Map 3D.1 and Annex 1;
 - identify more local and neighbourhood centres and those with distinct roles in meeting special needs;
 - seek close partnership working with retailers and other stakeholders to identify developments that will support delivery of this plan's objectives, focusing it where practicable on town centres and where this is not practicable on the edge of town centres.

⁴ In fact, Kilburn straddles the boundary of London Borough of Brent and London Borough of Camden, and this is recognised at Table A1.1 of the London Plan.

2.10 **Policy 3D.1** of the London Plan deals specifically with town centres, and notes that the Mayor will and boroughs should “enhance access to goods and services and strengthen the wider role of town centres, including DPD policies”, to:

- encourage retail, leisure and other related uses in town centres and discourage them outside the town centres;
- encourage forms of development, operational practice and consumer behaviour which will help to reduce carbon dioxide emissions;
- improve access to and within town centres by public transport, cycling and walking;
- enhance the competitiveness and quality of retail and other consumer services in town centres;
- support a wide role for town centres as locations for leisure and cultural activities, as well as business and housing and their key role in developing a sense of place and identity for sustainable local communities;
- require the location of appropriate health, education and other public and community services in town centres;
- designate core areas primarily for shopping uses and secondary areas for shopping and other uses and set out policies for the appropriate management of both types of area;
- encourage net additions to town centre capacity where appropriate to their role in the overall network;
- undertake regular town centre health checks and integrated strategic and local consumer need and capacity assessments;
- support and encourage town centre management, partnerships and strategies including the introduction of Business Improvement Districts in appropriate locations and appropriate provisions to support the safety and security of town centres.

2.11 **Policy 3D.2** deals with town centre development and notes that DPD policies should:

- assess the need and capacity for additional retail, leisure, commercial and other town centre development and reconcile these by making appropriate provision following the sequential approach;
- relate the scale of retail, commercial and leisure development to the size and role of a centre and its catchment and encourage appropriate development on sites in town centres in the network, or where sites are not available on the edge of centres;
- encourage additional comparison goods capacity in larger town centres and convenience goods capacity in smaller centres of appropriate scale, especially District centres, to secure a sustainable pattern of retail provision;
- treat proposals for out of centre development or for intensification or expansion of existing out of centre retail facilities in line with Policy 2A.8;
- manage existing out or edge of centre retail and other service provision in line with the sequential approach, seeking to reduce car dependency and traffic generation and to improve public transport access to promote more sustainable forms of development.

2.12 A number of other policies are also relevant. First, **Policy 2A.4** deals with the Central Activities Zone, which as we note above extends into the southern part of the London Borough of Camden. Map 5G.1 in the Plan provides an indicative boundary for the CAZ, although it makes clear that the detailed boundary should be defined in DPDs.

- 2.13 Map 5G.1 also identifies key features and characteristics of the CAZ for particular areas:
- The area of the borough lying south of New Oxford Street and west of Kingsway is characterised by a mix of uses with strong arts, cultural or entertainment character;
 - That part of Charing Cross Road running along the boundary of the borough is a CAZ frontage;
 - Much of Kingsway falling within the borough is a CAZ frontage, together with parts of High Holborn, the eastern end of New Oxford Street and small sections of Euston Road;
 - Much of the area east of Kingsway and south of High Holborn, together with the area around the southern part of Grays Inn Road is characterised by a mix of uses with a strong legal character;
 - Tottenham Court Road is a CAZ frontage and part of the West End Special Retail Policy Area;
 - The area east of Tottenham Court Road is characterised by a mix of uses with a strong academic character;
 - The Tottenham Court Road/Eastern Oxford Street area, Euston station area and King's Cross rail lands are Areas of Opportunity.
- 2.14 The basis for the identification of CAZ frontages is not explained in the Plan, though paragraph 5.180 notes that projected comparison goods expenditure in the CAZ should be accommodated in Knightsbridge (20%) and the West End (62%), with the remainder elsewhere in the CAZ, with the most appropriate locations being the other CAZ frontages. Furthermore, **Policy 5G.4** of the Plan notes that the Central Area Frontages (presumably the same as CAZ frontages) should be the focus for enhanced and expanded retail provision. Policy 5G.4 also notes that a framework will be drawn up for the West End Special Retail Policy Area (within which Tottenham Court Road falls), with a view to supporting, reinforcing and extending the distinctive retail offer, together with encouraging uses including hotels and restaurants.
- 2.15 Turning to the Opportunity Areas identified, each of which may have a bearing on future retail locations, the Plan notes at **section 5B** that:
- The location, accessibility and underuse of the station airspace and adjacent areas at **Euston** provide an opportunity for intensification;
 - There is substantial development potential to enhance the attractions of the **Tottenham Court Road/Eastern Oxford Street** area through development supported by enhanced public transport accessibility associated with Crossrail;
 - There is an opportunity to create a sustainable business and residential community at **King's Cross**.
- 2.16 The Areas of Intensification, also identified by the Plan at section 5B, may also have a bearing on future retail locations. Two Areas of Intensification lie in London Borough of Camden:
- The newly identified **West Hampstead** Area for Intensification, where there is an opportunity to improve the links between rail, Underground and bus as well as achieving the intensification of the use of the land.
 - The **Holborn** Area for Intensification, where there is an opportunity for the area to benefit from improved public transport capacity and accessibility through mixed use redevelopment at higher densities.
- 2.17 The **Farringdon/Smithfield** Area for Intensification is also of note, given that it lies close to the boundary of London Borough of Camden, though its potential is unclear and is

dependent upon operational rail requirements and the outcome of a review of wholesale markets in London.

Sub-Regional Development Framework for Central London

- 2.18 The London Plan 2004 identified five sub-regions within London: Central, East, West, North and South. As we note above, London Borough of Camden fell within the Central London Sub-region, alongside the City of Westminster, Islington, Kensington and Chelsea, Lambeth, Southwark and Wandsworth. Sub-regional development frameworks were prepared for each of the sub-regions and were intended to provide guidance on the implementation of policies in the London Plan.
- 2.19 The Sub-Regional Development Framework for Central London was published in May 2006 and addresses the broad aspirations of the London Plan 2004. It should be noted, however, that the London Plan 2008 (Consolidated with Alterations since 2004) makes clear that the next round of Sub-Regional Development Frameworks will have a stronger emphasis on policy implementation, and to reflect this they will be known as Sub Regional Implementation Frameworks. Moreover, the sub-regions have been redrawn in the London Plan 2008 (Consolidated with Alterations since 2004), and London Borough of Camden now falls in the North sub-region.
- 2.20 Given that the sub-regional development frameworks were intended to inform future revisions of the London Plan, they have been partly superseded by the publication of the new, consolidated London Plan. Nevertheless, the Sub-Regional Development Framework for Central London provides useful background and identifies a number of actions for London Borough of Camden related to retail and town centres at Action 1D (p22):
- *When making provision for anticipated retail demand in LDFs, boroughs are encouraged to undertake fine grained distributions of need and capacity taking into account the indicative sub-regional and borough need for new comparison and convenience goods retail floorspace to 2016 in Annex 4, Table 1D.1 and 1D.2.*
 - *Boroughs are asked to verify the pipeline of retail floorspace, including the strategically significant proposals in Annex 4, Table 1D.3, and consider these in light of local assessments of need and the sequential test.*
 - *The Mayor will continue to work with boroughs and other stakeholders to consider areas where reconciliation of retail need and capacity [may be needed], especially that associated with the West End, which may require coordination between the Central London sub-region and its neighbours.*
- 2.21 The strategically significant proposals in London Borough of Camden identified in Annex 4, Table 1D.3 are:
- King's Cross (25,000 sq m additional comparison floorspace; 3,000 sq m additional convenience floorspace; estimated commencement of initial phase 2010);
 - Camden - Brunswick Centre (3,995 sq m additional convenience floorspace; estimated commencement of initial phase 2004).
- 2.22 Table 2.2 of the SRDF sets out a summary of potential growth in town centres in the sub-region to 2016. The parts of the table dealing with centres falling within London Borough of Camden, in whole (Camden Town) or part (Kilburn and the West End), are repeated in the table below.

Table 2.1 Potential growth to 2018 of town centres in London Borough of Camden

Centre	London Plan Town Centre Category	Total floorspace (sq m)	Indicative comparison floorspace need (sq m)	Office action	Comment
West End	Inter-national	1,497,000	125,000 - 185,000	Coordination of provision based on localised sub-markets	Reinforce unique retail offer (based on breadth and choice of shopping; improve accessibility; improve environment/public realm; identify capacity for additional retail floorspace)
Camden Town	Major	104,000	6,000 - 9,000	Some mixed use	Strengthen specialist retail, leisure and cultural role
Kilburn	Major	66,000	3,000 - 4,000	No strategic demand	Integrated approach to regeneration required

Source: London Plan Sub-Regional Development Framework, Table 2.2, paragraphs 153-158 and paragraphs 164-172

- 2.23 A further reference to Camden Town is made at section 1F of the SRDF, which notes the existence of a cluster related to the night-time economy in the centre. The centre is also addressed in Annex 1 of the SRDF, which notes that the centre's catchment extends 'well beyond borough boundary drawing in visitors and tourists to its unique market and mix of retail, leisure and vibrant evening activity'. It further notes that public transport capacity improvements should support the role of the town centre and the potential for intensification.

London Plan Supplementary Planning Guidance: Retail Need Assessments

- 2.24 A draft version of the SPG on retail assessments was programmed for summer 2007, though we suspect it has been delayed pending consultation on a new or revised PPS6.

London Plan Supplementary Planning Guidance for the Central Activities Zone

- 2.25 The London Plan 2008 commits the Mayor of London to preparing Supplementary Planning Guidance on implementation of his policies which bear on CAZ. This has not yet been published.

London Plan Supplementary Planning Guidance on Town Centre, Retail and Leisure Issues

- 2.26 The London Plan 2008 commits the Mayor of London to preparing Supplementary Planning Guidance on town centre, retail and leisure issues. This has not yet been published.

Replacement Unitary Development Plan (Adopted June 2006)

- 2.27 The strategic policies for town centres, retail and entertainment (S11 and S12) indicate that the Council will seek to:

- *[S]upport the character, function, vitality and viability of centres by guiding appropriate uses to them and will seek their improvement through town centre management, environmental, design, transport and public safety measures;*
- *[P]rotect shops, services and food and drink uses, inside and outside centres, where they contribute to the character and function of the area, and minimise the impact to any area from the external impacts of development with a shopping, service or entertainment character.*

- 2.28 Section 6 deals with retail and town centre uses and notes at paragraph 6.9 that the aims of the policies in this section are:

- *to promote the success of Camden's centres;*
- *to provide for and retain a range of retail (shops, services and food and drink) and entertainment uses in appropriate locations; and*
- *to protect local residents and areas from the harmful impact of such uses.*

- 2.29 More specifically, the policies aim to:

- guide shopping and services towards Central London Frontages, Town Centres and Neighbourhood Centres, together with a new town centre and local parades in the King's Cross Opportunity Area;
- guide food and drink and entertainment uses to Central London Frontages, Town Centres and the King's Cross Opportunity Area;
- ensure that new retail development does not have unacceptable impacts on the viability of centres;
- ensure that non-retail uses do not have an unacceptable cumulative impact on the character of the area in which they are located;
- protect the amenity, function, vitality and viability of centres by only granting permission for development outside Use Classes A1, A2, A3, A4, A5, B1a or D2 provided that they do not harm the centre as a shopping area and a place to live;
- protect Central London Frontages, Town Centres and any focus of shopping and service uses established in the King's Cross Opportunity Area by resisting the net loss of shopping floorspace at ground floor level;
- ensure that strong elements of convenience shopping are retained in Neighbourhood Centres, by resisting development that would prevent the centre from being capable of providing a range of convenience shopping;
- protect local shops by only granting permission for development which would result in the loss of shops (Use Class A1) where it contributes to local character, function, vitality, viability and amenity (within the Central London Area) or where there is alternative provision within 5 to 10 minutes walk (outside the Central London Area).

Recent Research

London Town Centre Assessment: Stage 1 - Comparison Goods Floorspace Need

- 2.30 The Greater London Authority (GLA) appointed Experian to assess current and future comparison goods floorspace needs throughout London, in order that boroughs and the GLA can consider systematically the possible future roles of centres. This part of the London Town Centre Assessment, Stage 1, was published in September 2004.
- 2.31 The study focuses on projected demand for comparison goods to 2016 and converting that into a floorspace requirement. It builds upon existing and forecast expenditure datasets across all boroughs of London and identifies centres where the need for floorspace is greatest.
- 2.32 The study is intended to be a broad, strategic, region-wide assessment of the baseline or gross floorspace need associated with the centres where the need for additional floorspace is greatest, providing the context and coordination framework for more local and precise studies to be undertaken for individual boroughs and development proposals.
- 2.33 The study identified floorspace requirements under four different scenarios:
- Scenario 1: with fixed productivity growth, assuming a £4,000/sq m sales density for additional developments
 - Scenario 2: with split productivity growth, assuming a £4,000/sq m sales density for additional developments
 - Scenario 3: with fixed productivity growth, assuming a £5,000/sq m sales density for additional developments
 - Scenario 4: with split productivity growth, assuming a £5,000/sq m sales density for additional developments
- 2.34 Four different estimates of productivity growth were applied to each of these scenarios and resulted in identified need in London Borough of Camden of:
- Scenario 1: Between 5,223 sq m and 20,963 sq m
 - Scenario 2: Between 5,680 sq m and 10,369 sq m
 - Scenario 3: Between 4,178 sq m and 16,771 sq m
 - Scenario 4: Between 4,544 sq m and 16,771 sq m
- 2.35 We compare the conclusions of the Experian work with our own assessment of need later in this report. The GLA commissioned an update of this study in 2007/08, but the results had not been published at the time of writing.

London Town Centre Assessment: Stage 2 - Convenience Goods Floorspace Need

- 2.36 Stage 2 of the London Town Centre Assessment focussed on convenience goods, and this part of the study was published in June 2005. The study concluded that London Borough of Camden's base convenience floorspace requirements to 2016, under a scenario assuming a £5,500/sq m sales density for additional supermarket developments, would be between 5,783 sq m and 14,425 sq m, depending on the level of productivity growth.
- 2.37 Under an alternative scenario assuming a £9,400/sq m sales density for additional supermarket developments, the floorspace requirement would be between 3,383 sq m and 8,440 sq m, again depending on the level of productivity growth. We compare the conclusions of the Experian work with our own assessment of need later in this report.

London-wide Town Centre Health Checks 2006 Analysis

- 2.38 The London-wide Town Centre Health Checks were published in January 2006 and are based on analysis undertaken in 2006. They were undertaken in the light of a commitment in the London Plan to test the London Town Centre network through regular town centre 'health checks', with reclassification of centres through Sub-Regional Development Frameworks and subsequent reviews of the London Plan. The health checks were undertaken by the GLA, and draw on data from a range of sources, including surveys of the boroughs. The GLA sees the healthchecks as an important element of assessing the health of the network and centres' relationships to each other.
- 2.39 The healthcheck commentary makes the following points in relation to Camden Town:
- The centre provides substantial town centre floorspace (variously given as 104,358 sq m and 112,748 sq m), similar in scale to smaller Metropolitan centres;
 - However, in contrast to Metropolitan Centres much of this (36% or 37,760 sq m of 104,358 sq m) is leisure-related; Camden Town has the fourth highest amount of leisure floorspace of all centres in London, and GOAD data indicates that it has the third highest number of leisure outlets in London (82 restaurants/cafes, 29 take aways, 58 bars/pubs, 0 nightclubs);
 - Some 60% of floorspace in Camden Town is retail-based (62,898 sq m of 104,358 sq m);
 - It has the third highest amount of office floorspace of all centres outside the Central Activities Zone, though at 147,663 sq m it is well short of the office floorspace at Croydon (475,639 sq m) and Hammersmith (327,502 sq m);
 - Camden Town has 3,700 sq m of vacant floorspace;
 - There are unimplemented permissions at Camden Town for 2,205 sq m of retail and 93 housing units
- 2.40 The healthcheck commentary makes the following points in relation to Kilburn High Road:
- Kilburn High Road (Camden) has 4,120 sq m of vacant floorspace;
 - There are unimplemented permissions at Kilburn High Road (Camden) for 120 housing units and 79 hotel bedspaces.
- 2.41 The healthcheck commentary makes the following points in relation to Swiss Cottage/Finchley Road:
- The centre is large in comparison to smaller Major centres (75,000 sq m floorspace), with retail floorspace of 38,000 sq m as well as almost 18,000 sq m of leisure floorspace
 - It has a particularly high turnover of convenience goods (at £130m), but has a low proportion of comparison goods retail floorspace (46% of retail floorspace) - lower than all other Major centres except Camden Town (44%) and Peckham (43%);
 - It has a low number of multiples (42) - lower than all other Major centres except Brixton (39) and Wandsworth (35);
 - Based on some indicators, the centre is operating above the District level, but others suggest that it is still functioning as a District centre.
- 2.42 Finally, the healthcheck commentary notes that 70% of floorspace in Hampstead is related to food and drink.

Retail in London: Working Paper A - Retail in the West End

- 2.43 This document formed part of GLA Economics' wider study of retail in London. It was published in March 2005 and is based on available data, though it was also informed by discussions with a number of parties interested in retail in the West End. It concluded that:
- The West End is by far the largest retail area (in terms of floorspace, employment and range of shops) in the United Kingdom (UK);
 - In contrast to most retail centres in the country, it is easy to get to by public transport, and attracts both London residents and overseas tourists;
 - There is little hard evidence of a significant trend away from retail in the West End (retail rents have grown at least as fast as most other London retail centres);
 - There has nevertheless been a slight downturn in sales since 2003, and this is best explained by the slowdown in economic activity, which was particularly severe in London, and not by the introduction of the congestion charge as some retailers have suggested;
 - Retail expenditure in the West End is expected will grow strongly over the next decade or so. It shows that the West End will remain the largest retail area (in terms of floorspace) in London.
- 2.44 However, it further notes that:
- Other retail centres are more 'car-friendly', which means that poor quality public transport could deter consumers;
 - The level of pedestrian and traffic congestion (plus the level noise, fumes, litter and exposure to the elements) can deter some consumers, but these 'environmental factors' are likely to be more effectively addressed by other retail centres.
- 2.45 The report notes that the following policy issues arise:
- It is difficult to coordinate actions to address the problems from which the West End suffers, but BIDs can play a key role;
 - Transport is key, and any improvements to public transport and the pedestrian environment would improve consumers' experience of the West End.

Report of the West End Central Retail Area Planning and Development Commission

- 2.46 The West End Central Retail Area Planning and Development Commission was set up by the Mayor of London in response to:
- Concerns that the West End had lost its competitive edge compared with other centres;
 - Concerns that it is underperforming its potential as a retail centre of international standard appropriate for an exemplary 21st century world city. At the same time, there are a number of initiatives;
 - The opportunity that new developments and initiatives, such as the first review of the London Plan, the creation of the New West End Company and the 2012 Olympics and Paralympics.
- 2.47 The Commission was charged with developing policy options for the West End, which it defined as including Tottenham Court Road and the northern part of Charing Cross Road, to inform review of the London Plan and other Mayoral strategies. The Commission published its final report in November 2006 and concluded that:
- The West End needs urgent action to sustain and develop its distinct retail offer;

- There is a need for a holistic approach that addresses the needs and opportunities presented by the whole area;
- There is a tension between what makes it successful, notably the range and choice of shops, and the things that dissuade people from visiting the area, such as congestion (both traffic and pedestrian) and environmental quality;
- There is scope to make more of the retail, leisure, creative and visitor-based agglomerations in the area.

2.48 The Commission went on to make a number of recommendations. In relation to planning policy and its implementation it noted that a 'supportive planning framework' is required to:

- Promote the area as a retail area (that based on Oxford, Bond and Regent streets and Tottenham Court Road) of international, national and London-wide importance;
- Encourage a greater number of large, flagship and/or distinctive shops (reinforcing the area's distinctive offer);
- Improve the quality of the urban environment, transport/accessibility, legibility, amenity and consistency of the area, and to promote the most efficient use of space and ensure high quality design.
- Encourage the provision of complementary uses: hotels, cinemas, theatres, restaurants, and perhaps an international convention centre, with particular emphasis on promoting a wider range of eating and drinking facilities in the area;
- Provide the basis for preparation of a planning framework as part of the London Plan process setting out a sustainable development programme for the area.

The Role the Markets Play in the Vitality & Viability of Camden Town

2.49 In the light of pressure for redevelopment of Camden Town Underground station and adjacent land, including Camden Market (Buck Street) and the Electric Market (also known as the Electric Ballroom Market), London Borough of Camden commissioned a study to examine:

- The wider role of the markets in Camden town centre;
- The specific roles of the Camden Market (at Buck Street) and the Electric Market; and
- The contribution that the Camden Market (at Buck Street) and the Electric Market make to the vitality and viability of the town centre.

2.50 The report was completed in October 2006 and drew the following conclusions:

- In terms of town centre vitality and viability, the evidence base is not strong enough to support the case for requiring the retention of Camden Market (at Buck Street) and the Electric Market in their current form;
- There are limited opportunities for an alternative market site(s) to accommodate displaced market stalls within the town centre during an interim but lengthy construction period, though other opportunities may arise in the future;
- If retail use, which could include a new covered market, was included as part of any large-scale redevelopment of the Camden Town Underground Station site, this would support the future vitality and viability of the town centre.

2.51 It should be noted that Bircham Dyson Bell, acting on behalf of Camden Lock (London) Limited, commissioned Chase & Partners to critique the study. Chase & Partners argued that the study lacked objectivity and sought to downplay the role of the markets at Camden generally, and in particular the role that the Camden Market at Buck Street

and the Electric Market have in enhancing the attractiveness of the town centre as a shopping and tourist destination.

3 CURRENT SHOPPING AND LEISURE PATTERNS IN THE STUDY AREA

- 3.1 A necessary first step towards establishing the capacity for new retail floorspace in a locality is to understand current shopping and leisure patterns in an area. The accepted best means of establishing these patterns is through a survey of households within a given geographical area. A survey of shopping and leisure patterns across the London Borough of Camden and in parts of the adjacent boroughs was carried out in September/October 2003. In our view the shopping and leisure patterns identified in the survey are unlikely to have changed substantially, as no major developments have begun trading since then.
- 3.2 The Study Area for the survey extends to cover the whole of both the London Borough of Camden and Islington and four wards on the west-side of the London Borough of Brent and three wards in the northern sector of the City of Westminster. The area was chosen to reflect both the fact that a number of Camden's centres are located on the outer edges of the Borough (indeed Kilburn High Road straddles the Camden/Brent boundary), and the need to encompass the likely extent of the main catchment area of any significant retail element that may emerge in the King's Cross regeneration proposals.⁵
- 3.3 For the purpose of analysis the Study Area has been subdivided into eight zones based as far as possible on the existing centre distribution as indicated below. Four of the zones (Zones 1 to 4) are wholly within the London Borough of Camden, one in London Borough of Brent (Zone 5), one in the City of Westminster (Zone 6) and the final two (Zones 7 and 8) are wholly within London Borough of Islington and collectively cover the whole of that borough.
- 3.4 The eight zones are as follows:
- | | |
|----------------------------|--|
| ▪ LB Camden zones | Zone 1: covers the southern part of Camden, but no existing town centres |
| | Zone 2: centred as far as possible on Camden Town |
| | Zone 3: centred on Kilburn and Swiss Cottage/ Finchley Road |
| | Zone 4: centred on Hampstead |
| ▪ LB Brent zone | Zone 5: centred on Kilburn |
| ▪ City of Westminster zone | Zone 6: covers the Regent's Park area, but no existing centres |
| ▪ LB Islington zones | Zone 7: centred on Nags Head |
| | Zone 8: centred on Angel |
- 3.5 A map of the Study Area is reproduced in section 1. It is important to note that the analysis contained in this section deals only with the shopping and leisure patterns of households resident within the Study Area. The habits and attitudes of visitors to the centres from beyond the Study Area, i.e. those travelling in for work, shopping or leisure pursuits (including tourists) from beyond the Study Area, is assessed through Visitor Surveys, which were conducted in a total of nine centres, and are reported in the next section of this report.
- 3.6 The household survey involved a systematic random sample of a total of 1,000 households, 125 in each of the eight zones, drawn directly from the residential

⁵ Proposals have now come forward but were not clear at the time

telephone subscriber listings. A full description of the Survey Methodology is set out at Appendix 1.1.

- 3.7 The survey questionnaire principally sought to establish shopping trip destinations for convenience and comparison goods, and leisure trip destinations for food and drink and commercial leisure activity. Trip characteristics were also assessed through questions on the mode of transport used to access the centre/facilities, journey length and trip frequency. Respondents were also asked for their qualitative views in respect of matters such as their reasons for visiting the centres, and whether or not the centre meets their shopping and leisure needs. The survey questionnaire is reproduced in full at Appendix 1.2.
- 3.8 In all cases the respondents were the person responsible for undertaking the majority of the household's shopping.
- 3.9 The results of the household survey are set out in 34 tables at Appendix 1.3. The data is presented mostly in the form of the results for each zone, but where data for each individual centre is more relevant, we use this in addition or instead. Due to the dominance of the West End⁶ and, to a lesser extent, Brent Cross, for some questions a number of the centres failed to obtain sufficient responses to allow for meaningful examination. Therefore we have only included centres in our analysis that received more than twenty responses for each particular question.

Comparison Goods Shopping

- 3.10 We asked a series of questions to establish comparison goods shopping patterns in the Study Area zones. Because of the density of shopping provision in the locality, and the likelihood that shoppers visit a number of centres on a reasonably regular basis, we asked respondents which is their main centre plus up to three other centres that they also visit. This is important in the calculation of the market shares for each centre, as the smaller centres may not be the main location for comparison goods shopping, but are often a second, third or even fourth trip destination. We also asked respondents to estimate the proportion of total comparison goods spend made at the main location (main only as to ask for all locations was considered likely to lengthen the interviews unnecessarily), and questions relating to trip characteristics and satisfaction with the centre.
- 3.11 The responses to the questions dealing with the centres visited combined with the proportion of spend in the main location are used to calculate the market share of each of the centres included in the analysis by applying the proportion of total spend available to each centre in accordance with the number of households visiting each centre. The proportion of spend in the second, third and fourth locations is based on our judgement of an appropriate ratio to apply.

Main Destination

- 3.12 Respondents were first asked in which centre they undertook most of their shopping for clothes, shoes and homeware items. The class of goods used represents an established proxy for non-bulky comparison goods shopping, and the question was designed to establish where comparison shopping is undertaken. The results are set out at Table 2.1 (survey question 1a) of Appendix 1.3.

⁶ We have adopted the ODPM (now CLG) definition for the West End (as presented in the 2004 Defining Town Centre Boundaries Report), which includes Covent Garden, Soho, Oxford Street, Regent Street, Bond Street, Piccadilly and all the streets that intersect with these, plus two of the other London Borough of Camden Central London Area centres (in addition to Covent Garden (northern part) - Tottenham Court Road and Charing Cross Road. These centres are contiguous, and evidence from the surveys conducted in the course of this study demonstrate that the general public are unable to distinguish in shopping terms between these diverse and specialist areas that in aggregate constitute the 'West End'. Thus where reference is made to 'West End' throughout this report it is based on the above mentioned ODPM definition.

- 3.13 The table demonstrates the dominance of the West End in the Study Area, with half of all trips from the whole area being made to that centre. The dominance varies from over three quarters in Zone 1 to only just over 30% in Zone 5, and indeed it is only Zone 5 where another centre (Brent Cross) is more dominant than the West End. Brent Cross is the second most popular comparison goods shopping destination in the Study Area recording 12% overall, highest in Zone 5, but also significant in Zones 3 and 4 in particular. Combined, these two centres account for almost two-thirds of all main shopping trips in the Study Area.
- 3.14 Camden Town is the dominant centre in the London Borough of Camden, achieving a 5% main trip haul overall, with over a quarter of trips from Zone 2 (Camden Town), albeit that figure being only half the draw to the West End. Camden Town's draw from the rest of the Study Area is surprisingly weak, and only exceeds 5% of main trips in Zone 1 and 4, which is likely to reflect the specialist nature of its fashion offer and a lack of depth in the mainstream fashion-wear offer; a point also drawn out of the healthcheck assessment. Hampstead derives over 17% of main trips from Zone 4 (Hampstead), but few main trips from elsewhere in the Study Area, and Kilburn draws 15% and almost 10% respectively from the two zones that bisect the centre (Zones 5 and 3). It is not surprising that Kilburn commands a larger proportion of trips from Zone 5 than Zone 3 given that currently the shopping provision to the west of Kilburn is weaker than that to the east.
- 3.15 The Islington centres have a share of the overall number of main trips midway between Camden Town (5.1%) and Kilburn (3.6%) at 4.4% and 5.0% respectively. Nags Head accounts for a respectable one in five trips from Zone 7 (Nags Head), and 8% from Zone 8. Angel draws almost a quarter of all trips from Zone 8 (Angel), and also accounts for 9% from Zone 7. Neither centre has much influence beyond Zones 7 and 8, although Angel draws over 6% from Zone 1.

Other Destinations

- 3.16 We asked respondents where else they shop for comparison goods and the results to this question are set out in Tables 1.2 (a second location), 1.3 (a third location) and 1.4 (a fourth location) (survey questions 7a, 7b and 7c respectively).
- 3.17 Table 1.2 indicates that overall more than two-thirds of households shop at more than one location, which is consistent with the choice available to Study Area households. Households in Zones 1 and 6, the two zones closest to the West End, have much the highest proportions (41% and 43% respectively - refer to the 'no other' centre on the last row of the table) of households that only shop in the one location, which almost certainly reflects the quality of the provision in the West End. The most significant 'second' locations are once again the West End and Brent Cross, which reflects that those who choose to shop mainly in the London Borough of Camden centres will also visit West End and Brent Cross as a second choice. Of the centres within the Study Area, Camden Town and Angel attract the highest number of shoppers as second choice locations.
- 3.18 The proportions of households that shop in more than two locations is set out in Table 1.3. The table indicates that only a quarter of all households regularly shop in three or more locations. In addition to visits to the West End and Brent Cross, the London Borough of Camden and London Borough of Islington centres, households do visit locations elsewhere in London and beyond. Table 1.4 demonstrates that very few (only 8%) households regularly shop at four or more locations.

Spend

- 3.19 Shoppers were asked what proportion of their total expenditure they make in their main centre for comparison goods. The responses to this question are set out in Table 1.5 (survey questions 1b). The overall mean average proportions vary across the Study Area, but not vastly (ranging between 57% and 68%), and indicate that overall marginally less than two-thirds of all expenditure is spent in the main centre.

- 3.20 The table also sets out the mean spend proportion for those households visiting two, three and four locations. Naturally households that only visit the one location spend 100% of their available expenditure in that centre, and as one would expect the table indicates that the proportion of spend in the main centre (this is what Q1b asked) decreases as the number of centres routinely visited increases. Thus the proportion of spend in the main centre by households visiting two locations averages across the Study Area at 62%, those visiting three locations averages 55%, and 50% of total expenditure is made in the main location by those households that visit four locations.
- 3.21 The next step is determine the appropriate ratios of spend to apply to the households visiting two, three and four different locations for their comparison goods shopping needs. The proportions are based on the findings in respect of the main location as referred to above. The proportions we consider to be appropriate are set out in Table 3.1 below.

Table 3.1 Proportion of Total Comparison Goods Spend by Respondent Group

Respondent Group	Proportions
Those using 1 centre only	100%
Those using 2 centres	60% / 40%
Those using 3 centres	55% / 30% / 15%
Those using 4 centres	50% / 25% / 15% / 10%

- 3.22 These findings confirm that a household's primary destination accounts for the lion's share of all expenditure, and inform our market share calculations.

Market Shares

- 3.23 We use the results of the main and other comparison goods shopping destinations and the spend data to calculate the market share for each of the centres that draw expenditure from the Study Area, and the results are set out in Tables 2.6a and 2.6b (based on the results to survey questions 1a and 1b). The calculations involve a few steps. First of all we strip out from the results those shoppers who only shop by catalogue/mail order/Internet as in this study we are calculating market shares for traditional forms of shopping, i.e. bricks and mortar retailing, and not the special forms of trading (SFT) such as mail order, catalogue and the increasingly popular e-tailing. We deal with the expenditure that goes to these forms of trading separately in the needs assessment section of this report. A total of 19 solely non-store based households are therefore removed from the dataset resulting in a total of 983 respondent households within the Study Area.
- 3.24 The next step requires the data in Tables 1.1 to 1.4 to be split out to accord with the respondent group classifications and then the proportions of total spend are then applied and the aggregate total market shares are set out in Table 1.6a, total available comparison goods spend in each of the Study Area zones.
- 3.25 We then tested the market share data by applying the market share data to the total available comparison goods expenditure, adding in what we consider to be realistic figures for turnover inflow, i.e. turnover generated from beyond the Study Area, and calculating average sales densities for each centre (Table 1.6b). The vast majority of the centres had what we consider to be realistic sales densities with the exception of three (Kentish Town, Swiss Cottage/Finchley Road and Cricklewood), which appeared to have unrealistically low market shares, which is likely to result from the local dominance of Camden Town, the West End and Brent Cross. In accordance with common practice we have therefore made adjustments to the data for these centres to

bring them up to what we consider to be realistic levels. This required multiplying the market shares by four in the case of Kentish Town and three in the case of the other two. To accommodate these upward adjustments, downward adjustments have been made to the market shares of all the other centres.

- 3.26 The reworked market shares are presented in Table 1.6b, which demonstrates that overall London Borough of Camden centres retain a market share of just under 20% from across the Study Area. The share is highest in Zone 2 (Camden Town) at 37% and is lowest (approximately 2%) in Zone 8 (Angel). This finding - together with the fact that with the exception of Zone 1, Camden centres draw much higher market share from the London Borough of Camden zones (Zones 1, 2, 3 and 4) - demonstrates the localised nature of the catchment areas for all these centres. London Borough of Camden centres draw relatively low market share from Zone 1 (southern Camden). The latter is dominated by the attraction of the West End and other Central London Area centres, which are the destination for two-thirds of all shopping trips.
- 3.27 Overall the West End draws a market share of 43%, highest in Zones 1 and 6 (two-thirds) and lowest in Zone 5 where Brent Cross is the dominant centre. Camden Town attracts almost a quarter of all trips from Zone 2 and 8.5% from Zone 4, but the centre's influence in the Study Area is very limited otherwise. Kilburn draws respectable share from Zones 3 and 5 (8% and 14% respectively), but again little from other zones. This pattern is repeated for all other centres, Nags Head enjoys a 20% market share from Zone 7 and almost 8% from Zone 8, but no more than 3.6% from any other zone. Angel draws a 27% market share from Zone 8, almost a double-digit share from Zone 7 and 7% from Zone 1, but from only one other Zone does the centre draw more than 1%. In comparison the market share for Brent Cross only drops below 5% in two zones (Zones 1 and 8). These findings once again reinforce the very localised nature of shopping for comparison goods in the London Borough of Camden and London Borough of Islington centres.

Comparison Goods Shopping Trip Characteristics

- 3.28 We asked respondents about the means of transport normally used when shopping for clothes, shoes and homeware, and we present the results for those centres where enough responses were recorded to make analysis meaningful in Table 1.7 (survey question 2). The table shows that overall the bus is overwhelmingly the most popular mode of transport used to access the centres, accounting for just less than two-thirds of all trips from the Study Area to Camden Town, 57% to Wood Green and half of all trips to the West End. The bus is also the most popular mode for trips to both the Islington centres. Overall the private car is only half as popular as the bus as a means of transport to these centres, and is only more significant than the bus for shoppers accessing Hampstead and Brent Cross. Trips to Hampstead from the Study Area are overwhelmingly made on foot (almost three quarters of the total). Unsurprisingly given its location, 70% of shopping trips to the Brent Cross shopping centre are car borne, with the bus accounting for just about all of the other trips. The table also indicates how important trips on foot are to the other centres, not only for Hampstead, but also for Kilburn, Nags Head and Angel in particular.
- 3.29 Respondents were asked how long on average it takes to get from their home to the centre, and the results are set out in Table 1.8 (survey question 3). The table demonstrates that overall journey length tends to be short with very low proportions involving journeys of more than half an hour. This finding is consistent with the density of centres in the area and the high proportion of bus and walk-in shoppers referred to above. The Hampstead zone (Zone 4) has the highest proportion of shopping trips that take longer than 30 minutes, but even here such trips only account for one in five.
- 3.30 The frequency of visit to the centres is set out in Table 1.9 (survey question 6). The table points to a dichotomy between the regularity of visit to the larger centres (the two purpose-built centres of Brent Cross and Wood Green and the West End) and the traditional centres. The traditional centres are visited much more frequently than the

larger centres, averaging at around two-thirds of shopping trips made at least on a weekly basis compared with an average of 25% for the large centres.

Consumer Views and Attitudes

- 3.31 The reasons for choosing to shop in each centre were sought and the results are presented in Table 1.10 (survey question 5). The reasons chosen again reflect the very different profile of the town centres from the larger centres (West End, Wood Green and Brent Cross), with far higher proportions of shoppers in the former citing proximity to home as being a significant reason compared to the latter. Indeed, this reason was cited by approximately 50% of all shoppers to the town centres, much the highest reason given, and approximately double the proportion that considered the selection and quality of shops to be a main reason for visiting. The selection and quality of shops is more important than proximity in respect of the West End and Wood Green, but not Brent Cross. The main factor in the 'other' category in respect of Brent Cross largely comprises of the ease of parking and the fact that parking is free. Value for money is an important factor for Kilburn shoppers, and the convenience of access is important for shoppers at Wood Green in particular, but also those in Camden Town and the West End. The lack of importance placed on rail/Tube services is surprising and is in sharp contrast to the findings in respect of bus access.
- 3.32 Respondents were asked how good their main centre is at meeting their comparison goods shopping needs by grading the centres from 'very good', 'good', 'neither good nor poor', to 'poor' and 'very poor', and the responses are set out in Table 1.11 (survey question 4). The table indicates that most centres scored highly, with the centres that score best once again being the larger centres - the West End, Brent Cross and Wood Green, plus Angel this time. The high level of satisfaction with Angel may have been enhanced due to the recent addition of the purpose built N1 centre. The centres with the highest neutral or 'poor' score are Camden Town, Kilburn, Hampstead and Nags Head.

Convenience Goods Shopping

- 3.33 We asked a series of questions to determine shopping patterns within the Study Area for convenience goods. The questions asked which specific store the household uses to undertake most of the main food shopping and also other stores used regularly for food shopping. Questions were also asked on the proportion of convenience goods expenditure made in the main location, the shopping trip characteristics and the satisfaction with the main location.
- 3.34 The convenience goods analysis differs from the comparison goods assessment because it identifies some of the key stores within each of the centres, but in common with the comparison goods approach we aggregate up market share to centre level.

Main Destination

- 3.35 The patterns for main convenience goods shopping, as set out in Table 1.12 (survey question 8a), are very different from the pattern for comparison goods shopping. The chief difference being the much more localised draw with no one store having an overall dominant position within the Study Area. In Zone 1 the local Zone 1 stores in the Brunswick Centre and Holborn dominate, although the Sainsbury store on Liverpool Road, Islington draws a high proportion of households. In Zone 2 the Camden Town stores dominate, accounting for over two-thirds of all households. This pattern is repeated across all the zones with the exception of Zones 4, 5 and 6 where there is very limited foodstore provision, but good provision in the neighbouring zones (Zones 2 and 3), to which the households in Zones 4, 5 and 6 are drawn.
- 3.36 Overall Swiss Cottage/Finchley Road (Sainsbury and Waitrose) is the centre with the largest main convenience goods shopping draw (13.4%), followed by Camden Town

(Sainsbury and Safeway⁷) with 12.7%, Angel (Sainsbury) with 8.4% and Kilburn High Road (Sainsbury) with 4.8%.

Other Destination

- 3.37 A similar pattern prevails for other locations used by households for convenience goods shopping as is shown in Tables 1.12, 1.13 and 1.14 (survey questions 12a, 12b and 12c). Marginally less than 30% of households use only their main store to shop for convenience goods, compared to 70% that use two or more. The proportion using three or more falls to around 25% and only 6% of households shop for convenience goods at four or more stores.

Spend

- 3.38 Shoppers were asked what proportion of their total expenditure they make in their main convenience goods store. The responses to this question are set out in Table 1.16 (survey questions 8b). The mean average proportions show very little variation across the Study Area, much less than that for comparison goods, the range being between 70% and 75%, with the mean overall being 72%.
- 3.39 The table also sets out the mean spend proportion for those households visiting two, three and four locations. As explained above in the comparison goods assessment households that only visit the one location spend 100% of their available expenditure in that centre, and households that visit more than one location will spend an inverse proportion of their expenditure in each. Thus the proportion of spend made in the main store by households visiting two stores averages 70% across the Study Area, those visiting three locations averages 65%, and 60% of total expenditure is made in the main location by those households that visit four locations.
- 3.40 The next step is to estimate based on the above information how the total spend is likely to sub-divide, and our estimates are presented below in Table 3.2.

Table 3.2 Proportion of Total Comparison Goods Spend by Respondent Group

Respondent Group	Proportions
Those using 1 store only	100%
Those using 2 stores	70% / 30%
Those using 3 stores	65% / 25% / 10%
Those using 4 stores	60% / 25% / 10% / 5%

- 3.41 These findings inform our market share calculations.

Market Shares

- 3.42 We adopt the same basic procedure for the calculation of convenience goods market shares as we have for comparison goods, that is, we remove from the dataset any households that undertake this form of shopping via non-store based means, we allot a weighting proportion to the respondent group based on the spending pattern (as set out in Table 3.2 above), and we finally check and adjust market shares as necessary to reflect what we consider to be a realistic shopping pattern. For the purposes of calculating market shares, and eventually for the calculation of need, we move from being store specific (as per the survey data), to being centre specific. Thus, for example, a market share for Camden Town is calculated in aggregate rather than separately for each of the individual stores within that centre.

⁷ The Safeway store in Camden Town now trades as a Morrisons store

- 3.43 A total of nine households shop for convenience goods via the internet and so the total number of households surveyed in the Study Area and which are used to derive market shares drops from 999 to 990. The resultant market shares are set out in appendix Table 1.17a.
- 3.44 We then test the market share data by calculating average sales densities for each centre (after adding in turnover derived from beyond the Study Area). There were a number of centres where sales densities were either a little higher or a little lower than what we consider to be realistic. The reasons for this are not clear, but under-representation of households in the sample of centres with smaller foodstores, and over-representation of households visiting the bigger foodstores in the centres needing weighting downwards is the principal suspect. The range of adjustments required to obtain what we consider to be realistic sales densities and market shares was less than that for comparison goods, but involves more centres. In all eight centres require adjustment, four upwards (Tottenham Court Road (a factor of 1.5), Kentish Town (2.0), West Hampstead (3.0) and Cricklewood (1.5)) and four downwards (Swiss Cottage/Finchley Road (0.75), Nags Head (0.9), Angel (0.75) and Brent Cross (0.5)).
- 3.45 Having undertaken the above mentioned data adjustments the market shares have been calculated and are presented in appendix Table 1.17b. The table demonstrates the very localised nature of this form of shopping. The London Borough of Camden centres (those contained in Zone 1 to 4) derive a total market share of just over half of the entire Study Area, which is very respectable considering the other provision within the Study Area, and the share from within London Borough of Camden alone (Zones 1 to 4) is considerably higher still - at two-thirds or better. Zone 1 generates the lowest share (68%) and indicates that significant proportions of households in this zone undertake their convenience goods shopping beyond the London Borough of Camden boundary, most notably at Angel (10%). There is a significant reduction in market share for London Borough of Camden centres beyond the administrative boundary with Zones 5 and 6 drawing approximately 40% and 50% respectively and much lower proportions from the London Borough of Islington zones (approximately 8% and 10% from Zones 7 and 8).
- 3.46 Looking at specific centres, the table demonstrates that stores in Holborn/Tottenham Court Road dominate the Zone 1 market share, and stores in Camden Town dominate Zone 2 and neighbouring Zone 4. Indeed the Camden Town stores have the highest market share for an individual zone (70% from Zone 2) and also the highest overall centre total at 18%, demonstrating the successful trading position of the centre. Stores in Swiss Cottage dominate the Zone 3 market share and are also significant in neighbouring Zones 4, 5 and 6, all of which lack a modern main convenience goods shopping attraction. Kilburn derives a significant market share from Zones 3 and 5 and 6 as expected. Market shares in the two London Borough of Islington zones (Zones 7 and 8) are dominated by stores located in both Nags Head and Angel.
- 3.47 In summary the market share data confirms that although there are no good quality modern convenience foodstores in Zones 4, 5 and 6, good quality provision is available close at hand in Camden Town (Zone 2) and the various centres in Zone 3. The overall picture is of good provision enabling shoppers to undertake their convenience shopping needs locally.

Convenience Goods Shopping Trip Characteristics

- 3.48 Respondents were asked how they normally travel to shop for convenience goods, and we present the results for those centres where enough responses were recorded to make analysis meaningful in Table 1.18 (survey question 10). The table shows that there are significant differences between the mode used by shoppers in the various centres. In the Central London Area centres access on foot dominates, presumably a large proportion of such trips are work based rather than home based. In Camden Town and Swiss Cottage/Finchley Road, Nags Head and Brent Cross the car is the dominant mode for residents to access the centres, particularly in the case of the latter

centre. In Angel shoppers on foot outnumber the car borne. The bus is significant in all centres, but surprisingly low in Nags Head. No other means of transport are significant for this form of shopping.

- 3.49 Respondents were asked how long on average it takes to get from home to the centre, and the results are set out in Table 1.19 (survey question 11). The table demonstrates that virtually no households travel more than 30 minutes to undertake convenience goods shopping, indeed less than 10% travel for longer than 20 minutes. This finding is consistent with our experience of this sector elsewhere; shoppers are prepared to travel for longer in rural locations, but in inner city areas the greater availability of choice reduces the need to travel for much more than 10 minutes. In this Study Area two-thirds of trips are for less than 10 minutes. In Zones 1, 7 and 8 over 70% are less than 10 minutes. The inference is that convenience goods shopping, which is undertaken very regularly, tends to be done as close to home as possible regardless of the quality of the provision.

Consumer Views and Attitudes

- 3.50 Due to the requirement to keep the questionnaire to a manageable length we did not ask questions about frequency of visit to convenience goods shopping locations or duration of visit. Responses to such questions would have been interesting, but are not central to the study and certainly less important than other questions that were asked. We did seek respondents' views about how good the main store is at meeting their needs for this type of shopping. As for the similar question in respect of comparison goods respondents were asked to choose from five categories ('very good', 'good', 'neither good nor poor', 'poor' and 'very poor'). The responses are set out in Table 1.20 (survey question 9).
- 3.51 Table 1.20 demonstrates that the Zone 1 households are significantly less well served for foodstore provision than households elsewhere in the Study Area. Approximately 30% of Zone 1 households consider their current main store provision to be less than good, i.e. 'neither good nor poor', 'poor' and 'very poor', which compares to 13% in the Study Area overall and less than 10% in Zones 3, 4 and 7. This finding points to a qualitative deficiency in foodstore provision for Zone 1 households. The one surprising result is response from Zone 4, where there is very little modern convenience goods retail provision, but households are satisfied with the stores that they visit, which tends to be stores in Zones 2 and 3.

Leisure Activity

- 3.52 We asked a series of questions to ascertain the leisure habits of the Study Area households. The questions focused separately on the eating and drinking, i.e. use of restaurants and bars, habits of residents and also on the commercial leisure activities, i.e. use of activities such as cinema, theatre, bowling. The questions asked where do households go most often, the frequency of visit, the means of travel, journey length and finally a question to determine the degree of satisfaction with the facilities on offer. Below we review the responses firstly in respect of the locations to eat and drink and then those to undertake commercial leisure activity.

1. Eating and Drinking Locations

Main Destinations

- 3.53 The responses to the question concerning where households go most regularly to eat and drink are set out in Table 1.21 (survey question 13b). The table indicates that overall and unsurprisingly the West End is the primary location for this type of activity with just over a third of all Study Area households visiting for this purpose. Across the Study Area the highest proportion visiting come from Zone 1 (45%) and the lowest from Zones 2 and 8, zones where Camden Town and Angel respectively dominate as locations for this activity. Overall Angel is the most dominant centre after the West End,

but its influence is very focused in the London Borough of Islington zones (Zones 7 and 8) with much lower draw in the other zones. The other significant centres for this activity in the Study Area are Camden Town and Hampstead, which together are the most important centres in Zones 2 and 4 and have significant draw from most other zones. Kilburn, Swiss Cottage/Finchley Road and West Hampstead all have extremely localised attraction.

Trip Characteristics

- 3.54 The respondents were asked how frequently they go to the location most often visited for eating and drinking, and the responses are set out in Table 1.22 (survey question 13a). The table indicates much less variation between the zones for this activity than there was for comparison goods shopping. On average across the Study Area 40% visit their primary location for this activity on at least a weekly basis. Perhaps the most striking finding is that almost a quarter of households never undertake this activity. Across the zones it is Zone 3, which has the lowest proportion (18%) that never undertake this activity and Zones 6 and 7 that have the highest proportion (28% and 29%).
- 3.55 The responses to the trip mode question are set out in Table 1.23 (survey question 13c). The table indicates that the majority of trips are made on foot, with most centres experiencing between 40% and 50% of trips made in this way. Only at Swiss Cottage/Finchley Road are more trips made by means other than by foot: here the car accounts for the largest proportion of trips. The bus and Underground are the most significant modes for trips to the West End, and indeed the bus in particular is a significant mode for trips to all the centres.
- 3.56 The final trip characteristic question asked was in respect of journey length, and the results are set out in Table 1.24 (survey question 13d). The table reinforces the earlier findings that trips are predominantly local with overall almost 40% taking less than 10 minutes and two-thirds less than 20 minutes. The highest proportion (almost a half) of trips of less than 10 minutes are undertaken by households in Zone 1. Zone 4 has much the highest proportion of households that travel for more than half an hour to their eating and drinking destination, which is surprising given that the zone is home to Hampstead, one of the most popular attractions for this type of activity.

Consumer Views and Attitudes

- 3.57 The responses to the question concerning visitor satisfaction with the eating and drinking provision are shown in Table 1.25 (survey question 13e). The responses indicate generally high levels of satisfaction, with the ratings of 'poor' or 'very poor' centres being almost negligible. Angel scores most highly in terms of a very good rating with three quarters of visitors giving this rating, this compares to an average for all the centres of around 50% and the lowest score of 36% for Kilburn.

2. Commercial Leisure Locations

Main Destinations

- 3.58 Respondents were asked which location they visit most frequently to undertake commercial leisure activities such as cinema and bowling. The results are set out in Table 1.26 (survey question 14b). The overall pattern is unsurprisingly similar to those for locations for eating and drinking leisure trips. The West End once more comes out on top with a little less than a third of all Study Area trips and Camden Town and Angel are once more significant other locations. However, the importance of the provision at the O2 Centre at Swiss Cottage/Finchley Road is evident, drawing twice as many Study Area trips compared to the provision in Camden Town.
- 3.59 Across the zones the West End retains two-thirds of all trips from Zone 1, much the highest figure for any zone, Zone 2 is once more dominated by Camden Town, while the influence of Swiss Cottage/Finchley Road is widely felt in particular in Zones 3, 4, 5 and 6.

Trip Characteristics

- 3.60 Trip frequency is set out in Table 1.27 (survey question 14a). The results show a similar pattern to the responses to the same question for eating and drinking locations with little discernible differences between the zones. However, this type of provision is visited far less frequently than places to eat and drink with only 15% of households using such facilities weekly or more often compared with 40% for the latter. Once again the most striking finding is the proportion of households that claim never to use such facilities, 36% in this case. In common with responses in respect of places to eat and drink Zone 3 has the highest proportion of regular visits and the lowest (jointly with Zone 4) proportion of residents never using such facilities.
- 3.61 Table 1.28 (survey question 14c) sets out the responses to the mode of transport used to access the facility question. In common with trips to places to eat and drink, access on foot is significantly the most common means, once again reinforcing the very local nature of the leisure provision in the area. Almost twice as many households walk to Camden Town than drive (42% compared to 22%), while around a third travel by bus. Swiss Cottage/Finchley Road and Hampstead attract the highest proportion of trips by car, although in the latter's case trips by foot account for more than half of all trips and the centre attracts the lowest total of bus borne visitors.
- 3.62 Once again with journey length the trip characteristics for commercial leisure activity show very similar profile to those for trips out to eat and drink, as is demonstrated in Table 1.29 (survey question 14d). Overall the majority of journeys (three quarters) take less than 20 minutes, and again Zone 4 has the highest proportion of households travelling for the longest.

Consumer Views and Attitudes

- 3.63 The satisfaction with the commercial leisure facilities is addressed in Table 1.30 (survey question 14e). The findings are that again there is general satisfaction with the provision used, again unsurprising given the scale of provision in the West End and its dominant role. The negative views are negligible, although Camden Town, Nags Head and somewhat surprisingly Swiss Cottage/Finchley Road draw significant numbers giving the centre a neutral rating.

Socio-demographics

- 3.64 The final four tables set out the socio-demographic characteristics of the sample. In addition to evaluating differences between zones, we have also compared the sample profile against ONS data for the Study Area, London and GB.
- 3.65 Table 1.31 (survey question 15) sets out the socio-economic class of the sample and indicates that overall the sample included higher proportions of the higher skilled higher earning A/B and C1 households compared with the lower skilled/unskilled lower earning potential C2 and D/E categories. There is relatively little noteworthy variation across the zones.
- 3.66 Comparison with the ONS data for the Study Area shows the sample provides an almost exact match for the higher earning groups, although there is under representation of C2 and over representation of D/E. The Study Area has higher proportions of higher earners than either the London or GB averages.
- 3.67 The age (Table 1.32) (survey question 16) and sex (Table 1.33) (survey question 18) profiles exhibit the expected patterns, which mirror national trends with two-thirds of the shoppers being female and the modal age group being the retired. However, there is an interesting difference between the age profiles in Zones 5 and 6. In Zone 5 50% of shoppers are aged between 25 and 44 compared to less than half this in Zone 6. Conversely almost 50% of Zone 6 shoppers are retirement age, more than three times the proportion in Zone 2.

- 3.68 Comparison with the ONS data for the Study Area indicates that the sample under-represents the younger age groups, but closely matches the high spending mid-age group (the 35-44 group). The sample is over-represented in the older age groups. The ONS data also indicates that the Study Area as a whole has a more youthful population than the London and GB averages. The ONS data also indicates that the sample under-represents males as compared to females.
- 3.69 The final dataset covers the ethnic makeup of the sample and is presented in Table 1.34 (survey question 17). The ethnicity of the Study Area sample exhibits some interesting variations. Overall 85% of the Study Area sample is white, with black Afro-Caribbean accounting for the largest proportion of the remainder (some 7%). The proportion of white British varies from 49% in Zone 5 to 71% in Zone 8. Zone 5 exhibits the largest diversity of ethnic groups and Zone 8 the least.
- 3.70 The ONS data uses aggregates of the ethnic origin groups used in the survey, but indicates that overall there is a reasonably close correlation with the ethnic mix sampled within the Study Area. For example, in respect of the biggest ethnic group - White British/Irish, the households interviewed in that ethnic group equated to some 68% of the sample, which compares to the ONS figure of 73%. There are significant differences between the proportions of households in different ethnic groups in the Study Area compared to London and even greater differences with GB averages.

Key Messages

- 3.71 A detailed household questionnaire was used across the Study Area's eight zones to establish market shares for both comparison and convenience goods. This involved a random sample of 1,000 households, 125 households in each zone. The questionnaire focused on spending patterns in the identified centres within London Borough of Camden, in two centres identified in London Borough of Islington (Angel and Nags Head) and those centres elsewhere that draw significant numbers of shoppers.
- 3.72 The resultant data illustrates the perceived function and attractiveness of each centre and the shopping habits of residents by zone. For comparison goods shopping Table 1.6b demonstrates the huge attraction of the West End (a 43% market share), followed by Brent Cross (13%). No centre in Camden or Islington comes close to these centres in terms of comparison market share, the next rankings being Angel (6%), Camden Town (5%), and Nags Head (4%). Thus the dominance of the West End and the presence of Brent Cross as a major diversion of comparison spend is clearly confirmed by the survey results.
- 3.73 Inevitably, market shares for convenience goods present a very different and more diffused pattern of trade. In terms of the main food shopping (see Table 1.12) of those households surveyed, the questionnaire shows Swiss Cottage (Sainsbury and Waitrose) as the centre with the largest market share (13.4%), followed by Camden Town (Sainsbury and Safeway⁸) with 12.7%, Angel (Sainsbury) with 8.4% and Kilburn High Road (Sainsbury) with 4.8%. The commensurate market shares for all convenience expenditure (see Table 1.17b) are Swiss Cottage (10%), Camden Town (18%), Angel (8%) and Kilburn High Road (6%).
- 3.74 The travel characteristics related to comparison goods shopping trips demonstrates the dominance of bus travel. This accounts for two-thirds of all trips from the Study Area to Camden Town, and 50% of all trips to the West End. Hampstead is accessed by much the lowest proportion of bus borne shoppers (9%). The Underground is significant as a means of travel only to the West End (21% of all trips). This compares with only 4% for Camden Town.

⁸ The Safeway store in Camden Town now trades as a Morrisons store

- 3.75 A significant number of journeys for comparison goods shopping purposes from within the Study Area are made on foot. Walking dominates trips to Hampstead and is significant for other centres with a largely local catchment, namely Kilburn High Road (42%), Nags Head (38%) and Angel (31%). As might be expected, trips to Brent Cross are largely car borne (71%), with no other centre having more than 20% of trips by car. Thus the general pattern is very much one of reliance on public transport for most centres, but this transport is generally bus- and not Tube-based.

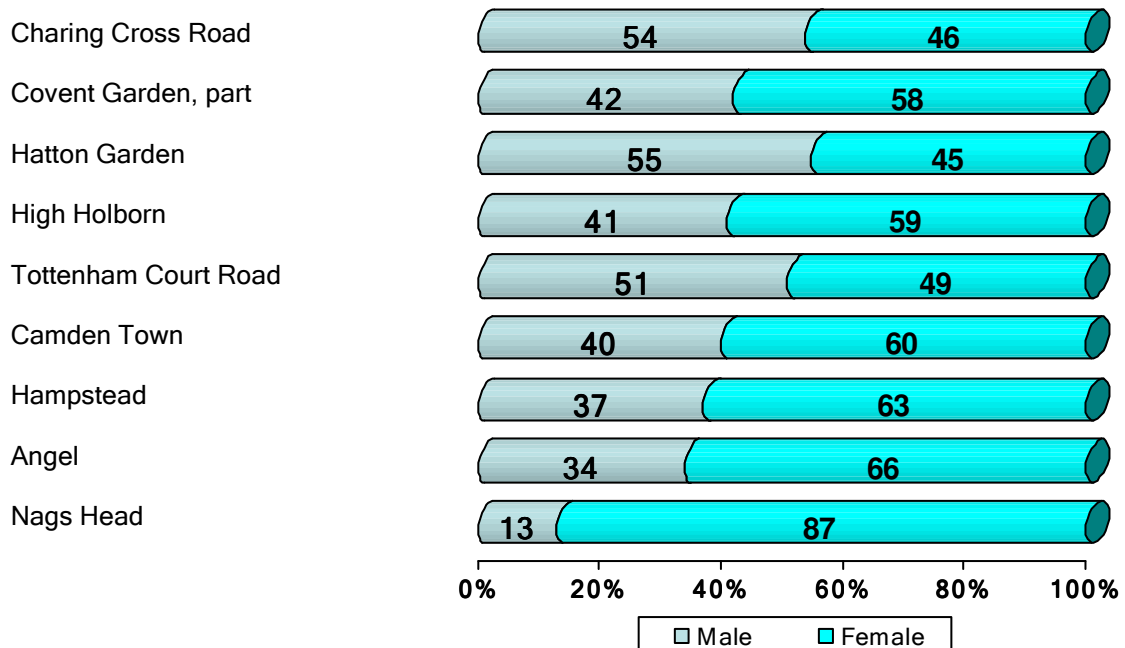
4 PROFILE OF VISITORS TO CAMDEN AND ISLINGTON CENTRES

- 4.1 In this section we assess the habits and attitudes of visitors using the Borough's main shopping centres, and those of visitors to Angel and Nags Head in neighbouring Islington. The selection of centres was based on a variety of criteria. Chief amongst these was the need to secure information on those centres, which are considered to benefit the most from visitor spending, and thus centres such as Kilburn, Swiss Cottage, West Hampstead and Kentish Town were not selected. Two Islington centres were included because they are the closest centres to London Borough of Camden.
- 4.2 The assessment is made through analysis of the results of a series of street-side shoppers' surveys that were undertaken in the centres during normal shopping hours (1000 to 1700 hours) on Friday 5 and Saturday 6 September 2003. The centres surveyed were:
- Charing Cross Road
 - Covent Garden (northern part)
 - Hatton Garden
 - High Holborn
 - Tottenham Court Road
 - Camden Town
 - Hampstead
 - Angel
 - Nags Head
- 4.3 The surveys sampled a representative number of visitors in each of the centres (50 on the Friday and 50 on the Saturday) throughout the shopping day and the interviewers roamed freely in the centres to avoid any locational or time-related bias. Inevitably, the precise location of any on-the-street survey will have some bearing on the survey results, but our experience indicates that the method employed will provide a fair representation of visitor profiles across the whole of those centres surveyed. The survey days (a Friday and a Saturday) were selected to reflect a typical weekday (Friday is accepted to be such) and the situation at the weekend.
- 4.4 The survey was based on a structured questionnaire that asked a series of unprompted questions aimed at drawing out information on visitor habits and attitudes in each specific centre. The questionnaire is reproduced at **Appendix 2** of this report along with the survey results set out in 20 tables.
- 4.5 Below, we analyse the responses to the surveys referring to the tables at Appendix 2, but also using a series of bar charts embedded in this section, which we use to illustrate some of the data. The charts are ordered as per the list of centres given at paragraph 4.2. We firstly consider the characteristics of the visitors in the centres then we move on to consider the purpose of the trip, spending, accessibility characteristics before considering the attitudes of the visitors to the centres, and finally we draw out the key messages from the survey work.

Visitor Characteristics

- 4.6 We asked a series of questions to determine the visitor characteristics, which were in respect of sex (survey question 16), age group (survey question 17) and residence (survey question 18/19). The three charts below illustrate the visitor characteristics: sex, age and place of residence in each of the centres surveyed.

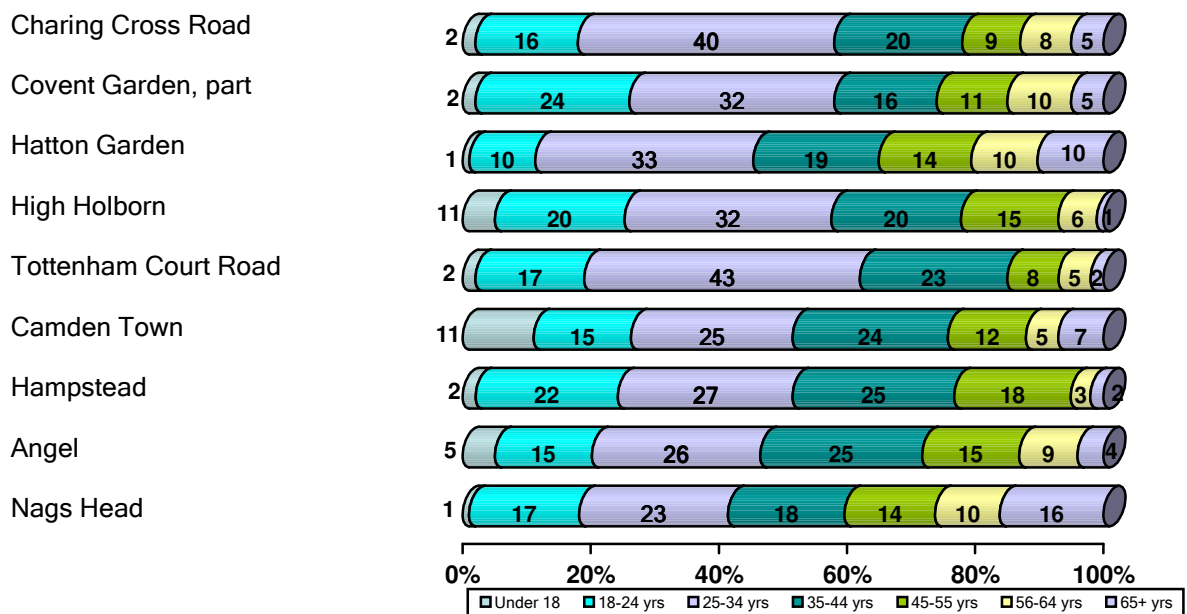
Chart 4.1 Sex of Visitors



Source: Table 2.18, Appendix 2.2

4.7 Chart 4.1 (and **Table 2.18**, Appendix 2.2) illustrates that the Central London Area centres (the top five in the chart) generally exhibit similar sex characteristics ranging between 41 - 55% males. The major/district centres have lower proportions of males, albeit Camden Town only 1% less. However, Nags Head has by far the smallest proportion of males at just 13%.

Chart 4.2 Visitor Age Group

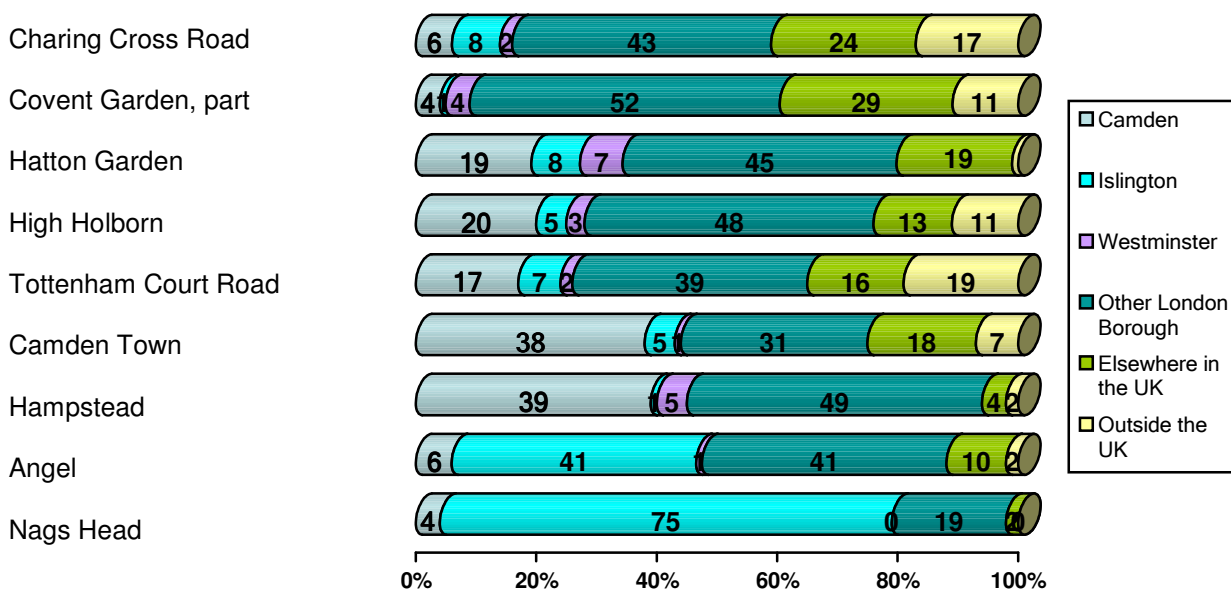


Source: Table 2.19, Appendix 2.2

4.8 Chart 4.2 above (and **Table 2.19**, Appendix 2.2) sets out the age of the respondents. The age band providing the biggest proportion of visitors in all centres is the 25-34 group, which again is more pronounced for the Central London Area centres ranging

from 32-40% compared to the other centres, which range between 23-27%. Nags Head has much the highest proportion of retired visitors (16%), and Hatton Garden has the smallest proportion of visitors aged less than 24 (11%).

Chart 4.3 Residence of Visitors



Source: Table 2.20, Appendix 2.2

- 4.9 Chart 4.3 (and **Table 2.20**, Appendix 2.2) identify the residence of the survey respondent. The location that has a significantly higher proportion of local residents is Nags Head where 75% of visitors are resident in the Borough of Islington. The high percentage of local people in Nags Head is reflected in the shopping habits of the area; of the nine locations it is the most likely to be used for supermarket and grocery shopping.
- 4.10 The next highest proportion of local borough visitors is the other Islington centre, Angel (41%), then Hampstead (39%) and Camden Town (38%). However, unlike Nags Head these three locations also have significant numbers of visitors from elsewhere in London and elsewhere in the UK. Interestingly, and perhaps surprisingly, only a quarter of visitors to Camden Town are from outside London.
- 4.11 The Central London Area centres have a far higher proportion of visitors from elsewhere in the UK and foreign tourists than the other centres. Covent Garden (northern part), unsurprisingly, leads the way with 40% of visitors coming from beyond London. The proportion and/or the absolute number of visitors is likely to be higher still in the principal areas of Covent Garden - James Street and The Piazza.
- 4.12 Central London Area centres are much more likely to have visitors from outside the UK than the other centres. Almost a fifth of the visitors (19%) to Tottenham Court Road are from outside the UK, and 17% are from abroad on Charing Cross Road. Covent Garden (northern part) and High Holborn each have 11% of the visitors from abroad, although the other Central London Area centre, Hatton Garden, has somewhat surprisingly only 1%.

Trip Characteristics

- 4.13 We now turn to look at the reasons why visits to the centres are made, the frequency of visits and the duration of stay. We asked questions identifying the main purpose of the visit (survey question 1a), what other activities were intended (survey question 1b), the frequency of visits (survey question 6) and the duration of the visit (survey question 7).

The main purpose of the visit

- 4.14 Table 4.1 below sets out the main reasons for visiting each of the centres aggregated into shopping and non-shopping related reasons.

Table 4.1 Purpose of Visit

Location	Shopping	Non-shopping
Charing Cross Road	45%	52%
Covent Garden, part	54%	45%
Hatton Garden	31%	68%
High Holborn	28%	72%
Tottenham Court Road	38%	58%
Camden Town	47%	53%
Hampstead	36%	63%
Angel	57%	43%
Nags Head	69%	29%

Source: Table 2.1, Appendix 2.2

NB Totals do not always add to 100% because figures exclude visitors who did not respond to this question

- 4.15 Table 4.1 above indicates that the locations most likely to be visited mainly for a shopping purpose are Nags Head (69%), Angel (57%) and Covent Garden (northern part) (54%). In the case of Nags Head this reflects the relative lack of non-shopping attractions. Non-shopping reasons are more prevalent in High Holborn (72%), Hatton Garden (68%) and Hampstead (63%), the former two centres most likely due to work related reasons.
- 4.16 We now turn to **Table 2.1**, Appendix 2.2 to identify the activities undertaken in more detail. The area most likely to be visited mainly for shopping for clothes and shoes is Covent Garden (northern part) (28%), and indeed this is the primary reason of visiting this centre. The other centres visited mainly for this purpose are; Camden Town (16%), Hampstead (14%) and Nags Head (11%). Surprisingly only 4% of visitors to the Angel visit the centre mainly for clothes and shoe shopping.
- 4.17 Shopping at supermarkets is the main reason for visits to Nags Head (22%), the next highest destination for supermarket shopping being the other Islington centre, Angel (12%). Where non-supermarket grocery shopping is concerned the Nags Head again is the location that is most likely to be visited (25%), followed by Angel (9%) and Camden Town (7%).
- 4.18 Turning now to other specific forms of comparison goods it comes as no surprise that the centre most likely to be visited primarily for buying jewellery is Hatton Garden (21%), and shopping for electrical goods is the main reason to visit Tottenham Court Road (27%).
- 4.19 Moving on to consider non-shopping reasons for visiting the centres, it is difficult to fully separate visits to pubs from (other) leisure visits. Nevertheless, the evidence suggests that visits to pubs, cafes, restaurants are not significant reasons for visiting the centres by day at least. More significant reasons are visiting banks/building societies (43% of visitors to Hatton Garden do so mainly for this reason), which is not unexpected with the largely office workforce-based catchment population, leisure/recreation (almost one in five visitors to Hampstead (18%) do so for this reason), and work related reasons where Charing Cross Road (31%) and High Holborn (28%) have the highest proportions.

Frequency of visits

- 4.20 The frequency of visits to each of the centres is set out in **Table 2.8**, Appendix 2.2. The table demonstrates that Hatton Garden is by some measure the most frequently

visited location with daily visits by 56% of visitors. The next most often frequented centre is High Holborn where 38% of visits are made on a daily basis. Both of these centres tend to function as predominantly work place destinations where visitors' main purpose is work rather than any form of shopping/leisure, and this almost certainly explains the high frequencies in these locations.

- 4.21 The two Islington centres have the highest proportion of visitors making more than weekly visits to the centres (66% and 64% respectively), which indicates that these centres provide a very localised shopping function. This result was expected for Nags Head, but is a little surprising for Angel, but may reflect the attraction in particular of the Liverpool Road Sainsbury store and/or Chapel Street market.
- 4.22 The Central London Area centres have a much higher proportion of first time or infrequent visitor. A third of visitors to Charing Cross Road, Tottenham Court Road and Covent Garden (northern part) are doing so either for the first time or as a rare visit. This is likely to be due to the significant proportions of visitors in these locations that are either from outside London or foreign tourists. A quarter of all visitors to Tottenham Court Road are visiting for the first time, which is by far and away the highest proportion of all the centres.

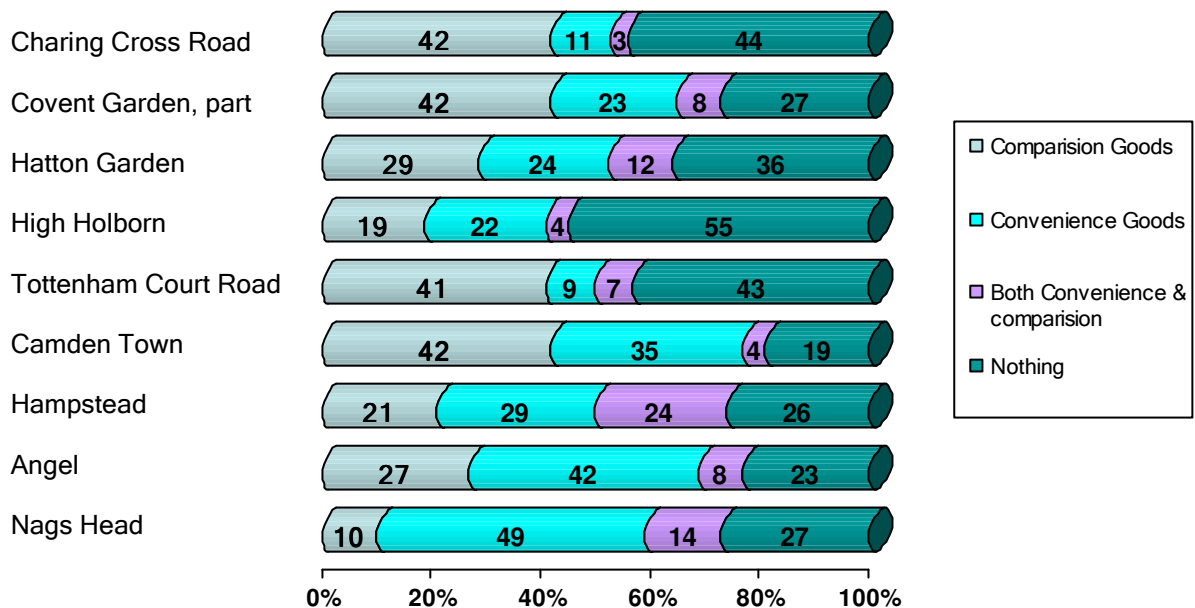
Duration of visit

- 4.23 The duration of visit to the centres is set out in **Table 2.9**, Appendix 2.2. None of the centres have high proportions of visitors spending less than half an hour in the centre, which is encouraging from a retailer perspective, as there is a general correlation between length of stay and spend. However, Angel and particularly Nags Head have the highest proportion of visitors spending relatively short periods (less than an hour) in the centres (35% and 42% respectively).
- 4.24 All the centres, except for Hatton Garden, attract a large proportion of visitors for between one and two hours. Nags Head again comes out top for this type of visitor, which means that only approximately a quarter of all visitors stay for more than two hours, all the other centres having at least double this proportion.
- 4.25 The majority of the centres attract significant proportions of visitors who stay for the longest period (over four hours) and it is likely that these are predominantly tourists and workplace visitors both in the Central London Area centres and elsewhere. Hatton Garden has the highest proportion of visitors staying for more than four hours (52%), which is likely to be workplace visitors.
- 4.26 Turning to consider duration of visit in relation to residence, **Table 2.9**, Appendix 2.2 demonstrates that overall residents living in local London Boroughs are the most likely to spend up to an hour in a location compared with those from elsewhere (42% compared to 12%). However, residents from elsewhere in the UK/non-local residents tend to spend much longer periods in the centres than the locals, averaging approximately 2.5 hours compared to below two hours for visitors from local London Boroughs.

Spending Characteristics

- 4.27 We asked two questions to determine visitor spend characteristics. The questions asked what type of goods (if any) the visitor had or intended to buy in the centre (survey question 2) and how much the visitor intended to spend on the goods (survey question 3). Below, we report on the responses to these questions, and to aid our understanding of the spending patterns between the different visitor groups in each of the centres we also cross-tabulate the responses to survey questions 2 and 3 by the question that asked the visitor's place of residence (survey question 19).

Chart 4.4 Spending Characteristics



Source: Table 2.3, Appendix 2.2

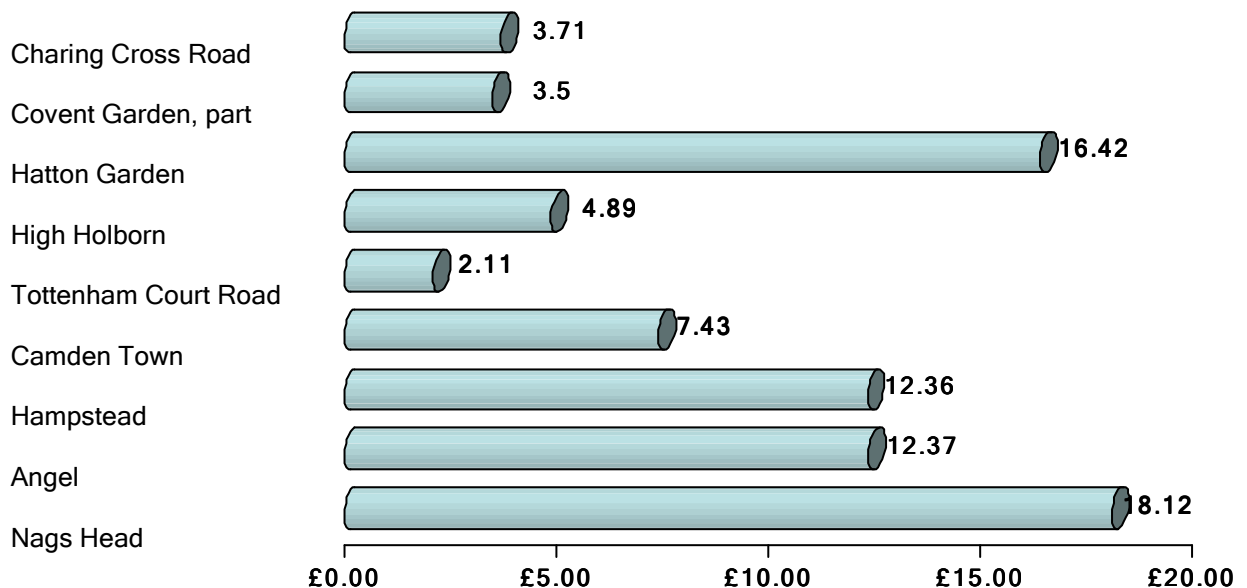
- 4.28 Below, we analyse the data presented in Chart 4.4 with regard to the comparison and convenience goods purchases. Visitors to the Central London Area centres Covent Garden (northern part) (42%), Charing Cross Road (42%), Tottenham Court Road (41%) and Camden Town (42%) are much more likely to purchase comparison goods than visitors in the other locations. Overall Camden Town is the principal location where visitors undertake some form of shopping, with over 80% doing so. At the other end of the spectrum only 10% of visitors to Nags Head make comparison goods shopping purchases, although in the case of that centre half of all visitors make convenience goods shopping purchases. The proportions of visitors making both convenience and comparison goods purchases are relatively small except in the case of Hampstead where a quarter of visitors purchase both types of goods.
- 4.29 In addition to Nags Head, convenience goods are also the principal purchase made in Angel (42%), Hampstead (29%) and High Holborn (22%). The findings reinforce the significance of the day-to-day convenience goods shopping role of these centres.
- 4.30 Comparing the propensity to spend on comparison and convenience goods helps to identify the role of the centres. It is clear from the survey that visitors to Nags Head are five times as likely to be buying convenience goods as comparison, but for Angel the proportion is much lower at 1.6 times more likely, and even lower in Hampstead (1.4 times more likely), and for Camden Town the ratio reverses (with a proportion of 0.8 - i.e. more visitors making comparison goods purchases than convenience goods purchases). The Central London Area centres also vary in the proportion of visitors spending on convenience and comparison goods. Visitors to High Holborn are more likely to purchase convenience goods than comparison goods (1.2 times more likely), in Covent Garden (northern part) visitors are twice as likely to make comparison goods purchase and at Charing Cross Road and Tottenham Court Road almost four times as likely.
- 4.31 With the exception of Covent Garden (northern part), the Central London Area centres have the highest proportions of visitors that make no purchases at all.
- 4.32 We have also reviewed the spending characteristics of the various visitor groups and present this cross tabulation in the final columns of **Table 2.3**. The table demonstrates some very clear patterns. The most evident pattern is that more local London residents

(defined as residents of Camden, Islington and Westminster) visit the centres to buy convenience rather than comparison goods (38% compared to 22%). The reverse is true for visitors from beyond the local Boroughs.

Spend in the area

- 4.33 Of those indicating that they have/intend to make purchases we then asked how much they have/intend to spend (survey questions 3a and 3b), coding the answers in spend bands (**Tables 2.4 and 2.5**, Appendix 2.2). The charts below set out the mean spend firstly on convenience goods and then that on comparison goods.

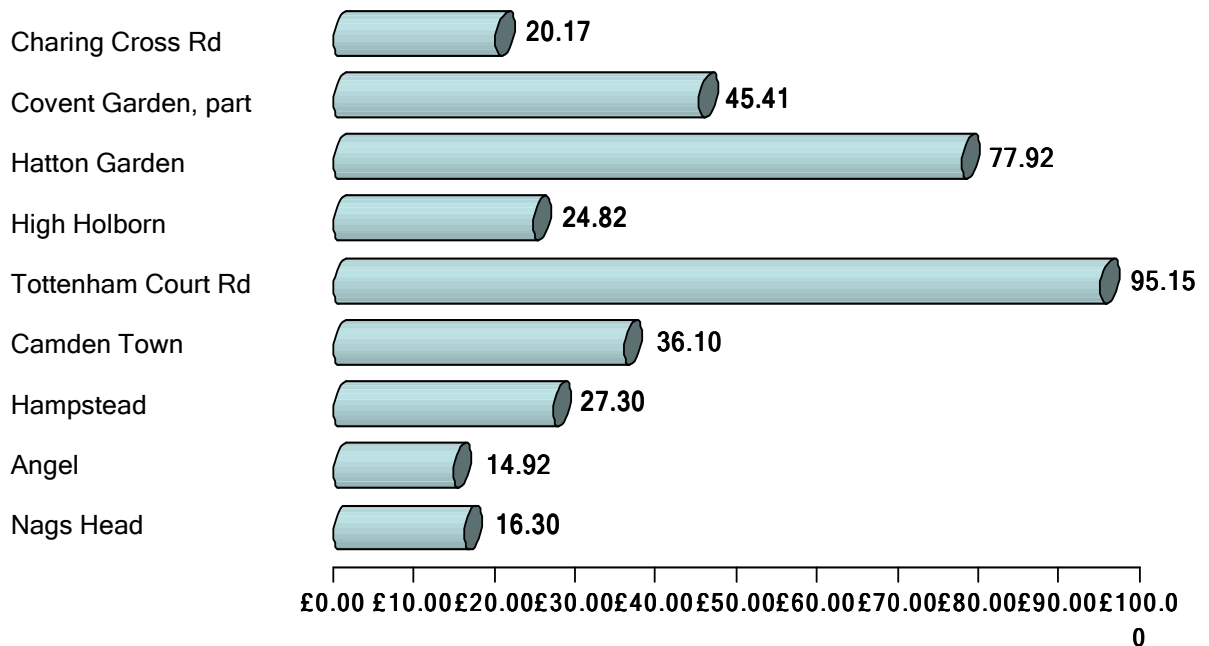
Chart 4.5 Mean Spend on Convenience Goods (£ sterling)



Source: Table 2.4, Appendix 2.2

- 4.34 Nags Head is the centre with the highest mean spend on convenience goods (£18.12) with Tottenham Court Road having the lowest with an average spend of £2.11. These results reflect both the type of visitors to the area and the nature of the provision - Nags Head being the centre with the highest proportion of local visitors, and foodstore provision that can cater for bulk convenience goods shopping, and Tottenham Court Road one of the lowest proportions of local visitors and foodstore provision which is much more 'top-up' in nature. The convenience goods spend in centres outside Central London is considerably higher than the Central London Area centres with the exception of Hatton Garden where the Leather Lane market is likely to account for the high spend.
- 4.35 The final four columns of **Table 2.4**, Appendix 2.2 adds to the above analysis by calculating the mean spend by visitor group. The table demonstrates the importance of residents of the local London Boroughs in terms of spend on convenience goods (achieving a mean spend of £14.64), which is significantly higher than all other groups. 'Other London' and 'Elsewhere in the UK' groups spend only approximately a third as much as locals (mean spend £5.38 and £4.35) and the foreign tourists only half as much again (mean spend £2.83).

Chart 4.6 Mean Spend on Comparison Goods (£ sterling)



Source: Table 2.5, Appendix 2.2

- 4.36 Generally the comparison goods spend trend is the reverse of that for convenience goods, that is highest in the Central London Area centres and much less in the other centres, although Camden Town and Hampstead show reasonably high levels of spend. Visitors to the Islington centres undertaking comparison goods shopping, spend the least.
- 4.37 Visitors to Tottenham Court Road on average record the highest spend £95.15, Tottenham Court Road is also the centre where visitors making purchases are most likely to spend over £200 (Table 2.5, Appendix 2.2). The lowest comparison goods spend is in Angel and Nags Head where visitors making purchases on average spend only £14.92 and £16.30 respectively.
- 4.38 The final four columns of Table 2.5 of Appendix 2.2 set out spend by the different visitor groups. Much the highest spenders are those that live in 'other London Boroughs' (mean spend £59.42), followed by those from outside the UK and those living elsewhere in the UK (£38.17 and £38.14 respectively). Residents living in local London Boroughs spend on average only a third of that spent by their 'other London Borough counterparts, and only half as much as those living outside London at an average spend of £20.64.

Transport and Accessibility Characteristics

- 4.39 We now move on to consider the transport and accessibility characteristics of the visitors to the centres. We asked two questions to determine the mode of transport used to access the centre (survey question 4) and journey time to the centre (survey question 5).

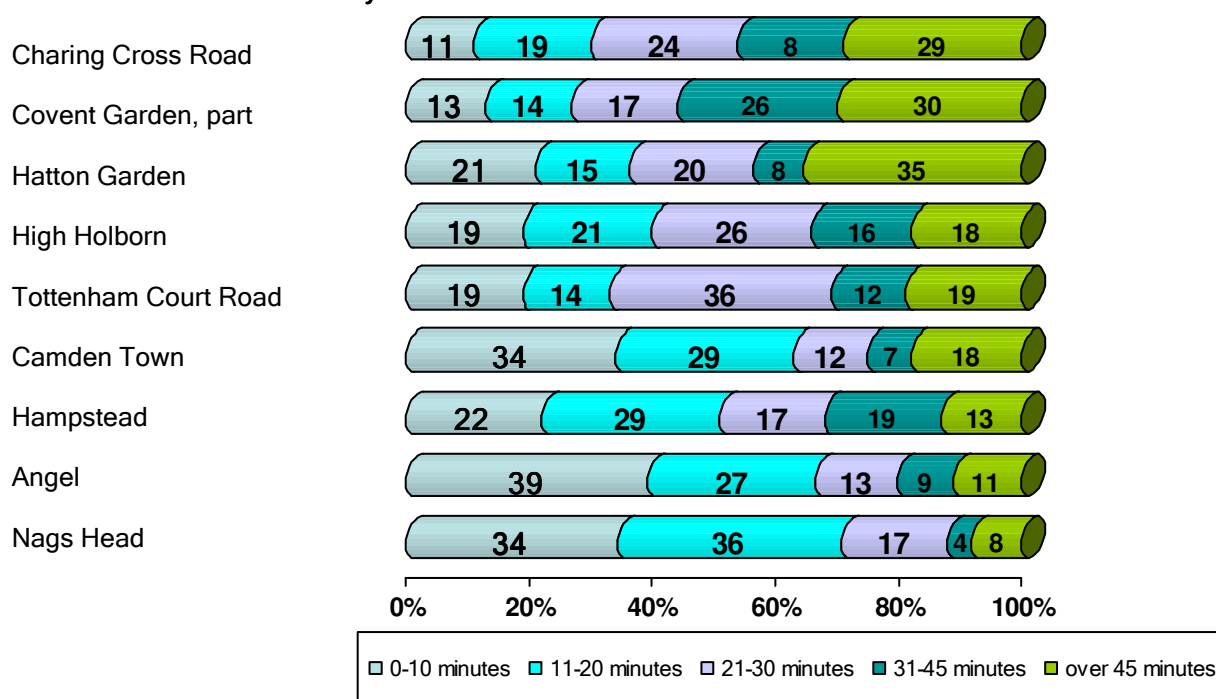
Mode of transport

- 4.40 Table 2.6 of Appendix 2.2 sets out the mode of transport used by respondents to reach the centres, and demonstrates the dominance of public transport and modes other than the private car. The Central London Area centres have the highest proportion, 92% of visitors to Covent Garden (northern part) for example use means other than the private car. The proportion is the same in Camden Town, and only in Hampstead do significant proportions of visitors (a third) use the private car to access the town centre.

- 4.41 These findings confirm the view that the private car is not necessary for shopping trips in this part of Inner London, as the overwhelming majority of shopping trips are made by public transport. We suspect that the proportions using the car for convenience goods shopping will be less than the overall averages, as in our experience the car is the dominant mode for main convenience goods shopping trips.
- 4.42 Walking is the single most popular mode for trips to a number of centres with significant proportions of visitors to Nags Head 46%, Angel 35%, Hatton Garden 35% and Camden Town 33% making the journey on foot.

Duration of Journey

Chart 4.7 Duration of Journey



Source: Table 2.7, Appendix 2.2

- 4.43 Chart 4.7 above demonstrates that the centres that have the highest proportion of journeys of less than ten minutes are Angel, Nags Head and Camden Town, a finding that corresponds to the high proportion of walk-in visitors in these centres. Additionally, two-thirds of visitors to the above mentioned centres have journey times of less than 20 minutes. Hampstead is the only non-Central London centre where journey times tend to be longer (only half, as opposed to two-thirds, taking less than 20 minutes), which is likely to reflect the fact that although 40% of visitors are from LB Camden, a third travel by car, which the survey indicates (**Table 2.16**, Appendix 2.2) is associated with problems of a lack of car parking, which suggests a significant proportion of the journey time for car borne shoppers is spent seeking out a space to park. As expected the Central London Area centres have much the highest proportion of more lengthy journeys for example 30% of visitors to Covent Garden (northern part) have journey times in excess of 45 minutes.

Visitor Attitudes

- 4.44 We asked a series of qualitative questions to ascertain visitors' attitudes and satisfaction with the local centres. The questions determined whether the centre was the main centre used for comparison goods shopping (survey question 8), which other centres are visited for comparison goods shopping purposes (survey question 15), the reasons for choosing to visit the centre (survey question 10), the general satisfaction

with the provision of shopping and leisure facilities (survey questions 9, 12 & 13) and measures that would make for improvement (survey question 14).

- 4.45 The overwhelming pattern illustrated in **Table 4.2** below is that across the board the majority of visitors in each of the centres use another centre as their main location for comparison goods shopping. Indeed the only centres where more than 20% use the centre visited as the main location for this type of shopping are Nags Head (40%) and Angel (29%). These high totals, especially at Nags Head, reflect the fact that these centres have much lower proportions of visitors from beyond London Borough of Islington and the borough residents are using these centres for comparison goods shopping.
- 4.46 The pattern in the Central London Area centres is of high proportions of visitors from beyond the local area who use other centres for their main comparison goods shopping. It seems likely that the relatively high proportions of visitors to Tottenham Court Road and Charing Cross Road are explained by visitors associating shopping in these locations with trips to Oxford Street / the West End more generally.

Main Centre

Table 4.2 Main Centre for Comparison Goods Shopping

Location	Main Centre - Yes	Main Centre - No
Charing Cross Road	17%	83%
Covent Garden, part	9%	91%
Hatton Garden	11%	89%
High Holborn	4%	96%
Tottenham Court Road	13%	87%
Camden Town	11%	89%
Hampstead	13%	87%
Angel	29%	71%
Nags Head	40%	60%
Charing Cross Road	17%	83%
Covent Garden, part	9%	91%
Hatton Garden	11%	89%

Source: Table 2.10, Appendix 2.2

Meeting Comparison Goods Shopping Needs

- 4.47 **Table 2.11**, Appendix 2.2 sets out visitor satisfaction with the comparison goods provision in the centres. The mean score towards the bottom of the table indicates that overall the combined score for all of the centres is a score marginally over average (3.21, average being 3.0). However, there is significant variance between the scores achieved by the individual centres. Covent Garden (northern part) outperforms all the other centres by some margin in terms of meeting visitor needs for comparison goods shopping with three quarters rating the centre 'very good' or 'good' and a mean score of over 4.0. Hampstead is the next best performing centre (62% of visitors rating the centre 'good' or better), and the centre achieves a mean score of 3.76. Of the other centres only Camden Town and Angel achieve a mean score greater than the average.
- 4.48 The lowest rated centres are three of the Central London Area centres (Hatton Garden, High Holborn and Tottenham Court Road), which achieve mean scores of 2.6, 2.5 and 2.7 respectively), which is likely to reflect the specialist roles of these centres, although

the other specialist Central London Area centre, Charing Cross Road is perceived to be better at meeting needs.

Other Frequently Visited Centres

- 4.49 **Table 2.17**, Appendix 2.2 demonstrates that overall the most frequently visited centre for clothes and shoe shopping is the West End/Central London⁹ (58%), followed by Brent Cross 15% and Camden Town (10%). The West End/Central London is the most frequently visited shopping destination for visitors in all locations and by all visitor groups, but particularly by London-based visitors. Almost half (46%) of all visitors to Hampstead also shop at Brent Cross. Wood Green is a significant alternative destination for visitors to Nags Head and Camden Town.
- 4.50 A third of visitors from outside the UK are most likely to visit the West End and other Central London Area centres to shop for clothes and shoes. They are very unlikely to visit local centres for this purpose. This is also the case for those living elsewhere in the UK (43% visit the West End/Central London).

Reasons for choosing to visit the centre

- 4.51 The reasons for visits to the centres are set out in **Table 2.12**, Appendix 2.2 in response to survey question 10. The respondents were free to mention multiple reasons for their visit, and so some of the columns will add to more than 100%. The responses given include all reasons given, including leisure activity, and we make assessment of the responses below. However, the survey also asked specific and separate questions relating to food and drink and D2 leisure activity, and we report on the responses to the questions in detail subsequently.
- 4.52 Two-thirds of visitors to Nags Head do so because it is close to home, which tallies with the high proportion of visitors to Nags Head from local Boroughs (Chart 4.3). The next highest proportion is at Angel (42%).
- 4.53 Convenience of location (in terms of it being close to work) is also a key reason for visiting Hatton Garden (29%) and High Holborn (28%).
- 4.54 A third of all visitors to Tottenham Court Road use the centre because of the good selection/ quality of shops, which reflects the quality of the specialist offer in this centre, and almost a quarter choose to shop in Covent Garden (northern part) (24%) and Hampstead (23%) for the reason of the selection and quality of shopping provision.
- 4.55 Almost a fifth (19%) of visitors in Hampstead choose to visit because it is a 'pleasant place to shop', which is much the highest proportion, and is in contrast to only 1% of visitors in Nags Head who cite this as a reason to visit.
- 4.56 The markets in Hatton Garden (Leather Lane) and Camden Town are a reason for visiting the centres for between one in six and one in seven visitors (16% and 18% respectively), which is a significant attraction.

Meeting Food and Drink Leisure Needs

- 4.57 The responses to the question that asked if the centre the respondent was located in met their need for food and drink facilities (survey question 13), are set out in **Table 2.15** of Appendix 2.2. Table 2.15 indicates that all centres with the exception of Nags Head have over 50% of visitors rating the provision of cafes/bars/restaurants 'very good' or 'good'. Angel is the top performer with a rating of over 90%. All the Central London Area centres have a 'very good/good' rating of over 60%. The general levels of

⁹ West End/ Central London definition - the question asked 'Which other centre do you visit most frequently for clothes and shoe shopping' and the responses were not prompted, and therefore we can conclude that visitors gave the answer 'West End or Central London' because they were not able to distinguish between the various areas that collectively constitute the West End/Central London area.

satisfaction are high with no centre other than Nags Head, having a mean score of much less than 4.0 (the score for a rating of 'good').

Meeting Commercial Leisure Needs

- 4.58 The responses to the question addressing satisfaction with meeting commercial leisure needs (question 12) are set out in **Table 2.14** of Appendix 2.2. Visitors to Covent Garden (northern part), as would be expected, score Covent Garden¹⁰ highest in respect of meeting needs for commercial leisure facilities with much the highest mean score of over 4.2, i.e. better than the 'good' rating score of 4.0. The only other centres with ratings approaching 4.0 are Angel and Charing Cross Road. However, perhaps the most noteworthy message from the respondents is the high proportion of day-time visitors who do not use such leisure facilities (the 'don't know' category). It is very likely that if the same questions were asked in the evening, outside the core shopping hours, the responses would be very different. Comparing the proportions of 'don't know' responses for food and drink and D2 activity tends to suggest that whereas visitors do visit A3 facilities by day far fewer visit D2 leisure facilities by day.

Non-shopping facilities used

- 4.59 **Table 2.13**, Appendix 2.2 sets out the responses from visitors in respect of what non-shopping facilities they use in the centres. However, as with the previous discussion on leisure activity, there is a need for some degree of caution with interpreting the results as the surveys were conducted only during the core shopping hours (1000 - 1700). The main finding is that overall less than 50% of visitors use any such facilities. The proportion varies from Covent Garden (northern part) where two-thirds of visitors use such facilities to Hatton Garden and Nags Head where approximately three quarters of visitors do not use such facilities.
- 4.60 In all locations the most common non-shopping activity is visiting restaurants/cafes/bars. Visitors to Tottenham Court Rd (47%), the northern part of Covent Garden (43%), Angel (39%) and High Holborn (38%) use these facilities the most. Table 2.13 also demonstrates that visitors from beyond the local London Boroughs are more likely to use such facilities (the three non-local Borough groups averaging 35% compared to an average of 25% for local Borough).
- 4.61 Other than visits to restaurants/cafes/bars the proportions of visitors using other non-shopping facilities is very low. Ten per cent of visitors to Camden visit the cinema, 9% of visitors to Covent Garden (northern part) visit the theatre and 9% of visitors to Tottenham Court Road visit a museum/art gallery. Nine per cent of visitors to Hampstead visit the Heath/other open space. Visitors from outside the UK are much more likely to visit museums, galleries and the theatre than UK residents.

Improvements Suggested by Respondents

- 4.62 The responses to survey question 14, which asked for suggested improvements to the centres are set out in **Table 2.16** of Appendix 2.2. The table indicates, in common with such surveys we have conducted elsewhere that most visitors made no suggestions at all (45%). The proportions vary from just over 50% in Tottenham Court Road, Charing Cross Road, Camden Town and Hampstead to only 19% at Nags Head. These generally high proportions does not necessarily constitute a ringing endorsement of the centres, as visitors invariably find it hard to come up with suggestions in response to street surveys especially if the visit is a rare one or even a first. Therefore the suggested improvements, albeit mostly low in percentage terms, do reflect important issues for consideration.

¹⁰ It is very likely to be the case that respondents in Covent Garden (northern part) have not distinguished their response between the London Borough of Camden sector of Covent Garden and that within London Borough of Westminster, and so have considered all the leisure facilities available in the area when responding to this question.

- 4.63 Access to the centres is generally not considered to be an issue for improvement in the centres except for Hampstead where access and parking are identified as issues, particularly the latter. High Holborn is the location where visitors consider more and a better range of shops would help. Interestingly Hampstead is also identified as a location where more shops would make for improvement. A better range of shops at Nags Head is also identified as a suggested improvement.
- 4.64 Overall the responses appear to indicate that the provision of leisure facilities is adequate as only 1% of visitors considered this to be an issue. Improving the shopping environment was most keenly considered important in High Holborn (22%) and Nags Head (17%), with no other centre scoring above 5%.

Key Messages

- 4.65 Below, we draw out the key messages from the Visitor Survey in respect of each of the centres surveyed starting with the five Central London Area centres, followed by Camden Town and Hampstead, and then the two London Borough of Islington centres.
- 4.66 **Central London Area centres:** These comprise Charing Cross Road, Tottenham Court Road, High Holborn, Covent Garden (northern part) and Hatton Garden. The Visitor Survey broadly reflects many conceptions as to the nature and function of these centres. Thus Charing Cross Road has a large proportion of visitors from UK outside London and from overseas (41%) and low expenditure per head for both convenience and comparison goods. Tottenham Court Road and Hatton Garden have high levels of (specialist) comparison expenditure, with the former being the centre having the largest proportion (19%) of visitors from outside the UK. High Holborn is very much a convenience centre supported largely by local workers rather than residents or visitors. Covent Garden (northern part) has the second highest proportion of visitors from outside London (40%), almost certainly reflecting its location as part of the diverse and vibrant group of attractions located at Covent Garden.
- 4.67 Four of the Central London Area centres surveyed have a high degree of reliance on journeys by Tube. The exception is Hatton Garden. This is only partially accountable by reference to the geography of the Underground system and is almost certainly more a reflection of significant walk-in trade by office workers from nearby surrounding premises.
- 4.68 **Camden Town:** The survey shows Camden Town is a centre that attracts proportionately far more visitors from elsewhere in the UK and from abroad than any other surveyed centre in Camden or Islington. Camden Town also has a fairly even split, by visitor numbers, between convenience and comparison expenditure and a larger proportion (28%) of visitors travelling by Tube than any other Camden or Islington centre in the survey.
- 4.69 The centre's strength derives from comparison and A3 expenditure and leisure activities. Of the eight centres included in the Visitor Survey, Camden Town is proportionately the most popular for indoor leisure activities and the second most popular for meeting in cafes, bars and restaurants. Of the nine surveyed locations, Camden had the fewest respondents who considered it a pleasant place to shop.
- 4.70 **Hampstead:** The Visitor Survey places Hampstead as a particularly distinctive centre. It has proportionately more visitors from other London Boroughs than any other centre. It has a clear balance between convenience and comparison goods shopping by visitor numbers. Only a very small proportion of visitors consider that comparison needs and café/bars/restaurant provision in this centre are poorly or very poorly catered for - 8% and 4% respectively.
- 4.71 Hampstead is the centre that has the highest proportion of visitors travelling by car (33%). This comparatively high proportion together with the current difficulties in accessing the centre and also in finding a car parking space (as identified in 2.16),

suggests that it will be difficult to generate significant modal shift for Hampstead shoppers.

- 4.72 **Islington centres:** These comprise the Angel and Nags Head. In both cases, a high proportion of visitors live within the local borough - some 41% and 75% respectively. The proportion for Angel is quite similar to those for Camden Town and Hampstead (which average 39%). Thus Nag's Head presents quite a different profile and is strongly dependent on travel by bus, with 44% of visitors using this means of transport.
- 4.73 Both the Islington centres are strong in terms of convenience draw:
- An average of 46% of visitors had or intended to buy convenience goods - a significantly higher proportion than any other centre surveyed;
 - Actual or intended convenience spend per head is higher than any other centre with the exception of Hatton Garden;
 - Both centres have very high proportions of their trade based on local 'close-to-home' journeys.
- 4.74 On the other hand, actual or estimated comparison goods spend per head in the two Islington centres was lower than any other centre surveyed. On aggregate, this spend was only half of that for the two Camden centres surveyed.

5 THE NEED FOR ADDITIONAL RETAIL FLOORSPACE

Background

- 5.1 In this section we set out our assessment of the need for additional retail floorspace in the London Borough of Camden centres and other centres in the Study Area over the period up to 2027¹¹. Separate assessments are made for comparison and convenience goods shopping. The assessments are based on the changes in expenditure potential brought about by population change and real growth in per capita spending levels.
- 5.2 We have employed a step-by-step approach to the assessment in accordance with standard practice, and in a manner consistent with the approach recommended by the GLA¹². The approach is as follows:
- **Step 1:** Define the Study Area, and to allow for more sensitive analysis subdivide this area into a series of zones that reflect as far as possible the existing centre distribution (this step is discussed in Section 2 of this report);
 - **Step 2:** Calculate population estimates for each Study Area zone for the base year (2007) and for the forecast years (2012, 2017 and 2022 and 2027) using population projections provided by London Borough of Camden.
- 5.3 Steps 1 and 2 are common for both comparison and convenience goods shopping. The rest of the data and modelling (Steps 3 to 9) rely on separate datasets for the two forms of shopping, and are therefore reported separately.
- **Step 3:** Obtain per capita comparison and convenience goods expenditure estimates for each Study Area zone for the base and forecast years (with all monetary values maintained at constant prices);
 - **Step 4:** Calculate the total available expenditure within each of the Study Area zones by applying the population data to per capita expenditure, and also the growth in expenditure over the period 2007 to 2027;
 - **Step 5:** Calculate the quantum of expenditure available in the Study Area for non-bulky comparison goods retailing by making a deduction from the total available expenditure figures to account for the expenditure captured by out-of-centre retail warehousing;
 - **Step 6:** Calculate the base year turnover and total market share derived from the Study Area of each of the centres included in the assessment by applying the market shares for each zone (from the 2004 study) to the pool of available expenditure;
 - **Step 7:** Calculate the base year turnover and total market share derived from the Study Area of each of the centres included in the assessment by applying the market shares for each zone (from the 2004 study) to the pool of expenditure available from both the resident population and from visitors (inflow);
 - **Step 8:** Make a deduction for claims on the expenditure growth (floorspace efficiency, e-tailing and committed new floorspace); and finally
 - **Step 9:** Convert the resulting residual expenditure (that is the growth in expenditure, less the claims deduction), based on market shares set out in the 2004 study, to a floorspace requirement in the forecast years.

¹¹ The Study provides forecasts for 2012, 2017, 2022 and 2027. Whilst we consider that the forecasts to 2017 are robust, a degree of caution needs to be exercised with the 2022 and 2027 forecasts, because MapInfo/Oxford Economic Forecasting do not provide expenditure growth estimates beyond 2016.

¹² GLA 'A London Review of Retail Need Methodologies', SDS Technical Report 15, August 2002

- 5.4 Below we outline the work and calculations undertaken at each step. Steps 1 and 2 are common to both the comparison goods and the convenience goods assessments, but following these steps we then firstly outline the comparison goods assessment before dealing with that for convenience goods. All the tables (Tables 3.1 to 3.11 and 4.1 to 4.10) referred to in the text, and that set out the floorspace requirement calculations, are reproduced in Appendices 3 and 4.
- 5.5 We conclude by identify and seeking to explain possible reasons for any discrepancies between Roger Tym & Partners' analysis and the conclusions of the work undertaken by Experian for GLA.

Need Assessment

The Basic Study Area Data

Step 1: Study Area Definition

- 5.6 The Study Area was defined at the outset of the study to set the geographical parameters of the household shopping patterns survey, and its extent and indeed the zonal subdivision is discussed fully in section 3 paragraphs 3.3 to 3.5 of this report and is illustrated by the map in section 1. The eight Study Area zones are based on ward-level geography¹³.

Step 2: Study Area Population

- 5.7 London Borough of Camden has provided population projections for each of the Study Area zones. The projections are provided on an annual basis for the period 2006 to 2031.
- 5.8 In the case of those zones falling within London Borough of Camden, the projections are based on aggregated ward data. The projections are GLA 2006 Round-based (RLP Low - SRP), constrained to GLA 2006 Round-based (RLP High). Work has been done for London Borough of Camden to update the projections in terms of the births projection, retention of 0 year olds and distribution of 0-4 in the base year (2001). Furthermore, Camden provided an up to date forecast of housing change which was built into an RLP Low projection, designated RLP Low (SRP). After taking advice from GLA Demography Team, London Borough of Camden officers have converted RLP Low (SRP) for Camden to match with RLP High, and these are the figures presented here.
- 5.9 Ward projections for partnering boroughs (Brent, Islington and Westminster) are GLA 2006 Round-based (RLP High). These are GLA's interpretation of population distribution according to demographic determinants and GLA's view of forecasted housing change from the London Development Database (LDD) and the London Housing Capacity Study (LHCS) 2004. These projections are reproduced in the appendices - for comparison goods in Appendix 3, Table 3.1 and for convenience goods in Appendix 4, Table 4.1.

Comparison Goods Need

- 5.10 We now move on to consider the need for additional comparison goods floorspace.

¹³ Camden (Bloomsbury, Holborn and Covent Garden, King's Cross, Camden Town with Primrose Hill, Cantelowes, Haverstock, Kentish Town, Regent's Park C, St Pancras and Somers Town, Belsize, Fortune Green, Frognal and Fitzjohns, Kilburn C, Swiss Cottage, West Hampstead, Gospel Oak, Hampstead Town, Highgate); Brent (Brondesbury Park, Kilburn B, Mapesbury, Queens Park); Westminster: (Abbey Road, Maida Vale, Regent's Park W); Islington (Finsbury Park, Highbury East, Highbury West, Hillrise, Holloway, Junction, Mildmay, St George's, Tollington, Barnsbury, Bunhill, Caledonian, Canonbury, Clerkenwell, St Mary's, St Peter's)

Step 3: Per Capita Comparison Goods Expenditure Estimates

- 5.11 We have obtained per capita comparison goods expenditure estimates for each of the Study Area zones from MapInfo/Oxford Economic Forecasting together with percentage growth figures for the forecast years. The data obtained are 2004 expenditure estimates at 2004 prices, reflecting the availability of data sets used by MapInfo to construct the estimates. They are also consistent with the demographic information provided by the MapInfo 2004 Population Updates. (MapInfo's Expenditure per head estimates use population and household counts from their 2004 Population Updates.)
- 5.12 The data provides *total* annual per capita comparison goods expenditure estimates, which includes a proportion of expenditure that is spent by special forms of trading (SFTs) such as mail order, catalogue and Internet sales which is not available for conventional store-based (bricks and mortar) retailing, and therefore needs to be subtracted from the pool of expenditure available for bricks and mortar retailing.
- 5.13 Based on Experian's Retail Planner Briefing Note 2.3D (December 2005), we have therefore made a deduction of 5.7% in 2004, 8.6% in 2007 and 12.3% in 2012. Experian envisages that the rate of SFT growth will slow in the post-2011 period, with non-store sales in the comparison sector plateauing at around 12.4% in 2014. We have therefore made deductions of 12.4% for 2017, 2022 and 2027.
- 5.14 Thus the first row of **Table 3.2** gives the MapInfo 2004 per capita expenditure figures for each of the Study Area zones net of the proportion spent via SFT. The figures show quite significant variations across the Study Area with the highest expenditure per head in Zone 6 closely followed by Zones 3 and 4, with the lowest in Zones 1, 2 and 5.
- 5.15 The 2004 per capita expenditure estimates are projected forward to the base year (2007) and to the forecast years 2012, 2017 and 2022 and 2027 based upon the MapInfo expenditure growth projection of 4.4% per annum for 2005 to 2016 and our own assumption that this trend will continue to 2027¹⁴. We also make a deduction for Special Forms of Trading (SFT), based on Experian's Retail Planner Briefing Note 2.3D (December 2005), of 5.7% in 2004, 8.6% in 2007 and 12.3% in 2012. Experian envisages that the rate of SFT growth will slow in the post-2011 period, with non-store sales in the comparison sector plateauing at around 12.4% in 2014. We have therefore made deductions of 12.4% for 2017, 2022 and 2027. The resultant per capita expenditure figures in the base and forecast years are set out in **Table 3.2** in the rows below the 2004 data.

Step 4: Total Expenditure Estimates

- 5.16 In Step 4 we calculate the total available comparison expenditure in each zone by applying the population forecasts (set out in Table 3.1) to the per capita expenditure figures (set out in Table 3.2). The results are presented in **Table 3.3**, which identifies the pool of expenditure generated in each Study Area zone (and the total for the whole Study Area) over the time horizon, and also the expenditure growth at each forecast year.
- 5.17 **Table 3.3** shows that the Study Area as a whole currently generates nearly £2 billion of comparison goods expenditure, which is forecast to grow by 13% to over £2.2 billion in 2012, rising to approximately £2.54 billion in 2017, to £2.9 billion in 2022 and to £3.3 billion in 2027. Over the twenty year period to 2027 comparison goods expenditure is forecast to grow by nearly £1.3 billion.

Step 5: Out-of-Centre Retail Warehouse Expenditure

- 5.18 At **Table 3.4** we separate out the comparison goods expenditure that is currently captured by out-of-centre retail warehousing from the expenditure available for all

¹⁴ The growth projections for 2017 onward must be treated with caution.

other forms of retailing. We do this to accord with current Government policy, which seeks to direct all retail development into town centres, and adopt a goods-based rather than a format driven approach to the need for additional retail provision¹⁵. Our approach is to identify the quantum of comparison goods expenditure captured by out-of-centre retail warehousing expenditure in the base year, and in an acknowledgment that the turnover of the existing provision will not stand still, but will continue to grow, we allow for growth at 1.8% per annum¹⁶, which is the same rate we allow for existing floorspace within identified centres.

- 5.19 Our estimate is that in the base year out-of-centre retail warehousing captures 13.45% of the total comparison goods expenditure across all zones. This figure is derived from Experian's retail categories data that indicates that across the Study Area 26.9% of expenditure is spent on bulky goods. We estimate that half of this proportion (13.45%) is spent in the existing centres in department stores and other large stores with out-of-centre retail warehousing capturing the other half.
- 5.20 Thus **Table 3.4** indicates that in the base year the Study Area as a whole provides £1.7 billion of expenditure available for all forms of comparison retailing except out-of-centre retail warehousing, and this figure rises to nearly £2.0 billion in 2012, £2.2 billion in 2017, £2.5 billion in 2022 and £2.9 billion in 2027.

Step 6: Turnover of Existing Centres from within the Study Area

- 5.21 Having calculated the available spend and growth in expenditure on comparison goods generated from within the Study Area, the next step is to calculate the turnover of the existing centres generated from within the Study Area by applying the market share (by visit) estimates¹⁷ to the pool of available expenditure within each zone. The exercise also allows us to calculate the total Study Area market share for each of the centres.
- 5.22 The results are set out at **Table 3.6**, which shows the turnover derived from each zone within the Study Area by each centre in London Borough of Camden, the two London Borough of Islington centres and other significant centres beyond the Study Area. The spending patterns are derived from applying the results of the household survey (set out at **Table 3.5**) to the available expenditure in each of the zones set out in Table 3.4. Tables 3.5 and 3.6 demonstrate the dominance of the West End as a comparison goods shopping location drawing nearly £700 million worth of expenditure from the Study Area, a 40% market share across the whole of the Study Area. The centre with the next highest draws is Brent Cross at £209 million, a 12% market share. Of the centres located within the Study Area, Angel/Upper Street derives the highest turnover from the study area at £128.1 million (a 7.4% market share), followed by Nag's Head/Holloway Road at £110.4 million (a 6.4% market share).
- 5.23 Of the centres in London Borough of Camden, Camden Town derives a turnover of £89.3 million (a 5.2% market share), followed by Swiss Cottage/Finchley Road at £58.2 million (a 3.4% market share), Kilburn at £53.7 million (a 3.1% market share), Hampstead at £51.3 million (a 3.0% market share) and Kentish Town at £31.0 million

¹⁵ See paragraph 3.10, Planning Policy Statement 6 (2005)

¹⁶ Paragraph 8.2 of Experian Retail Planner Briefing Note 4.0 refers to recent research for the BCSC which has revisited the estimates and projections in Retail Planner Briefing Note 2.2 (April 2005) in some detail and, in particular, has given more attention to the possible impact of past changes in net-to-gross ratios and to the impact of the sale of comparison goods in convenience stores on the estimates. It used central projections of 2.3% for comparison goods, which falls within the range previously recommended (2.0% and 2.5%). However, although this level of sales density growth has occurred in the past, we consider this level is unlikely to continue in the study area over the study timeframe. This is because such high levels of sales density growth occur due to unmet consumer expenditure growth. As there are new developments that will open in and outside the study area, notably King's Cross, Stratford City and White City, we consider that the sales density growth is unlikely to reach these levels. We have therefore assumed that the comparison floorspace in the study area will improve by 1.8% per annum, lower than the level forecast by Experian.

¹⁷ Market share data obtained from the Camden Household Survey (September/October 2003)

(a 1.8% market share). West Hampstead derives only £6.5 million, a 0.4% market share.

- 5.24 Collectively the Study Area centres retains a third of all Study Area expenditure, and London Borough of Camden centres retain 17.7%. The London Borough of Camden centres retain 29.6% of the borough's expenditure (Zones 1 to 4), reflecting the proximity of the West End as an internationally renowned shopping attraction.

Step 7: Base Year Total Turnover and Floorspace Sales Densities of Existing Centres

- 5.25 Step 6 above provides turnover and market share data for the centres generated from within the Study Area, but naturally each centre will derive some turnover from beyond the Study Area, which we term 'inflow turnover'. Due to the attraction of centres such as Camden Town for visitors from beyond London and abroad we have divided the inflow between that derived from elsewhere in London, which we term 'other London inflow', and that from beyond London, which we term 'non-London/tourist inflow'. We have based our assessment on the proportion of inflow turnover on a combination of the findings of the Visitor Survey, other consultants' estimates and our professional judgement. Our estimates of inflow turnover, the resultant total turnover and the resultant sales densities for each of the centres included in the assessment, are set out in **Table 3.7**.
- 5.26 The table indicates that Camden Town attracts half its comparison goods turnover (£89.3 million) from beyond the Study Area. This reflects the specialist fashion wear content of much of Camden Town's retail offer, and the high numbers of UK and foreign tourists that are attracted to visit by the centre's reputation. Camden Town is the only one of the six London Borough of Camden town centres where we consider tourist expenditure accounts for a very significant proportion of centre turnover. Kilburn also generates approximately a third from beyond the Study Area, but this is almost entirely due to the location of the centre towards the periphery of the area: the same reasoning applies to a number of the other centres. The figures demonstrate that very few of the centres are considered to attract significant expenditure from beyond London. Apart from Camden Town, the centres located within Study Area derive the vast majority of their turnover from the Study Area.
- 5.27 The table indicates that the London Borough of Camden centres collectively generate turnover of around £464.3 million. Camden Town generates the most, with a sales density of £5,555/sqm. Kilburn and Swiss Cottage/Finchley Road each generate comparison goods turnover of around £83 million, with sales densities of £4,911 and £6,649. Hampstead, as indicated by its high sales density, trades very well, which is unsurprising given the large number of fashion boutiques in the centre that retail comparatively high value goods. West Hampstead has the lowest turnover and sales density of all the London Borough of Camden centres, reflecting the limited comparison goods offer in the centre.
- 5.28 Turning to the London Borough of Islington centres, Angel/Upper Street and Nag's Head/Holloway Road achieve turnovers of £150.6 million and £122.7 million respectively. The turnovers of both centres are lower than that of Camden Town, but significantly better than London Borough of Camden's other major centres Kilburn and Swiss Cottage/Finchley Road. The sales densities of around £6,650/sqm may reflect the better range and quality of the provision in Angel and the popularity of Nags Head with its local and loyal shopping public.
- 5.29 The difference in scale between the local centres and both the West End and Brent Cross is evident from the table. Our analysis suggests that the West End achieves a turnover of £6,944 million, higher than projected in the London Town Centre Assessment¹⁸ but nevertheless a figure we think reasonable, given that it represents a

¹⁸ Table 24 of the London Town Centre Assessment Stage 1 - Comparison Goods Floorspace Need (September 2004) projects a turnover for the West End of £5,715 million in 2006 and £7,051 million in 2011.

sales density of £5,489/sqm, within the range we would expect for an International Centre.

- 5.30 The turnover of Brent Cross is estimated to be approximately one tenth that of the West End's, and nearly one and half times higher than all the London Borough of Camden centres combined, which reflects the popularity of this purpose built centre, as noted in our household survey. Brent Cross has the highest sales density of all the centres assessed at around £9,500/sqm.

Step 8: Deduction for existing floorspace commitments and likely take up of floorspace in the centres

- 5.31 The next step in the assessment is to make deductions for (i) the likely take-up of currently vacant floorspace in the centres and (ii) any existing floorspace commitments, that is extant permissions (both those unimplemented and those under-construction) within the Study Area that will draw on the pool of expenditure growth in the forecast years. The deductions made are set out in **Table 3.8**.
- 5.32 In this case there is no need to factor in improvements in occupancy rates as vacancy rates within the centres, especially the primary frontages, are extremely low averaging around 1%. There are, however, a number of committed schemes for which an allowance needs to be made: King's Cross Central, St Pancras International¹⁹, White City, Stratford City and the LDA scheme at Wembley. The committed Wembley Quintain scheme and the Wembley Central Square scheme Wembley Town Centre are scheme are not expected to have a material draw on the pool of expenditure growth. We have excluded the proposed additional floorspace at Brent Cross at this stage as it is not yet a commitment, though as an application was submitted in March 2008 we run an alternative scenario including the Brent Cross extension later in our quantitative analysis (see below).
- 5.33 For the King's Cross scheme, London Borough of Camden officers have advised that up to 45,925 sq m net additional A use floorspace has been permitted. There are no conditions or legal agreements restricting the amount of A1 floorspace, though a legal agreement restricts the combined additional A1/A2 floorspace to 32,500 sq m. The retail statement submitted in support of the King's Cross application indicates at Tables 7.1 and 7.2 that the additional comparison goods floorspace is expected to total between 21,950 sq m gross (15,055 sq m net) and 24,800 sq m gross (17,010 sq m net). We have therefore assumed a mid-point of 23,375 sq m gross (16,033 sq m net) A1 floorspace. The retail statement further assumes that 30% of the floorspace would be on line by 2011, 65% by 2016 and the remainder by 2021, an approach we have adopted.
- 5.34 The retail statement also assumes a sales density at Table 7.1 of £6,500/sq m at 2003 prices. We have rebased this sales density to 2004 prices based on price indices set out at Table 3 of MapInfo/Oxford Economic Forecasting Information Brief 06/1. We estimate that 60% of turnover will be drawn from the study area in 2012, 55% in 2017 and 50% in 2022, reflecting the wider catchment of King's Cross as the amount of floorspace increases. We assume a growth in sales efficiency of 1.8%/annum for each phase at 2012, 2017 and 2022 to reflect the fact that the new floorspace will increase its turnover following completion.
- 5.35 For St Pancras International, the retail statement submitted in support of the King's Cross application indicates that 6,550 sq m gross (4,493 sq m) comparison floorspace is being provided at St Pancras International. The retail assessment assumes that this floorspace will trade at £6,500/sq m at 2003 prices. We have rebased this sales

Assuming constant growth in this period, this implies a turnover of £5,982.2 million in 2007. The price base is not stated, but we assume that all data in Table 24 is at 2001 prices, in common with the rest of the document. If the turnover data is rebased to 2004 prices, this implies a turnover of £6,368.1 million in 2007.

¹⁹ The development at St Pancras International opened in November 2007, but is not yet fully occupied

density to 2004 prices based on price indices set out at Table 3 of MapInfo/Oxford Economic Forecasting Information Brief 06/1. We estimate that 15% of turnover will be drawn from the study area and assume a growth in sales efficiency of 1.8%/annum to reflect the fact that the new floorspace will increase its turnover following completion

- 5.36 For White City, Stratford City and the LDA scheme at Wembley our allowances for trade draw are based on the retail statements submitted in support of the applications. In the case of the Wembley Quintain scheme the retail statement submitted in support of the application indicates that there will be no material draw from existing centres as the new retail floorspace will be sustained by the wider development. In the case of the Wembley Central Square we are advised that no retail statement was submitted in support of the application as the amount of retail floorspace was not considered to be materially significant, and that it would have a negligible impact on nearby centres.
- 5.37 Other major mixed use schemes are also beginning to come forward, most notably at Euston and Victoria stations. In the case of Euston, British Land was selected in April 2007 as Network Rail's preferred development partner for the redevelopment of the station. We understood that British Land are in the process of drawing up a masterplan, but at this stage there is no indication of the amount of retail floorspace likely to be included. Consequently we have not included additional floorspace at Euston in our assessment.
- 5.38 In the case of Victoria, an application was submitted in April 2007 by Land Securities for redevelopment of the transport interchange. This includes up to 41,500 sq m gross non-food retail floorspace, though in fact a proportion is likely to be given over to A2, A3, A4 and A5 uses. A retail assessment submitted in support of the application indicates that, in terms of comparison goods, the proposal is likely to draw upon expenditure growth envisaged for the West End area, which it defines as stretching from Paddington in the north west, to Green Park in the south and Holborn and the Strand in the east. Given that the majority of the West End floorspace lies outside the study area we have made no allowance for the likely draw of the Victoria station development.

Step 9: Convert the resulting residual expenditure to a floorspace requirement

- 5.39 The final step, Step 9 draws together all of the above calculations. The workings for Step 9 are presented in **Table 3.9**. The first half of the table deals with the expenditure retention from the Study Area and with inflow expenditure from elsewhere, concluding with the total available expenditure figures in the base and forecast years. The bottom half of the table deals with the necessary deductions from the available expenditure, and the conversion of the residual expenditure (that is the growth in expenditure, less the claims deduction) into a floorspace requirement by applying an assumed sales density for future new comparison goods floorspace.
- 5.40 We build into the assessment 1.8%/annum growth in sales density to reflect the efficiency improvements existing traders make, to allow for continued profitability and investment in the building fabric, staff and product.²⁰
- 5.41 Dealing firstly with the calculations leading to the total available expenditure figures, we have applied the current market share for all the centres currently trading within the Study Area, which is approximately a one third share. Thus the floorspace requirement calculations include those for the centres in the centres within the London Boroughs of Islington and Brent that fall within the Study Area as well as those falling within London Borough of Camden. The inflow expenditure from beyond the Study Area incorporates growth of 4.4%/annum in the forecast years in accordance with MapInfo/Oxford Economic Forecasting Information Brief 06/2. Thus the total available expenditure in the base year is £744 million, growing to £868 million in 2012, around £1,010 million in 2017, 1,187 million in 2022 and £1,386 million in 2027.

²⁰ See footnote 16

- 5.42 We then make a deduction for commitments in each of the forecast years (as set out in Table 3.8). In accordance with standard practice we have made the assumption that as of the base year expenditure and floorspace is in equilibrium, i.e. the residual expenditure figure is £0.0 million.
- 5.43 In converting the residual expenditure to a floorspace requirement, we have adopted a sales density of £6,500/sqm in 2007. We make an allowance for growth in the sales density of 1.8%/annum, in accordance with our approach to making an allowance for growth in the forecast years of the existing floorspace. Thus we estimate that in 2012 there will be a requirement for 3,534 sq m comparison floorspace, for 9,041 sq m in 2017, for 16,936 sq m in 2022 and 26,531 sq m in 2027.

Alternative Scenario Including Brent Cross Extension

- 5.44 An application for new retail development at Brent Cross was submitted in March 2008 and includes a substantial amount of additional comparison goods floorspace. Drawing on the estimated turnover of the new floorspace set out in the retail assessment submitted in support of the application, we estimate that 10% of the turnover of this development would come from the Study Area's aggregate turnover. Our analysis of the Brent Cross extension's likely trade draw is presented at Table 3.10.
- 5.45 At Table 3.11 we rerun Step 9 where we convert the residual expenditure to a floorspace requirement. We conclude that, if the Brent Cross extension was built out by 2017, there would be a requirement in the Study Area for 3,354 sq m additional comparison floorspace, rising to 4,944 sq m in 2017, 12,850 sq m in 2022, and 22,360 sq m in 2027.

Comparison with Projections by Experian for GLA

- 5.46 The Experian work for GLA (October 2004) runs a number of scenarios identifying a requirement for London Borough of Camden of between 4,200 sq m and 21,000 sq m, albeit over a slightly different period of 2001 to 2016. The outputs of our more fine-grained analysis are consistent with the more 'broad brush' analysis undertaken for GLA.

Convenience Goods

- 5.47 Our approach to the assessment of the convenience goods floorspace requirement is essentially the same as that used for the assessment of the comparison goods floorspace requirement and so in the interests of brevity and avoiding any unnecessary methodological repetition we restrict our reporting wherever possible to the findings.

Step 3: Per Capita Comparison Goods Expenditure Estimates

- 5.48 **Table 4.2** sets out the per capita expenditure figures sourced from MapInfo/Oxford Economic Forecasting together with percentage growth figures for the forecast years. The data obtained are 2004 expenditure estimates at 2004 prices, reflecting the availability of data sets used by MapInfo to construct the estimates. The 2004 per capita expenditure estimates are projected forward to the base year (2007) and to the forecast years 2012, 2017 and 2022 and 2027 based upon the MapInfo's expenditure growth projection of 0.9% per annum for 2005 to 2016 and our own assumption that this trend will continue to 2027.
- 5.49 The data provide *total* annual per capita comparison goods expenditure estimates, which includes a proportion of expenditure that is spent by special forms of trading (SFTs) such as mail order, catalogue and Internet sales which is not available for conventional store-based (bricks and mortar) retailing, and therefore needs to be subtracted from the pool of expenditure available for bricks and mortar retailing. We therefore make a deduction for Special Forms of Trading (SFT) of 1.25% for 2004, 2.15% for 2007, 3.2% for 2012, 3.2% for 2017, 3.2% for 2022, 3.2% for 2027. This is based on Experian's Retail Planner Briefing Note 2.3D (December 2005), with

each of the Experian estimates halved to reflect the dominance of shelf-picking in convenience goods home delivery, rather than from a hub outside the catchment as is common with comparison goods.

Step 4: Total Expenditure Estimates

- 5.50 The total available convenience goods expenditure in the Study Area is calculated by applying the population projections to the per capita expenditure figures. The resulting total expenditure estimates for the Study Area, for the base and forecast years are set out in **Table 4.3**.
- 5.51 Table 4.3 indicates that in the base year there is approximately £1,034 million of convenience goods expenditure generated from within the Study Area. The available expenditure grows by £57 million in the five years to 2012, by a further £56 million by 2017, by £71 million to 2022 and by £65 million to 2027.
- 5.52 The projected expenditure growth for convenience goods is of a much lower order than that for comparison goods. The main reason for this is because growth in convenience goods expenditure is much lower than for comparison goods simply because as a population our spending on food and other convenience goods has levelled out. The main supermarket operators' response to this has been to increase the level of pre-prepared food and meals in an attempt to increase turnover and drive up market share. Nevertheless for the foreseeable future growth in this sector of the market is likely to remain relatively low.

Step 5: Out-of-Centre Retail Warehouse Expenditure

- 5.53 Step 5 does not apply to convenience goods retailing.

Step 6: Turnover of Existing Centres from within the Study Area

- 5.54 In Step 6 we calculate the turnover of the existing centres generated from within the Study Area by applying the market share (by visit) estimates²¹ (set out in **Table 4.4**) to the pool of available expenditure within each zone. The household survey obtained market shares for all convenience goods outlets, that is both the large foodstores, the smaller format convenience provision and local convenience stores. The exercise also allows us to calculate the total Study Area market share (by turnover) for each of the centres, and the results are set out in **Table 4.5**.
- 5.55 Table 4.5 demonstrates that London Borough of Camden stores derive £531 million from the Study Area, which equates to a market share of over 51%. The data indicates that the London Borough of Camden stores retain a market share from the borough (Zones 1 to 4) of more than 74%, a very healthy share considering the quantity and quality of provision in the locality.

Step 7: Base Year Total Turnover and Floorspace Sales Densities of Existing Centres

- 5.56 Convenience goods shopping patterns are much less widely drawn than those for comparison goods, as was noted in the household shopping patterns survey. However, each centre will derive some turnover from beyond the Study Area and in Step 7 we account for this and present the resultant total turnover and the sales densities for each of the centres included in the assessment in **Table 4.6**.
- 5.57 The table indicates that, with the exception of London Borough of Camden's Central London Area centres, the estimates of inflow turnover are much lower than for comparison goods retailing. Indeed only Kilburn and Hampstead, located towards the outer limits of the Study Area, have inflow estimates greater than 10%.

²¹ Market share data obtained from the Camden Household Survey (September/October 2003). The survey provided data on individual stores, which for the purposes of the need assessment we have aggregated data to centre level.

- 5.58 The centre sales densities vary from the highest for Holborn at around £21,000/sqm to £3,700/sqm at Hampstead. Generally the sales densities are high and reflect the quality of the local provision, the localised shopping habits of a very densely populated catchment area, and the boost to turnover made by the non-resident population.

Step 8: Deduction for claims on the expenditure growth

- 5.59 We make deductions for claims on the expenditure growth for years 2012, 2017 and 2022 and 2027 at **Tables 4.7a, 4.7b, 4.7c and 4.7d** respectively. We make an allowance for the improvements in floorspace efficiency and committed new floorspace, but not for improved occupancy rates for the reasons set out above in reference to comparison goods retailing. We build into the assessment a 0.9%/annum sales density improvement for the existing stock to reflect the continued efficiencies traders make to generate continued profitability and investment in the building fabric, staff and product. We also build into the assessment the convenience floorspace commitment at King's Cross which, the retail statement submitted in support of the application notes, is the equivalent of three large foodstores, together with the small amount of convenience floorspace proposed at St Pancras International. We estimate that new large foodstores would draw much of their turnover from the Study Area, but that the turnover of convenience floorspace at St Pancras International²² will be largely driven by rail travellers.

Step 9: Convert the resulting residual expenditure to a floorspace requirement

- 5.60 Step 9 draws together all of the above calculations, and we set out the calculations in **Table 4.8**. The retained expenditure figures are based on the current market share (approximately 70% of the total) for all the centres within the Study Area. The inflow expenditure from beyond the Study Area incorporates growth of 0.9%/annum in the forecast years in accordance with projections set out in MapInfo/Oxford Economic Forecasting Information Brief 06/2 for 2005 to 2016 and our assumption that this trend will continue to 2027. Thus the total available expenditure in the base year is £832 million, growing to £877 million in 2012, £922 million in 2017, £978 million in 2022 and £1029 million in 2027.
- 5.61 We then make a deduction for commitments in each of the forecast years (as set out in Tables 4.7a, 4.7b, 4.7c and 4.7d). In accordance with standard practice we have made the assumption that as of the base year expenditure and floorspace is in equilibrium, i.e. the residual expenditure figure is £0.0 million.
- 5.62 We have adopted a sales density figure of £10,000/sqm in 2007, which is lower than the sales densities currently achieved in most of the Study Area centres, but is a figure that represents a realistic density achievable by the main foodstore operators. The sales density is permitted to grow by 0.6%/annum, reflecting advice at paragraph 8.2 of Experian Retail Planner Briefing Note 4.0 (October 2006).
- 5.63 After the deductions referred to in Step 8 above we find that by 2012, there is a requirement for around 901 sq m net new convenience floorspace, and a need for 1,432 sq m net by 2017. By 2022 there is a need for 2,840 sq m net, and by 2027 a need for 4,733 sq m net.

Alternative Scenario Including Brent Cross Extension

- 5.64 An application for new retail development at Brent Cross was submitted in March 2008 and includes additional convenience goods floorspace. Drawing on the estimated turnover of the net additional new floorspace set out in the retail assessment submitted in support of the application, we estimate that 2% of the turnover of this development would come from the Study Area's aggregate turnover. Our analysis of the Brent Cross extension's likely trade draw is presented at Table 4.9a, 4.9b, 4.9c and 4.9d.

²² The development at St Pancras International opened in November 2007, but is not yet fully occupied

- 5.65 At Table 4.10 we rerun Step 9 where we convert the residual expenditure to a floorspace requirement. We conclude that, if the Brent Cross extension comes forward by 2012, there would be a requirement 901 sq m net convenience floorspace and 1,351 sq m net in 2017. By 2022 there would again be a requirement for additional floorspace of 2,758 sq m, and by 2027 a requirement for 4,649 sq m.

Comparison with Projections by Experian for GLA

- 5.66 The Experian work for GLA (June 2005) runs two scenarios. The first, which we think unrealistic, assumes a sales density of £5,550/sq m for supermarkets. A second, more realistic scenario assumes a sales density of £9,400/sq m. Under this more realistic scenario, and assuming productivity growth of 1.0%, Experian identify a requirement for additional convenience floorspace requirement of 3,383 sq m by 2016. Clearly this is higher than the requirement we have identified, but the Experian work is necessarily 'broad brush' and thus some discrepancy is to be expected.

Key Messages

- 5.67 The need for additional retail floorspace has been assessed using a tried and tested step-by-step model. It is consistent with the approach recommended by the GLA and is based on population, expenditure per head, existing and committed floorspace and market shares as derived from survey work, with a base year of 2007 and projections to 2012, 2017 and 2022 and 2027. Our work distinguishes between comparison and convenience expenditure/floorspace and projects the need for additional floorspace by these two categories.
- 5.68 For this study, a total of eight survey zones were used. These cover the whole of London Borough of Camden as well as areas in neighbouring boroughs, which include retail centres used by the borough's residents. Most retail modelling within conurbations is difficult and this has proved to be the case here. London Borough of Camden's residents have a wide range of choice of centres for comparison and convenience shopping, as well as a good public transportation system, which allows relatively good access to many centres. In parallel, the centres within and adjoining the Borough have complex and overlapping catchment areas and the picture is further complicated by the close proximity of the West End (as an international centre), Brent Cross (as a major sub-regional centre) and by committed developments at White City and Stratford, and the likelihood of new floorspace at Brent Cross.
- 5.69 The resultant retail capacity assessment (see Tables 3.9 and 4.8 of the summary totals) is thus put forward as a realistic outcome from the methodology adopted and the survey results as secured. This assessment is based on the existing market shares of each of the centres in the study and can be summarised (with floorspace rounded to the nearest 500 sq m for comparison goods and 100 sq m for convenience goods) as follows:
- The net floorspace requirement for **comparison** goods grows from approximately 3,500 sq m in 2012, to 9,000 sq m in 2017, to 17,000 sq m in 2022 and to 26,500 sq m in 2027.
 - The net floorspace requirement for **convenience** goods grows from approximately 900 sq m in 2012, to 1,400 sq m in 2017, to 2,800 sq m in 2022 and 4,700 sq m in 2027.
- 5.70 However, if the Brent Cross extension is built out by 2017:
- The net floorspace requirement for **comparison** goods grows from approximately 3,500 sq m in 2012, to 5,000 sq m in 2017, to 13,000 sq m in 2022 and to 22,500 sq m in 2027..

- The net floorspace requirement for **convenience** goods grows from approximately 900 sq m in 2012, to 1,400 sq m in 2017, to 2,800 sq m in 2022 and 4,600 sq m in 2027.

6 REVIEW OF EXISTING CENTRES

- 6.1 In this section we draw together the key findings for each of the centres studied by reference to the healthcheck assessments (which are reported in full in the Annex to this report), along with the survey results (household and visitors' surveys) pertaining to customer views and behaviour, set out in the earlier sections of this report.
- 6.2 We firstly identify the current characteristics of each centre, then point to the outlook and finally identify if there are prospects for the centres to absorb some of the, admittedly limited, future growth potential identified in the preceding section.
- 6.3 The centres that we have assessed are:
- Major Centres (as identified by the London Plan): Camden Town, Kilburn (also having regard to that part of the centre in London Borough of Brent);
 - District Centres (as identified by the London Plan): Swiss Cottage/Finchley Road, Kentish Town, Hampstead and West Hampstead;
 - Centres/frontages/areas falling within the Central Activities Zone (as defined by the London Plan): Hatton Garden/Leather Lane, Covent Garden (also having regard to that part of Covent Garden within Westminster), Tottenham Court Road/New Oxford Street, Charing Cross Road, High Holborn.
- 6.4 Below, we summarise the key findings for each centre in the order listed above.

Major Centres

Camden Town

Centre Characteristics

- 6.5 In terms of A1 floorspace, Camden Town is the largest centre in the London Borough of Camden, with 55,250 sq m. A very low proportion of this is in service use. The centre's street markets are a national and international tourist attraction. The scale of these, combined with the attractive environment in the market areas, provides Camden Town with its unique selling point. The market area is to the north west of Camden Underground station towards Chalk Farm, and is renowned for an emphasis on fashion and clothing provided by in large measure independent traders, which adds to the uniqueness and interest and attracts a young clientele. Away from the market area in the south of the centre the high street area is increasingly dominated by the multiple traders who are attracted by Camden Town's fashionable image, and whose impact continues to be to drive up rents. The two areas offer quite different shopping and attract different groups of shoppers.
- 6.6 Camden Town is attractive to both retailers and investors. Rents are higher in Camden Town than in both Charing Cross Road and High Holborn (though it is notable that growth in rents has been substantially lower than in other centres and frontages in the Central Activities Zone), and yields are attractive at 6%, indicating that Camden Town is a viable and healthy centre. Demand for retailer representation is high, though the proportion of A1 units lying vacant (10%) suggests a possible mismatch between the type of units available and/or exact location of retailer requirements.
- 6.7 The Visitors' Survey demonstrates the wide draw of Camden Town to visitors from beyond the local boroughs, with 30% coming from elsewhere in London and a quarter from elsewhere in the UK or from abroad. This finding is reinforced by the household survey, which found that beyond the Camden Town zone (Zone 2) the centre's draw within the Study Area is surprisingly weak. Returning to the Visitors' Survey, visitors to Camden Town spend less on comparison goods than the three LB Camden centres within the West End, but more than any other centre (£36). Visitors also spend more on convenience goods (£7) than visitors to the Central Area Centres (with the exception of Hatton Garden), but significantly less than visitors to Hampstead. A total

of 8% of visitors access the centre by private car, while a third walk-in, with the remainder using some form of public transport. The survey also highlighted crime and/or the perception of crime is a significant issue for visitors. The incidence of robberies in the centre is higher than elsewhere in the borough and in London as a whole, and measures such as demarcating 'safety zones' around cash points have recently been introduced to address this.

- 6.8 The household survey demonstrates the strength and attraction of the A3 and D2 leisure provision in Camden Town, which draw primarily from the local area (Zone 2), but also from across the Study Area.

Outlook

- 6.9 The trends in the market indicators suggest that Camden Town will continue to perform well and draw in the crowds of visitors that it presently does as long as it continues to retain the wealth of independent fashion orientated traders that provide the centre's unique selling point and the principal attraction to shoppers and other visitors. The range of shops and services in Camden Town is the best of all the London Borough of Camden centres although in terms of "high street" multiple offer Camden Town does not match centres such as Brent Cross.

- 6.10 Much of the new retail development in recent years has involved consolidating a number of smaller units into larger stores for the national chains, such as Virgin and Gap. The expansion of the multiple traders northwards towards the market area could in the future threaten the viability of traders housed in the smaller units as rents are driven higher because of the supply-side shortages. The introduction of further traffic calming measures and improved pedestrian facilities within the centre would bring further benefits. Shop front improvements of the stock beyond primary frontages would also broaden the centre's attraction. There is a need to reduce crime rates, particularly during the evenings and weekends.

Opportunities for Growth

- 6.11 Camden Town is predominantly a linear centre with little opportunity for expansion within its existing boundaries, and the provision of large modern retail floorplates that are attractive to the national chains may only be possible through the comprehensive redevelopment of existing buildings. However, any development proposals that sought to expand the mainstream retailer area northwards into the markets area may lead to the erosion of Camden Town's uniqueness. On the other hand, there may be spin off benefits from redevelopment in key locations. Consideration should therefore be given to opportunities for relocation of displaced market stalls should redevelopment proposals for parts of the existing markets be brought forward.

Kilburn

Centre Characteristics

- 6.12 In terms of A1 floorspace, Kilburn is London Borough of Camden's second largest centre (behind Camden Town) with a total of 42,291 sq m of A1 retail floorspace. Kilburn has some strengths, including a strong evening economy, which has seen an improvement in the quality of provision in recent times, comparatively good quality architecture and good accessibility.
- 6.13 Overall, the performance of the centre is improving. Retail rents have increased by nearly 50% in the past six years, though they still fall some way short of the borough's more successful centres, and yields are relatively low at 9%.
- 6.14 In common with most of the London Borough of Camden's centres, and indeed many traditional centres in London, Kilburn is a linear centre. However, in Kilburn's case the length of the retail area (around 1.5km) spreads the retail attraction out, which dilutes the overall attraction. An advantage that Kilburn does have over some other London Borough of Camden centres is that although traffic volumes are significant, the traffic

does not dominate the street scene in the way that it does in Swiss Cottage/Finchley Road, Camden Town or most of the Central Area Centres.

- 6.15 The views and perceptions of Study Area residents of Kilburn were assessed through the household survey (because Kilburn functions very much as a local centre it was not included with the centres where a Visitors' Survey was required) the key findings of which are set out below.

Outlook

- 6.16 There is some demand from national multiples for floorspace in Kilburn, but this is predominantly from A1 comparison "discount" format retailers seeking large units. However, Kilburn lacks large units to accommodate such demand and there is little space for expansion. The centre's large catchment population suggests that it could support a wider range of retailers, but the shopping environment and the overall lack of sufficient critical mass of retail attraction suggests that Kilburn is unlikely to attract significant numbers of national multiples in the future, and is unlikely to increase its market share.
- 6.17 The household survey results demonstrate that only modest proportions of households in Kilburn's natural catchment area (Zone 3 and 5 - 7.7% and 14% respectively) use the centre for comparison goods purposes and without the provision of facilities to rival Brent Cross in Kilburn this pattern will not change. The priority for Kilburn should be to build on its relative strengths, the most important being its large and relatively affluent catchment population who should be encouraged to continue to use Kilburn for convenience and day-to-day shopping purposes, and to use the improving evening economy facilities.
- 6.18 Kilburn must also continue to improve the quality of the shopping environment, building on recent streetscape and shopfront improvement schemes to enable the centre to compete to maintain its market share in the face of growing competition.

Opportunities for Growth

- 6.19 Opportunities to expand the retail provision in the centre of Kilburn are limited. However, there may be an opportunity for a small infill development at the junction with Palmerston Road and would involve the loss of some short term parking and pedestrian access to the Webheath Estate. On the western side of Kilburn High Road, within the London Borough of Brent, there is a possible opportunity for development of the Mecca Bingo Hall car park.
- 6.20 The weakness of the prime pitch in Kilburn and the linear nature of the centre suggest that the best opportunity to enhance Kilburn as a shopping destination will be to consolidate the retail activity in the central area and allowing other activities to come forward in less centrally located areas. The precise location and extent of any consolidation would require more detailed local study.

District Centres

Hampstead

Centre Characteristics

- 6.21 In terms of A1 floorspace, Hampstead is the second smallest of Camden's six town centres, providing a total of 12,560 sqm of A1 retail floorspace. The centre has a strong reputation for providing a high quality fashion offer, with a large number of the more upmarket national fashion chains and independents represented in the centre. There is a comparatively low proportion of A1 convenience floorspace in the centre, and no large food retailer capable of providing a main convenience goods shopping destination. The centre has good representation of A3 activity, especially in respect of cafés and restaurants. The shopping environment is particularly pleasant with the centre located within a designated conservation area that contains large numbers of

listed buildings that add visual interest, and the volume and speed of road traffic passing through the centre is comparatively low.

- 6.22 The market indicators demonstrate that Hampstead is performing well. Indeed, in many respects it performs significantly above what would normally be expected for a centre of its size, which largely reflects the affluent catchment area. The centre functions as a comparison goods shopping destination particularly for ladies wear, and has a much better quality and range of fashion-wear stores than all the other London Borough of Camden centres, with the exception of Covent Garden (northern part). Hampstead has high retail rental values, which is largely the result of the high number of small units present in the centre that are attractive to the fashion-wear boutique operators. Retailer demand for units of a wider variety of sizes is high, which maintains low shop vacancy rates.
- 6.23 The Visitors' Survey indicates that almost 40% of visitors come from Camden and all but a very small number (6%) come from elsewhere in London. Comparison goods spend in Hampstead is lower than most other centres in the London Borough of Camden, while convenience goods spend is one of the highest (at £12), which is surprising given the lack of main convenience goods shopping destinations, but is likely to reflect the strength of the top up shopping provision in the centre. The lack of large convenience goods stores in the centre is emphasised by the household survey, which indicates that convenience goods shopping needs are being met in other centres such as Camden Town and Finchley Road/Swiss Cottage. Despite this, the Visitors' Survey does not indicate that the lack of food retailing provision in the centre is an issue; the main concern for visitors is the lack of sufficient car parking provision. The fact that a third of visitors to Hampstead arrive by car has undoubtedly contributed to parking being the main issue raised. However, the household survey demonstrates that three quarters of local residents access Hampstead on foot, with the car accounting for only 18% of trips.
- 6.24 Hampstead scored highly in response to questions on visitor satisfaction and meeting comparison goods shopping needs in both the Visitor and Household surveys. The centre retains a reasonable proportion of households' comparison goods expenditure (12.6%) from the centre's local catchment area (Zone 4), which compares favourably with the draw of Brent Cross which is located close by. The centre also scored highly in terms of providing an A3 leisure location and satisfying that need.

Outlook

- 6.25 With demand for retail representation especially from the fashion-wear retailers in Hampstead outstripping supply the outlook is for continuing success. The centre will retain its "village" atmosphere and continue to offer an attractive mix of A1 and A3 activity in a very conducive shopping environment.

Opportunities for Growth

- 6.26 In common with most of the London Borough of Camden centres there is no obvious opportunity to expand the centre, which in Hampstead's case is all the more challenging given the Conservation Area status and Listed Buildings affecting the centre. Were there to be the physical capacity for growth there would undoubtedly be demand from the fashionwear operators and quite possibly a major foodstore operator.

Kentish Town

Centre Characteristics

- 6.27 Kentish Town provides 17,400 sq m of A1 retail floorspace and functions very much as a local centre, with the retail and service provision directed very much at serving the day-to-day needs of the local population. For a centre of this size the range of shops and services provided is good, and the retail provision is dominated by independent traders. A substantial amount of floorspace is in use for A3/A4/A5 uses.

- 6.28 There is only a limited amount of market data available for Kentish Town, though the proportion of vacant A1 units is relatively low at 6%. There is some retailer interest, though this is focussed on the budget end of the market (TK Maxx, Poundland) and A3/A4/A5 uses (Starbucks, KFC).
- 6.29 A number of improvements have been made to Kentish Town Road, including:
- improved pedestrian crossings;
 - more parking and loading bays;
 - new and brighter street lights;
 - repaving of footpaths.
- 6.30 Further repaving of footpaths is proposed, together with the creation of squares at Rochester Road, Farrier Street and Healey Street.
- 6.31 Accessibility to Kentish Town by public transport is good as both Underground and bus transport the visitor into the heart of the centre.

Outlook

- 6.32 The improvements being made to the centre are likely to make the centre increasingly attractive to retailers and shoppers, albeit only to a relatively local catchment, reflecting the size of the centre and the proximity to the higher order centre at Camden Town. The centre is therefore likely to continue to serve as a local centre.

Opportunities for Growth

- 6.33 There are few, if any, opportunities to accommodate new development.

Swiss Cottage/Finchley Road

Centre Characteristics

- 6.34 In terms of A1 floorspace, Swiss Cottage/Finchley Road is the third largest centre in the London Borough of Camden with a total of 33,970 sqm of A1 retail floorspace, over half of which is used for comparison goods retailing. Overall, Swiss Cottage/Finchley Road is performing reasonably well, with the proportion of vacant A1 units at around 7%, lower than both Camden Town and Kilburn. Furthermore, yields are reasonable at 7%.
- 6.35 The opening of the O2 Centre in 1999 has provided a significant increase in both A3 and D2 leisure provision in the locality, acting as a key anchor for the centre, and our household survey demonstrates the wide scale attraction of the centre. At the southern end of the centre, the Visage leisure centre/Swiss Cottage Cultural Centre has provided another anchor for the centre. Smaller scale development has also taken place at the northern end of the centre, with a new residential-led scheme with retail at ground floor recently completed at the corner of Lymington Road (southern side) and Finchley Road. That said, it is clear that there is a heavy reliance on the Habitat store, which has relocated to the O2 centre, and the Waitrose store, which has expanded to fill the entire unit, to provide the retail attraction.
- 6.36 Like most linear centres located on a busy arterial route, a key issue is the poor shopping environment that results from the traffic-choked roadway and the fact that visitors are unable to move freely and easily about the centre. The barrier created by the road has led to the main retail attraction becoming focused on the western side of Finchley Road, with the eastern side suffering as a result.
- 6.37 The household survey identifies the importance of the O2 Centre in attracting visitors from a wide area, beyond the local zone (Zone 3), although the A3 activity draw is much more localised.

Outlook

- 6.38 The O2 Centre trades very successfully, and the wider centre is now performing reasonably well. Moreover, the centre has a large and relatively affluent catchment population, and there is an opportunity to build on this. A key concern, however, is the dominance of road traffic, which has a major negative impact upon the quality of the shopping environment. Without measures to reduce the dominance of the road traffic this centre will continue to lose out to centres elsewhere that provide both a more conducive shopping environment and consequently a better quality and range of shopping. If the shopping environment can be improved there may be an opportunity to increase the retention rates for comparison goods shopping, which are currently low (11% of Zone 3 and 10% of Zone 6).

Opportunities for Growth

- 6.39 Although the centre is performing reasonably well, it would nevertheless benefit from greater consolidation of the retail activity. The precise definition of any redrawn primary frontages or the primary shopping area would require detailed local assessment, but may extend south towards the Swiss Cottage area (incorporating Superdrug, WH Smith, Argos, Costa Coffee and McDonald's) and north to include the O2. A potential redevelopment site (or perhaps more likely a refurbishment opportunity) exists at the junction of Lymington Road (northern side) and Finchley Road. This former car showroom could potentially accommodate requirements from specialist furniture showrooms or scooter sales, for which there is a known demand. This would ensure that 'core' retail activity which generates a higher footfall is concentrated in the areas around Habitat and Waitrose.

West Hampstead

Centre Characteristics

- 6.40 In terms of A1 floorspace, West Hampstead is the smallest of the London Borough of Camden town centres providing 9,110 sq m of A1 retail floorspace. Market information on the centre is limited, but it is evident that the centre performs both a convenience and comparison goods shopping role, albeit the comparison goods stores are limited to a relatively local catchment. Convenience floorspace is currently dominated by independent convenience outlets, though we understand that the Woods and Woods furniture store on West End Lane closed on 17 February 2008 and will re-open in the summer as a Tesco store.
- 6.41 The northern part of the centre has a pleasant village character; environmental quality is high with wide pavements, a seating area, attractive buildings and well-maintained shopfronts. However, the southern part of the centre, where the station is located, has narrow pavements and a less attractive environment. Relatively few visitors access the town centre by rail (other than commuting related shopping trips on the way home from work). Nevertheless, if improvements to the environment from the south could be implemented this would undoubtedly have a positive effect on trading prospects in the centre, albeit not significant.

Outlook

- 6.42 West Hampstead's role will continue to be the provision of the day-to-day needs of the local catchment population, both in terms of convenience and comparison goods. The proposed Tesco store will provide a new anchor for the centre and may encourage linked trips to other stores in the centre. On the other hand, it may put at risk some of the existing convenience retailers.

Opportunities for Growth

- 6.43 The area around the stations is the subject of draft planning framework, published in March 2004 and seeks the development of:

- both frontages to West End Lane as an extension to the retail centre (with small scale retail units at ground floor level and residential use above)
- land immediately to the east of West End Lane for a new transport interchange with a mix of residential/office/small scale retail, albeit with residential the dominant use after transport.

6.44 In addition, West Hampstead has been identified as an Area for Intensification in the London Plan. The opportunity to take forward development consistent with the planning framework remains. However, the location is likely to attract only comparison goods retailers serving the immediate catchment and some convenience retail serving both the immediate catchment and the commuting public.

Centres/frontages/areas Within the Central Activities Zone

Charing Cross Road

Characteristics

- 6.45 Charing Cross Road is part of the West End, and is a specialist retail centre for books and music. The centre is linear in nature and is bisected east west by the Westminster City and London Borough of Camden borough boundaries (Westminster responsible for the western side and Camden for the eastern side). Almost all the A1 class floorspace on Charing Cross Road is in comparison goods use. In terms of market indicators, Charing Cross Road is performing better than in recent years, with rents increasing by 60% between 2001 and 2007, the greatest increase for all the centres and frontages for which data are available. That said, rents are still lower than in Tottenham Court Road and High Holborn
- 6.46 The views and perceptions of visitors are restricted to the analysis of the Visitors' Survey. This centre, together with Covent Garden (northern part) and Tottenham Court Road, has the highest proportion of visitors from beyond London (some 40%). The average spend on comparison goods is the lowest of all the Central Area Centres (£20), which is likely to reflect the value of the goods sold in the centre. Only 3% of visitors access Charing Cross Road by private car, with the majority travelling by tube, bus or train.

Outlook

- 6.47 Charing Cross Road is not a mainstream comparison goods shopping location: it has a particular specialist retail function, which is of international renown. This specialist function should be encouraged and any pressure for A3/A4/A5 uses should be resisted. The shopping environment on Charing Cross Road is poor, and the centre would therefore benefit from environmental improvements. Difficulties in management posed by the centre being bisected by the City of Westminster and London Borough of Camden could be in part solved by the creation of a BID for the centre, possibly in conjunction with Tottenham Court Road.

Opportunities for Growth

- 6.48 There is little opportunity for expansion in this centre, other than at the northern end (see section on Tottenham Court Road/New Oxford Street).

Covent Garden (northern part)

Centre Characteristics

- 6.49 Covent Garden (northern part) is also part of the West End and performs a specialist fashion retailing role comprising, in the main, independent fashion-wear retailers commonly occupying small units of between 60 sq m to 100 sq m set in a high quality shopping environment. In common with the southern part of Covent Garden (located in the City of Westminster) it is a destination and festival shopping area attracting visitors from all over the UK and from abroad.

- 6.50 There is substantial retailer interest in Covent Garden: 74 national multiples have space requirements within the wider Covent Garden area. Both A1 comparison and A3 retailers are seeking space in the wider Covent Garden area, most of whom would almost certainly also consider space in Covent Garden (northern part), with its mix of fashion and A3 retailing. Those retailers seeking space are generally at the 'quality' end of the market.
- 6.51 Our assessment of the views and perceptions of visitors to Covent Garden (northern part) are restricted to those of the visitors interviewed within the centre during the visitors' survey, and not a detailed assessment of the views of residents within the Study Area, as through the medium of the household survey we were unable to distinguish separate views for Covent Garden (northern part) from views expressed in respect of the wider West End. The Visitors' Survey confirms the high proportion of non-London based visitors to the area, with 40% of visitors surveyed coming from beyond London. Other than Hatton Garden and Tottenham Court Road (both of which are specialist shopping venues with high value items), visitors to Covent Garden (northern part) have the highest spend on comparison goods (£45) of all the centres surveyed. The centre also has one of the highest proportions of visitors arriving by means other than the private car (92%).

Outlook

- 6.52 The future for this centre are firmly linked to the fortunes of the West End as a whole, and will be sensitive to the global security situation and the terrorist threat more so than other centres that rely less on tourist numbers. The expectation is that due to the overall offer in Covent Garden, in terms of which Covent Garden (northern part) plays an important role, the area will continue to offer the type of unique visitor attraction that will keep drawing the crowds. An important facet of the area is the balance of A1 to A3 retail provision, with A3 important in the Plaza and the adjoining streets. The combination of retail and places to eat and drink is crucial to the overall attraction given the benefits of maximising dwell times throughout the day and into the evening. However, the A3 activity must not come to dominate the A1 uses if the area is to retain its retail attraction.

Opportunities for Growth

- 6.53 There are no retail development opportunity sites in Covent Garden (northern part).

Hatton Garden

Centre Characteristics

- 6.54 Hatton Garden is not part of the West End. The centre has two distinct retail functions; a specialist retail area for jewellery of international repute, and also as a local centre providing the day-to-day needs of the local resident population and office workforce. Added colour and interest is provided by Leather Lane market, which is an important attraction for both local residents and workers.
- 6.55 The Visitors' Survey demonstrates that a third of visitors are from the local London boroughs with almost half coming from elsewhere in London, and a fifth from elsewhere in the UK. The survey did not identify large numbers of foreign visitors. In terms of spend the survey identified that Hatton Garden comparison goods spend (£78) was only bettered by Tottenham Court Road and the convenience goods spend was considerably higher than any of the other Central Area Centres at over £16. Whilst only 10% of visitors travelled to the centre by the private car, the largest single group of visitors were those who travelled on foot and not those travelling by forms of public transport.

Outlook

- 6.56 Hatton Garden's role as a world-renowned centre for jewellery and its distinctiveness relies on the juxtaposition of manufacturing activity and retail. Further expansion of the

retailing activity should be encouraged where this can be achieved without undermining the manufacturing activity.

- 6.57 If retail-led development were to be taken forward at Smithfield Market and/or Farringdon Station could halt any further expansion or possibly erode Hatton Garden's role in serving the day-to-day needs of the local resident population and office workforce. This may mean that the centre would need to become more focussed on its specialist function.

Opportunities for Growth

- 6.58 The specialist nature of the dominant activity in Hatton Garden suggests that any future expansion of the retail activity in the centre will be piecemeal in nature, and in common with the other centres and frontages in the Central Activities Zone will be mostly provided through intensification.

High Holborn

Centre Characteristics

- 6.59 High Holborn is not part of the West End, and unlike Camden's other Central Area Centres does not have a specialist retail function. The centre principally serves the daytime weekday office workforce, and has much reduced visitor numbers in the evening and at weekends. The retail provision reflects this role with large numbers of A3 activities, sandwich bars and routine comparison goods stores.
- 6.60 Data from Colliers CRE indicates that Zone A rents in High Holborn have risen from £1,399/sq m per annum in 2001 to £1,938/sq m per annum in 2007, an increase of 39%. By that measure it is doing better than Charing Cross Road, which achieved rents of £1,722/sq m in 2007, but falls some way short of Tottenham Court Road, which achieved rents of £2,637/sq m.
- 6.61 The views and perceptions of visitors to the centre are assessed through analysis of the Visitors' Survey, which indicates that 20% of all visitors are local London Borough of Camden residents. Visitor spend on comparison goods is the second lowest of all the centres/frontages within the Central Activities Zone (at £25), but the convenience goods spend is second highest at £5. The survey indicates that no visitors at all use the private car to access the centre, with most using Tube or bus.

Outlook

- 6.62 High Holborn's strengths are the wide variety of A3 provision and the convenience goods, comparison goods and service outlets that cater for daytime weekday office workers and the needs of local businesses.

Opportunities for Growth

- 6.63 Given the role of this centre and the separation from the West End, the centre will continue to provide refurbished retail accommodation (and in some cases redevelopment of individual sites). That said, Holborn has been identified as an Area for Intensification, and nearby Tottenham Court Road has been identified as an Opportunity Area in the London Plan, and there is a case for further consideration of the links between the two areas.

Tottenham Court Road/New Oxford Street

Centre Characteristics

- 6.64 Tottenham Court Road is located within the West End, and it is a successful centre renowned for two specialist retail sectors: electronic goods and furniture. These two activities are distinct from one another, in terms of both location and catchment area. The electronics retailers tend to locate in the southern part of Tottenham Court Road, where the units command higher rents, and the furniture traders group in the central and northern zones.

- 6.65 The market indicators available show that Tottenham Court Road is performing well: rental levels are the highest of all London Borough of Camden's centres and have seen an increase of 47% between 2001 and 2007. The majority of floorspace on Tottenham Court Road is used for A1 comparison retail, but the centre also has good provision of A1 convenience floorspace.
- 6.66 The Visitors' Survey indicates that approximately a quarter of all visitors come from the local boroughs, while just over a third come from beyond London (less than Covent Garden (northern part) and Charing Cross Road, but more than Hatton Garden and High Holborn). Visitors to Tottenham Court Road record the highest spend on comparison goods with an average of £95, which reflects the high value items sold in this centre. Convenience goods spend is the lowest of all centres surveyed. The mode of transport used to access the centre shows a similar pattern to that of the other centres and frontages within the Central Activities Zone, with reliance on public transport, significant numbers walking to the centre (which indicates that local residents are more inclined to walk) and very few (5%) arriving by private car.

Outlook

- 6.67 It is likely that the successful specialist retail in Tottenham Court Road will continue to thrive, and that there will be some pressure for intensification of existing sites. Although data specific to New Oxford Street is not available, it appears to be performing less strongly and lacks the vitality that might be expected of a central London frontage.

Opportunities for Growth

- 6.68 On Tottenham Court Road itself the main scope for expansion is through intensification of sites in existing A1 use, along with the cleared site at the junction of Tottenham Court Road/Grafton Way. Tottenham Court Road has been identified as an Opportunity Area in the London Plan, and nearby Holborn has been identified as an Area of Intensification, and there is a case for further consideration of the links between these two areas. On New Oxford Street there is an opportunity to introduce additional retail activities, perhaps building on the existing cluster of photography and computer-related retail at the western end of the street. South of New Oxford Street there is an opportunity to introduce new food and drink uses, specialist shops and tourist and entertainment attractions along St Giles High Street and Shaftesbury Avenue.

Key Messages

- 6.69 As is to be expected of an inner London borough, London Borough of Camden's retail centres and frontages display a diverse range of characteristics, ranging from the world renowned Covent Garden to the village-like Hampstead. Some centres are significant London centres in their own right; some have a strong evening economy; others attract high proportions of visitors from beyond London, some present a limited range of goods and services; some serve primarily local residents whilst others are reliant on weekday custom by office workers. There is wide divergence between the centres in terms of the key performance indicators, which means some are more attractive for future investment than others.

Conclusions on the Centre Hierarchy

- 6.70 One of the aims of the previous study was to assess the appropriateness of the existing retail centre hierarchy. This must be seen in the context of the London Plan, which as we note in section 2 identifies Camden Town and Kilburn as 'Major Centres', together with four district centres: Swiss Cottage/Finchley Road, Kentish Town, Hampstead and West Hampstead. Importantly, one of the key 'tests of soundness' for LDF development plan documents is the need to in 'general conformity' with Spatial

Development Strategy (London Plan). The London Borough of Camden would therefore need a compelling reason to divert from the definitions in the London Plan.

- 6.71 Major centres are described as Annex 1 of the London Plan as 'characteristic of inner London'. It further notes that:
- They act as important shopping and service centres, often with a borough-wide catchment;
 - Their attractiveness is derived from a mix of both comparison and convenience shopping
 - They typically have over 50,000 square metres of retail floorspace;
 - May have some leisure have some leisure and entertainment functions.
- 6.72 District centres are also described at Annex 1 of the London Plan. It notes that:
- They have traditionally provided convenience goods and services for more local communities;
 - They may have specialist shopping functions, often as a result of their lower rents.
 - Many have a linear nature, which may need to be consolidated to make more efficient use of land and transport capacity.
- 6.73 We have assessed the role and function of each centre based upon the town centre healthcheck work and the results of the household and visitor surveys. In the light of our analysis we are satisfied that Camden Town serves as a 'Major' centre. It is, however, difficult to see how Kilburn can be defined as a 'Major' centre, given that its catchment is relatively small and, although it has a substantial proportion of comparison goods floorspace, performs a local shopping role, not at all the role that is envisaged for a Major centre.
- 6.74 We agree with the London Plan's designation of Swiss Cottage/Finchley Road, Kentish Town, Hampstead and West Hampstead as district centres, but that is not to say they fit neatly within the London Plan definition of a district centre. Leisure provision at Swiss Cottage/Finchley Road, attracts visitors from a wide catchment, although the retail catchment is more local. Similarly, Hampstead has a substantial comparison goods offer, though given that this is focussed on the upmarket fashion-wear sector it may be seen as the 'specialist' retail role to which Annex 1 refers.
- 6.75 We agree that Kentish Town and West Hampstead do function in accordance with their district centre designation by providing a local convenience and service sector retail offer.
- 6.76 Designation of the centres, frontages and areas in the Central Activities Zone is even more difficult. The London Plan indicates that Tottenham Court Road and part of New Oxford Street are central area frontages which fall within the West End Special Retail Policy Area (WESRPA), for which a planning framework will be prepared by the Mayor of London and other stakeholders. We agree with the London Plan designation of these frontages, though defining their exact extent will require more detailed analysis, and may also be dependent on whether London Borough of Camden continues to pursue a policy seeking to extend the quality of the retail offer along New Oxford Street. There is a case for widening the WESRPA to take account of the Opportunity Area at the junction of Tottenham Court Road, Charing Cross Road and Oxford Street and New Oxford Street, together with Charing Cross Road itself. This could be considered through joint working in the preparation of the planning framework for the WESRPA.
- 6.77 High Holborn/Kingsway and Charing Cross Road are also defined as a central area frontages, a designation with which we agree. Again, the exact extent of these frontages will require more detailed analysis, probably in consultation with the GLA. Hatton Garden receives no mention in the London Plan, but in our view it could usefully

be identified as a district centre, given that it provides on the one hand for a relatively local catchment for 'day-to-day' retail but also performs a specialist role.

Capacity to Accommodate the Floorspace Growth Projections

- 6.78 In section 5 we concluded that if the Study Area centres maintain their existing market share expenditure growth in the Study Area will produce the net floorspace requirements set out in Table 6.1 below.

Table 6.1 Forecast floorspace requirements (sq m net)

Type of floorspace	2012	2017	2022	2027
Without Brent Cross extension				
Comparison	3,500	9,000	17,000	26,500
Convenience	900	1,400	2,800	4,700
With Brent Cross extension				
Comparison	3,500	5,000	13,000	22,500
Convenience	900	1,400	2,800	4,600

- 6.79 Our assessment indicates that there is very little physical capacity to accommodate significant additional retail floorspace in any of the London Borough of Camden centres. The requirement for new floorspace will therefore need to be accommodated through redevelopment of existing retail, coupled with some additional development at the Opportunity Areas at Euston and Tottenham Court Road and Areas for Intensification at West Hampstead and Holborn.
- 6.80 One critical issue requiring further consideration is the role of the markets at Camden Town, and the extent to which part of the markets might come forward for redevelopment. It is difficult to offer a view on this at this stage, given the recent fire and the current uncertainty over the Camden Town Underground station site, but as our previous study of markets suggested, we do not believe that conclusive evidence is available to justify the retention of Camden Market (at Buck Street) and the Electric Market in their current form. However, should redevelopment of Buck Street come forward, there may be an opportunity to accommodate some displaced traders at Hawley Wharf. It may also be possible to accommodate an element of non-market retail space at the Camden Town Underground station site and the Hawley Wharf site.

7 SUMMARY AND CONCLUSIONS

Survey Conclusions and Shopping Patterns

Household Survey

- 7.1 A detailed household questionnaire was undertaken for the 2004 study and we have drawn on its outputs for this update. The survey was undertaken across the Study Area's eight zones to establish market shares for both comparison and convenience goods. This involved a random sample of 1,000 households, 125 households in each zone. The questionnaire focused on spending patterns in the identified centres within London Borough of Camden, in two centres in London Borough of Islington (Angel and Nags Head) and those centres elsewhere that draw significant numbers of shoppers.
- 7.2 The survey illustrated the perceived function and attractiveness of each centre and the shopping habits of residents by zone. For comparison goods shopping, the West End proved hugely attractive, securing a 43% market share), followed by Brent Cross (13%). No centre in Camden or Islington came close to matching the West End or Brent Cross, the next rankings being Angel (6%), Camden Town (5%), and Nags Head (4%).
- 7.3 Inevitably, market shares for convenience goods presented a different and more diffuse pattern of trade. In terms of the main food shopping, of those households surveyed, the survey showed that Camden Town (Sainsbury, Safeway²³, Marks & Spencer and Sainsbury's Local) with 16.2% was the centre with the largest market share, followed by Swiss Cottage (Sainsbury and Waitrose) (13.4%), Angel (Sainsbury) with 8.4% and Nag's Head/Holloway Road (Waitrose and Safeway, trading as Morrison) with 7%.
- 7.4 The travel characteristics related to comparison goods shopping trips demonstrates the dominance of bus travel. This accounts for two-thirds of all trips from the Study Area to Camden Town, and 50% of all trips to the West End. Hampstead is accessed by much the lowest proportion of bus borne shoppers (9%). The Underground is significant as a means of travel only to the West End (21% of all trips). This compares with only 4% for Camden Town.
- 7.5 A significant number of journeys for comparison goods shopping purposes from within the Study Area are made on foot. Walking dominates trips to Hampstead and is significant for other centres with a largely local catchment, namely Kilburn High Road (42%), Nags Head (38%) and Angel (31%). As might be expected, trips to Brent Cross are largely car borne (71%), with no other centre having more than 20% of trips by car. Thus the general pattern is very much one of reliance on public transport for most centres, but this transport is generally bus- and not Tube-based.

Visitor Survey

- 7.6 A visitor survey was undertaken for the 2004 study in respect of each of the centres surveyed starting with the five Central London Area centres, followed by Camden Town and Hampstead, and then the two London Borough of Islington centres in the study area. Once again, we have drawn on its outputs for this update.
- 7.7 **Camden Town:** The survey showed Camden Town is a centre that attracts proportionately far more visitors from elsewhere in the UK and from abroad than any other surveyed centre in Camden or Islington. Camden Town also has a fairly even split, by visitor numbers, between convenience and comparison expenditure

²³ The Safeway store in Camden Town now trades as a Morrisons store

and a larger proportion (28%) of visitors travelling by Tube than any other Camden or Islington centre in the survey.

- 7.8 The centre's strength derives from comparison and A3 expenditure and leisure activities. Of the eight centres included in the Visitor Survey, Camden Town is proportionately the most popular for indoor leisure activities and the second most popular for meeting in cafes, bars and restaurants. Of the nine surveyed locations, Camden had the fewest respondents who considered it a pleasant place to shop.
- 7.9 **Hampstead:** The Visitor Survey places Hampstead as a particularly distinctive centre. It has proportionately more visitors from other London Boroughs than any other centre. It has a clear balance between convenience and comparison goods shopping by visitor numbers. Only a very small proportion of visitors consider that comparison needs and café/bars/restaurant provision in this centre are poorly or very poorly catered for - 8% and 4% respectively.
- 7.10 Hampstead is the centre that has the highest proportion of visitors travelling by car (33%). This comparatively high proportion together with the current difficulties in accessing the centre and also in finding a car parking space (as identified in Table 2.16), suggests that it will be difficult to generate significant modal shift for Hampstead shoppers.
- 7.11 **Centres/frontages/areas Within the Central Activities Zone:** These comprise Charing Cross Road, Tottenham Court Road/New Oxford Street, High Holborn, Covent Garden (northern part) and Hatton Garden. The Visitor Survey broadly reflects many conceptions as to the nature and function of these centres. Thus Charing Cross Road has a large proportion of visitors from UK outside London and from overseas (41%) and low expenditure per head for both convenience and comparison goods. Tottenham Court Road and Hatton Garden have high levels of (specialist) comparison expenditure, with the former being the centre having the largest proportion (19%) of visitors from outside the UK. High Holborn is very much a convenience centre supported largely by local workers rather than residents or visitors. Covent Garden (northern part) has the second highest proportion of visitors from outside London (40%), almost certainly reflecting its location as part of the diverse and vibrant group of attractions located at Covent Garden.
- 7.12 Four of the Central London Area centres surveyed have a high degree of reliance on journeys by Tube. The exception is Hatton Garden. This is only partially accountable by reference to the geography of the Underground system and is almost certainly more a reflection of significant walk-in trade by office workers from nearby surrounding premises.

Healthcheck Conclusions

- 7.13 Below we briefly summarise the healthcheck and survey work findings in respect of each of the centres and conclude on each centre's role and position in the retail hierarchy. The centres that we have assessed are:
- Major Centres (as identified by the London Plan): Camden Town, Kilburn (also having regard to that part of the centre in London Borough of Brent);
 - District Centres (as identified by the London Plan): Swiss Cottage/Finchley Road, Kentish Town, Hampstead and West Hampstead;
 - Centres/frontages/areas falling within the Central Activities Zone (as defined by the London Plan): Hatton Garden/Leather Lane, Covent Garden (also having regard to that part of Covent Garden within Westminster), Tottenham Court Road/New Oxford Street, Charing Cross Road, High Holborn.

Major Centres

- 7.14 Camden Town and Kilburn are both identified in the London Plan as Major centres. **Camden Town** serves a much wider catchment than any other centre in the

Borough outside the Central Activities Zone and attracts people from around the world. The centre scores highly in terms of the key performance indicators of town centre health, although rental growth has been much lower than in frontages in the Central Activities Zone. A critical issue for Camden Town is the future of the markets, particularly in the light of proposals for the redevelopment of Buck Street and the recent fire. On the one hand the redevelopment of parts of the market may lead to the erosion of Camden Town's uniqueness. On the other hand, there may be spin off benefits from redevelopment in key locations. Consideration should therefore be given to opportunities for relocation of displaced market stalls should redevelopment proposals for parts of the existing markets be brought forward. We agree with the London Plan designation of Camden Town as a Major centre.

- 7.15 **Kilburn** serves a relatively localised catchment. The health of the centre is improving, and retail rents have increased by nearly 50% in the past six years and it has a strong evening economy. That said, the shopping environment is unattractive and the centre lacks the larger units required to accommodate those retailers who are seeking space in the centre. The priorities for Kilburn are to build on its strengths in order that it can continue to serve the local population for convenience and day-to-day shopping purposes, and to improve the quality of the shopping environment. In terms of the centre's designation, it is difficult to see why Kilburn is defined as a 'Major' centre in the London Plan, given that its catchment is relatively small and, although it has a substantial proportion of comparison goods floorspace, performs a local shopping role, not at all the role that is envisaged for a Major centre.

District Centres

- 7.16 The O2 Centre at **Swiss Cottage/Finchley Road** has much improved the leisure offer in this centre, and attracts people from a wide area. The catchment for the retail offer, however, is much smaller. The centre is performing reasonably well, though there is a heavy reliance on the Habitat store, which has relocated to the O2 centre, and the Waitrose store, which has expanded to fill the entire unit, to provide the retail attraction, and the centre may benefit from consolidation of the centre around the core shopping and leisure areas. Based on the London Plan definition we think designation as a 'district centre' is reasonable.
- 7.17 **Kentish Town** serves a very localised catchment population principally for convenience goods and retail services. The centre does support some comparison goods retailing, but the stores form a comparatively low proportion of the overall floorspace, and like the other small centres, a large number of the comparison goods activity is either to serve day-to-day needs or specialist retailers drawing from a much wider catchment such as electronics and musical instrument stores. Improvements are being made to the streetscape which are likely to make the centre increasingly attractive to retailers and shoppers, albeit only to a relatively local catchment, reflecting the size of the centre and the proximity to the higher order centre at Camden Town. The centre is therefore likely to continue to serve as a district centre, in accordance with its London Plan designation.
- 7.18 **Hampstead** is the second smallest of the London Borough of Camden's centres in terms of floorspace (West Hampstead being the smallest) but is performing strongly. The centre is renowned for its fashion-wear boutiques and attractive environment and attracts shoppers for this type of goods from beyond its immediate catchment. In respect of this activity the centre performs considerably better than its size would suggest. If additional floorspace could be accommodated in the centre it would undoubtedly trade well. However, because significant numbers of shopping trips to Hampstead are made by car, and the physical constraints placed on future development by the quality of the environment, there is no obvious prospect for significant additional floorspace in the centre.

- 7.19 This centre does not easily fit into the London Plan centre definitions as it has only modest retail floorspace, which suggests a district centre designation, yet a substantial proportion of this is for comparison goods. However, much of the comparison goods floorspace can be seen as specialist, and thus consistent with the London Plan district centre status.
- 7.20 **West Hampstead** caters predominantly for the convenience goods and service needs of a very localised catchment, with high provision of convenience goods retailing such as grocers, newsagents and off-licences. The centre is fulfilling its role as a district centre, and this role would be reinforced if a new transport interchange and associated development were to come forward in the future.
- 7.21 *Centres/frontages/areas falling within the Central Activities Zone*
- 7.22 **High Holborn/Kingsway** and **Charing Cross Road** are both designated in the London Plan as central area frontages. They perform different roles, the former providing retail and service facilities for the daytime office worker population and the latter as a specialist shopping destination (for books and music). Both are performing well, though the latter would benefit from environmental/streetscape improvements. The exact extent of the frontage will need to be agreed through more detailed analysis, possibly in association with GLA officers.
- 7.23 **Tottenham Court Road** and part of **New Oxford Street** are also designated central area frontages in the London Plan, and also fall within the West End Special Retail Policy Area (WESRPA). Both Tottenham Court and the western part of New Oxford Street are performing well, though there is an opportunity to develop the New Oxford Street further east in order to improve the link with Holborn.
- 7.24 **Hatton Garden** has two distinct retail functions as both a specialist retail area for jewellery and as a local centre providing the day-to-day needs of the local resident population and office workforce. Added colour and interest is provided by Leather Lane market, which is an important attraction for both local residents and workers. **Covent Garden** (northern part) performs a specialist fashion retailing role and the area is performing well, with numerous retailer requirements.

Forecast Retail Need

- 7.25 In section 5 we concluded that if the Study Area centres maintain their existing market share expenditure growth in the Study Area will produce the net floorspace requirements set out in Table 7.1 below.

Table 7.1 Forecast floorspace requirements (sq m net)

Type of floorspace	2012	2017	2022	2027
Without Brent Cross extension				
Comparison	3,500	9,000	17,000	26,500
Convenience	900	1,400	2,800	4,700
With Brent Cross extension				
Comparison	3,500	5,000	13,000	22,500
Convenience	900	1,400	2,800	4,600

Accommodation of Need

- 7.26 Our assessment indicates that there is very little physical capacity to accommodate significant additional retail floorspace in any of the London Borough of Camden centres. The requirement for new floorspace will therefore need to be accommodated through redevelopment of existing retail, coupled with some additional development at the Opportunity Areas at Euston and Tottenham Court Road and Areas for Intensification at West Hampstead and Holborn.
- 7.27 Turning to convenience goods, the limited requirement should, in our view, be accommodated through small scale extensions to existing stores in the short- to medium-term. In the longer-term (to 2027) there may be scope for a new foodstore, though the broad location of any new store should be considered later and in the light of an updated retail study which identifies qualitative deficiencies in convenience provision at that time.