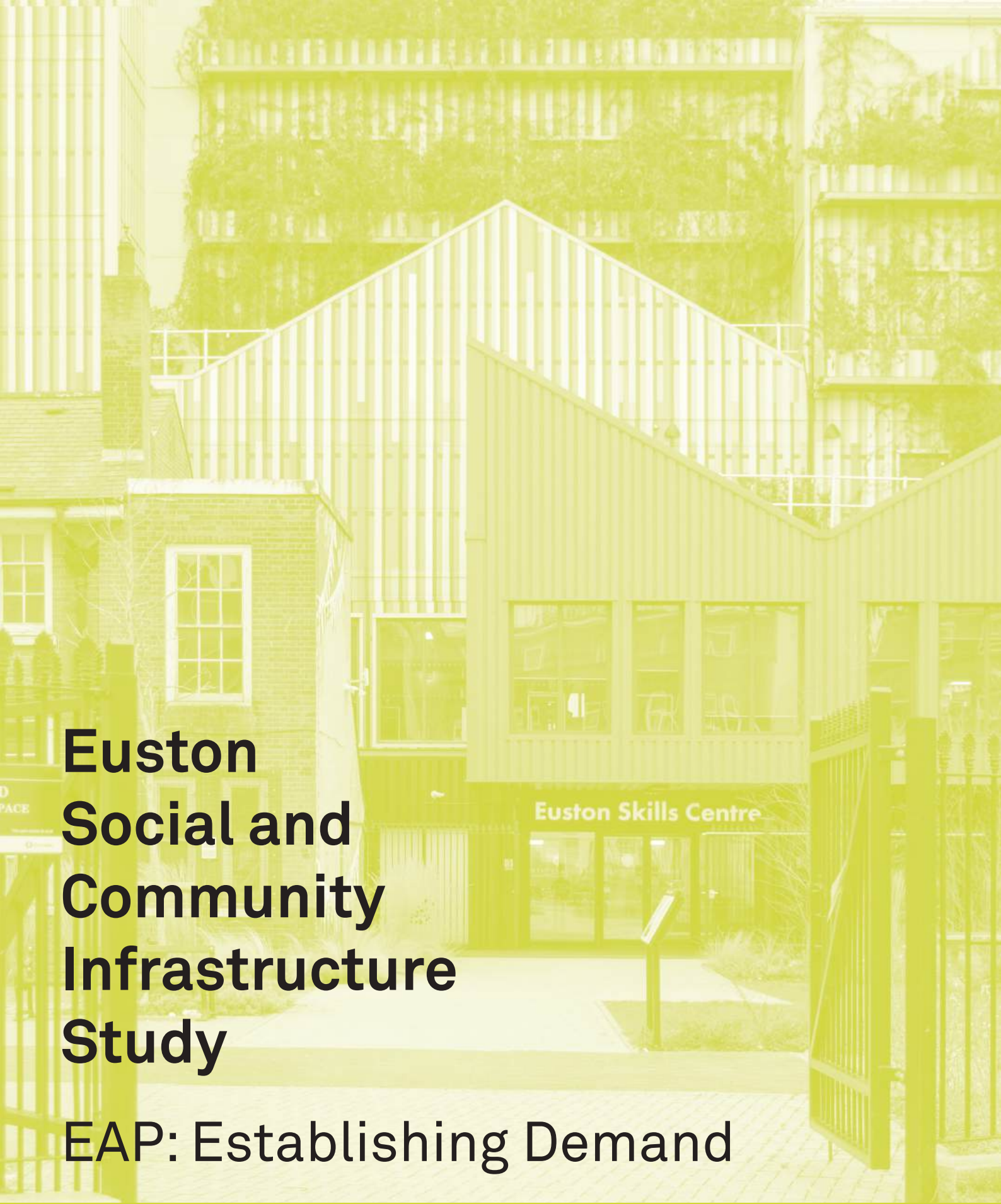




Euston Social and Community Infrastructure Study

EAP: Establishing Demand



Camden



**Euston
Housing
Delivery
Group**



**Aspinall
Verdi**
property
regeneration
consultants



EXECUTIVE SUMMARY

This Study:

In 2025, Architecture 00 with support from Pragmatix Advisory and Aspinall Verdi were commissioned by London Borough of Camden (LBC) and Euston Housing Delivery Group (EHDG) to undertake a Euston Social and Community Infrastructure Study. This study assesses the current capacity of existing social and community infrastructure within the Euston Area Plan (EAP) and tests projected data derived demand triggered by potential growth identified in the EAP of approximately 2,000 new homes and 17,300 new jobs by 2051.

There are two primary outputs as part of this study:

- Demand Assessment Spreadsheet Model: An excel-based tool which assesses sufficiency of provision (surplus / shortage) based on existing supply, existing population data and standard benchmarks. This tool aims to allow LBC to test multiple scenarios of growth as plug-ins to understand how this may trigger demand to different types of social and community infrastructure.
- Establishing Demand Report: [This report](#) is underpinned by the spreadsheet model, and considers additional qualitative factors and nuances for different types of infrastructure.

Why is this important:

With significant development expected across Euston over the coming decades, and with existing planning policy already seeking developer contributions towards social and community infrastructure, this study provides an evidence base to indicate the scale and nature of future demand across Euston, helping to inform how such contributions may be directed over time. Early consideration of what social and community infrastructure could be needed to support future growth - and how it will be safeguarded, integrated, and distributed across the area and development timeline - will be critical. This is particularly important given the risk of erosion of these facilities due to redevelopment, and the potential for widening inequalities between vulnerable residents (who rely on accessible and affordable community infrastructure) and the high-earning jobs and institutions for which the area is primarily a place of work.

As a data-driven study focusing on hard infrastructure across multiple different uses, this study has limitations in how accurately it is able to calculate demand and/or the nuance of said demand locally. However, it aims to provide an initial evidence base identifying where existing unmet and projected demand is greatest, and to inform the direction of further investigation, capacity testing, feasibility work, and early-stage engagement and negotiation with the private sector where there are gaps in provision or market-led delivery.

Given the broad range of facilities considered, the study also seeks to identify opportunities to meet demand in more creative ways. While it is not solely the responsibility of the public sector to deliver this infrastructure, LBC is well placed to maintain an overarching understanding of demand. In doing so, it can work collaboratively with developers and existing service providers to ensure that social and community infrastructure is embedded early and equitably within Euston’s long-term regeneration.

The study should also be viewed within a rapidly evolving strategic context. Alongside the delivery of HS2 and station redevelopment proposals, Government, Camden and the GLA are actively exploring opportunities to accelerate housing delivery and wider regeneration across the Euston area. Future development capacity may exceed current assumptions, potentially generating additional demand for social and community infrastructure beyond that identified in this assessment.

Approach & Methodology:

The Demand Assessment Spreadsheet Model underpins the quantitative analysis – informing the supply, population proxies and benchmarking. All uses are assessed using either a per capita benchmark or a gross space norm and have been stress-tested and adjusted, where appropriate, using locality-specific datasets where available. Where possible metric reflect approaches used in other LBC studies, London benchmarks or industry standards and therefore often reflect a best-case benchmarks and may not be achievable in a dense inner-city context. This analysis is broken down across different area boundaries



– comparing the EAP in isolation with the wider Euston area (which includes a c.280m buffer zone). This recognises that whilst population growth will be concentrated within the EAP, residents and workers will use services outside of the boundary and vice versa. The three main localities / wards in the wider Euston area (Regents Park Locality, Somers Town Locality and Bloomsbury locality) are also considered.

Qualitative assessment looks more broadly at spatial and location factors – considering distribution of provision, quality of facilities, socio-economic factors, demand trend analysis and other specific use indicators that may impact demand. Whilst this study has not undertaken any community engagement, recent and ongoing LBC engagement programmes have been reviewed and over 20 1:1 conversation have been held with LBC departments, local service providers and pan-London partners to test findings.

In an attempt to indicatively quantify demand in order to support further capacity and feasibility testing, each infrastructural category sets out a ‘consolidated demand’ which considers all of the analysis. This is further broken down across localities based on where existing and future demand is the largest – the latter influenced by where the most growth is planned to come forward (i.e. Regents Park ward).

Headline Findings for Quantitative Analysis (Existing & Future):

The following table summarises quantitative outputs (as shortage or sufficient) across the EAP + buffer boundary. For further detail see *Category-by-category Analysis* - Section 2.

Existing EAP (2025)			Future EAP (2051)  c. 2,000 new homes + 17,300 new jobs		
Educational	Nurseries	Surplus	Shortage		
	Primary School	Surplus	Surplus		
	Secondary School	Surplus	Surplus		
	Adult Education	Sufficient	Sufficient		
Community	Community Centres	Sufficient	Sufficient		
	Mosques & prayer space	Shortage	Shortage		
	Churches	Surplus	Surplus		
	Laundrettes	Sufficient	Sufficient		
Sports	Outdoor Sports	Shortage	Shortage		
	Gyms & Studios	Net	Shortage		
	Indoor Sports	Shortage	Shortage		

Existing EAP (2025)			Future EAP (2051)  c. 2,000 new homes + 17,300 new jobs		
Healthcare	GPs	Net*	Shortage		
	Dentists	Sufficient*	Net		
	Pharmacies	Surplus	Surplus		
	Adult Social Care	Sufficient*	Sufficient*		
Culture	Libraries	Surplus	Net		
	Cultural venues	Surplus	Shortage		
	Public Houses	Surplus	Shortage		
Open Green	Playspace	Shortage	Shortage		
	Growing Space	Surplus	Surplus*		
	Public Parks	Shortage*	Shortage*		

* Starred uses are particularly sensitive to the study area applied. Findings may differ where infrastructure and service provision across the wider Euston area is considered alongside provision within the EAP boundary. The accompanying analysis should therefore be read in full to understand the nuances relating to identified shortages, sufficiency, and catchment relationships.

Headline Findings from Qualitative Analysis (Existing):

The EAP is generally well served by social and community infrastructure considering it's inner city context. There is sufficient educational infrastructure, community facilities, cultural infrastructure, libraries, pubs, and primary healthcare when tested against standard benchmarks. When assessed in isolation, the EAP also demonstrates greater infrastructure sufficiency than the wider Euston area (EAP + buffer) across many categories, reflecting its central location and concentration of services.

Whilst a lot of the facilities that also serve the non-residential community are concentrated around Euston Station / Euston Rd. in the South and Camden Town in the North, **there are multiple 'infrastructure' clusters integrated within neighbourhoods** - often around anchor facilities like schools (i.e. Regent's High School cluster in Somers Town which is located just outside of the EAP boundary) or green spaces (Cumberland Market in Regents Park locality which sits within the EAP boundary). **Whilst walkability and catchments are rarely limiting factors, provision is not always evenly distributed.**

Regent's Park and Somers Town are geographically severed by rail and road infrastructure, which act as hard barriers limiting movement and access across the wider area although station redevelopment proposals and wider planning policies seek to improve permeability and connectivity over time.. These neighbourhoods also experience some of the **highest deprivation levels** in the area. In these contexts residents are more dependent on low-cost, publicly accessible facilities and as such neighbourhood-scale provision is essential and surplus at an "area-wide" level does not eliminate the need for local provision. Regeneration that fails to **protect and strengthen affordable infrastructure** risks widening the divide between long-standing communities and the growing workforce.

Quantitative sufficiency sometimes hides quality and suitability challenges. Across several categories - particularly primary care and community centres - clinical room numbers or floor area appear sufficient. However, many **service providers operate from ageing or constrained facilities.** These spaces often don't support modern, integrated service models and viability and operational sustainability are increasingly challenging. Community facilities also provide significant social value through delivering **cross-category services at affordable or low-barrier**

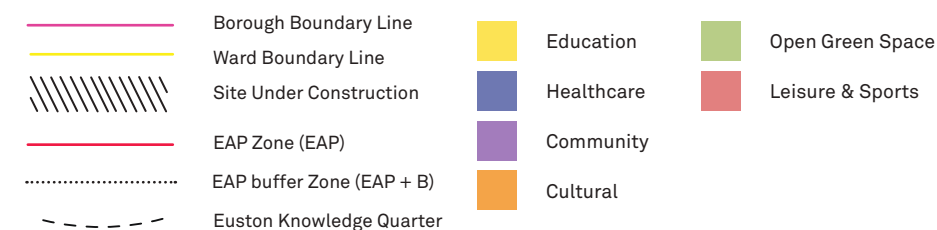
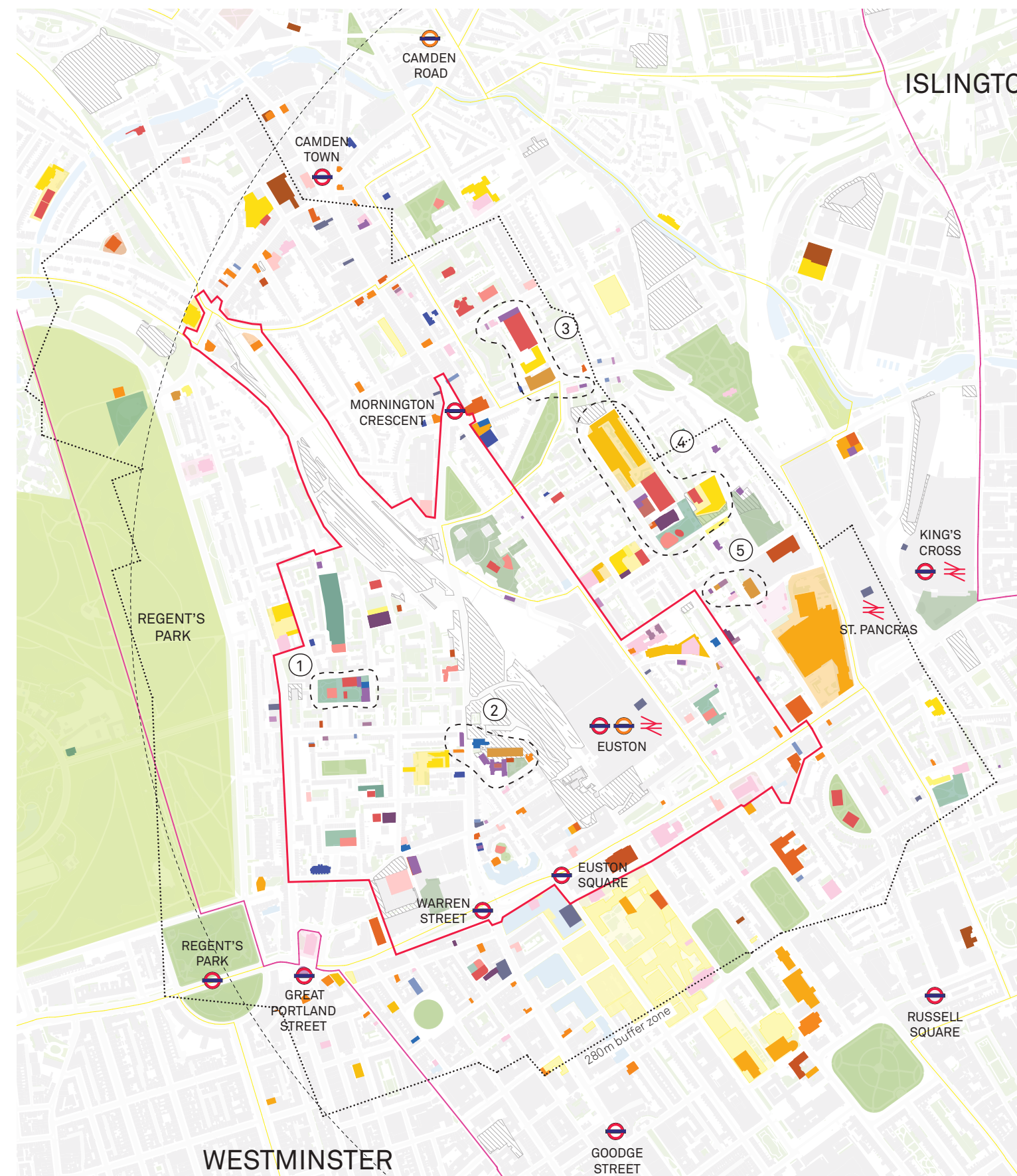
rates. These spaces are particularly important in high-deprivation neighbourhoods where residents may be priced out of other venues. **Future investment should prioritise upgrading and repurposing existing stock and core organisation costs - not just delivering new floor space.**

Educational infrastructure is in surplus. Falling birth rates are expected to result in continued surplus in primary and secondary capacity, reducing pressure for new school provision. This presents an **opportunity to rethink how educational facilities can support wider community use** outside core hours and operate as multi-functional neighbourhood anchors.

The most acute shortages are space-hungry and costly uses. These quantitative shortfalls are concentrated in uses that require larger sites or generate lower commercial returns, including indoor and outdoor sports provision, Parks and green space, play space and certain cultural leisure uses. These pressures are intensified by the area's dense urban context, high land values and limited development capacity, which constrain the ability to expand provision.

Green space and play provision are structurally constrained. Whilst quantitative sufficiency of green space varies considerably depending on whether Regent's Park is considered within the boundary - there is a clear, felt, deficit for integrated green space and play provision at a neighbourhood level. The loss of open space associated with HS2 further increases pressure, reinforcing the need for accessible, community-scale green infrastructure.

Religious and cultural provision does not fully reflect local demographics. When tested against population demographics, there is a clear shortage of mosque and prayer space, particularly for women during peak periods such as Friday prayers. Cultural venues is more difficult to quantify, and whilst there is some valuable local provision (like ODAC, Camdens people theatre, People's Museum), much of the existing offer is also oriented toward visitors and workers rather than local residents. As a result, affordable and community-accessible cultural space remains limited.



Social & Cultural Infrastructure Clusters

- ① Cumberland Market
- ② Euston Skill Centre (Former Maria Fidelis School)
- ③ St. Pancras Community Association (outside EAP)
- ④ Regent's High School (outside EAP)
- ⑤ St. Pancras & Somers Town Living Centre (outside EAP)

Headline Findings from Qualitative Analysis (Future):

Growth amplifies existing shortages. Future demand builds directly on existing patterns of surplus and shortage and assumes that current facilities remain operational to 2051. As a result, **categories that are already under pressure (particularly indoor and outdoor sports provision, green and play space and places of worship for muslims) experience the most significant future demand.** As such it will be important to consider how regeneration can help to address existing deficits.

Growth in the EAP triggers only some additional demand. With c. 2,000 new homes and c. 17300 new jobs, additional demand is triggered across nurseries, GPs, dentists, cultural venues, and pubs. This reflects both residential growth and the cumulative effect of increased worker populations. **Even at minimum growth levels, it is helpful to consider how infrastructure responds to incremental demand.**

The EAP functions as an infrastructure centre for the wider Euston area. When assessed in isolation,

the EAP boundary generally demonstrates greater infrastructure sufficiency than the wider Euston catchment (280m buffer). This pattern is evident across a number of infrastructure types, including primary healthcare, adult social care, cultural venues and productive green space. The exception is green space overall, where the wider catchment benefits from access to Regent's Park. The findings suggest that the EAP's central location makes it an attractive focus for community, cultural and social provision. **As a result, future development within the EAP presents an opportunity not only to meet demand generated by growth within the boundary itself, but also to address existing and shortages across the wider Euston area.**

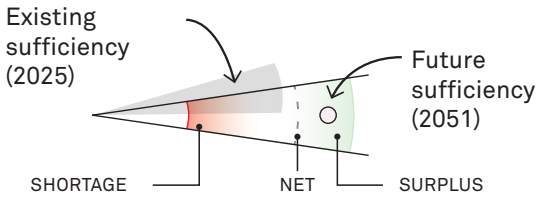
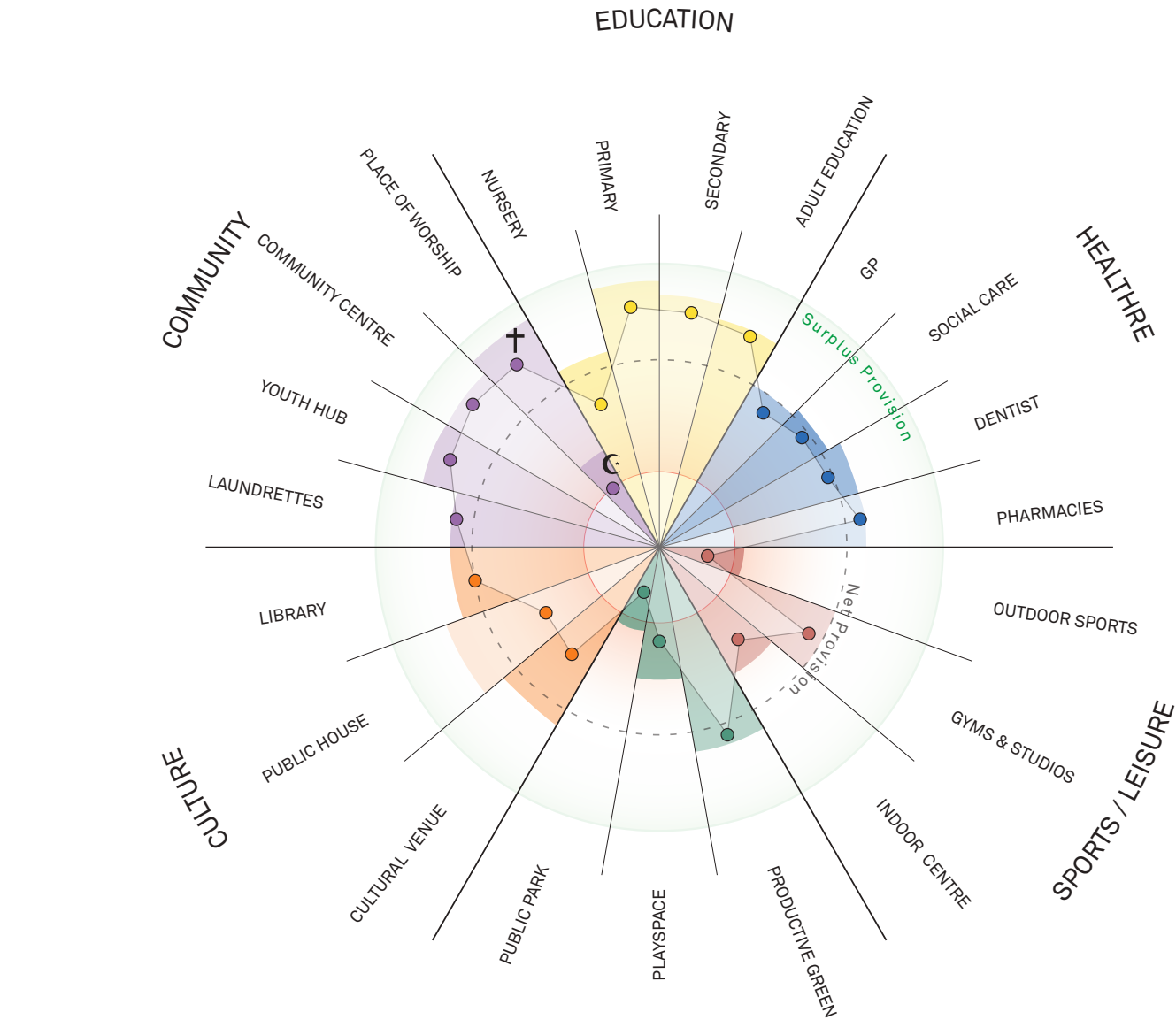
As an **employment-led masterplan**, Euston's growth is not driven by housing alone. Increased worker and student populations significantly **intensify demand for sports facilities, nurseries, green space, pharmacies, pubs and cultural venues.** Whilst the market is likely to respond to some of this demand, LBC should consider what levers are available to support the delivery of facilities to serve both residents and workers, helping to integrate emerging employment areas with surrounding communities.

Regent's Park ward presents the greatest opportunity for transformation with a significant proportion of future development sites within

this locality, which also has **some of the highest levels of existing unmet demand.** As future growth will not be evenly distributed across the EAP, a distribution-based approach to infrastructure planning will be critical. Given the severance between Bloomsbury, Somers Town and Regent's Park, some services will need to be provided within each locality rather than assumed to function across the wider area. This alignment creates a strategic **opportunity to deliver new, fit-for-purpose infrastructure, and upgrade ageing stock.**

Not all future demand requires new standalone facilities. A proportion of additional demand could be met through repurposing and intensifying existing assets. Surplus educational space, underused community facilities and ageing healthcare premises present opportunities for expansion, co-location and consolidation. Delivering infrastructure in integrated civic hubs or as distributed doorstep services (rather than as isolated, single-use buildings) would improve efficiency.

For further detail see *Category-by-category Analysis - Section 2* - which covers analysis and recommendations for categories



GREEN SPACE

Note: The above diagram represents the data outputs from the spreadsheet tool for the EAP boundary only. Note that this has been further refined through the consolidated demand.

The above diagram represents existing unmet demand (solid) and projected future demand (dot) triggered by potential EAP population growth.

Recommendation & Next Steps:

Regeneration in Euston provides a rare opportunity to address existing shortfalls, modernise existing infrastructure and align future provision with demographic demand. However, it should be noted that this document outlines aspirational sufficiency in line with best practice benchmarks that may not always be feasible to deliver. Coordinated between LBC, development partners, private developer and local service providers will be critical to ensuring that social and community infrastructure is embedded early, equitably distributed, and designed to support both long-standing communities and new populations. Concluding recommendations from this study include:

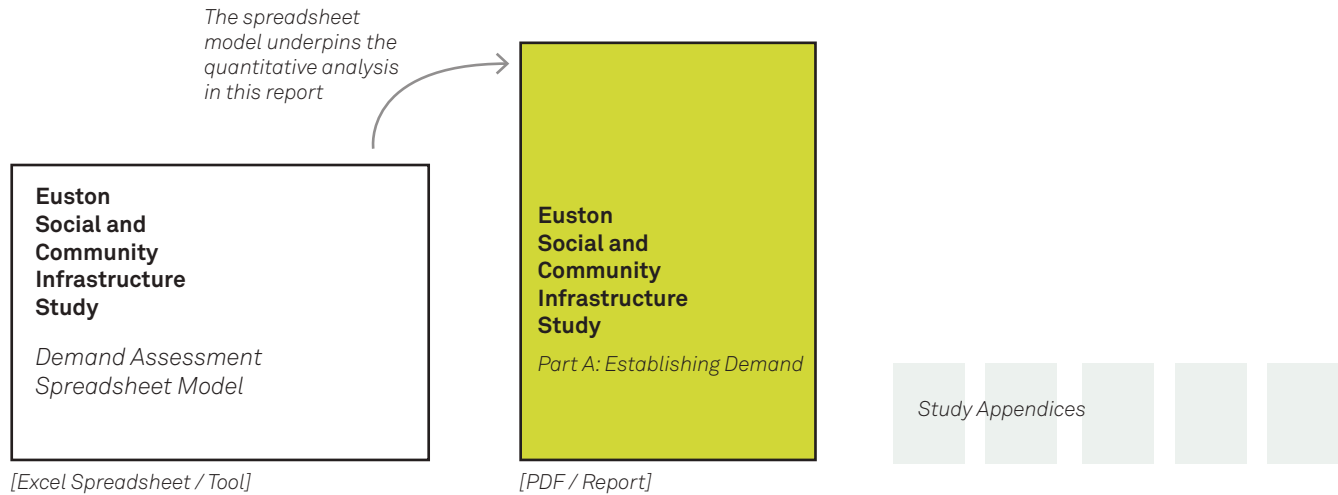
- **Align with lived experience:** Test findings against resident and user experience (using the RAG or the next Housing PACT cohort) to validate and refine identified demand.
- **Enable affordable access:** Work across VCS and private sectors to support existing provision, improve affordability, and expand community-facing offers.
- **Plan spatial delivery:** Translate demand into clear spatial strategies - prioritising co-location, intensification, and accessible neighbourhood-scale provision.
- **Target key shortages:** Proactively address major gaps (e.g. sports provision, multi-faith space, green space and playspace) through partnerships and site-specific opportunities.
- **Improve connectivity:** Reduce severance between localities through masterplanning that enhances movement and integrates infrastructure across Euston.

This report was produced in by Architecture00 with support from Pragmatix Advisory and Aspinall Verdi.

It is a high level assessment of existing supply and sufficiency of social and community infrastructure in Euston; and anticipated growth required of said provision to support future population uplift in the area.

It has been developed through extensive review of other London Borough of Camden (LBC) literature (assessments, policy, other evidence bases) and in conjunction with a Demand Assessment Spreadsheet Model which is a tool aimed to quantify anticipated surplus and shortages based on different levels of growth across the Euston Area Plan (EAP).

It is a research-led study which requires further market and stakeholder testing.



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01 STUDY OVERVIEW & CONTEXT

STUDY OVERVIEW

STUDY OBJECTIVE:

This study aims to evaluate the capacity of existing community and social infrastructure - including education, sports, healthcare, social, cultural, and open space provision - against current needs and future demand arising from the regeneration of the Euston area. It establishes a baseline of existing provision and uses a data-driven approach to benchmark this against the projected growth of the EAP area to understand the infrastructure required over time. In doing so, it aims to provide an understanding of the community and social infrastructure that may be needed, supporting the delivery of EAP policy objectives and helping to identify where future investment and growth efforts could be focused, alongside the plans and priorities of infrastructure providers, community organisations and developers.

SUBJECT AREA:

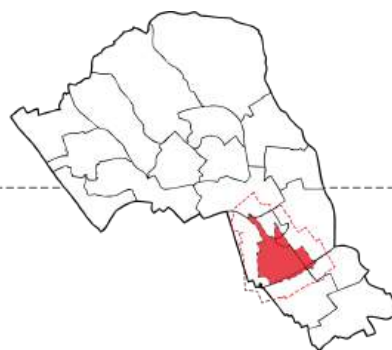
The Euston Area Plan (EAP) is a planning policy document which sets out the Council's vision for future development at Euston until 2051. The study focuses on the EAP boundary, reflecting the geographical area to which EAP policies apply. An additional 280m buffer from the boundary has also been analysed to reflect the wider use and accessibility of social and community infrastructure beyond the EAP - this recognizes the growing pressures from EAP population growth on social and community infrastructure beyond the red line boundary; and offers a useful comparator to the EAP in isolation. Data has also been considered on a ward / locality level; differentiating between different neighbourhoods separated by severance caused by railway and road infrastructure.

PROJECT OUTPUTS:

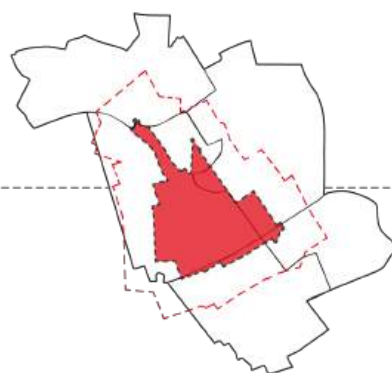
- **Demand Assessment Spreadsheet Model:** An excel model tool to calculate sufficiency of social and community infrastructure across the EAP and EAP buffer based on benchmarks. Note that there are multiple limitations with this methodology which are set out further within the methodology and caveats section.
- **Demand Assessment Report:** This report – analyses data findings from the spreadsheet model, offers spatial analysis and some nuance to the quantitative outputs.



Borough: Camden, Greater London



Wards: Bloomsbury, Regent's Park & St Pancras and Somers Town



Study Area: Euston Area Plan + 250m buffer

AREA CONTEXT

Euston is identified as an Opportunity Area in the London Plan and the EAP sets the planning framework for the area. With the construction for HS2 underway, and Network Rail, Crossrail 2 and Transport for London developing plans for the station to become a major new London transport hub; the wider area is set to be transformed into a significant powerhouse for the overall UK economy, driving innovation and productivity.

As a result, the Euston Housing Delivery Group (EHDG set up by MHCLG) is working with LBC to identify opportunities to unlock the delivery of thousands of new homes, including affordable housing, across the wider Euston area. This recognises that as well as a being a major new employment zone and transport hub, Euston needs to be a great place to live for local people – a place where critical neighbourhood infrastructure is not only available but accessible to residents and designed to meet their needs.

In 2015 the EAP was adopted, identifying potential for a substantial amount of new housing (approximately 2,800–3,800 additional homes by 2031). In subsequent years, progress has been significantly constrained by uncertainty and delays associated with HS2 proposals, limiting delivery across the area.

In 2025, Government confirmed plans to establish a Euston Delivery Company to oversee the delivery of the station redevelopment and support wider regeneration ambitions. At the same time, LBC has been exploring the potential for locally led delivery arrangements, including a possible Development Corporation, to strengthen governance and accelerate housing and regeneration delivery across the wider Euston area.

The proposed submission draft of the EAP update (January 2026) updates the planning framework for the area. Key changes include reduced housing capacity (reflecting the reduction in enabled land), increased employment capacity, amended land-use assumptions, and an extended plan period to

2051. Together, these changes provide an updated policy baseline and renewed clarity for long-term planning and investment in Euston.

Development in Euston will include the station and over-station redevelopment, alongside a number of surrounding sites identified for redevelopment, refurbishment or retrofit to deliver additional homes and commercial space.

This study assesses existing social and community infrastructure capacity and tests the impacts of residential and employment growth in line with the updated EAP. However, ongoing work by EHDG, Government, the GLA and LBC to identify additional development opportunities means that future growth could exceed current assumptions. The study therefore also considers a broader geography beyond the EAP boundary and should be viewed as establishing a starting point for infrastructure planning that will require further review as development capacity, funding arrangements and governance structures evolve.

A CASE FOR INVESTMENT

WHY IS THIS IMPORTANT?

The London Plan champions the importance of community and social infrastructure in creating resilient and inclusive neighbourhoods. There is a particular focus on “areas of major new development and regeneration [where] social infrastructure needs should be addressed” to ensure “London’s diverse communities are met, informed by a needs assessment of social infrastructure”⁹

This sentiment is echoed within Camden’s (LBC) new draft Local Plan where policy SC3 sets out the Council’s approach to the protection of existing and provision of new social and community infrastructure. From prescribing planning obligations to secure contributions towards new and improved facilities; to safeguarding existing provision – this policy recognises that many of these facilities “are vulnerable to pressure from uses which attract higher land values and once they are lost cannot easily be replaced”¹⁰

This approach is reinforced by the Euston Area Plan (2026), which seeks to ensure that growth and regeneration are accompanied by the social and community infrastructure needed to support existing and future communities, while securing long-term benefits for local neighbourhoods. Social infrastructure is part of the EAP objectives 1 and 2.

With significant development expected across Euston over the coming decades; early consideration to what and how social and community infrastructure will be safeguarded, integrated, distributed and accessed across the area and development timeline will be critical. As well as being an opportunity for responding to existing unmet demand or infrastructural shortfalls, it will help meet the ambitions of the Camden Local Plan in

“securing long term benefits from the station redevelopment for existing neighbouring communities”, “ensuring that all aspects of development promote health and well-being and addresses concerns around safety and security.”¹¹

WHO WILL BRING THIS FORWARD?

There is a broad range of facilities considered as social and community infrastructure, and each have very different conditions (spatial, operational, financial, deliverability) with demand and supply often driven by complex market and socio-economic dynamics. Different stakeholder (public sector, private sector, community and VSO) will be required (and best placed) to bring different types of provision forward; and undertake their own dedicated assessment regarding the local needs at that time.

However, there is value in considering different assets holistically to understand where there are overlapping demand; what should be prioritised; what serves the socioeconomic profile of Euston residents and more. This is particularly necessary given the dense, urban context of Euston where there is competition for space and land values make it challenging to take a more flexible approach.

LBC are well placed to hold this overarching understanding of demand – working in collaboration with developers and existing service providers to guide an equitable regeneration and that benefits everybody.

11 Camden Local Plan 2025, Policy S2

9 London Plan 2021
10 Camden Local Plan 2025, Policy SC3 - 10.61

WHAT COULD CONSIDERED SOCIAL AND CULTURAL INFRASTRUCTURE SUPPORT?



Tackling Inequality:

Euston has a very high proportion of socially rented households (around 65% in the EAP area) and both Regents Park estate and Somers Town experience significantly higher levels of multiple deprivation than surrounding parts of Camden. This sits in stark contrast to the area’s concentration of knowledge-economy jobs, world-class institutions and expected growth in high-skilled employment. Although social and community infrastructure alone will not alleviate inequality, without investment that is accessible, affordable and locally relevant, future regeneration risk deepening the divide – creating a more unequal, segmented neighbourhood rather than a cohesive one.



Integration, Social Cohesion and Reducing Isolation:

Community and social infrastructure is vital for helping people mix across age, income and cultural backgrounds – building the social ties that reduce isolation and support wellbeing. This is especially important in the Euston area, where only 44% of residents are economically active and an aging population and increased mental health issues are significant. High-quality social infrastructure can foster connections, support participation, and help integrate individuals who may otherwise be excluded from local economic and social life.



Stronger Local Economy & Community Wealth:

With lower employment levels in the site area and concentrated pockets of deprivation, social and community programmes and infrastructure provides pathways into training, skills development, entrepreneurship and local employment. Investment can help ensure that the benefits of regeneration circulate within the community – supporting local wealth creation rather than displacement.



Access, Affordability and Essential Local Provision:

Euston’s inner-London location means that much provision is commercially driven, catering to visitors and workers. For lower-income residents – who rely most on local facilities and are less able to travel elsewhere – this creates gaps in access to cultural, educational and social opportunities. Targeted investment can ensure that regeneration

expands, rather than restricts, the social capital available to local people.



Living in a Dense Urban Context:

The large majority of homes within the EAP and buffer are flats or maisonettes – far above the London and Camden average. Overcrowding is a significant issue with recent data showing at least 236 overcrowded households in the EAP on the rehousing waiting list as of September 2024. (with a Camden average of 1 in 5 of households live in overcrowded conditions)⁹. This links to poorer physical and mental health, child development, and social relationships. In a setting with limited private green space, amenity or communal areas, residents depend heavily on accessible public and community facilities for recreation, wellbeing, services and daily life. Strengthening this infrastructure is critical to ensure that a high-density neighbourhood remains liveable, healthy and inclusive.



Delivering Equitable Regeneration After a Decade of Disruption:

Euston communities have lived through years of construction impacts, delays and unfulfilled regeneration promises. Trust has been eroded, and service providers are managing cumulative strain. Current engagement shows that protecting, enhancing and reproviding community facilities is one of residents’ top priorities. Investment now is a chance for LBC and EHDG to demonstrate a model of equitable regeneration, placing local people at the centre of long-term change.



Innovation and Opportunity:

Euston sits within the edges of the Knowledge Quarter, a partnership of over 100 organisations within a one-mile radius of King’s Cross. It has one of the highest concentrations of knowledge-producing organisations in the world. Its status as a centre for health, life sciences and research institutes creates opportunities for innovative models of community health, wellbeing, learning and cultural provision, including pilots and partnerships. Together with the climate agenda and the need for a just transition, this provides a strong platform for showcasing low-carbon, inclusive and future-focused community infrastructure, such as retrofit, circular economy approaches and nature-based solutions.

9 We Make Camden, State of the Borough 2024, p73

APPROACH & LIMITATIONS

Given the breadth of uses explored as part of this study, the methodology has had to balance a standardised approach to assessing demand for social and community infrastructure with bespoke indicators for different types of provision. Whilst infrastructure is assessed through a series of categories, many facilities are multi-functional, co-located, and support a range of activities and services that cut across traditional classifications.

Whilst this study primarily reflects and builds on a data-driven assessment - drawing on outputs from the spreadsheet model developed as part of the commission - it also incorporates a range of qualitative approaches. These are used to spatialise the data, capture nuances in infrastructure supply and demand, and test findings against wider research and on-the-ground experience. The following methodology provides an overview of the key steps, alongside associated caveats and limitations.

The study also considers a number of cross-cutting themes that influence how infrastructure functions in practice, including accessibility and affordability, co-location and multi-functionality, emerging social trends, and climate resilience.

Appendix A provides a complete methodology for how the analysis was undertaken for each category.

1 Project Parameters, Literature & Data Review

Ahead of the quantitative and qualitative assessment, project parameters were defined and data was collected to inform the development of the spreadsheet model, contextual understanding, and initial hypotheses.

WHAT IS SOCIAL & COMMUNITY INFRASTRUCTURE?

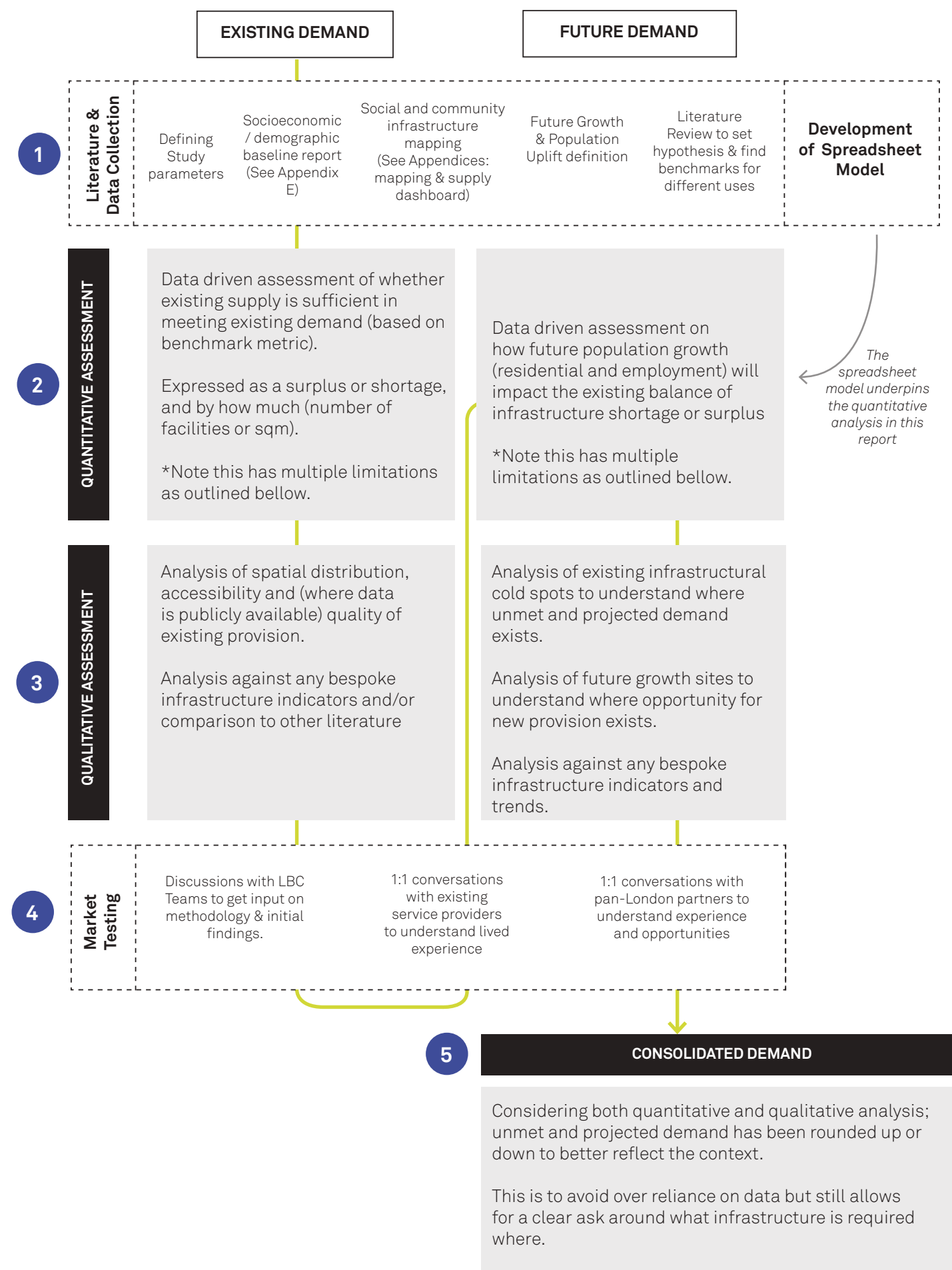
Infrastructure Categorization:

The definition of social and community infrastructure is broad but most often refers to “a range of services and facilities that meet local and strategic needs and contribute towards a good quality of life”⁹. The GLA’s Connective Social Infrastructure primer sets out the equal importance of “formally recognised social infrastructure, such as health and education provision” and “informal spaces and services [which] are just as important to the social networks that make communities more connected and resilient.”¹⁰

This study is primarily concerned with the **hard infrastructure** - i.e. the physical assets and facilities needed to enable services. The categories of uses have been guided by what the London Borough of Camden (LBC) draft Local Plan defines as social infrastructure.

The study focuses on critical neighbourhood infrastructure that supports and sustains Euston’s communities, excluding employment uses that are not publicly accessible (such as artists workspace) and selected private-sector uses that do not form part of the core neighbourhood infrastructure assessment (including higher education and private healthcare). While programmes and networks are considered, they are not subject to quantitative assessment. It should also be noted that not all uses explored fall within statutory

9 Good Growth by Design: Connective Social Infrastructure, Page 16
10 Good Growth by Design: Connective Social Infrastructure, Page 15

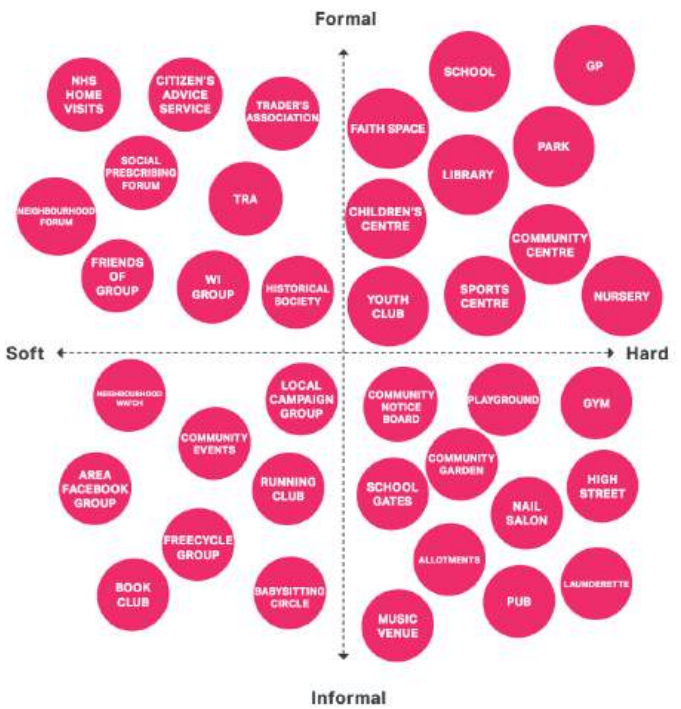


or public sector responsibility, with some more typically delivered by the market. In addition, a range of non-spatial factors - such as workforce, funding, and affordability - affect some uses capacity to serve the community; these are explored in more detail within the report but are not quantified.

Existing Supply Mapping:

The supply dashboard in Appendix C identifies relevant facilities within the EAP and the wider Euston area (EAP + B). This has informed the assessment of quantitative sufficiency and supported spatial analysis. It should be noted that:

- Facility size is a broad estimate based on footprint and storey count and should be interpreted as an indicative measure only.
- Some private or inaccessible facilities (including private healthcare and higher education) have been excluded from



Ref: GLA connective social infrastructure diagram - categorises a wide range of different types of provision against informal vs. formal uses and hard vs. soft uses

infrastructural demand calculations where they do not contribute directly to community-access provision. However, they have been included in the mapping and supply dashboard, recognising the service-based and outreach benefits they have for local communities.

- Location of facilities has been broken down by 'locality' (which is reflective of the three EAP wards) in order to assess how supply across different localities differs.

The infrastructure assessed in this study is grouped into six main categories, as set out on the next page.



This study will focus primarily on 'Hard' infrastructure - albeit this varies between formal and informal provisions.

Education	• Nursery / preschool • School: Primary • School: Secondary & Sixth Form • Adult Learning & Training
Healthcare	• Primary Care: GPs • Primary Care: Dentists • Adult Social Care • Pharmacies
Community	• Community Centres (Halls, Youth Spaces) • Places of Worship (Mosques and Churches) • Laundrettes
Cultural	• Libraries • Public Houses • Cultural Leisure (Galleries and Performance Space)
Sports	• Indoor Sports Facilities • Outdoor Sports Facilities • Gyms & Studios
Green Space	• Outdoor Playspace • Productive Green Space / Growing Space • Public Parks

To Note: This study will not propositionally respond to some of the more systemic challenges that face a lot of different social and community infrastructure including funding barriers to workforce, inequalities and lack of service uptake across Euston. However, it aims to respond to the challenge of space that can, if delivered appropriately, act as an enabler.

WHO IS DRIVING DEMAND?

Audience / Users:

The primary focus of this study is on social and community infrastructure that serves the resident population (existing and projected).

To model demand for infrastructure, existing population data and key demographic factors were used to inform existing demand and shape how shifts in population characteristics translate into future demand.

Demographic factors expected to shape demand forecasts for social infrastructure in Euston include: population and age projections; religion; accommodation type and tenure; household life stage; share of students; general health levels etc.

With future by 2051, population projections include only the uplift generated by planned development, not any organic growth assumed by public demographic projections. This avoids double-counting future population.

Given the central location of Euston, it is also important to consider that many facilities also experience demand from non-residential users (including workers, visitors, and non-resident students). Due to limited data, this has been reflected through an estimated "additional pressure" percentage for relevant uses.

The uplift in workers has been calculated through additional number of jobs per growth sites and assumes all additional workers are non-residents; though there is a risk of double-counting where workers also live locally.

- Key data sources that underpin the modelling and ensure a robust evidence base include:
- Office for National Statistics
 - Office for National Statistics Census
 - Camden Council

Existing and future population overview is provided overleaf. For a comprehensive analysis - See Appendix. E

Existing Population Overview:

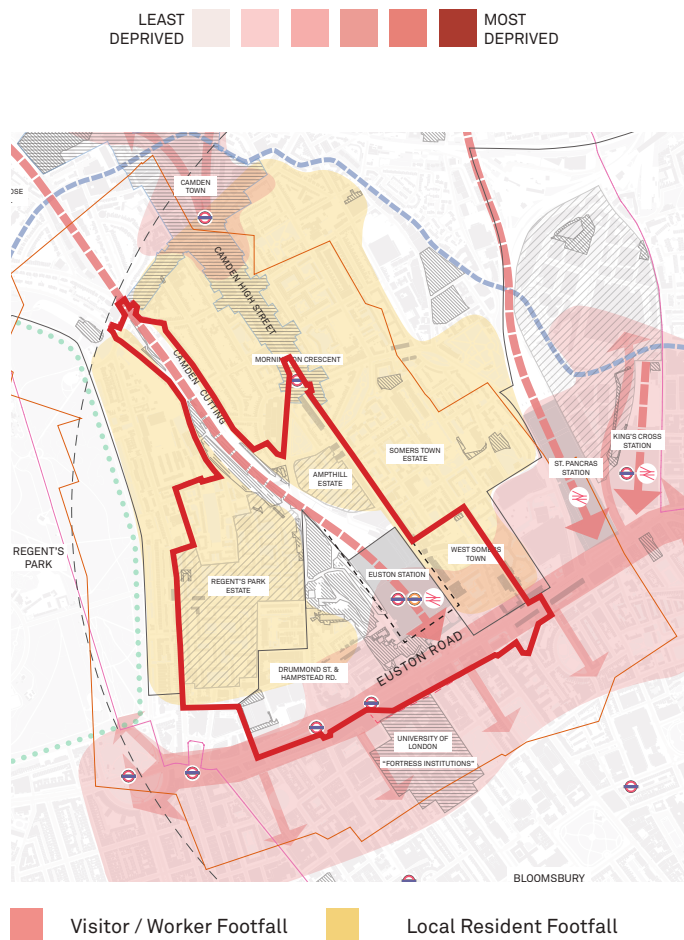
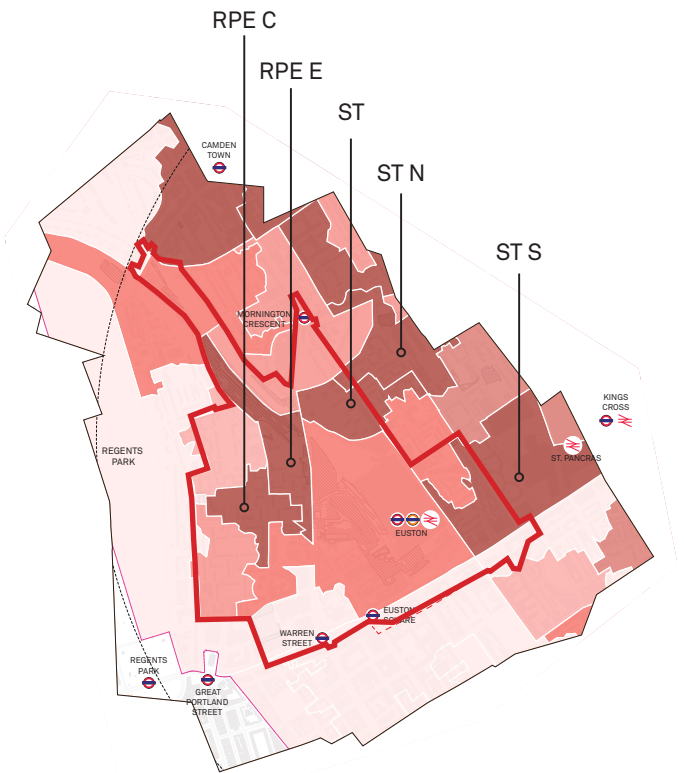
As a central London borough, Camden is well known for its thriving local economy. It contains major transport hubs such as King’s Cross and Euston; cultural districts like Camden Town; business districts including the Knowledge Quarter and the CAZ; and 11 higher education institutions – making its student population the third largest in London (with 43% of residents aged under 30).

There are a huge number of workers and visitors moving through Euston everyday – which will increase following the delivery of HS2. As an employment led masterplan, the station should serve this audience but, critically, not at the cost of those living in the area. This study, whilst accounting for additional pressure of certain facilities due to high worker flows, focuses on the existing and future resident population.

The study area sits across Bloomsbury ward, Regent’s Park ward and St Pancras and Somers Town ward. As well as having different urban fabric, each ward has variations in population demographics. Whilst there are some extremely wealthy pockets, in general, deprivation in the EAP area is high and population health is poor – creating large disparities between those who live in Euston, the buffer area, and those who work or go to university in the area.

Within the EAP area, 4 out of 7 LSOAs closest to Euston Station are included in the 10-20% most deprived LSOAs in England. This includes Regent’s Park Estate (RPE) Central, RPE East and Somers Town (ST), ST North and ST South.

Following are some headline statistics comparing Euston demographics to Camden and London averages. Further socioeconomic analysis can be found in Appendix E.



The study area has a higher proportion of **Asian & Black, Caribbean or African** residents at **62%** compared with Camden and London at **40%** and **46%** respectively.

82% of residents have lived at their address since birth, or 10 years or more.

There is a strong local network and sense of community amongst residents, with deep attachments and ties to the local area.

Only **44%** of residents are **economically active** and in employment, while more than **1 in 10 have no qualifications** at all.

Residents have few accessible employment opportunities in the area, exacerbated by lack of qualifications and economic inactivity.

The EAP area has a high proportion of school children and full-time students, making up **36%** of residents.

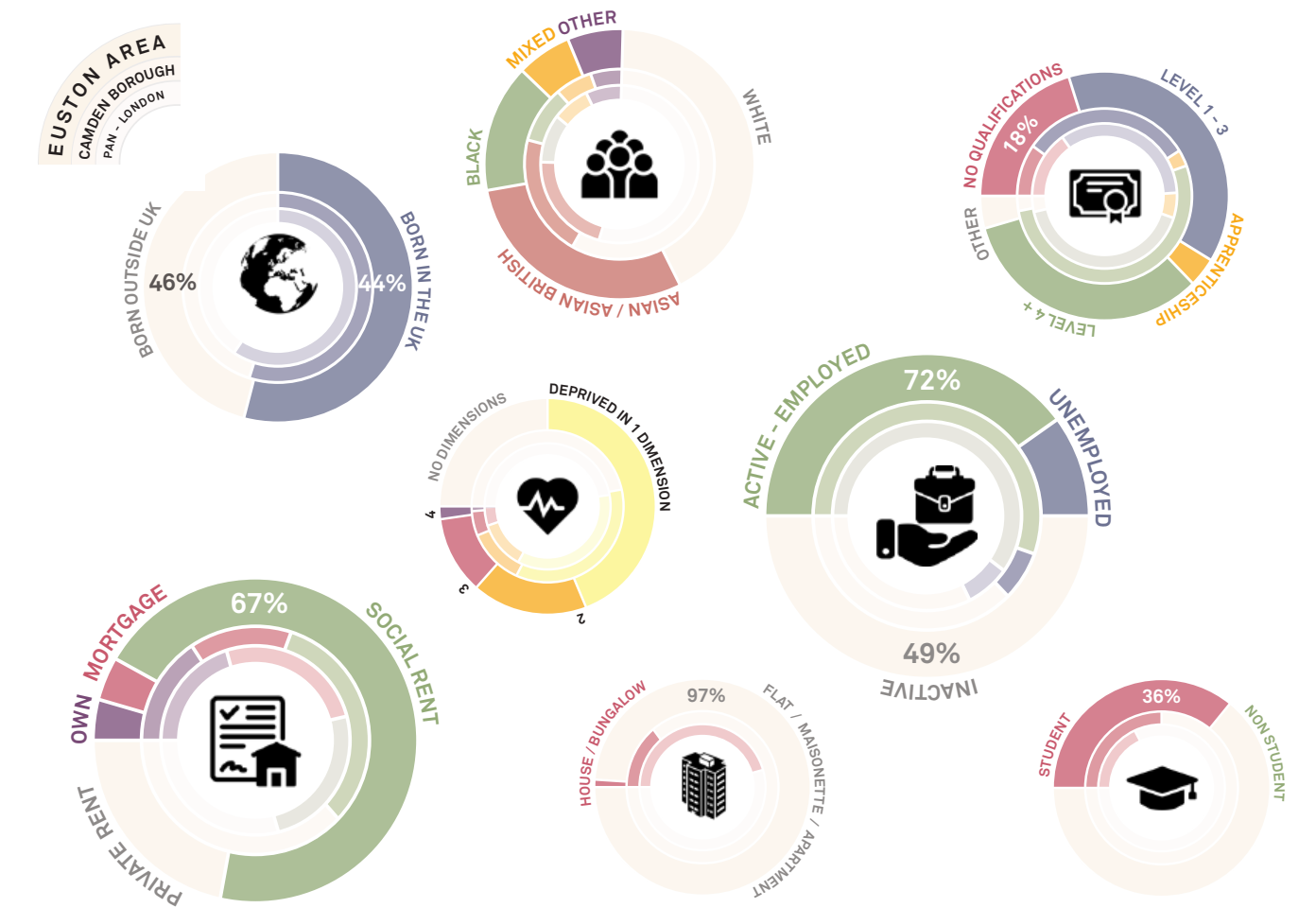
The proportion of residents aged **under 18** is expected to fall further, conversely residents aged **65 and over** is expected to rise 3% to **15%**.

Demand for health and social care is expected to rise, and housing, public spaces and community activities must support ageing in place to prevent risks of loneliness and isolation.

67% of residents live in social housing tenures.

25-32% of residents live overcrowded households.

Areas with a higher concentration of social housing and overcrowding are likely to place greater reliance on public services, welfare and affordable infrastructure. The quality and availability of social housing is exacerbating issues of overcrowding, linked to higher risks of poor physical and mental health, impacts on children and education, and long term social and economic impacts.



Data Source: See appendix E
- Socio-economic baseline report (ONS)

Growth Sites & Growth Period:

This study uses ONS data to anticipate future population statistics and calculates residential growth based on new homes delivered on earmarked growth sites – using this to assess pressures on existing and demand for new community and social infrastructure.

The study considers capacity today and future growth (data for which is outlined below):

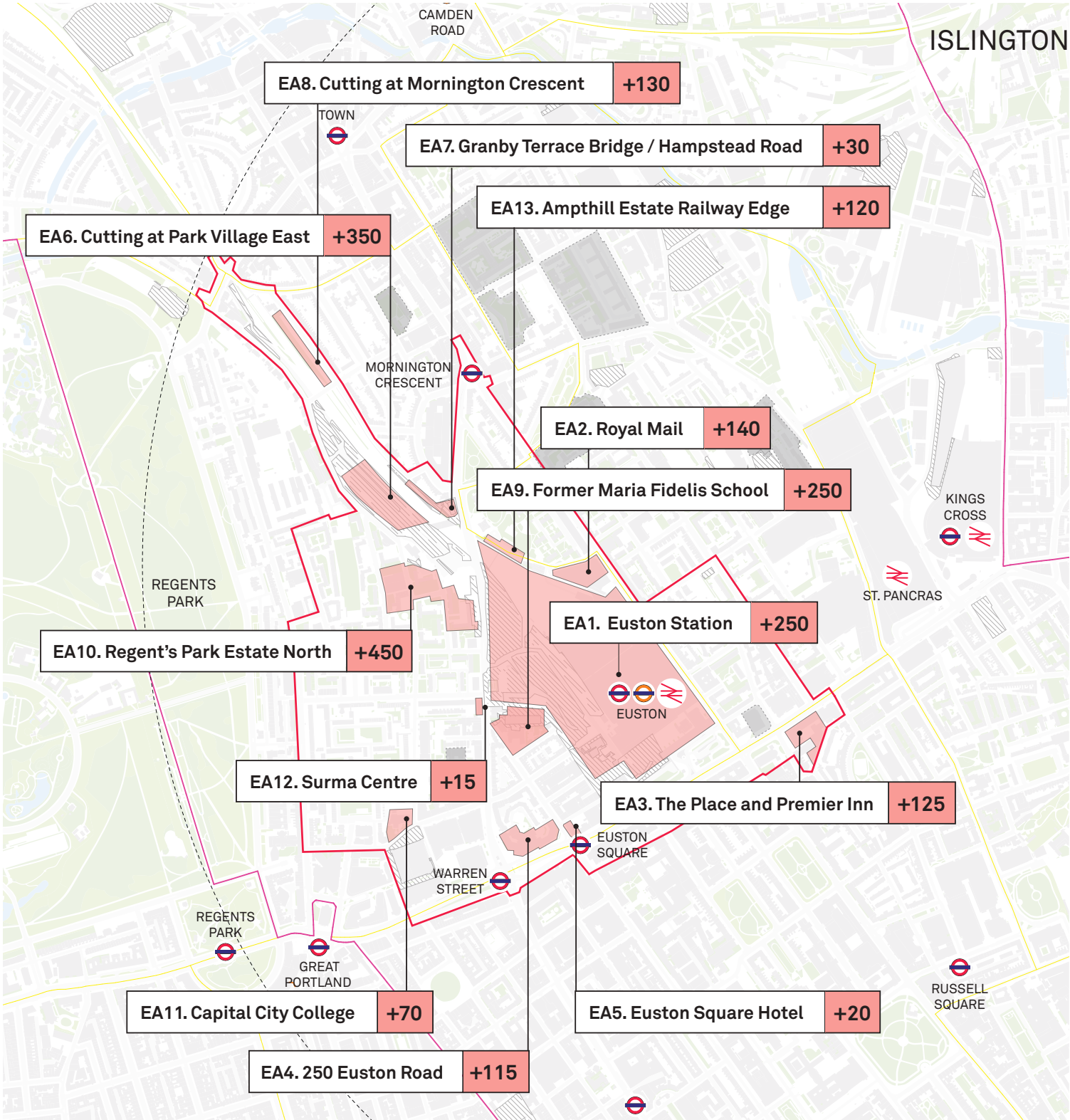
- **Existing EAP (2025):** Explores whether existing supply within the EAP boundary meets demand of the existing residential community within the EAP boundary (with due consideration to additional pressures caused by workers and non-resident students).
- **Existing EAP + buffer (2025):** Explores whether existing supply within the wider Euston area (EAP + 2080m buffer) meets demand of the existing residential community within that wider area (with due consideration to additional pressures caused by workers and non-resident students).
- **Future EAP growth (2051):** Explores policy-compliant growth and reflects the EAP Draft 2026. Findings are expressed for the EAP (ie. whether existing supply within this boundary is sufficient to meet the growing population) and for the EAP + buffer (ie. whether existing supply in this the wider area is sufficient to meet the existing population as well as the net uplift within the EAP). Future findings build on the balance of existing surplus and shortage.

Given the early stages of feasibility and typology development for most of these sites, some assumptions based on LBC policy have been made in regard to size and tenancy of new homes. The spreadsheet model enables LBC to input more detailed breakdowns as this becomes available.

Where existing social and community infrastructure is located on sites earmarked for development, this has been identified. Where data is unavailable, the study assumes that facilities will be re-provided either on site or nearby, in accordance with LBC Policy SC3 (Social and Community Infrastructure).

	TODAY (2025)		+	EAP Sites Net Uplift (by year 2051)			=	Assumed Total (2051)	
	nr. homes	nr. residents		nr. homes	nr. residents	nr. jobs		nr. homes	nr. residents
EAP	3,026	9,329		2,061	6,366	17,309		5,087	15,728
EAP + Buffer	10,366	31,958		/	/	/		12,427	38,324

Projected Growth Figures: The above table represents the overall uplifts that this report is underpinned by.



EA X - Site Name +XX

Site Reference Site Name # of Homes

Borough Boundary Line

Ward Boundary Line

Site Under Construction

EAP Zone

EAP 2025 Site Allocations*

EA1 Euston Station

EA2 Royal Mail

EA3 The Place and Premier Inn

EA4 250 Euston Road

EA5 Euston Square Hotel

EA6 Cutting at Park Village East

EA7 Granby Terrace Bridge/Hampstead Rd

EA8 Cutting at Mornington Terrace

EA9 Former Maria Fidelis School

EA10 Regent's Park Estate North

EA11 Capital City College

EA12 Surma Centre

EA13 Ampthill Estate Railway Edge

HOW WAS THE STUDY UNDERTAKEN?

Literature Review:

As well as capturing supply and demand the project has undertaken a comprehensive literature review to build off previous studies.

Focused on a data-led approach, this study does not include direct community engagement activities; but has instead been informed by an extensive literature review comprising over 40 London Borough of Camden documents - including policies, strategies, charters and reports relating to the relevant social and community infrastructure categories and the wider ambitions for the Euston Area. See bibliography for the full list of documentation reviewed.

This literature review plays a complementary role within this research, helping to inform the study hypotheses around where there may be unmet demand for different infrastructure, addressing gaps inherent in a data-led methodology, and surfacing key metric for different uses for the qualitative analysis.



2

Quantitative Assessment

The quantitative assessment undertaken through the *Demand Assessment Spreadsheet Model* underpins this study. This has been developed as an easy to use spreadsheet tool allowing LBC to plug in different growth scenarios and understand what infrastructure is triggered.

The model is based on existing supply (See Supply Mapping), existing and projected population data, and standard benchmarks / indicators.

Benchmark Calculations:

All social and community uses are assessments using either:

- Standard Per capita benchmark (x per 100,000 population) or;
- Standard Gross space norm (x sqm per user) - applied where facilities serve only a portion of the population

These calculations have been sense-checked and adjusted, where appropriate, using locality-specific datasets where available (such as activity data, workforce statistics, and waiting lists, Forms of entry data). Such datasets are not comprehensive across all services, and adjustments to the metric have been made only where sufficiently robust information exists.

Where possible metric reflect approaches used in other LBC studies, London benchmarks or industry standards. In many instances multiple metric were tested and the base formula refined.

It should be noted that some of these metrics represent best-case benchmarks and may not be achievable in a dense inner-city context; this is reflected in the analysis.

Audience / Users:

As outlined above the study primarily focuses on the resident population (existing and projected). but also considers “additional pressure” from workers and non-resident students for nurseries; Pharmacies; Pubs; Cultural Leisure; Parks / Open Green Space; Outdoor Sports Facilities; Indoor Sports Facilities

The uplift in workers has been calculated through additional number of jobs per growth sites and assumes all additional workers are non-residents; though there is a risk of double-counting where workers also live locally.

Boundary Confinements:

The analysis focuses on whether local supply is sufficient to meet population demand within the EAP boundary only before presenting data for the wider Euston area (EAP + buffer). The modelling does not explicitly account for cross-boundary usage (residents travelling outwards vs. non-residents travelling into the area to use facilities). While such dynamics are acknowledged, consistent data was not available to model these movements reliably.

Additionally some infrastructure exists outside of the buffer but will be accessed by Euston residents. This has not been accounted for as supply in the model but analysed as part of the qualitative assessment. Both these factors have been further considered to inform the consolidated demand.

Penetration Rates:

Where robust data was available, demand calculations incorporate penetration rates (i.e. the proportion of the total population that typically uses a facility). In such cases, demand is calculated using the total population rather than a benchmark ratio. This includes: Nurseries; Adult learning; Adult Social Care; Places of Worship.

Where no penetration rate was available, standard per-capita benchmarks were applied. These benchmarks inherently assume typical levels of utilisation, but may not fully reflect local variations in demand or behaviour.

Locality Analysis:

Given the breadth of social and community infrastructure analysed in this study, some consideration has been given to what services are required within the wider area, at a locality scale, or as doorstep provision.

Based on the location of existing provision and the existing and projected population within each locality, the model breaks down demand within Regents Park Locality, Somers Town Locality, and Bloomsbury Locality.



3

Qualitative Assessment

Data alone cannot provide an accurate account of demand across the EAP. As such, qualitative assessments has been undertaken to stress test the credibility of the data, understand findings spatially and capture local nuances in demand and provision.

Distribution Mapping:

Distribution of uses were assessed. This offers understanding of where there are ‘cold spots’ for specific amenities which is particularly important given severance in the area. It should be noted that this includes analysis of which uses benefit from being in areas of high footfall / clustered vs. which uses should be evenly distributed. Where available it used best-practice catchment benchmarks to assess cold spots.

Quality Analysis:

Quality assessments rely on authoritative, publicly available grading, such as Ofsted ratings or Care Quality Commission (CQC) inspections. Where no formal assessment exists, reference has been made to LBC studies and engagement feedback. Due to uneven availability of quality data across categories, comparisons should be interpreted with some caution.

Equivalent Provision:

The quantitative demand assessment expresses surplus / sufficiency or shortages of infrastructure in sqm or number of facilities depending on the type of metric used. This raw data has been translated into an ‘equivalent provision’ based on space norms. See *appendix G*.

Pipeline:

Where existing social and community infrastructure is located on sites earmarked for development, this has been identified. Where data is unavailable, the study assumes that facilities will be re-provided either on site or nearby, in accordance with LBC Policy SC3 (Social and Community Infrastructure).

Trend Analysis:

Forecasting of trends across each use was undertaken to identify anticipated changes in infrastructure demand over the short, medium, and long term, drawing on national and policy drivers, and incorporating consideration of emerging or non-traditional uses not quantitatively assessed.



4

Market Testing & Refinement

Whilst data-led approaches provide a robust evidence base for identifying patterns of demand at a strategic level, it is recognised that ‘need’ may be experienced very differently on the ground, and that quantitative and policy-led evidence does not always fully capture lived experience or local nuance.

As well as checking findings based on the other LBC literature - some of which undertook extensive community engagement - the study included over 20 targeted interviews with relevant Council leads, existing service providers and pan-London service providers. These interviews were used to stress-test emerging findings and to further inform the analysis of existing and future demand.

While specific category-related references regarding community priorities and sentiments are cited in the accompanying sections where relevant, particular emphasis has been placed on comparing findings across data-led analysis, engagement-led studies and stakeholder insights. Areas where findings align help to reinforce confidence in the identified priorities, while areas of divergence are treated as equally important, providing insight into how strategic patterns of demand are experienced locally and where further consideration or targeted responses may be required.

An engagement log is provided as Appendix F. Additionally, the following studies have been particularly influential in shaping the baseline, project priorities and understanding around LBC and EHDG commitments to the area.

Good Life Euston: The Good Life Euston project is a citizen-led research collaboration involving Camden Council, the UCL Institute for Global Prosperity (IGP), Lendlease, and Camden Giving. It aims to redefine prosperity by developing a Good Life Model and Index, based on surveys of over 3,000 households across neighbourhoods surrounding Euston Station. The model highlights social, systemic, and environmental factors that enable or limit people’s ability to flourish and provides a locally grounded understanding of what matters most to these communities affected by regeneration.



Fig: The Social Value Charter Themes & Objectives

Euston’s communities are strong and stable, with deep social ties and high levels of trust: 74% of residents report trusting their neighbours, well above the national average of 41%. Cultural and ethnic diversity is highly valued, with people of all backgrounds feeling able to express their identities and participate in community life. Satisfaction with local services and community spaces is high, highlighting the importance of these infrastructures in supporting wellbeing.

However, significant inequalities persist, particularly in secure livelihoods, systemic equity, and environmental conditions. Half of households earn under £17,400 per year, less than half the national median, with large disparities in income and financial inclusion. Trust in inclusive decision-making is low in areas such as Somers Town and Ampt Hill. Perceived crime, safety concerns, and poor housing quality (including issues with heating, noise, plumbing, and damp) are widespread.

These findings reveal pronounced spatial inequalities and varying levels of flourishing, emphasising the need for targeted, place-based investment in social and community infrastructure to protect and strengthen existing community assets through regeneration.

Social Value Charter: Developed by The Euston Partnership, the Euston Social Value Charter sets out a vision to place communities at the heart of development, promoting equity, inclusion, health, and resilience through accessible housing, social infrastructure, and lifelong learning opportunities. It emphasizes meaningful community engagement, supports the local economy and cultural identity, and aims to ensure high-quality open spaces, sustainable transport, and public safety during and after construction. Sustainability is central, with a commitment to creating an environmentally regenerative and resilient Euston.

RAG Feedback: The Euston Residents’ Advisory Group (RAG) is a diverse, broadly demographically representative group of 30 adult Camden residents, recruited by Camden Council with help from the Sortition Foundation, to “help shape the future of Euston” at a time when development around, within and above the station is having significant impact upon local lives.

Top priorities for Euston’s development from the Euston RAG focus on working closely with the community to recognise, support, and build on what already exists and is valued—such as gyms, markets, independent businesses, community venues, and events like the Somers Town Festival. There is a strong emphasis on fostering community ownership and participation in shaping and maintaining local spaces. Safety is another key focus, with calls for an active and visible police or warden presence. Economic vitality should be strengthened by promoting and investing in local markets, including upgrading Chalton Street Market. Cultural development should celebrate and share Euston’s authentic identity, encouraging inter-cultural connection. Finally, residents emphasize the urgent need for accessible, usable green spaces - not just open areas - with creative, inclusive design that supports everyday use and wellbeing.

Euston Housing Pact: The Social and Community Infrastructure study for Euston aligns closely with the priorities and community sentiment articulated through the Euston Housing Pact - a co-designed framework of values and commitments co-developed by residents, Camden Council and partners to guide the delivery of housing, neighbourhoods and associated infrastructure in the area. The Pact highlights a clear and consistent desire for development that strengthens existing networks, enhances social infrastructure, and supports wellbeing through safe, connected and well-served neighbourhoods, reinforcing the study’s direction of travel. It also reflects longstanding concerns around meaningful engagement, trust, and the need for community-led decision-making, which are critical to shaping future infrastructure provision.

The Euston Housing Pact was initiated after this study commenced and, whilst it has not directly informed its findings, it provides a valuable framework for future alignment and an opportunity to test and refine the study’s recommendations through ongoing community-led governance and delivery.

5 Consolidated Demand

To avoid over-reliance on quantitative outputs while still providing a clear articulation of infrastructure requirements, the consolidated demand (unmet and projected) draws on both quantitative and qualitative analysis. Figures have been rounded up or down where appropriate to better reflect the Euston context.

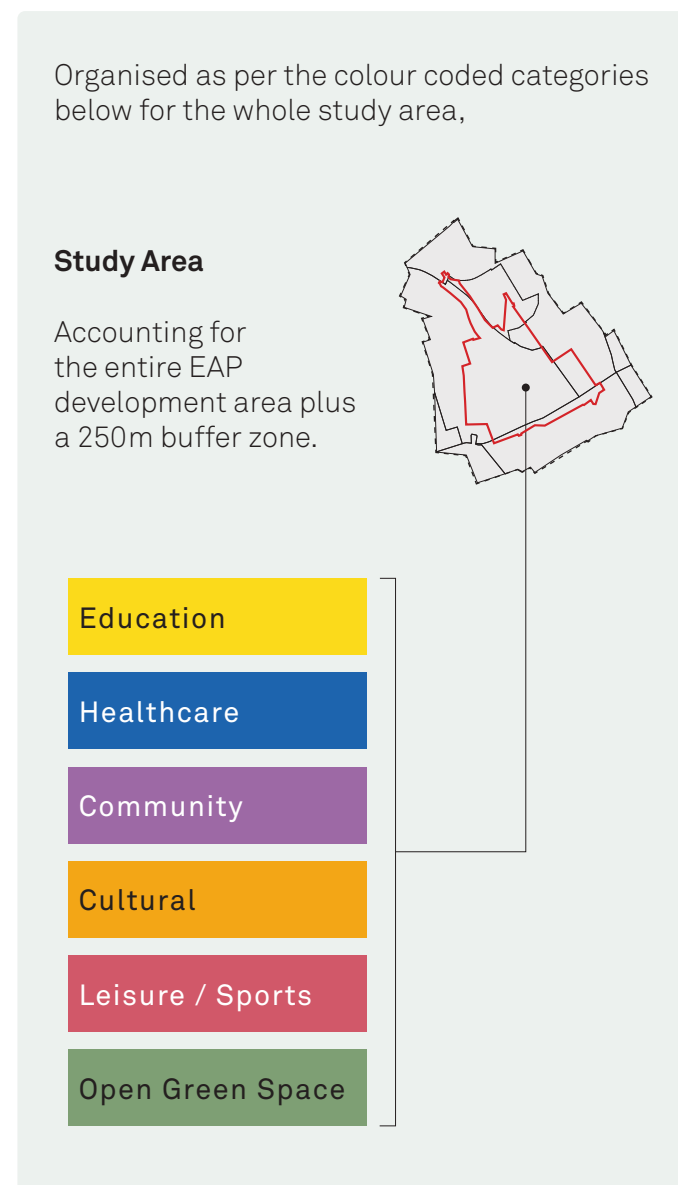
This is undertaken at the category level, considering the EAP area only. Category summaries provide a clear indication of where and why figures have been adjusted; and further delivery recommendations are offered.

Locality level analysis of existing unmet demand, future growth and therefore future opportunity to meet deficits has been undertaken to inform the priority location for emerging infrastructure.

It should be noted that it may not be feasible to meet all identified demand within the EAP area. Further consideration is therefore required in relation to the location of growth sites and the opportunities they present to accommodate demand. The extent to which demand are met will also vary by infrastructure type, with some provision more likely to be driven by market demand and private-sector delivery.

WHAT ELSE IS IMPORTANT TO CONSIDER?

This report unpacks data-derived demand outputs through qualitative analysis. It is structured based on 6 different categories.



As well as the limitations set out in the methodology, there are other important factors when considering sufficiency of and planning for social and community infrastructure.

• Social and community infrastructure often doesn't operate in silos

Many forms of social and community infrastructure are not delivered in isolation. Buildings and spaces are often shared, co-located or designed to accommodate multiple services over time. Flexible, adaptable spaces can therefore meet a broader range of community needs than single-purpose facilities.

Although this report assesses each infrastructure category separately; the final chapter considers a series of cross-cutting themes (including co-location and multi-functionality, accessibility and affordability, emerging social trends, and climate resilience) which provides some additional context beyond individual infrastructure categories.

• Different localities in Euston will have varying demand

There are three key localities in Euston with distinct identities.

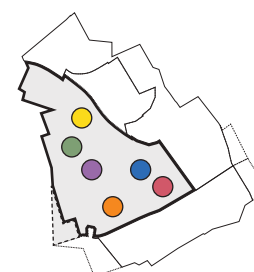
While this report assesses provision within the EAP area and the wider Euston area (EAP + buffer),

demand and access are not experienced evenly. This distinction is important as each area caters to a different kind of community and anticipates different levels of growth over the coming years. They are currently delineated and partly cut off from one another by Euston Road and rail infrastructure. This fractured nature means that residents are sometimes less likely to access certain services if situated in different localities. For example, GLL usage data shows lower-than-expected use of St Pancras Square by Somers Town residents despite their proximity.

Both Regent's Park and St Pancras and Somers Town cater to distinct residential neighbourhoods, connected only at the north in a series of bridges over the rail tracks. But Regent's Park ward is set to see significantly more growth over the coming years.

The Bloomsbury locality holds a different set of challenges, rather than sitting as a residential island, it forms the northern edge of an area catering more to visitors, workers and students.

The consolidated demand section identifies priority localities for future provision based on locality analysis.



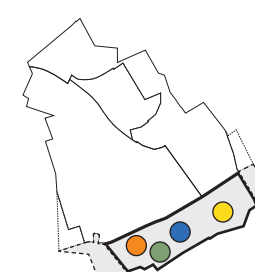
Regent's Park Locality

This area is a residential neighbourhood with a variety of housing densities, flanked by Regent's Park.



St Pancras & Somers Town Locality

This area is a residential neighbourhood that is predominantly low rise, with access to Mornington Crescent.



Bloomsbury Locality

This area hosts some residential but is dominated by visitors and students and workers at large institutions.

• Catchment Matters

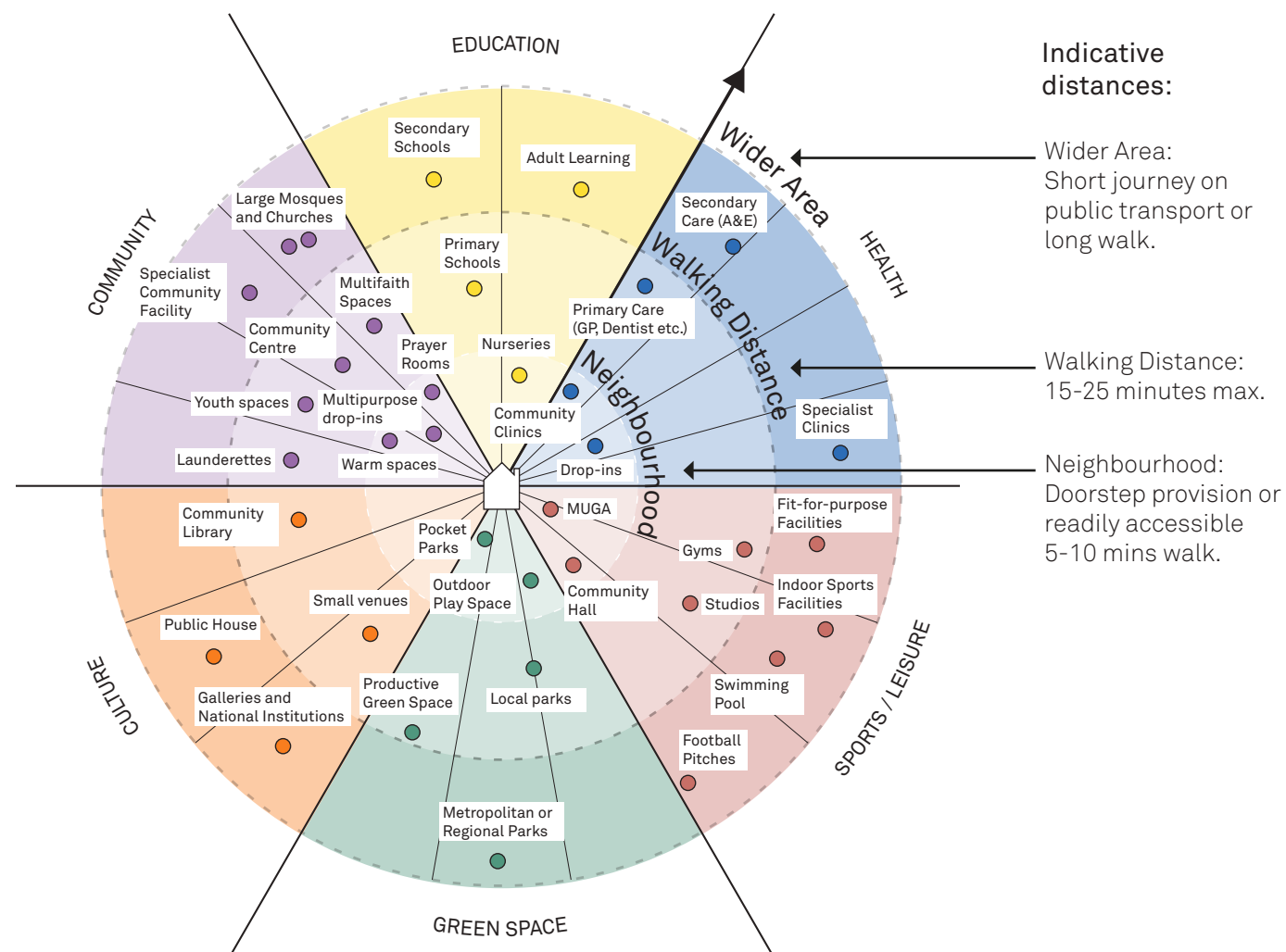
Given the breadth of social and community infrastructure analysed in this study, it is important to note that not all facilities or services are required at a locality or neighbourhood scale. In many cases, encouraging residents to use facilities in neighbouring areas is both appropriate and beneficial, as it can strengthen cohesion across the wider area. Where this is the case, connections and routes between neighbourhoods should be improved (e.g. routes from Bloomsbury to the secondary school in Somers Town, or from the Regent's Park Estate to the Somers Town leisure centre.)

However, some services are necessary on the doorstep at a neighbourhood scale, and feedback

suggests that without nearby provision many residents are unlikely to leave their homes. Where multiple local shortages overlap with areas of significant future growth, there is a strong case for intervention.

Based on the research and engagement with service providers, the diagram below outlines which uses should be considered at a neighbourhood scale and which have larger catchments that can be reasonably served at an area-wide level.

Insights such as these can inform what is necessary to include in specific development briefs.



Other Study Caveats

Whilst a number of limitations and caveats are set out within the methodology and referenced throughout the study, it is important to be clear about what this work is - and is not - seeking to achieve:

This study is not... quantifying demand as a fixed requirement that must be delivered.

This study is... projecting indicative levels of infrastructure required to support further capacity testing, feasibility work, and informed decision-making.

This study is not... a comprehensive account of capacity, nor does it capture the full nuance across all types of social and community infrastructure.

This study is... providing a high-level understanding of direction, helping to identify early priorities and opportunities.

This study is not... suggesting that LBC is solely responsible for delivering all identified unmet and future demand.

This study is... offering evidence to support coordination, partnership working, and (in some instances) negotiation with other delivery partners.

This study is not... assuming that all identified demand can be met within the study boundary.

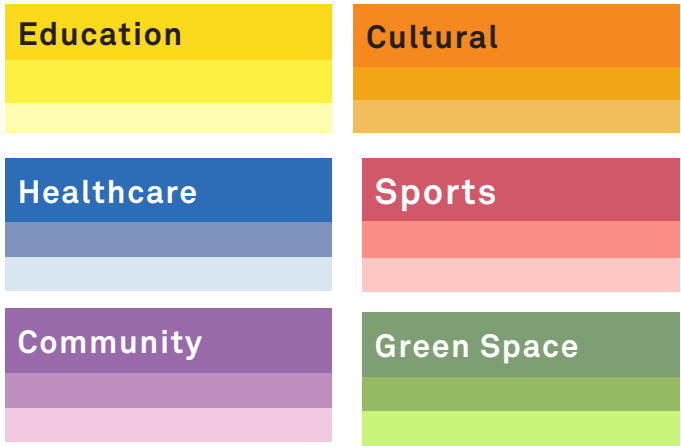
This study is... acknowledging the spatial and viability constraints of a dense inner-London context, where some needs will inevitably be met beyond the immediate area.

This study is not... predicting the future with certainty.

This study is... identifying likely infrastructure requirements based on current evidence, trends and growth assumptions.

SECTION OVERVIEW

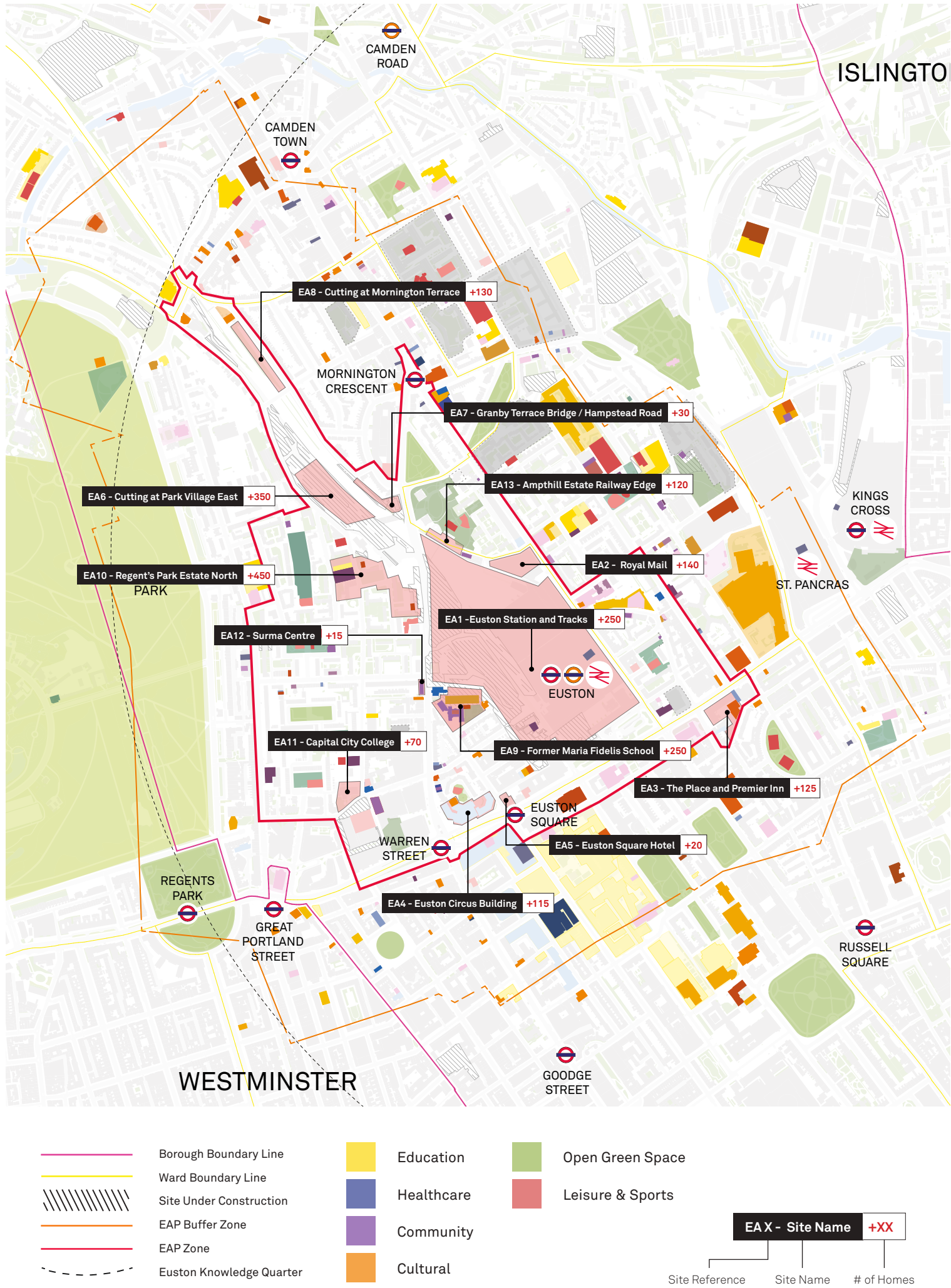
Based on research and the outputs from the spreadsheet model / trigger point formula, this section offers category-by-category analysis for a baseline understanding of current provision and projected demand across individual social and community infrastructure types. This has been achieved by using service-specific, London or national benchmarks; looking at current population demographics and future projects; developing an understanding of existing supply; and stress-testing against area-based data where available.



Note: Whilst aimed at providing evidence to support future strategy, social and community infrastructure should not be considered in silo's, and many of the uses analysed are not mutually exclusive.

Each Category Sets Out:

ABOUT	A top level overview of category priorities, sectoral responsibilities in ensuring sufficient provision; relevance to Euston's population; and community priorities and public sentiment as identified through other engagement studies.
EXISTING PROVISION & DEMAND	Data findings for existing (unmet) demand and supporting spatial analysis. Including mapping of existing supply.
FUTURE TRENDS & DATA DERIVED DEMAND	Data findings for future demand. This section also includes: - Demand trend analysis – See Appendix D for full analysis; - Trigger points; - Cold spot mapping; - Comparative analysis
CONSOLIDATED DEMAND & CONSIDERATIONS	Overall rating; use analysis, future recommendations and a consolidated demand figure which considers all analysis.



EDUCATIONAL INFRASTRUCTURE



LBC Policy Approach:

‘Building Back Stronger’ is Camden’s Education Strategy promoting principles of academic excellence and equity. The Local Plan identifies schools as a core community and social infrastructure and reiterated the London Plan in encouraging **multiple or shared use of educational facilities to enable access for the wider community.**⁹



LBC’s Role & Service Providers

LBC’s Education Service and school place planning function have a **statutory responsibility**¹⁰ to ensure that the **right number of school places are provided within different localities**. LBC undertake yearly Childcare Sufficiency Assessments and School Place Planning Reports to assess current and future need for educational infrastructure. This includes SEND and disability provision. Whilst LBC work closely with public schools; each institution has operational autonomy. There are also multiple public and VSO programmes across the borough that interface with schools offering additional support and programming. There are several independent/ private sector schools in the Euston locality that draw students from across London. **The majority of early years provision in Euston is also private sector operated.**¹¹

9 GLA, *The London Plan*.
10 LBC, *2024 School Place Planning Report*.
11 WSP, *Euston: Capacity Study*.

Adult learning is delivered both by private, public and VSO - with LBC focusing on entry level skills at affordable rates or free of charge. LBC offer multiple programmes to support adults into employment through skills and training and manage facilities like Regent’s Park Job Hub to enable this.¹² LBC also support and co-deliver other educational hubs in the area that provide out of school learning for children and adults, and focus on specific skills, such as the Euston Skills Centre (partnership between UCG and LBC), London AI Campus (partnership with Google and LBC).



Euston Overview (*Literature Review*)

Euston is home to many **education institutions of national and international significance** – however many of these are **higher education or private led** and not serving local residents. In line with wider Camden and inner London borough trends, Euston has seen a **drastic decline in birth rates** and as such, a drop in demand for conventional educational facilities – despite the borough being a net importer of students. This has resulted in the **closure and merger of schools** across the area – with two primary schools closed in Euston in 2019 (St Aloysius Roman Catholic Primary School and St Michaels CofE Primary School) and reduction in forms of entry at multiple schools.¹³ Maria Fidelis secondary school was also consolidated into one

12 URS, *Infrastructure Study Update*.
13 WSP, *Euston: Capacity Study*.

single new state-of-the-art building in 2019 due to HS2 station expansion and construction works.

With London’s SEND cohort rising by around 21% between 2019 and 2024 and the number of pupils with Education, Health & Care Plans (EHCPs) rising even faster¹⁴ — there is an **increase in SEND & disability demand**, putting clear upward pressure on specialist and independent placements, most notably the specialist school Woodlands Centre for Autism, which is part of Netley Primary School.

There is steady demand for Camden Adult Community Learning (CALC) services (particularly Health and Well-being, Digital Inclusion, Family Learning and English Languages (ESOL)); however **severe government funding cuts** impacts supply and diversity of affordable offering.

The **EAP 2026** identifies education as a key component of Euston’s future social infrastructure (Objective 3), seeking to ensure regeneration delivers education alongside homes and services. Section 3.2 also commits to an **Employment, Learning and Training Strategy, supporting education, skills, apprenticeships** and links with schools and further education providers to help local people benefit from regeneration.



Euston Demographics

Young People: Over a quarter of residents in the EAP and buffer area are in full-time education. ONS data suggests that Euston has a very young population – with 26% of residents aged 15 to 24 in the EAP boundary. However, this is primarily driven by higher education students accessing local institutions like UCL, UAL, SOAS, and other nearby universities, rather than a large resident population of families with children.

Children: Since 2018 there has been a drop in birth rates of over 30% across the LBC.¹⁵

Adult Education: In the site area, only 44% of residents are economically active¹⁶ (a significant proportion of residents have never worked or not worked in the last 12 months - indicating barriers to entering/re-entering the workforce). A larger share of Euston residents only hold Level 1 to 3 qualifications, and more than **1 in 10 hold no qualifications at all**, both higher than the borough and London averages.

14 LBC, *We Make Camden*.
15 LBC, *School Place Planning Report*.
16 Institute for Global Prosperity, *Good Life Euston Report*.



This Study

This study focuses on publicly accessible educational facilities – from early years through to sixth form and adult learning. Private sector institutions have been mapped and pressure of supporting infrastructure from these additional students considered.

The Demand Spreadsheet Model calculates sufficiency of provision based on:

- **Nurseries:** Gross sqm/child. It is assumed that 39% of children aged 0-2 years and 100% of children 3-4 require a space. 20% worker pressure is assumed.
- **Primary and secondary school:** Gross sqm/child. This has also been stress tested based on existing school capacity and Forms of Entry in the area.
- **Adult Learning:** Classroom hours per week; assessing multifunctional civic spaces currently used by CALC + specialist facilities.

Community Priority & Public Sentiment:

Euston Social Value Charter: An objective of the charter is “Delivering education, skills and training programmes for local schools and the local community to increase the knowledge of and interest in science and support careers in these fields.”

RAG / Community Conversations: Mentioned that “Current infrastructure – health, transport, **education**, open space – is poorly maintained and inadequate. Additional, improved facilities must come alongside housing, not after, and be designed in an integrated way.”

Good Life Euston: ‘Formal and Informal Learning’ is a domain within Good Life Euston focused on “Fair access to high-quality opportunities for education, training and lifelong learning, from early years to mainstream education, skills and training for work, and informal learning for personal development.” Sub-domains include early years support, improved educational outcomes for young people, skills and training for work and lifelong learning.

- ‘All LSOAs reported an average score of over eight for early years, which captures the satisfaction and support around childcare and early development, including the cost of childcare.
- Lifelong learning sub-domain scores are much less consistent, ranging from 4.7 in Euston Station and Hampstead Road to 6.4 in Somers Town South. This reflects varying levels of access to and participation in adult education.

EXISTING PROVISION & DATA DERIVED DEMAND

Existing Quantitative Analyses: What does the data assessment tell us?

The table below summarises the outputs from the spreadsheet model, using standard benchmarks to assess whether existing supply meets current demand. It considers provision both within the EAP boundary and across the EAP + buffer.

Type		Study findings (Surplus vs. shortage)	Total Quantum of surplus or shortage (nr. / sqm)	Equivalent Provision	Notes & Reference
Pre-school / Nurseries	EAP	Surplus	722 sqm	1 x large nurseries; 1 x small nursery	DfE & EYFS space ratios
	EAP+B	Surplus	1,133 sqm	2 x large nurseries; 1 x small nursery	
Primary School	EAP	Surplus	4,203 sqm	1 x primary schools	
	EAP+B	Surplus	12,749 sqm	2 x primary schools	
Secondary School & Sixth Form	EAP	Surplus	3,298 sqm	0.5 x small secondary school	
	EAP+B	Surplus	15,266 sqm	1 x secondary school	
Adult Learning	EAP	Sufficient	189 hrs	c. 3 x classrooms	GLA / DfE Guidance – Further & Adult Education
	EAP+B	Sufficient	314 hrs	c. 5 x classrooms	

*Due to shrinking young population accessing conventional schooling in Euston, there is a surplus in primary and secondary schools. This is in line with the FoE vs. nr. young people who live in the area and the stated capacity across each school.

Existing Qualitative Analysis: What does the spatial assessment tell us?

Pre-school & Nurseries:

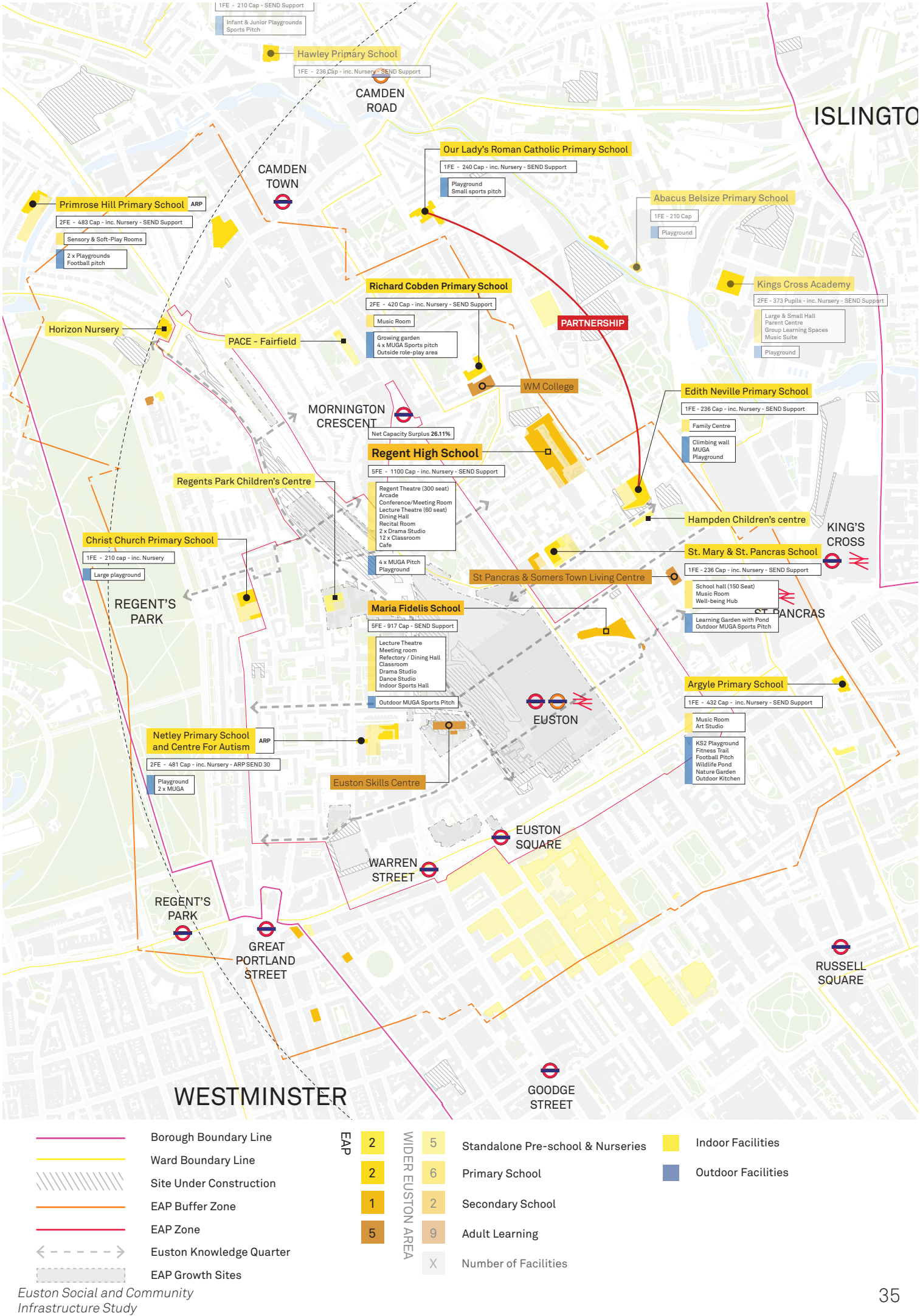
Nursery provision is well distributed across the wider EAP area – with both Somers Town locality and Regent’s Park locality offering child centres (albeit only the Regent’s Park centre is within the EAP boundary); and all three localities offering standalone nurseries. Most nurseries in Camden are private, although nursery classes are also offered at all primary schools. Whilst the exact breakdown of private vs. public provision is unknown, funded early education is offered across all nurseries. (In England, all 3 and 4 year-olds are entitled to 15 hours per week of funded early education, and up to 30 hours per week for eligible working parents.)

Given high demand for affordable / free provision often exceeds supply, admission policies (including catchment) apply. Input includes that there are limited affordable services beyond funded provision for young families to do with children in the area.

- **Opportunity / Need:** Supplementary uses / activities for under 5’s in the area outside of nursery + sufficient affordable and accessible early-years space to meet the needs of low-income families.

Primary School:

There are two primary schools within or on the EAP boundary, both located in Regent’s Park Estate. However when considering the buffer around, the majority of primary schools (5/8) are in the Somers Town locality. Schools within the Regents Park locality have capacity indicating no unmet demand. All schools within the wider Euston area have an Ofsted rating on Outstanding or Good - however the three primary schools nearest Euston Station and the CAZ have the lowest rating and highest surplus capacity.



Evidence indicates that some school facilities (i.e. Halls and sports facilities) are shared but with some schools constrained by the lack of outdoor space. Input also suggests that whilst surplus space exists – the growing need for SEND facilities is increasingly absorbing this surplus space.

- **Opportunity / Need:** Fit for purpose SEND facilities + Community programming of surplus space and access to education facilities outside schools hours

Secondary School:

Within the EAP there is one state secondary schools located in Somers Town. However, a second school is located nearby, just outside the EAP boundary. Each is rated Good by Ofsted and offers extensive facilities. **Maria Fidelis School** (EAP) occupies a new, fit-for-purpose building, while **Regent High School** is situated adjacent to the Somers Town Community, Sports and Youth Centre, with shared access to high-quality outdoor sports facilities. Accessibility for pupils from the Regent’s Park Estate should be considered in planning for any future educational needs.

- **Opportunity / Need:** Community programming of surplus space and access to education facilities outside school hours.

Adult Learning:

There is an ecosystem of adult learning, skills and training facilities which are difficult to quantify. Entry-level adult learning services has shifted away from estate-based or specialist hubs toward a more distributed ecosystem of voluntary and community sector operated spaces, including libraries and community centres – often located within housing estates as ‘doorstep’ provision. A lot of these spaces are located within the EAP boundary with more spaces available just outside the boundary in Somers Town. However, there seems to be fewer facilities North of the station and directly adjacent to Regent’s Park – the demographic of this area is also assumed to be less reliant on facilities. Purpose-built facilities such as the **Euston Skills Centre** and the **AI Campus** are accessible to residents and demonstrate how fit-for-purpose spaces can support more flexible and inclusive learning opportunities. Input suggests that the ecosystem of spaces from which (formal and informal) adult learning services are delivered from have expanded a lot in the last couple of years and whilst the barriers to accessing spaces has reduced, there is still a demand for provision close to home to ensure engagement from residents.

Opportunity / Need:

- Improve and invest in lower-quality community and VSO spaces that currently host adult learning, to enhance the quality and accessibility of provision.
- Establish a purpose-built or specialist hubs capable of delivering specialised courses and storing equipment, which can then be distributed across the wider adult learning ecosystem.
- Bloomsbury locality currently lacking in facilities that offer services – although additional spaces likely outside the borough boundary.



Regent High School:

(Outside of EAP boundary)

Opened in 2015, the school has state of the art facilities including 300 seat theatre, a large library and extensive sports facilities including a sports hall, gym and a multi games theatre shared with the Somers Town Community Sports & Youth Centre.



Euston Skills Centre:

(Within EAP boundary)

Delivered in 2024 by the HS2 team, the centre is a purpose-built facility that provides practical training and apprenticeships in construction and related fields. It is one of the few modern and fit for purpose spaces, including classrooms, workshops with specialist machinery, and an outdoor training area.



WM College:

(Outside of EAP boundary)

A charitable, not-for-profit adult education college offering a wide range of courses from entry level up to level 3, vocational qualifications, and employability focused course. There are support services for adults ranging from job search support, careers guidance, to advice on interview skills and study options.

FUTURE TRENDS & DATA DERIVED DEMAND

Trend Analysis: What broader forces are shaping future demand?

Considering national policy, demographic change, and evolving patterns of use, this table outlines the key upward and downward pressures likely to influence demand for infrastructure over time:

Type:		National	London / GLA	Camden	Drivers
Pre-school / Nurseries (Under 5)	S - M Term	↗	↗	→	Demand sustained by childcare expansion despite falling births; growth in workforce population and participation keeps pressure high.
	M - L Term	→	→	→	
Schools (Primary, Secondary, Sixth Form)	S - M Term	↘	↘	→	Demand sustained in the short term despite falling births due to high quality of schools attracting cross borough residents; gradual long term decline.
	M - L Term	↘	↘	↘	
Adult Learning	S - M Term	↗	↗	↗	Lifelong learning rising with labour upskilling needs; funding gaps constrain delivery capacity; skills gap within digital tech.
	M - L Term	↗	↗	↗	

S-M term: 2025-2035 M-L term: 2035-2050 ↗ Increase demand → Stable demand ↘ Decreasing demand

*See appendix D for a full analysis on future trends at a national, London and local scale

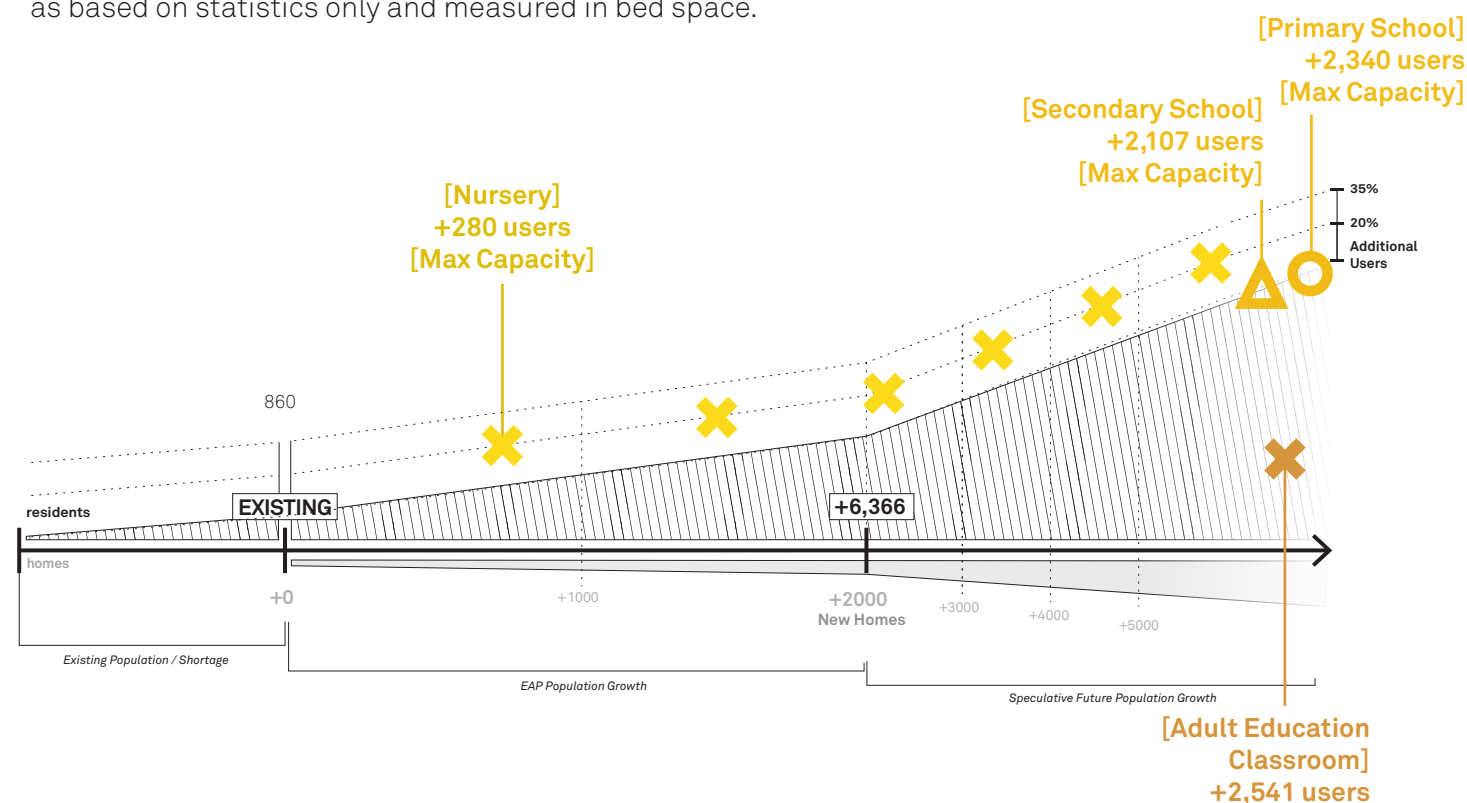
Future Quantitative Analysis: What does the data assessment tell us?

The table below summarises the outputs from the spreadsheet model and considers future growth (c. 2,000 new homes, alongside associated employment growth). It builds on the current position of surplus or shortage in provision:

Type		Study findings (Surplus vs. shortage)	Total Quantum of surplus or shortage (nr. / sqm)	Equivalent Provision	Notes & Reference
Pre-school / Nurseries	EAP	Shortage	893 sqm	1 Large nursery	DfE & EYFS space ratios
	EAP + B	Shortage	1,326 sqm	2 x large nurseries;	
Primary School	EAP	Surplus	2,418 sqm	1 x small school	
	EAP + B	Surplus	11,198 sqm	2 x primary schools	
Secondary School & Sixth Form	EAP	Surplus	1,584 sqm	0.25 x small school	
	EAP + B	Surplus	15,852 sqm	1 x school	
Adult Learning	EAP	Sufficient	181 hrs	c. 3 x classrooms	GLA / DfE Guidance – Further & Adult Education
	EAP + B	Sufficient	304 hrs	c. 5 x classrooms	

Future Quantitative Analysis: When does population growth trigger the demand for an additional facility?

This diagram shows the points at which the provision of new facilities should be considered across the wider Euston (EAP + buffer). Some facilities are required now (shown as a negative figure), others are required at or beyond the 2000 anticipated new homes + jobs.. Demand for the facilities in this category is measured through 'users' - a figure combining uptake from residents and an uplift of 179% for GPs to account for the wider neighbourhood. Pharmacies add a 20% worker uplift. Adult social care is indicative as based on statistics only and measured in bed space.



Future Qualitative Analysis: What other factors are important to consider?

Pre-school & Nurseries:

By 2051, there is an expected minor shortage of nursery provision within the EAP. Depending on the tenure and composition of future homes, consideration should be given to whether existing providers can expand their funded early education offer to meet residential demand. Additional nurseries could also be introduced within the EAP near the station to address future demand and to serve the growing worker and commuter populations.

Primary and Secondary Schools:

With future residential growth, the number of young people in Euston is expected to stay the same due to falling birth rates (even as the overall population grows). As such existing surplus school space in schools (within the EAP and the wider Euston area) is likely to remain stable.

Data suggests that no additional future demand for new primary or secondary school provision is triggered within the EAP. However, it should be noted that secondary schools are nearing capacity when considering future population growth when reviewed against existing capacity. The fact that schools remain in sufficient supply irrespective of growth is largely due to the scale of existing surplus capacity in local schools - which is sufficient to absorb additional pupil demand.

If capacity constraints were to emerge unexpectedly, intensification of existing facilities (i.e. The Maria Fidelis School on Drummond street or the Edith Neville rebuild as part of the CIP scheme) have the ability

to accommodate future vertical expansion.

It should also be noted that demand for SEND provision is expected to continue to increase. Whilst not quantified within this study, this may mean a required shift to more specialist or adapted facilities. This demand may absorb surplus space even where mainstream pupil numbers remain stable.

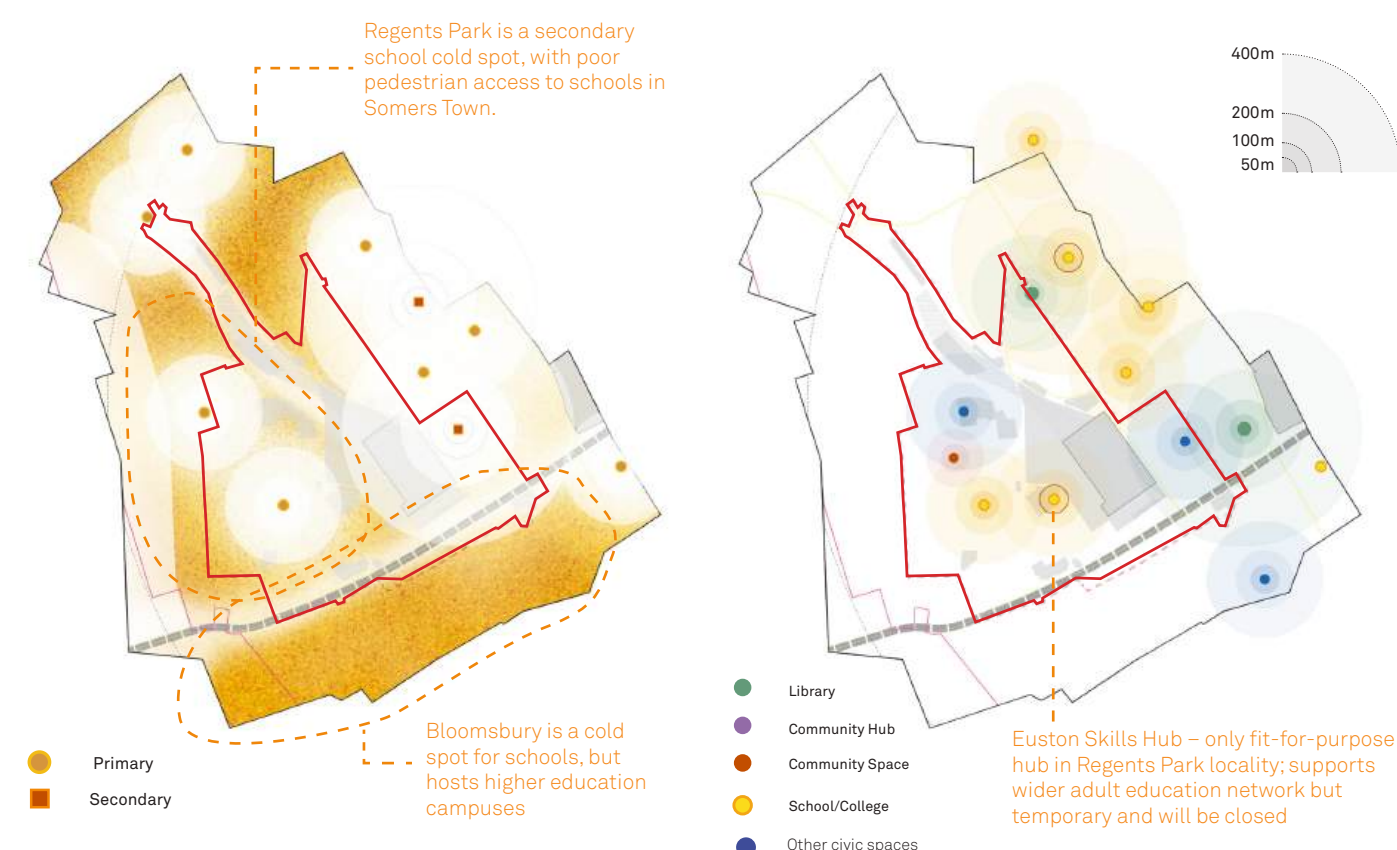
Adult Learning:

Quantifying the sufficiency of adult education provision is challenging, as it typically operates through a distributed, service-based model rather than fixed-purpose buildings. However, provision can be spatialised through integrated community spaces supported by fit-for-purpose hubs. While learners may access facilities across the borough and wider London depending on course type and accessibility, local provision remains important in reducing barriers to participation and supporting entry-level learning.

With future population growth in the EAP, there should be sufficient flexible and community space within the neighbourhood to support entry-level adult education demand (provided this is coordinated, funded, and supported appropriately). Continued investment in community and cultural spaces will therefore be critical to maintaining this model. Provision may also consider the benefits of co-location with nurseries for parent returners.

Additionally, whilst not quantified as part of this study, fit for purpose facilities (like The Euston Skills Centre in Regent's Park locality and Training Link in Somers Town) that can support this distributed approach (through material, outreach, storage, as a 'front door' etc) as well as offer higher-level education should be safeguarded - especially as demand for adult education is expected to grow.

Heat Maps: Where are the cold spots?



Primary & Secondary: Good distribution of primary schools across the EAP. Secondary schools are concentrated within the Somers Town but serve a larger catchment. Cold spot in Bloomsbury as a result of UCL campus.

Adult Education: Myriad of facilities/civic spaces used for Adult Education, made available at affordable rates. Fuelled by fit for purpose hub Euston Skill Centre and WM College.

HEADLINES & FUTURE CONSIDERATIONS

This section highlights key headlines and priorities for addressing unmet or projected demand. Note that in many cases, it will not be LBC’s responsibility to deliver these uses; however, they may play a role in encouraging delivery through planning levers, partnerships, or funding support. Deliverability refers to the spatial complexity and coordination typically required to deliver each type of infrastructure.

NURSERIES

Future demand for new provision:
Moderate

Deliverability:
Readily achievable + Market & Partnership

Priority Locality:
Somers Town / Surrounding Station

PRIMARY & SECONDARY SCHOOLS

Future demand for new provision:
Low / None

Deliverability:
Requires Coordination + LA Led

Priority Locality:
Regents Park

ADULT LEARNING

Future demand for new provision:
Low/ Moderate

Deliverability:
Requires Coordination

Priority Locality:
Regent’s Park

Recommendations: Key challenges, opportunities or strategies

Treat schools as multipurpose social infrastructure hubs: Schools in Euston function as key neighbourhood anchors, engaging young people, parents, and third-sector organisations. They also attract complementary uses in surrounding areas and provide opportunities to link education with industry and employment pathways. Given that school funding is based on pupil numbers, declining enrolment may reduce budgets while operational and management costs remain largely fixed, making diversification challenging. Priority should therefore be placed on retaining the quality of existing provision and identifying ways to repurpose surplus space in the interim to support other social and community uses, which can simultaneously address wider space shortages and enhance school viability. This might include increasing nursery provision which is an identified shortage.

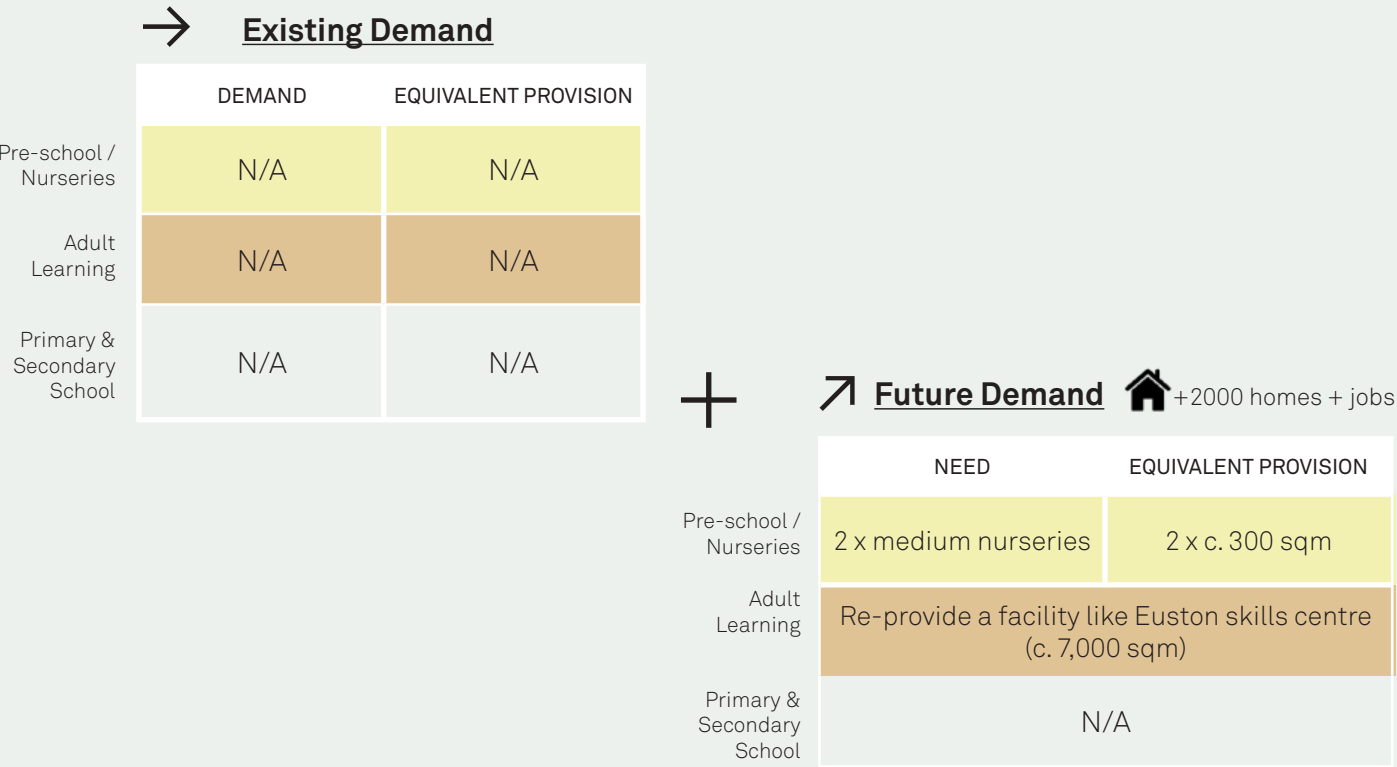
Safeguard fit-for-purpose facilities supporting adult education: Whilst there is no existing or projected shortage of spaces to delivery adult learning, The Euston Skills Centre, which provides skills and training for both young people and adults, is linked to HS2 and therefore offers temporary (“meanwhile”) capacity that will be lost. As one of the few ‘fit for purpose’ educational facilities, consideration should be given to a succession plan for this valued centre to address the gap in provision once the centre is demolished.

Support access to adult learning opportunities: High quality adult education facilities often go empty because the spade work hasn’t been done with the local communities to connect local people to opportunities. This can be quite time consuming and costly and needs to be done through co-production with local residents and with employability – local employers too. Support needed to communicate opportunities through local channels.

Consolidated Demand: What are the priorities for new infrastructure in Euston?

To establish a clear basis for negotiation and future feasibility testing, the following “consolidated” need combines both quantitative and qualitative assessments to adjusts the need figures. Distinct from above it removes the existing unmet need from projected demand figures and considers the EAP boundary only. Where relevant it suggests alternative types of infrastructure based on qualitative analysis.

- Nurseries / Preschool:** No change to size of output; but opt for more smaller facilities that are more easily delivered.
- Primary & Secondary School:** No shortage expected
- Adult Learning:** No requirement for additional multipurpose facilities; however, re-provision of the Euston Skills Hub within Regent’s Park would be recommended, recognising its role as a regional fit-for-purpose hub supporting a wider, but fragmented, adult education ecosystem.



HEALTHCARE INFRASTRUCTURE



LBC Policy Approach:

Improving **population health**, including physical and mental health, and reducing health inequalities is a core LBC policy objective⁹ and a driver in LBC's health and wellbeing strategy. Infrastructurally this is concerned with both healthcare facilities as well a **broadier definition of health infrastructure** including sports and leisure, community provision, green space and more.



LBC's Role & Service Providers

The NHS Long Term Plan sets out the re-organisation of existing health and social care services into an Integrated Care System (ICS). Camden is within the NHS West and North London ICB. The Health and Care Bill (2021) aims to increase collaboration between the NHS, local authorities and care providers to provide more joined up working to deliver better care to patients and residents. All Camden practices are members of one of eight 'Primary Care Networks' (PCNs). Practices within each PCN are working together to deliver nationally mandated 'enhanced services'. NHS WNL ICB has made a strategic commitment to improving the health of its population by **tackling health inequalities and focusing on preventative,**

early intervention and delivering services closer to home. This includes primary care and adult social care.¹⁰

Adult Social Care (ASC) in LBC is delivered through a mixed model combining home-based care, supported living, residential and nursing care, alongside a wide range of preventative and community-based services.¹¹ LBC monitor demand and service needs using Mosaic - reflecting the varied and complex nature of need across three broad service areas: neighbourhood-based provision (including older people and physical disabilities), physical health, mental health, and learning disabilities. LBC's strategic approach prioritises supporting residents to remain in their own homes for as long as possible, through floating care and support services, reablement, and adaptations.



Euston Overview (*Literature Review*)
Euston and its surrounding areas have an international reputation for excellence in health research and teaching. The Knowledge Quarter has established itself as a hub for technology and laboratory-enabled employment space, anchored by world-class institutions such as the UCLH

Biomedical Research Centre, the Francis Crick Institute, and Brill Place. Higher education and clinical teaching are delivered through University College London (UCL), the University of London, and the UCLH Foundation Trust, among others. The area is also well served by major hospitals, including University College Hospital (UCLH) and Great Ormond Street Hospital (GOSH).¹² However, despite this significant institutional presence, **this does not appear to translate into tangible benefits for the residents living within the EAP boundary** and its surrounding neighbourhoods – where population health statistics are poor.

The **EAP 2026 identifies healthcare as a key component of Euston's future social infrastructure through Objectives 1 and 3**, recognising the need for health facilities to support existing and future communities.



Euston Demographics

Health inequality: Euston residents score highly on the index of multiple deprivation; with 63.5% in social housing and only 44% economically active and in employment. Whilst the EAP records a similar share of residents in good health to London statistics, there are 5% fewer people in very good health and 2% more in bad health. The proportion of residents classified as disabled under the Equality Act is 17% across the site area and buffer compared with London overall (13%). Compared to other parts of the borough, there is huge health inequality - with the LBC Annual Health report outlining that "A boy born in Hampstead Town in 2020 is expected to live 13.5 years longer than a boy born the same day in Somers Town."¹³ This is amongst the highest inequality in life expectancy in the country.

Aging population: The 2021 Census states that there were 24,825 people living in Camden over 65 years of age (approx. 11.8% of the borough's population). The number of people aged over 75 is expected to increase by around 40% by 2041.¹⁴

Increase in mental illness & social care needs: 15% (32,000) of Camden residents defined themselves as disabled at the time of the 2021 Census.¹⁵ **The council is also required to commission enough care and support options within Camden for all predicted demand.**

¹² NCL, *Estates and Infrastructure Strategy*.
¹³ LBC, *Annual Health Update*.
¹⁴ LBC, *Camden Market Position Statement*.
¹⁵ LBC, *Infrastructure Delivery Plan*.



This Study

This section of the study focuses on healthcare infrastructure including primary care facilities and social care facilities. Euston is well served by secondary healthcare - this has not been quantified as part of this study.

The Demand Spreadsheet Model calculates sufficiency of provision based on:

- **GPs:** Care quality commission benchmark. This has also considered the nr. patients from elsewhere based on recent NCL ICB figures. This has been stress tested against NHS property capacity datasets, FTE working in EAP practices and space norms (sqm/patient).
- **Dentists:** NHS dental statistics benchmark. Note this does not differentiate between private and NHS dentists.
- **Pharmacies:** A London council planning benchmark - with non-residential pressure added to calculation.
- **Adult Social Care:** Beds required based on LBC ASC mosaic extract and indicative nr. beds in the area. Note that the reliability of this calculation is low and doesn't differentiate between the type of accommodation-based care required. LBC ASC services have more accurate ways of calculating need.

Community Priority & Public Sentiment:

Euston Social Value Charter: "Health" is one of the core themes of the charter with the objective to "Bolster wellbeing and community resilience with improved physical and mental health outcomes."

Good Life Euston sub domain: 'Health and Wellbeing Services' is a sub-domain within 'Our spaces and services' domain.

- 'Our spaces and services domain' scored an average of 6.7; the sub-domain for Health and wellbeing scored an average of 7/10.

RAG / Community Conversations: Has mentioned that "Current infrastructure – **health**, transport, education, open space – is poorly maintained and inadequate. Additional, improved facilities must come with housing, not after, and be designed in an integrated way."

⁹ LBC, "Policy SC1" in *Camden Local Plan*

¹⁰ NCL, *Estates and Infrastructure Strategy 2024*.
¹¹ LBC, *Camden Market Position Statement 2023*.

EXISTING PROVISION & DATA DERIVED DEMAND

Existing Quantitative Analyses: What does the data assessment tell us?

The table below summarises the outputs from the spreadsheet model, using standard benchmarks to assess whether existing supply meets current demand. It considers provision both within the EAP boundary and across the EAP + buffer.

Type		Study findings (Surplus vs. shortage)	Total Quantum of surplus or shortage (nr. / sqm)	Equivalent Provision	Notes & Reference
Primary care: GPs	EAP	Net	N/A	N/A	Equivalent provision an approximate based on comparable large GPs.
	EAP+B	Shortage	2nr.	c. 1,000 sqm	
Primary care: Dentists	EAP	Surplus	3 nr.	c. 450 sqm	
	EAP+B	Shortage	7 nr.	c. 1,100 sqm	
Adult Social Care*	EAP	Surplus	57 beds	see analysis & consolidates demand	Bespoke calculation based on LBC stats.
	EAP+B	Surplus	2 beds	See analysis	
Pharmacies	EAP	Surplus	5 nr.	c. 400 - 750 sqm	Assessment (PNA)
	EAP+B	Surplus	5nr,	c. 400 - 750 sqm	

**This study has not been able to capture the complexisty of ASC demand and provision. As such, this figure should be treated with caution and read in conjunction with analysis. LBC are actively seeking ways to increase provision, including exploring options to deliver supported accommodation as part of the Regents Park North Estate regeneration. LBC ASC services have more accurate ways of calculating demand.

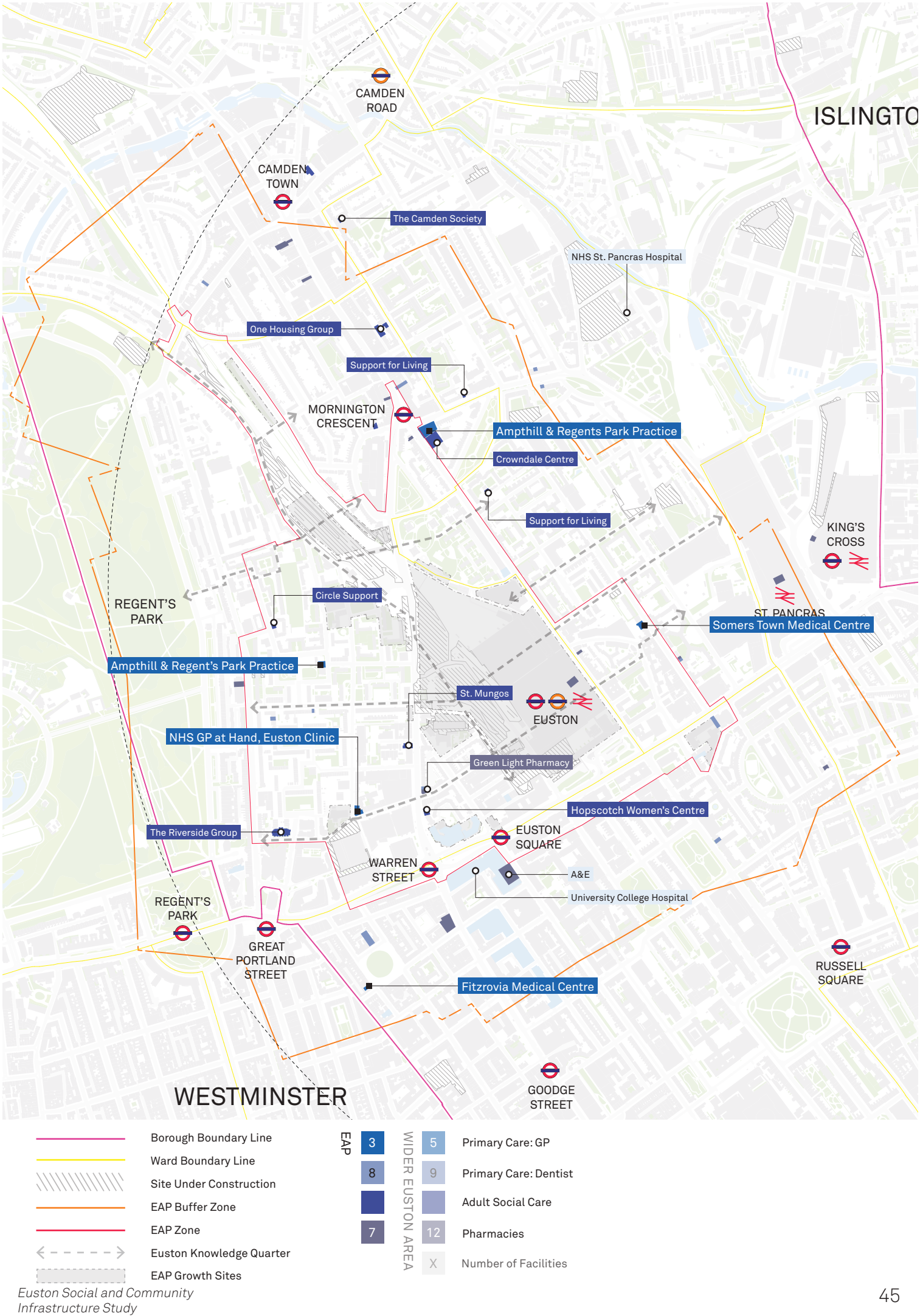
Existing Qualitative Analysis: What does the spatial assessment tell us?

Primary Healthcare

There is an even distribution of GPs across the wider Euston area (5 practices) - three of which are located within the EAP boundary which is therefore particularly well served. Most are accessible within around five minutes on foot or by public transport to all homes.

However, headline accessibility does not necessarily equate to sufficient capacity relative to demand. National evidence highlights the persistence of the “Inverse Care Law”, whereby areas experiencing higher deprivation and poorer health outcomes often receive comparatively lower levels of primary care resource relative to need. Studies (by the Nuffield Trust, Health Foundation and Royal College of General Practitioners) identify lower funding levels and fewer GPs per patient in more deprived communities despite significantly higher levels of complex and multiple morbidity. This is particularly relevant in the Euston context given the substantial health inequalities identified.

Feedback and evidence from Euson practice (Amphill & Regents Park Practice) also suggests that while some Euston practices report comparatively strong FTE GP provision per patient relative to national averages, providers note that this reflects the exceptionally high levels of deprivation, mental health need, multiple morbidity and linguistic complexity within the local population, which generate substantially higher clinical workload per patient than standard ratios imply.



The recent shift toward digital services, combined with increased collaborative, cross-disciplinary working - where local practices now include multiple doctors, physicians, pharmacists, nurses, and two social prescribers covering the area - has also changed space requirements for the facilities. This reflects a wider expansion in multidisciplinary primary care teams, with practices increasingly supported by prescribing pharmacists, physician associates, physiotherapists, paramedics, social prescribers and other non-doctor clinical staff. As a result, the capacity of primary care is increasingly determined by the ability to accommodate a broader range of clinicians and appointment types, rather than solely by the number of GP consulting rooms.

Practices now require a different mix of spaces than traditional GP surgeries, including back-of-house administrative space, quiet rooms for digital and telephone consultations, meeting and collaboration areas, and flexible clinical rooms capable of accommodating multidisciplinary teams. The increasing use of total triage and remote consultation platforms has fundamentally changed how estate functions operationally, meaning standard sqm-per-patient benchmarks may not fully capture real infrastructure requirements.

Additionally, many practices in the Euston area occupy poorer-quality stock and require upgrades. Evidence from local practices suggests that capacity pressures are already materially affecting service delivery. Some practices report being unable to accommodate additional community-based services, including vaccination programmes and visiting specialist consultations, due to constraints in clinical room space and supporting facilities. This limits the ability to deliver NHS ambitions around more integrated, neighbourhood-level care without significant estate reconfiguration or expansion.

Regent's Park Practice is particularly well located near green space, community spaces, and play areas, but there is no formal integration between these different uses. Other community organisations in the area, such as Somers Town Living Centre / Somers Town Community Association, also pursue health-related objectives and often serve as the first point of contact for residents experiencing health issues, although these roles are not formally recognised.

There are 9 dental practices across the wider EAP - 8 of which fall within the EAP boundary. While this suggests sufficient provision in quantitative terms within the EAP, there is an overall shortage in the wider Euston. Additionally, this figure includes both private and NHS practices and does not reflect access to affordable care. London-wide evidence indicates systemic constraints in NHS dental provision (limiting accessibility and affordability). As such, headline provision likely overstates effective access to services.

- **Opportunity / Need:** Upgrade existing primary care stock; diversification of space to better suit cross disciplinary and digital ways to working; better connection to and co-location with other community and social infrastructures.



Green Light Pharmacy:
(Within EAP boundary)

Opening its doors in 1999, Green Light set out to shift from a narrow dispensing/retail model to a community-centred, clinical and preventative service. It pioneered a community-focused “creative health” and social prescribing model built around free, nature-based group walks that support people’s physical, mental and social wellbeing.

Despite precarious and discontinued funding streams, the employee owned pharmacy continues to self fund the walks, growing the offer to three weekly groups that provide routine, variety and a safe space where people of different backgrounds can socialise, share experiences and strengthen connections.



Regent's Park Practice:
(Within EAP boundary)

A GP surgery situated in a garden, co-located with two community hubs (Hpod, Third Age Project), outdoor sports facilities and a playground; good example towards a more holistic idea of health and well-being.

Adult Social Care

Quantitative analysis of accommodation-based ASC provision suggests that the EAP and surrounding buffer area contains a relatively high concentration of care beds compared with other parts of LBC. Based on available data on identified bed spaces and the number of Camden residents currently accessing accommodation-based care, the study indicates a modest surplus of provision within the EAP area - with net provision within the EAP + buffer.

However, accommodation-based ASC operates within a complex system of provision and commissioning, and these findings should be interpreted with caution. The assessment compares identified bed spaces with current placements of Camden residents but does not account for residents placed from other boroughs, private placements, future demand growth or latent unmet demand. It also assesses accommodation-based care at a broad “supported accommodation and care bed” level and does not differentiate between specific forms of provision such as learning disability supported living, mental health supported living or extra care for over 65s.

Service-level evidence indicates continuing capacity pressures despite the apparent surplus identified through the model. LBC has identified both immediate and longer-term shortages in supported accommodation for people with learning disabilities and severe mental health needs, with increasing numbers of residents requiring out-of-borough placements due to the limited suitability and availability of existing provision. Demand for Extra Care housing is also expected to increase significantly, with further schemes required to support independent living and meet future care needs.

The apparent concentration of provision within and around the EAP may also reflect the fact that facilities serve a wider catchment than the study area itself. While there is a preference to support residents close to existing communities and support networks, accommodation-based care provision frequently serves borough-wide and sub-regional needs. Consequently, a proportion of local capacity is likely to be occupied by residents from outside the study area, reducing the extent to which identified bed spaces are available to meet demand generated by local population growth.

As a result, an apparent surplus may coexist with significant shortages in specific accommodation types and support pathways. As a result, an apparent surplus may coexist with significant shortages in specific accommodation types and support pathways. This also reflects the fact that adult social care provision is often planned and accessed across a wider geography than the EAP, meaning local supply and demand do not always align neatly.

Alongside residential provision, Euston benefits from a strong network of community facilities that support older people and adults with health or support needs. These facilities align with Camden’s preventative care agenda by helping to reduce isolation, promote wellbeing and delay or avoid the need for more intensive interventions.

Whilst the quantitative analysis does not identify an immediate shortage in accommodation-based ASC provision, there remains considerable uncertainty regarding the effective availability of local capacity. Taken together with evidence of high occupancy levels, specialist accommodation shortages and ongoing unmet demand across several client groups, accommodation-based adult social care should continue to be monitored as a potential infrastructure pressure.

- **Opportunity / Need:** Support the delivery of flexible, community-based adult social care provision aligned with preventative models of care; improve local access to residential and nursing care where higher-dependency needs arise; promote co-location and integration with health, wellbeing and community facilities.



Crowndale Health Centre / Ampthill Practice:
(Outside of EAP boundary)

Located in a multi-purpose council building serving as a hub for healthcare, Dental services, Social Care, and the Camden Town Library. The GP surgery is part of the Central Camden Primary Care Network.

FUTURE TRENDS & DATA DERIVED DEMAND

Trend Analysis: What broader forces are shaping future demand?

Considering national policy, demographic change, and evolving patterns of use, this table outlines the key upward and downward pressures likely to influence demand for infrastructure over time:

Type:		National	London / GLA	LBC	Drivers / Trends
Primary Care	S - M Term	↗	↗	↗	Rising patient load and workforce strain; shift toward multi-disciplinary hubs and flexible community clinics.
	M - L Term	↗	↗	↗	
Social Care	S - M Term	↗	↗	↗	Ageing population intensifies demand; workforce pressures and housing pressures drive chronic under-capacity.
	M - L Term	↗	↗	↗	
Pharmacies	S - M Term	↗	↗	↗	Increasing role in preventative health; distributed and growing in civic capacity
	M - L Term	↗	↗	↗	

S-M term: 2025-2035 M-L term: 2035-2050 ↗ Increase demand → Stable demand ↘ Decreasing demand
See appendix D for a full analysis on future trends at a national, London and local scale

Future Quantitative Analysis: What does the data assessment tell us?

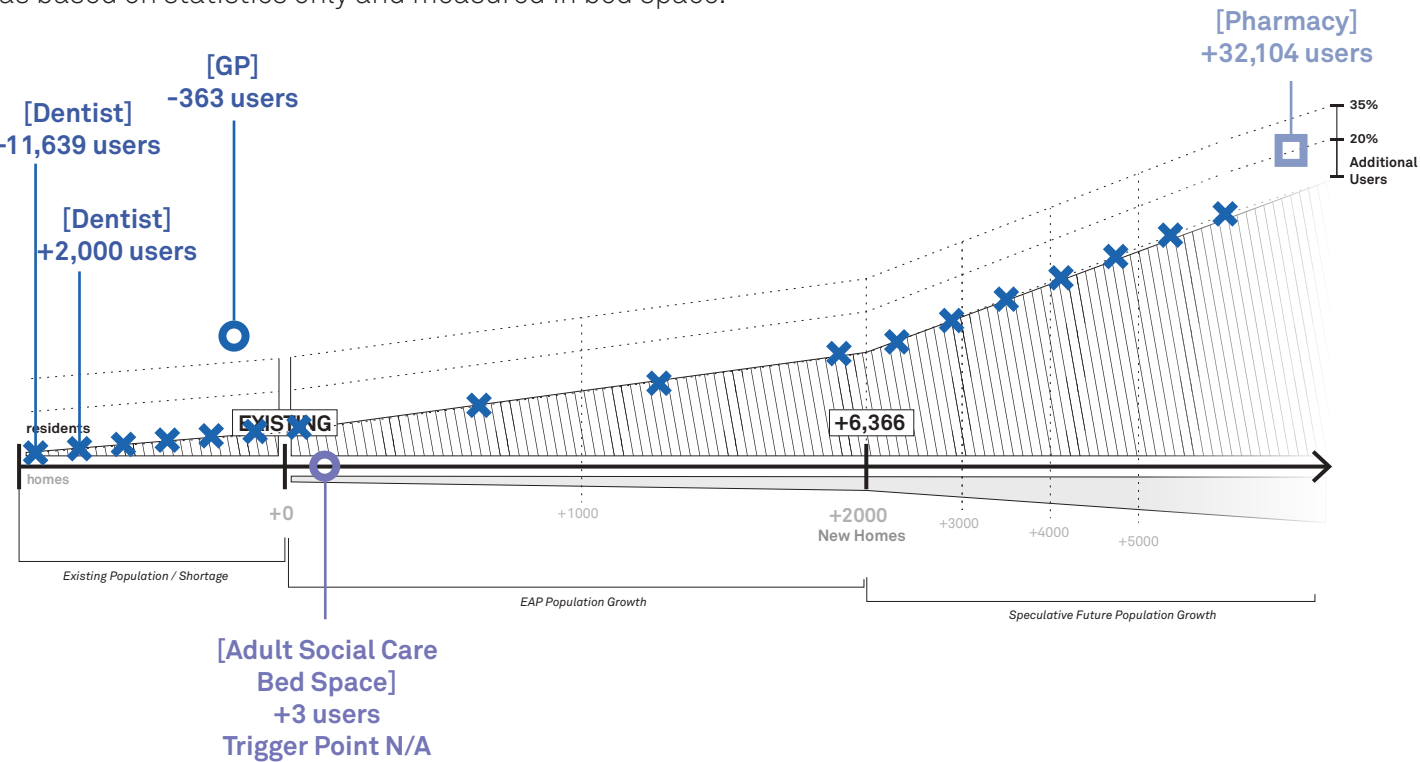
The table below summarises the outputs from the spreadsheet model and considers residential population growth in Euston (c. 2,000 new homes), alongside associated employment growth. It builds on the current position of surplus or shortage in provision:

Type		Study findings (Surplus vs. shortage)	Total Quantum of surplus or shortage (nr. / sqm)	Equivalent Provision	Notes & Reference
Primary care: GPs	EAP	Shortage	1 nr.	c. 500 sqm	Equivalent provision an approximate based on comparable large GPs.
	EAP+ B	Shortage	3nr.	c. 1,500 sqm	
Primary care: Dentists	EAP	Net	N/A	N/A	
	EAP+ B	Shortage	10 nr.	c. 1,100 sqm	
Adult Social Care*	EAP	Surplus	26 beds	see analysis & consolidates demand	Bespoke calculation based on LBC stats.
	EAP+ B	Shortage	10 beds	see analysis & consolidated demand	
Pharmacies	EAP	Surplus	3 nr.	c. 300-500 sqm	Assessment (PNA)
	EAP+ B	Surplus	2nr.	c. 250 sqm	

**This study has not been able to capture the complexity of ASC need and provision. As such, this figure should be treated with caution and read in conjunction with analysis. LBC are actively seeking ways to increase provision, including exploring options to deliver supported accommodation as part of the Regents Park North Estate regeneration. LBC ASC services have more accurate ways of calculating need.

Future Quantitative Analysis: When does population growth trigger the demand for an additional facility?

This diagram shows the points at which the provision of new facilities should be considered across the wider Euston (EAP + buffer). Some facilities are required now (shown as a negative figure), others are required at or beyond the 2000 anticipated new homes + jobs.. Demand for the facilities in this category is measured through ‘users’ - a figure combining uptake from residents and an uplift of 179% for GPs to account for the wider neighbourhood. Pharmacies add a 20% worker uplift. Adult social care is indicative as based on statistics only and measured in bed space.



Future Qualitative Analysis: What other factors are important to consider?

Primary Healthcare

With future growth in the EAP, demand modelling indicates that future population growth will trigger the demand for 1 additional GP practice based purely on floorspace (and not taking into account FTE or poor health statistics in the area). This figure increases when considering the wider area, which is less well-served.

While the NHS delivery model typically prioritises co-location or expansion of existing practices, some of Eustons GP practices are spatially constrained to expand vertically or laterally (such as Somers Town Medical Centre): existing premises are also of poor quality and although workforce capacity is not a limiting factor, a lack of suitable space restricts currently restricts modern models of care. Existing practices within the Euston area already report operating at or beyond practical estate capacity, limiting the ability to expand multidisciplinary staffing, host additional neighbourhood services, or accommodate visiting clinicians despite policy ambitions to shift more care into community settings.

Demand for primary care is expected to face upward pressure over time, reflecting: an ageing population, worsening baseline health outcomes, increasing long-term conditions. This pressure is likely to be particularly acute in areas of deprivation where higher levels of multiple morbidity and poorer baseline health outcomes generate disproportionately greater demand on primary care services relative to population size alone. However, this pressure may be partially offset by a shift toward integrated, preventative models of care being pursued locally, which change the type and distribution of infrastructure required - placing greater emphasis on community, leisure and green spaces alongside traditional clinical provision. Any future primary care provision should therefore be planned as part of a broader health ecosystem, rather than as standalone GP practice.

There is also systemic unmet demand for NHS dental services. Projected demand is elevated by an existing shortage of facilities. The calculation is based on all (private and NHS) practices; so if considering only 'affordable' provision this shortage increases and if considering only NHS services provision (reflective across London) and limited capacity within non-private services, this results in a significant shortfall in dental space under both growth scenarios. It should be noted, however, that the availability of NHS dentistry is influenced by commissioning, funding and workforce constraints as well as the availability of physical space.

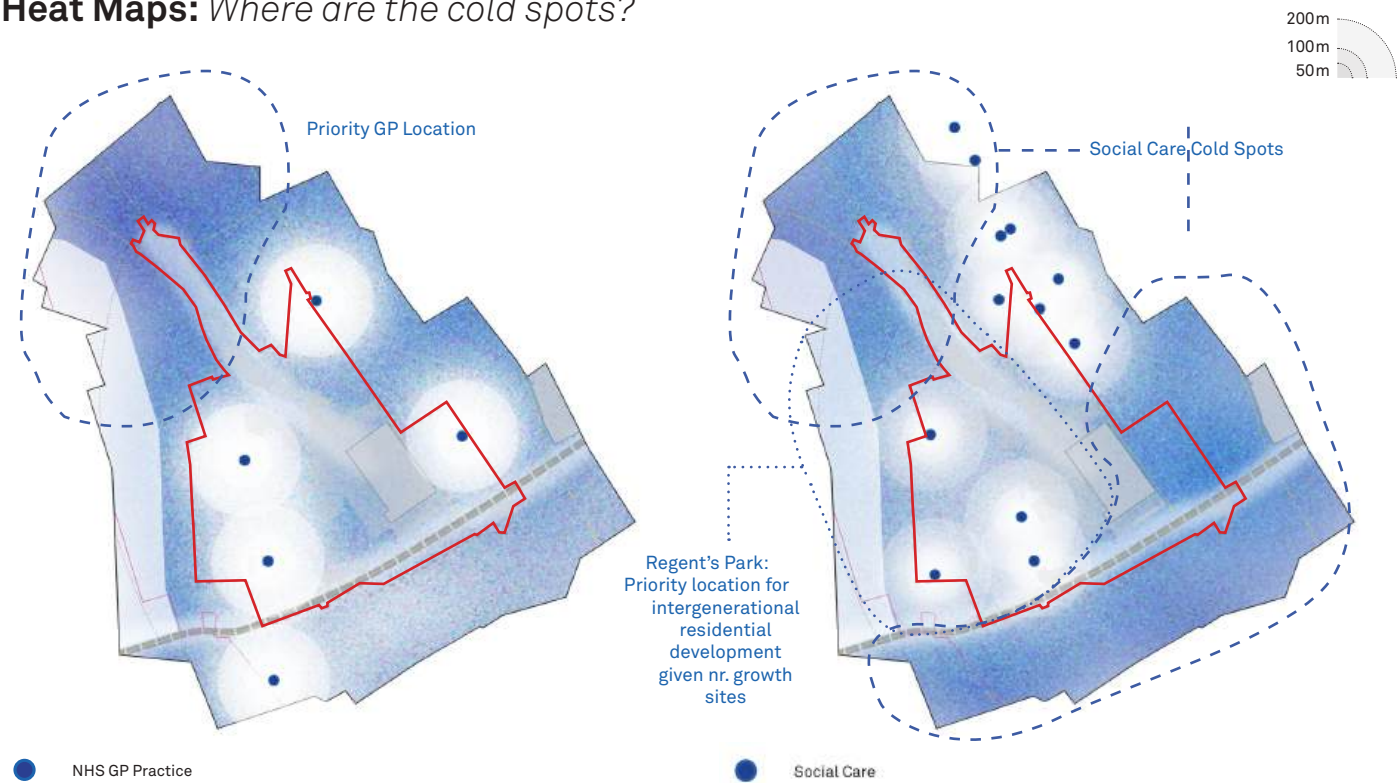
Adult Social Care

Based on the study metric, accommodation-based ASC provision is broadly sufficient to meet projected demand within the EAP to 2051, with a small shortage (approximately 10 beds) identified across the wider Euston study area (EAP + Buffer). Given the limitations of the methodology and the complexity of accommodation-based care provision, these findings should be treated with caution. While the quantitative assessment does not identify a substantial future shortage, the underlying demand trajectory is clear: Population growth, an ageing population and increasing prevalence of complex health and support needs are expected to drive continued growth in demand for adult social care over the plan period.

This aligns with evidence from LBC ASC, which identifies growing demand for learning disability supported accommodation, specialist mental health supported housing and Extra Care provision. Current needs assessments indicate that additional accommodation-based provision will be required across these service areas over the coming decades, alongside continued reliance on some out-of-borough placements where specialist needs cannot be met locally. TLBC is actively exploring opportunities to increase provision, including through regeneration initiatives such as the Regent's Park North Estate.

Whilst the study does not identify a significant quantitative shortage in accommodation-based care beds, new residential development presents opportunities to support delivery of alternative accommodation models that can help meet future needs, including Extra Care housing, supported accommodation, accessible and adaptable homes, and housing designed for older people. This should be complemented by continued investment in community-based and home-based support services, enabling residents to live independently for longer and reducing reliance on more intensive forms of institutional care.

Heat Maps: Where are the cold spots?



GP Surgery: Two GPs in Regent's Park and Somers Town locality, distributed within less than 400m from residents except for Camden Town centre, north of EAP.

Social Care: Facilities primarily located North of Mornington Crescent and Somers Town, with limited capacity around Regent's Park locality and none in Bloomsbury.

Headlines & Future Considerations

HEADLINES & FUTURE CONSIDERATIONS

This section highlights key headlines and priorities for addressing unmet or projected demand. Note that in many cases, it will not be LBC’s responsibility to deliver these uses; however, they may play a role in encouraging delivery through planning levers, partnerships, or funding support. Deliverability refers to the spatial complexity and coordination typically required to deliver each type of infrastructure.

PRIMARY CARE: GP's
Future demand for new provision: **Moderate**
Spatial Deliverability: **Requires coordination + Partnership**
Priority Locality: **Regent's Park North / Camden Town**

PHARMACIES
Future demand for new provision: **Low**
Deliverability: **Readily achievable + Market**
Priority Locality: **Central locations**

DENTISTS
Future demand for new provision: **High**
Deliverability: **Requires coordination**
Priority Locality: **Regent's Park / Somers Town**

ADULT SOCIAL CARE
Future demand for new provision: **Moderate**
Deliverability: **Requires coordination + LA led**
Priority Locality: **Regent's Park**

Recommendations: *Key challenges, opportunities or strategies*

Plan for GP growth through flexible, integrated health hubs: New space requirements for GP provision should be planned carefully, with consideration given to retrofitting or expanding existing facilities where feasible and ensuring new provision is fit for purpose, flexible, and capable of co-locating with wider health and wellbeing services. Rather than delivering standalone GP surgeries, future provision should be conceived as integrated community health hubs, aligned with NHS moves towards more locally coordinated, place-based care through emerging Neighbourhood Health Centres (NHCs). The DHSC / NHS England Neighbourhood Health Framework (2026) identifies NHCs as a key mechanism for integrating community health and support services locally as part of the wider shift from hospital-based to neighbourhood-based care.

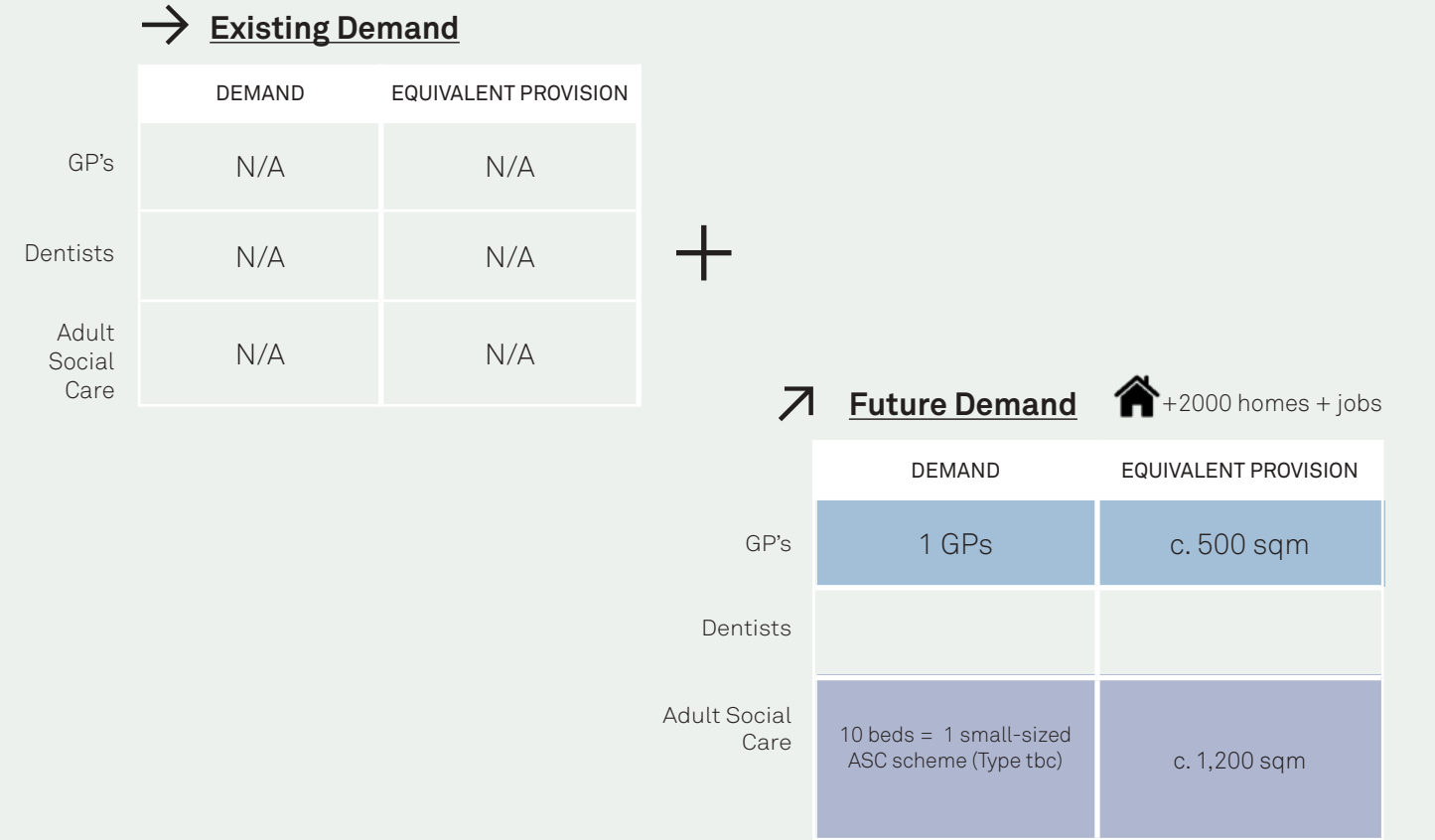
Use community and neighbourhood services to relieve pressure on primary and adult social care: Recent NHS and adult social care reforms provide an opportunity to shift demand away from institutional and clinical settings by strengthening community- and neighbourhood-based services. This approach can help relieve pressure on both GP practices and adult social care systems, particularly for residents with long-term conditions, mental health needs, or lower-level support requirements. The existing network of VSO, community, and cultural spaces across Euston provides a strong foundation for this model. With targeted investment, these spaces could accommodate e.g.. social prescribing and care navigation; preventative health and wellbeing activities; support services that enable residents to live independently for longer. This shift will require upgrading existing community spaces to be fit for health and care use; clarity on clinical standards / spec; and long-term funding, close collaboration between the Council, NHS partners, and local providers.

Innovative care models: There is an opportunity to explore innovative ASC housing and care models on earmarked growth sites to help address projected ASC demand and support independent living. This could include specialist older persons housing, extra care, intergenerational living models, learning disability supported accommodation and other forms of supported housing integrated with community and care services. Precedents such as Appleby Blue House in Southwark illustrate how specialist older persons housing - or other integrated approaches, including intergenerational schemes - can combine accommodation with community and care support.

Consolidated Demand: *What are the priorities for new infrastructure in Euston?*

To establish a clear basis for negotiation and future feasibility testing, the following “consolidated” demand combines both quantitative and qualitative assessments to adjust the demand figures. Distinct from above it removes the existing unmet demand from projected demand figures and considers the EAP boundary only. Where relevant it suggests alternative types of infrastructure based on qualitative analysis.

- **GPs:** No change to existing model output.
- **Dentists:** No change to existing model output.
- **Adult Social Care:** Findings for the EAP+Buffer have replaced the EAP boundary, recognising that accommodation-based adult social care provision operates across a wider catchment and is not planned or accessed solely at the EAP scale.



COMMUNITY INFRASTRUCTURE



LBC Policy Approach:

LBC local plan is committed to protecting and/or **re-providing any community facility lost due to HS2 works or redevelopment**, ensuring they remain in or close to their original location⁹. Additional multi-purpose community spaces will be brought forward (through CIL and S106) within major redevelopment schemes (including Euston Station redevelopment).¹⁰

Multiple LBC strategies reference **multi-purpose community facilities as critical infrastructure** to support other services including Adult Social Care, Adult Learning and Cultural programming. LBC also recognise laundrettes as community assets and valuable hubs, despite being commercially-led, with an Article 4 direction in place preventing their conversion into housing since 2018.



LBC's Role & Service Providers

There is an **active network of Voluntary and Community Sector (VCS)** organisations working across the borough managing community facilities and delivering support services to residents. These are often delivered in collaboration with or funded by public bodies like LBC and the NHS. LBC leases approximately 100 premises to charities and community organisations - of which around a quarter are community centres offering a wide

⁹ LBC, Local Plan

¹⁰ LBC, Infrastructure Delivery Plan.

range of services and facilities catering to all age groups.¹¹ Various estates in Camden also have Tenants and Residents Associations Halls which act as a focal point for local meetings and activities – for example The Regent's Park Estate TRA.

LBC also has interfaith officers who bring together residents, faith organisations and community groups in Camden to build dialogue, collaboration and trust across different faiths and beliefs.

Camden have a **Camden Community Investment Programme (CIP)** which is used to invest into community facilities (which are increasingly in poor condition) and work with organisations like the Camden Community Centre Consortium to ensure holistic oversight of the services and facilities provided across the borough.¹²



Euston Overview (Literature Review)

The Euston Area Plan suggests that there are a variety of community facilities in the Euston that deliver diverse programming. The Euston Community Hub recently opened, established by the Euston Partnership and located in the old Maria Fidelis school, is both an information centre, community centre for local organisations and delivers family and sports programming (including badminton).

Whilst the supply of **community centres across Euston has been identified as 'sufficient'** (through

¹¹ LBC, Infrastructure Delivery Plan.

¹² LBC, State of the Sector in Camden.

engagement and 1:1 discussion), operating costs have increased, funding has been squeezed and a lot of the **existing stock is not fit for purpose** – making it increasingly difficult for centres to operate viably.¹³ Organisations also report a need for access to quiet study space for those living in overcrowded accommodation (see libraries in culture category analysis).

LBC is due to undertake a comprehensive stock condition survey of TRA halls and community rooms which will assist with the identification of priority improvement.¹⁴

The EAP 2026 identifies community facilities as a key component of Euston's future social infrastructure through Objectives 1 and 3. The Delivery Plans (Chapter 4) require major development to provide or contribute towards community facilities and other social infrastructure to meet needs generated by development.



Euston Demographics

Ethnic Diversity: Euston has significant ethnic diversity and high proportion of residents born outside the United Kingdom indicate a need for culturally inclusive facilities and services that are responsive to different languages, cultures and community needs- 62% and 52% of residents are Asian, Black or another ethnic group in the EAP boundary and buffer respectively.¹⁵

Deprivation: There are areas with high levels of deprivation, primarily housed in estates, and council flats/social rent. There is evidence to suggest these vulnerable residents are more reliant on community infrastructure and free programming offered by community centres.

Religious Orientation: EAP boundary has a diverse religious profile, with notable proportions identifying as Muslim, Christian, or having no religion – influencing places of worship. Over 35% Muslim in the EAP boundary and 25%+ in the buffer. (LBC average = c.16%)¹⁶

Ageing population: There is a growing older population in Camden: 32,700 residents are aged 65 or over, which is 12.9% of the population [at mid-2020]. This is a 35% increase since 2011, and it could rise to as many as 42,000 people in this age bracket by 2030."¹⁷

¹³ LBC, State of the Sector in Camden.

¹⁴ LBC, Infrastructure Delivery Plan.

¹⁵ LBC, We Make Camden.

¹⁶ LBC, We Make Camden.

¹⁷ LBC, We Make Camden.



This Study

There are multiple facilities / sub-uses analysed as part of this wider study which are categorised as community infrastructure – offering affordable or free services to communities from libraries, cultural venues, sports facilities etc. As a result community provision is very challenging to quantify.

This section focuses on multi-purpose, flexible community facilities that can support a range of different programming and cater to local audiences, including the two most common places of worship (Churches and Mosques). For the purpose of this study, it also brings in laundrettes, that often act as social hubs and depend on proximity to residential areas.

The Demand Spreadsheet Model calculates sufficiency of provision based on:

- **Community Spaces:** Bespoke London LA benchmark for nr. facilities per population.
- **Places of Worship:** Sqm of space per user – using Muslim and Christian population as proxies and considering national penetration rates for these religions.
- **Laundrettes:** England average benchmark.

Community Priority & Public Sentiment:

RAG: Residents would like investment in community 'hubs' and centres that are genuinely inclusive to all including "At least one 'multidimensional' external space – serviced with water, power etc., for markets, festivals and celebrations.³⁵"

Social Value Charter Objective: Community, inclusion and equity - Ensure inclusion, accessibility and equity in all development, private and public, and provide social infrastructure that enriches community life and resilience.

Good Life Euston: "Community Spaces & Services" is a sub-domain within 'Our spaces and services' domain. In the Euston area, the 'our spaces and services domain' of the good life index scored an average of **6.7**. The community spaces and services sub-domain has the highest average score of **7.1**.

"Community richness, cultures, and identities" is a domain in the model focused on celebrating diversity and community heritage. The Euston area reported a domain score of **6.8**.

Origin Housing Feedback: Residents want key provisions in – mental health and wellness support, desire for community events, affordable sports and fitness and financial advice.

EXISTING PROVISION & DATA DERIVED DEMAND

Existing Quantitative Analyses: What does the data assessment tell us?

The table below summarises the outputs from the spreadsheet model, using standard benchmarks to assess whether existing supply meets current demand. It considers provision both within the EAP boundary and across the EAP + buffer.

Type:		Study findings (Surplus vs. shortage)	Total Quantum of surplus or shortage (nr. / sqm)	Equivalent Provision (indicative only)	Notes & Reference
Community Centres & Youth Spaces	EAP	Sufficient	10 nr.	c. 2,300 sqm	Approximate area based on existing facilities in EAP.
	EAP + B	Sufficient	10 nr.	c. 2,300 sqm	
Places of Worship	EAP	Shortage (mosques) Sufficient (churches)	3,582 sqm 13,110 sqm	2 x medium mosques; 9 churches	
	EAP + B	Shortage (mosques) Sufficient (churches)	9,638 sqm 18,111 sqm	1 x large mosque; 2 x medium mosques. 15 churches	
Laundrettes	EAP	Sufficient	2 nr.	c. 100 sqm	
	EAP + B	Sufficient	5 nr.	c. 250 sqm	

Note that community centre vary drastically is their offer, their audience and their opening hours. Quantitatively it is challenging to capture this nuance and outputs should be read in conjunction with analysis.

Existing Qualitative Analysis: What does the spatial assessment tell us?

Community Centres & Youth Centres

There are approximately seven community / youth centres within the EAP. The Regent’s Park and Somers Town localities are particularly well served (both within and beyond the EAP boundary) and benefit from a dense distribution of smaller community and youth centres - an expected pattern in neighbourhoods with large estates and high levels of social housing. Some centres offer intergenerational programming within flexible, multi-purpose spaces (e.g. Somers Town Community Association), while others cater to specific communities or needs (e.g. Surma Community Centre or Hopscotch Womens Centre).

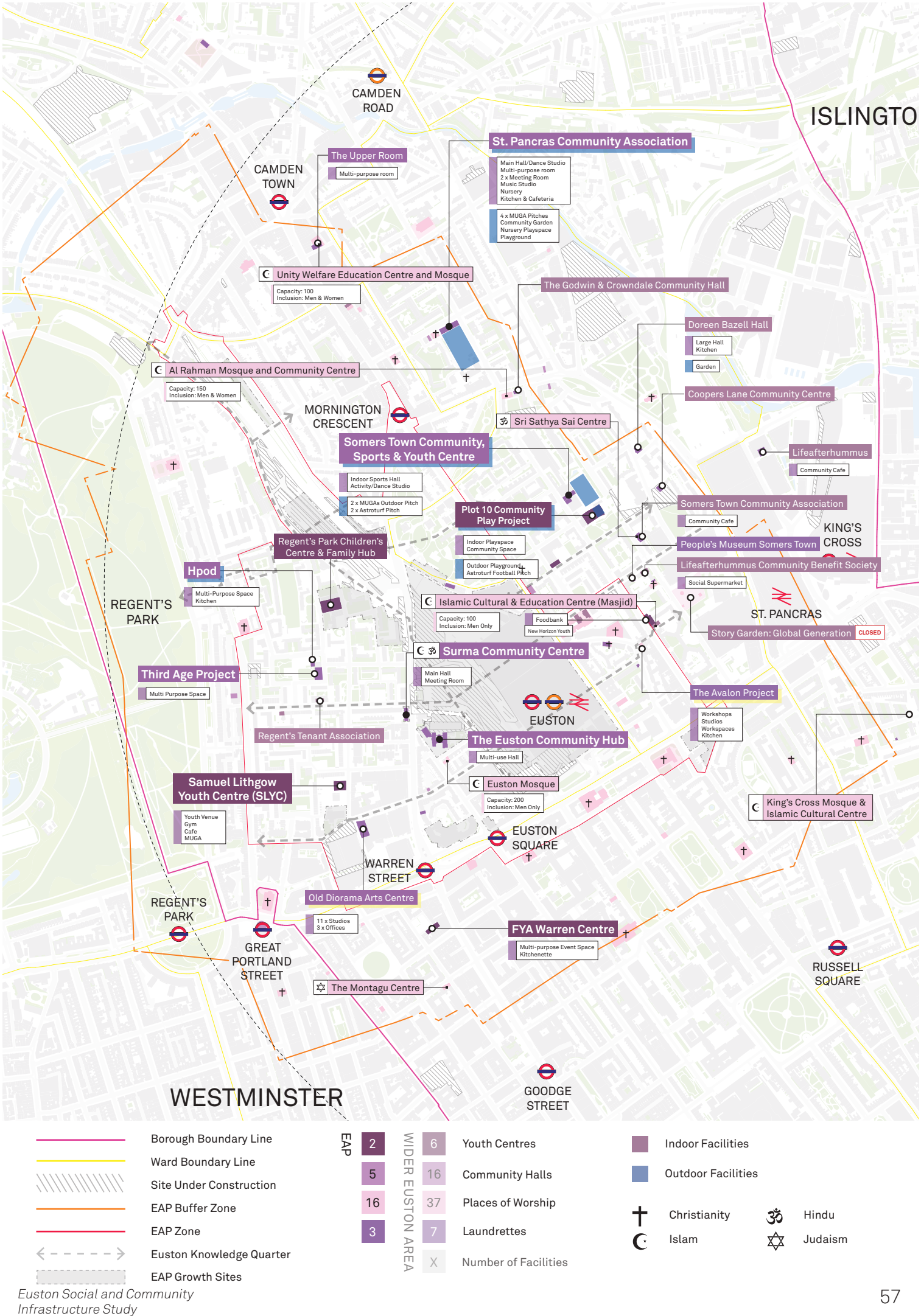
In contrast, the northern edges of the EAP buffer and the Bloomsbury locality (buffer) are less well served by multi-purpose community spaces, which may be due to differences in residential tenure mix and lower resident density. While the quantitative assessment suggest a surplus in space, there is an assumed higher reliance on community spaces in Euston especially where they provide affordable alternatives to the otherwise high market-rate services within the EAP.



Third Age Project

(Within EAP boundary)

The Third Age Project is a long-standing grassroots organisation supporting older adults (60+) in Regent’s Park, focused on reducing loneliness and social isolation. It provides a wide range of accessible activities and support services—including social, cultural, educational and wellbeing programmes—targeted particularly at low-income residents



Community spaces are embedded within long-established residential neighbourhoods such as Somers Town and the Regent's Park Estate. Many have operated for decades and act as a first point of contact for residents seeking a wide range of services explored in this study. Although some organisations (e.g. FYA based is in Bloomsbury) deliver programming across a wider ecosystem of facilities within the EAP, feedback indicates that barriers exist for residents (particularly young people) accessing centres outside their immediate locality. Some halls are primarily used by tenants' associations - such as the Regents Park Tenant's Association - and may therefore feel less public-facing or welcoming to the wider community. There is a clear contrast between larger, fit-for-purpose hubs such as St Pancras Community Association and The Living Centre, and smaller, lower-quality facilities within ageing stock, poor EPC ratings, and high operational costs.

- **Opportunity / Need:** Invest in poor quality spaces and quantify the range of services that these spaces deliver.

Places of Worship

Euston host an abundance of Christian churches (with approximately 30 churches across the EAP + buffer) - many serving both local congregations and wider communities through additional programmes. Feedback suggests that congregations are decreasing locally and multiple churches are struggling with dilapidating fabric and energy efficient (i.e. St Mary's Church Somers town).

Despite a relatively high proportion of Muslim residents (35% in the EAP and 25% in the EAP + buffer) there are only two mosques in Somers Town, one on Regent's Park Estate, and another in Camden Town – and across the EAP + Buffer there are only two prayer rooms accessible to women. Although the King's Cross Mosque & Islamic Cultural Centre is located on the edge of the buffer boundary, and the two mosque's are evenly distributed, there is evidence of unmet demand for Muslim prayer facilities, particularly for women with young families who cannot access mosques and during Friday prayer.

- **Opportunity / Need:** Provision of inter-faith religious spaces to meet unmet demand for mosque and prayer space, ensuring equal access for men and women.

Laundrettes

Laundrettes are generally located on edges; accessible to areas of social housing stock.

- **Opportunity / Need:** Provision dependant on demand from growth and uplift figures.



The Basil Jellicoe Hall:
(Within EAP boundary)
Used for Arabic classes, yoga, church, drama classes, scouts and tenants meetings.



Al-Rahman Mosque:
(Within EAP boundary)
Serves as a hub for the Muslim community, offering prayer services and a range of educational and social facilities. It is one of the only two mosques in the area that serves both men and women.



The People's Museum:
(Within EAP boundary)
A resident-led community organisation that preserves the history and voices of the Somers Town area, particularly its working-class heritage. It offers exhibitions, community workshops, local history tours, and a reading library - all co-created with local residents.

FUTURE TRENDS & DATA DERIVED DEMAND

Trend Analysis: What broader forces are shaping future demand?

Considering national policy, demographic change, and evolving patterns of use, this table outlines the key upward and downward pressures likely to influence demand for infrastructure over time:

Type:		National	London / GLA	LBC	Drivers
Community Spaces	S - M Term	↗	↗	↗	High social isolation and youth disconnection spur renewed demand for inclusive shared spaces.
	M - L Term	↗	↗	↗	
Places of Worship	S - M Term	→	→	↗	Falling attendance at church offset by multi-faith growth and wider community/social use of buildings.
	M - L Term	→	→	→	
Laundrettes	S - M Term	→	↗	→	Shift from traditional to on-demand services, and rapid growth of online laundry market.
	M - L Term	→	↗	↗	

S-M term: 2025-2035 M-L term: 2035-2050 ↗ Increase demand → Stable demand ↘ Decreasing demand
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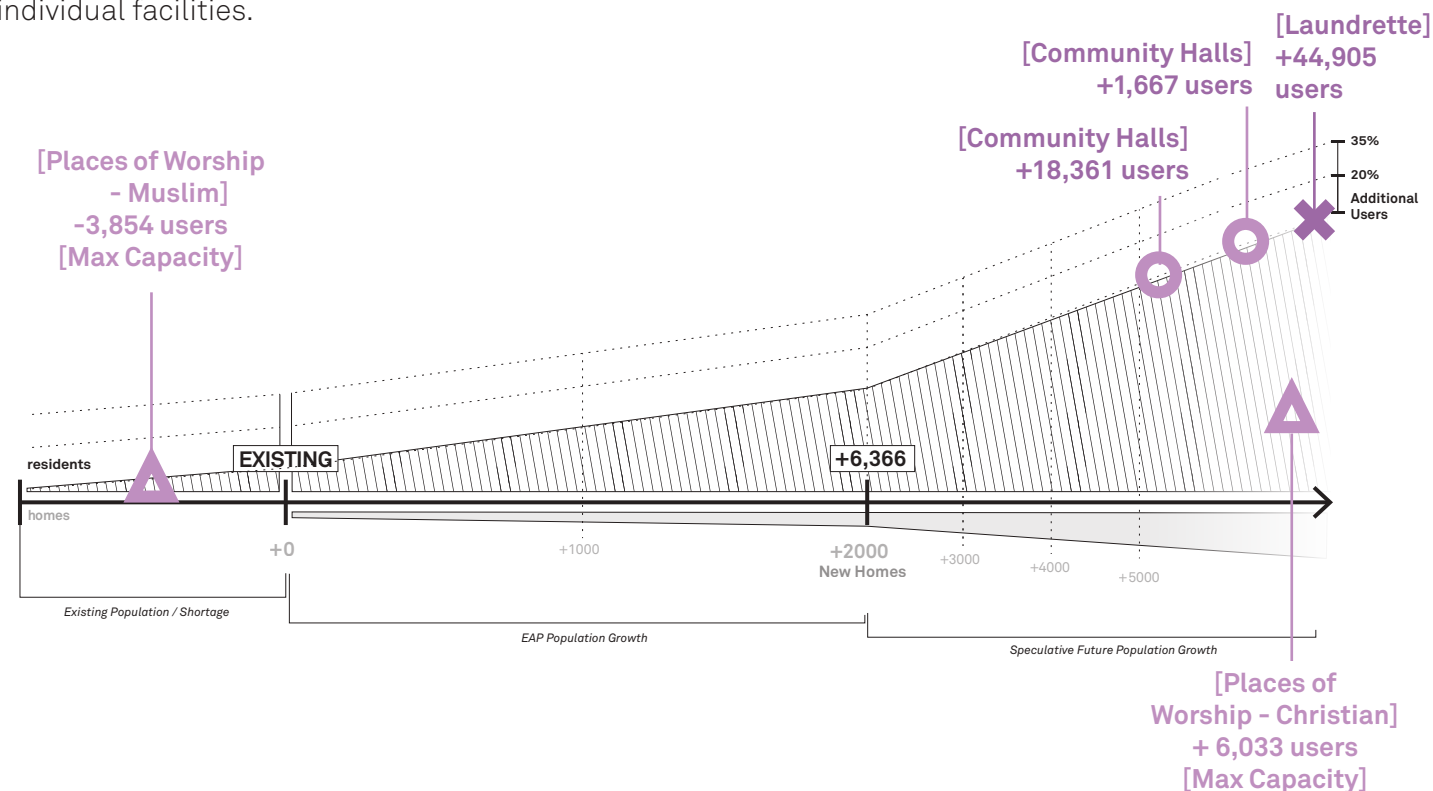
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Places of Worship	EAP	Shortage (mosques) Sufficient (churches)	6,770 sqm 12,653 sqm	1 x large mosque; 10 churches	
	EAP+B	Shortage (mosques) Sufficient (churches)	12,141 sqm 17,569 sqm	1 x XL mosque; 1 x medium mosque 14 churches	
Laundrettes	EAP	Sufficient	2 nr.	c. 100 sqm	
	EAP+B	Sufficient	4 nr.	c. 200 sqm	

Note that community centre vary drastically is their offer, their audience and their opening hours. Quantitatively it is challenging to capture this nuance and outputs should be read in conjunction with analysis.

Future Quantitative Analysis: When does population growth trigger the demand for an additional facility?

This diagram shows the points at which the provision of new facilities should be considered across the wider Euston (EAP + buffer). Some facilities are required now (shown as a negative figure), others are required at or beyond the 2000 anticipated new homes + jobs. Demand for the facilities in this category is measured through 'users' - a figure combining uptake from residents and a 20-35% students and workers uplift depending on the facility. Places of Worship use a m² per user metric so do not easily translate into individual facilities.



Future Qualitative Analysis: What other factors are important to consider?

Community Centres & Youth Centres

If the future EAP population were assessed in isolation from existing provision, three additional community/youth centres would be required to meet demand. However, given the number of existing community facilities within the EAP, future population growth should not trigger a requirement for additional community space. Bloomsbury is the only area within the study boundary where there is a shortage of community provision, however there is likely to be facilities south of the boundary which have not been considered as part of this study. There are also several factors which suggest that whilst this may not be a priority for new space; sustaining the existing surplus should be a priority. This includes:

- There is likely still demand for community spaces given the accessibility and affordability they provide compared to private venues and facilities elsewhere in London.
- High social isolation and youth disconnection spur renewed demand for inclusive shared spaces.
- Community spaces are also multi-functional and multi-purpose in their offer – providing access to healthcare, education, culture and sports.
- Anecdotal evidence suggests there is limited affordable offer for young people.
- If the tenure mix of future homes aligns with Camden's policy (i.e. 50% affordable housing, including intermediate and social rent), reliance on locally distributed and affordable community infrastructure is likely to increase.

As such, priority should be given to identifying funding and partnership opportunities to sustain and improve existing community facilities.

Places of Worship

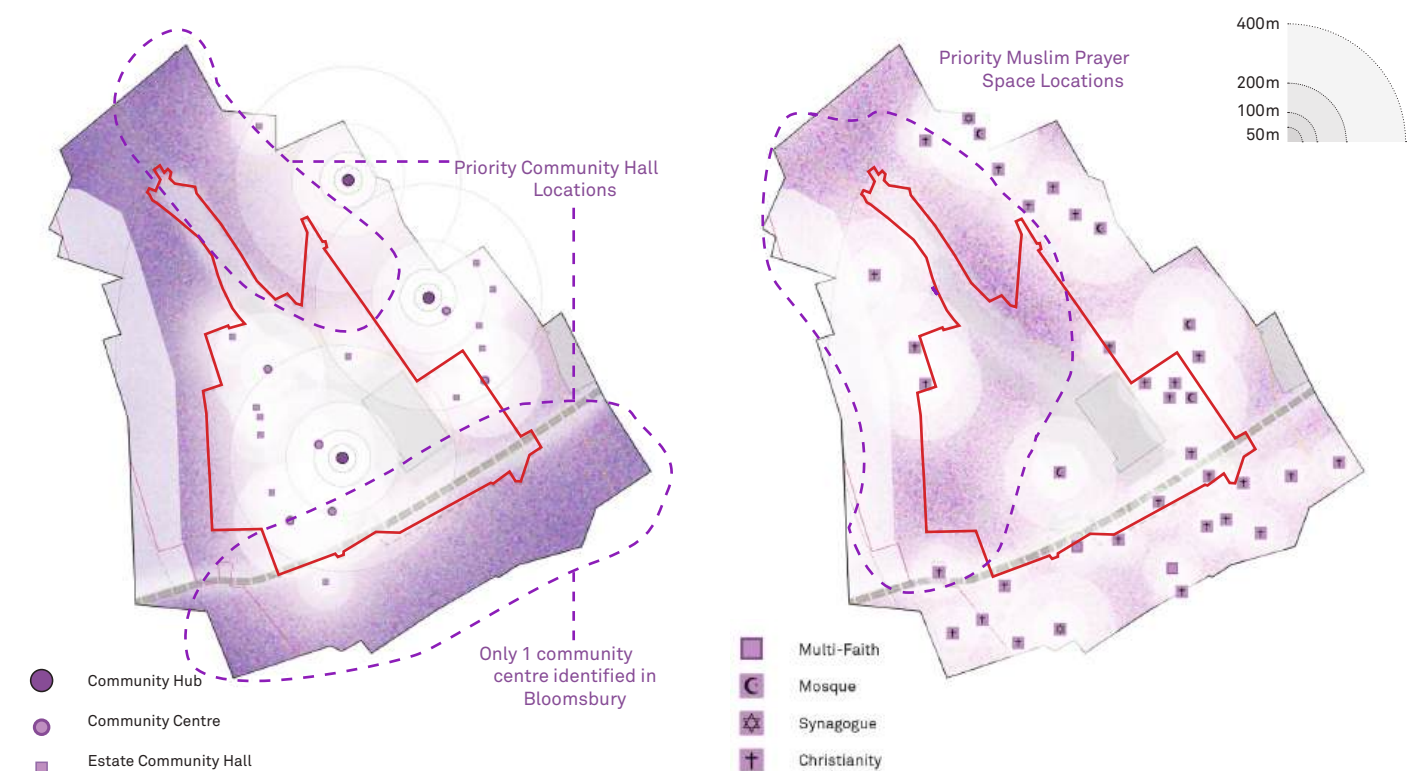
Projected demand for places of worship is strongly influenced by existing provision imbalances. For both churches and mosques, demand is highly time-specific, peaking at particular times of day or week, which presents challenges for efficient land use in a context where development capacity is constrained.

In the case of mosques, an existing shortage (when considering both the EAP and the wider area) drives the demand for additional capacity to meet both current and future demand. However, when contextualised, the scale of demand is relatively modest (if provision were balanced today, only c.2,500 sqm of additional space would be required within the EAP + buffer to serve the future population - equivalent to a single medium-sized mosque). Existing mosques within the EAP are typically located on constrained sites, limiting opportunities for expansion. While S106 agreements can support places of worship, funding must demonstrate wider community benefit and cannot promote specific faiths, restricting LBC's ability to directly address this demand through new development.

Demand is also primarily local, with limited pressure from workers who are often accommodated in smaller, private prayer spaces. As such, provision should prioritise more distributed, smaller-scale facilities, aligned with flexible or shared models such as interfaith or multi-use prayer spaces.

By contrast, the projected surplus of churches reflects an existing oversupply, with no additional capacity required in future but rather, a sustained surplus in existing provision. Declining attendance in traditional denominations, alongside increasing religious diversity, suggests that surplus church buildings may be better re-purposed for broader community or social uses - thereby meeting shortages / demand for other uses.

Heat Maps: Where are the cold spots?



Community Centres: Regent's Park and Somers Town (Estates) are well served by community facilities. Less provision near CAZ and Camden Town Centre.

Places of Worship: Diversity of religious spaces, with large provision of churches evenly distributed within each locality.

HEADLINES & FUTURE CONSIDERATIONS

This section highlights key headlines and priorities for addressing unmet or projected demand. Note that in many cases, it will not be LBC’s responsibility to deliver these uses; however, they may play a role in encouraging delivery through planning levers, partnerships, or funding support. Deliverability refers to the spatial complexity and coordination typically required to deliver each type of infrastructure.

PLACES OF WORSHIP

Future Demand for new provision:
Significant (Mosque), Low (Church)

Deliverability:
Requires coordination + limited LA opportunity to intervene

Priority Locality:
Regent’s Park / Somers Town

COMMUNITY HALLS/ YOUTH CLUBS

Future Demand for new provision:
Low

Deliverability:
Readily achievable

Priority Locality:
Bloomsbury / Somers Town North

LAUNDRETTES

Future Demand for new provision:
Low

Deliverability:
Readily achievable

Priority Locality:
Regent’s Park

Recommendations: Key challenges, opportunities or strategies

Invest in existing community centres first: Multiple community centres are struggling to operate viably in Euston giving poor funding landscape and high operational costs due to poor building stock. Investment in the existing stock of community centres should be prioritised before securing additional ground-floor community space in new developments in the Regent’s Park and Somers Town localities – particularly where S106 / CIL obligations are secured without a confirmed, locally embedded community operator which could risk diluting the strength of the existing offer. Existing centres already fill critical gaps in service provision and are at risk of market failure without intervention. LBC and other public partners should continue to support organisations where they deliver public services – this might include signposting to funding, operational support or premises improvements for more efficient operations. If community organisations occupying poor-quality facilities are decanted into new, fit-for-purpose spaces, it is critical that these moves occur within the same locality to maintain accessibility and due consideration is given to tenure agreements so that space remains affordable to VSO in spite of high grade space.

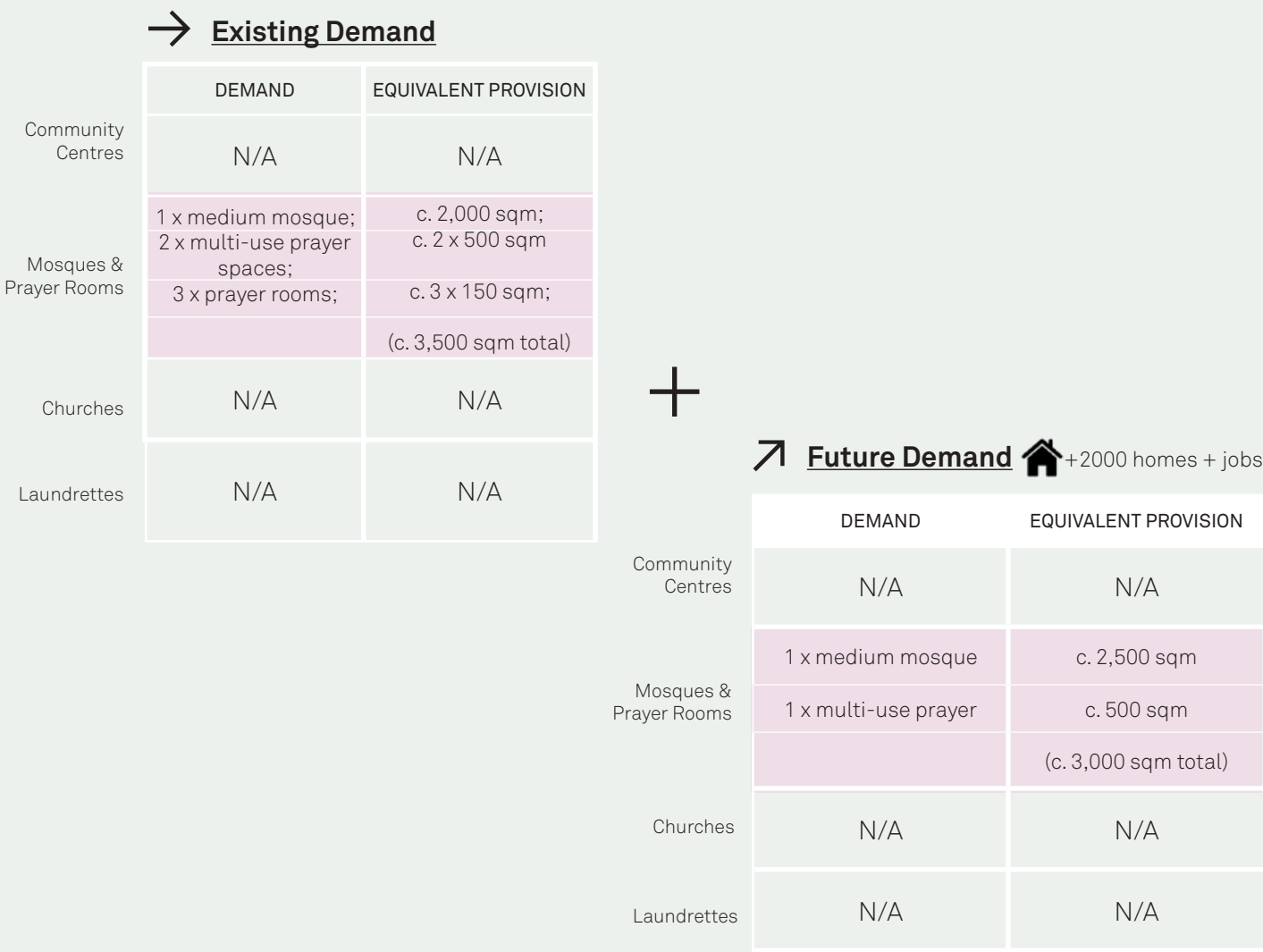
Repurpose surplus churches: Surplus churches can be adapted for wider community use, including social, youth, or interfaith activities, and can help address gaps in mosque or prayer space provision. Their protected status and large, unobstructed interiors make them safeguarded, flexible spaces suitable for multiple uses, such as indoor sports (boxing, badminton), under-5 provision, or cultural and leisure activities. However, heritage and thermal constraints mean careful consideration should be given to activities that do not require high heating or strict temperature control.

Plan strategically for mosques: Additional multi-faith capacity is required to serve the Muslim population / demand. New or adapted spaces should be inclusive, flexible, and integrated with wider community infrastructure. Engagement with the Muslim community is essential to understand needs and explore opportunities to relocate or expand into larger, more suitable spaces. Future provision could include non-full-time or distributed prayer spaces to accommodate overflow during Friday prayers and ensure accessibility across estates. Mosques are increasingly multifunctional, so new spaces should consider serving both the Muslim community and the wider community inclusively.

Consolidated Demand: What are the priorities for new infrastructure in Euston?

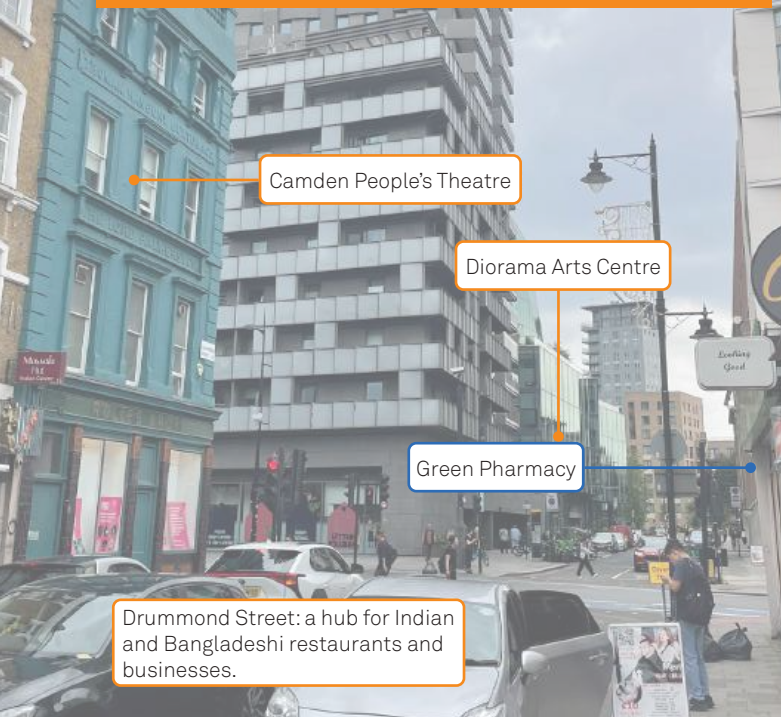
To establish a clear basis for negotiation and future feasibility testing, the following “consolidated” demand combines both quantitative and qualitative assessments to adjust the demand figures. Distinct from above it removes the existing unmet demand from projected demand figures and considers the EAP boundary only. Where relevant it suggests alternative types of infrastructure based on qualitative analysis.

- Community Centres:** No change to model output.
- Mosques & Prayer Rooms:** No change to model output / figure however distributed, smaller-scale facilities, aligned with flexible or shared models such as interfaith or multi-use prayer spaces should be prioritised.
- Churches:** No demand triggered
- Laundrettes:** No demand triggered.



*While S106 can support places of worship, funding must demonstrate wider community benefit and cannot promote specific faiths, restricting LBC’s ability to directly address this demand through new development.

CULTURAL INFRASTRUCTURE



LBC Policy Approach:

The Local plan sets out LBC's policy to protect existing cultural facilities and manage the impact of adjoining uses. This includes guidance on **locating larger creative facilities within the CAZ with smaller facilities more evenly distributed** (provided they do not have an adverse impact on their neighbours).⁹ Public houses are also identified for protection under policy where they are of community, heritage or townscape value - recognising that the "loss of an area's vibrancy as well as harming its diversity and interest".¹⁰



LBC's Role & Service Providers

Similarly to other London Local Authorities, LBC's culture team is small and concerned with supporting and promoting the ecosystem of cultural and creative service providers within the borough. It is separated out from the libraries team - who manage council owned libraries.

Aside from libraries, **cultural uses are provided by private sector or charitable / VSO**. Provision outside the CAZ often reflects local community through the type of services offered.



Euston Overview (Literature Review)

The Love Camden Cultural Strategy 2026-2031 underscores the strong existing foundation of cultural assets in Camden, ranging from world-renowned institutions (such as the British Library and Roundhouse) to grassroots artists and local communities while setting out an inclusive vision for the future.

Camden Town is a focal point for a lot of LBC's cultural provisions and draws visitors from across London and the world. However, Euston **is partly in the CAZ**, and nearby cultural anchors like the British Library and institutions like CSM (UAL) and independent service providers that serve the local community. There is also rich provision of small to medium sized organisations that have a wider than Euston reach (e.g.. The Place, Camden's People's Theatre, ODAC, New Diorama Theatre, etc).

The Euston Town BID have an "Arts & Culture Strategy" together with MTArt Agency, supported by Camden Council, describing Euston as a place with a "dynamic arts and culture scene that responds to Euston's rich history and spirited communities".

Incorporating new cultural venues into major development, particularly performance, exhibition, and creative industry spaces that

strengthen the Knowledge Quarter and local identity has also been identified as a policy priority.¹¹

Whilst there is **little existing evidence to indicate a surplus or shortage of cultural provision** in Euston, the 2019 - 2023 sector resilience and recovery assessment for LBC indicates a decline in the number of evening and night-time venues and a growth in the number of museums, public galleries, music recording studios, theatres and rehearsal spaces.

The **EAP 2026** recognises cultural and leisure uses as part of Euston's mixed-use regeneration through Objective 3. It also seeks to strengthen the area's role within the **Knowledge Quarter** by supporting knowledge-based, scientific and **creative industries, creating a vibrant place that benefits residents, workers and visitors.**



Euston Demographics

Population Diversity: Euston's demographic profile reflects significant ethnic and cultural diversity. Within the EAP boundary and buffer, 62% and 52% of residents are Asian, Black or another ethnic group respectively; similarly, 47% and 46% of residents in these respective areas are born outside the UK.¹² This diversity necessitates culturally inclusive facilities that accommodate varying religious practices, festivals, celebrations, and community events reflective of residents' diverse backgrounds.

Workers & Visitors: As well as residents, cultural provision heavily serves the worker population as well as visitors and commuters in Euston - causing

¹¹ LBC, *Infrastructure Delivery Plan*.

¹² LBC, *We Make Camden*.

an upwards pressure on central facilities. As a result this study has and applied an 20% and 35% multiplier to cultural Leisure and pubs respectively.



This Study

A wide range of facilities could be categorised as cultural provision and similarly to community provision, cultural infrastructure is challenging to quantify. For the purpose of this study, cultural infrastructure has been broken down into a handful of **core facilities including libraries, public houses, and cultural leisure** (incl. cinemas, performance venues, and exhibition spaces). This omits private-facing uses like workspace which fuel cultural ecosystems and disregards cultural programming - which is often where culture is most actively produced and experienced, shaping community identity and driving creative innovation beyond the physical spaces themselves.

The Demand Spreadsheet Model calculates sufficiency of provision based on:

- **Libraries:** benchmark from CIPFA Public Library Statistics. It only includes libraries that are public. This has been stress-tested against sqm/population metric and analysis considers both neighbourhood libraries and those with a London catchment.
- **Pubs:** Benchmark based on a 2020 England average and considers additional pressure from workers.
- **Cultural Venues:** Two calculations based on performance venues considering Performance venues (Theatres, Concert Halls, Cinemas) and Exhibition Space (galleries, museums and exhibition space). Both metric are based on London averages (GLA cultural infrastructure mapping) and consider worker demand.

Community Priority & Public Sentiment:

Social Value Charter priority: Culture and heritage - Create a meaningful environment that stimulates expression of and supports access to creativity, culture and identity.

RAG Feedback: Community Culture and Activity: Support and showcase Euston's existing culture, while allowing it to remain authentic. The RAG wants expression to be more visible and shared, with more opportunities for inter-cultural bonding, while also allowing the community to continue to evolve, and not to become a 'performed' version of itself. Initiatives are also needed to support people meeting and coming together.

Good Life Euston: "Community richness, cultures, and identities" is a domain in the model focused on celebrating diversity and community heritage.

- The Euston area reported a domain score of 6.8.

⁹ LBC, *Camden Local Plan*.

¹⁰ LBC, *Local Plan*.

EXISTING PROVISION & DATA DERIVED DEMAND

Existing Quantitative Analyses: What does the data assessment tell us?

The table below summarises the outputs from the spreadsheet model, using standard benchmarks to assess whether existing supply meets current demand. It considers provision both within the EAP boundary and across the EAP + buffer.

Type:		Study findings (Surplus vs. shortage)	Total Quantum of surplus or shortage (nr. / sqm)	Equivalent Provision	Notes & Reference
Libraries	EAP	Surplus	1 nr.	c. 200 sqm	
	EAP+B	Surplus	1 nr.	c. 200 sqm	
Public House	EAP	Surplus	3 nr.	c. 300 sqm	
	EAP+B	Surplus	3 nr.	c. 300 sqm	
Cultural Venues	EAP	Surplus	3 nr. small cultural venues	c. 100 sqm	GLA Design Guide - Designing Space for Culture
	EAP+B	Shortage	7 nr. small cultural venues	c. 700 sqm	

*Cultural Venues calculation is based on a wide range of different facilities and therefore has a low reliability.

Existing Qualitative Analysis: What does the spatial assessment tell us?

Libraries

There are multiple major institutional libraries and specialist libraries within the wider Euston area that serve a London wide audience - including the Wellcome Collection Library, the Birkbeck Library, and the British Library. Whilst these attracts visitors, many are specialist and unlikely to serve Euston's resident population; as such the quantitative assessment is only based on accessible spaces. This includes the British Library - with feedback suggesting that residents are increasingly using facilities there and there being local outreach and programming by the institution.

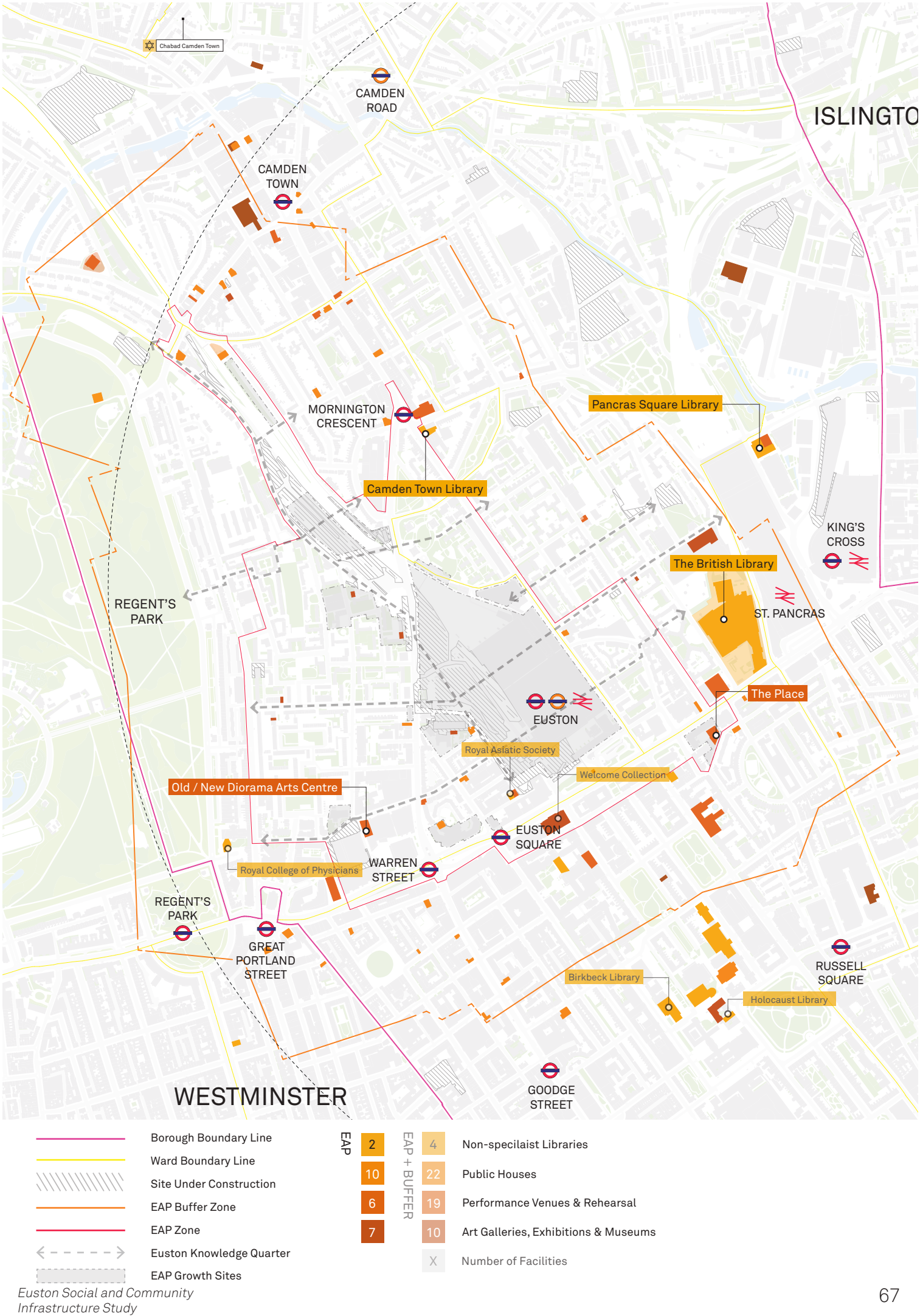
In the northern part of the study area - located on the EAP boundary - Camden Town Library provides an important local service, but there is a notable absence of equivalent provision within Regent's Park Estate and Somers Town. The closure of the former Regent's Park Estate Library has reportedly left a gap in accessible, walkable cultural and study space - particularly for families, young people, and those without digital access at home.

Despite this anecdotal local need, the EAP and the EAP + buffer area is quantitatively well served based on the number of library facilities. When tested against a floorspace (sqm /population) metric, provision appears significantly oversupplied - largely due to the scale of the British Library. However, this masks the demand



Camden Town Library:
(On the EAP boundary)

Camden Town Library is located on the ground floor of the Crowndale Centre. Beyond traditional library services, the facility offers adult education programs, community event spaces and a 'Library of Things' - a rental program for household DIY and repair items and tools,



for smaller, neighbourhood-level libraries that provide accessible, everyday cultural and study space..

- **Opportunity / Need:** *Smaller-scale, multi-purpose library or learning hubs within estates might be considered - combining traditional library functions with other services like community programming, digital access, and flexible meeting rooms.*

Public Houses

Pub provision is concentrated along Euston Road and Camden High Street – which are the high-footfall corridors in the study area. This reflects their role in serving commuters, office workers, and visitors. These pubs tend to be largely commercially oriented rather than tailored to local community needs. Residential areas of Somers Town and Regent’s Park Estate have comparatively fewer pubs, and those that do exist often operate as local social hubs with smaller catchments. The distribution pattern reinforces the divide between the commercial edges of the area and the more residential interiors, with fewer informal social spaces available within the estates.

Cultural Venues (Performance and Exhibition Spaces)

The area hosts a number of performance and cultural venues clustered around high-footfall zones - particularly Euston Road and Camden Town. As such, when looking at the EAP boundary in isolation there is sufficient provision with facilities supporting the CAZ through a mix of theatre, live music, and destination cultural attractions. These venues are likely to serve workers, students, and visitors, (benefiting from strong transport connectivity) however, smaller exhibition and cultural spaces are also evenly distributed across Somers Town and Regent’s Park Estate - offering more locally oriented access to cultural programming. Notable community-focused institutions like the People’s Museum and Camden People’s Theatre and community centres play an important role in ensuring that cultural infrastructure is not limited to commercial users but is also embedded in community identity and participation.

In spite of this existing ecosystems, when looking at the wider area (EAP + buffer) there is a quantitative shortage / unmet existing demand for cultural venues when calculated against benchmarks - likely due to the areas population density. This is particularly prominent in performance venues. The quantitative analysis considers a wide range of public cultural venues and the shortage has been expressed as small community facility equivalent (based on the GLA design guidance) given the target residential audience of this study. However, feedback suggests that there is an opportunity to support community providers to widen their reach; and that there is a gap in cultural leisure for young people in the area.

- **Opportunity / Need:** *Improving the visibility and accessibility of cultural opportunities within the estates.*



Old/New Diorama Arts Centre:

(Within the EAP boundary)

ODAC is a place for creative organisations, artists and communities to come together. It serves as a springboard for artistic creation and community action. Their stated focus is to use the arts as a tool to contribute to health, wellbeing and cohesion of our communities.



The Place:

(Within the EAP boundary)

The Place is a dance and performance centre. It is the home of London Contemporary Dance School, the Robin Howard Dance Theatre, and formerly the Richard Alston Dance Company. They offer course in the performing arts for every level of education, ages 6 and beyond.

FUTURE TRENDS & DATA DERIVED DEMAND

Trend Analysis: What broader forces are shaping future demand?

Considering national policy, demographic change, and evolving patterns of use, this table outlines the key upward and downward pressures likely to influence demand for infrastructure over time:

Type:		National	London / GLA	LBC	Drivers
Libraries	S - M Term	↗	↗	↗	Visitor numbers rebounding; evolving into digital and community hubs under funding and space constraints.
	M - L Term	↗	↗	↗	
Public House	S - M Term	→	→	→	Continued closures offset by community ownership and policy protection as social anchor spaces; generational shifts adding downwards pressure
	M - L Term	→	→	→	
Cultural / Leisure	S - M Term	↗	↗	↗	Recovered participation and creative-sector growth sustain demand for flexible, affordable cultural venues.
	M - L Term	↗	↗	↗	

S-M term: 2025-2035 M-L term: 2035-2050 ↗ Increase demand ↘ Stable demand ↘ Decreasing demand

See appendix D for a full analysis on future trends at a national, London and local scale

Future Quantitative Analysis: What does the data assessment tell us?

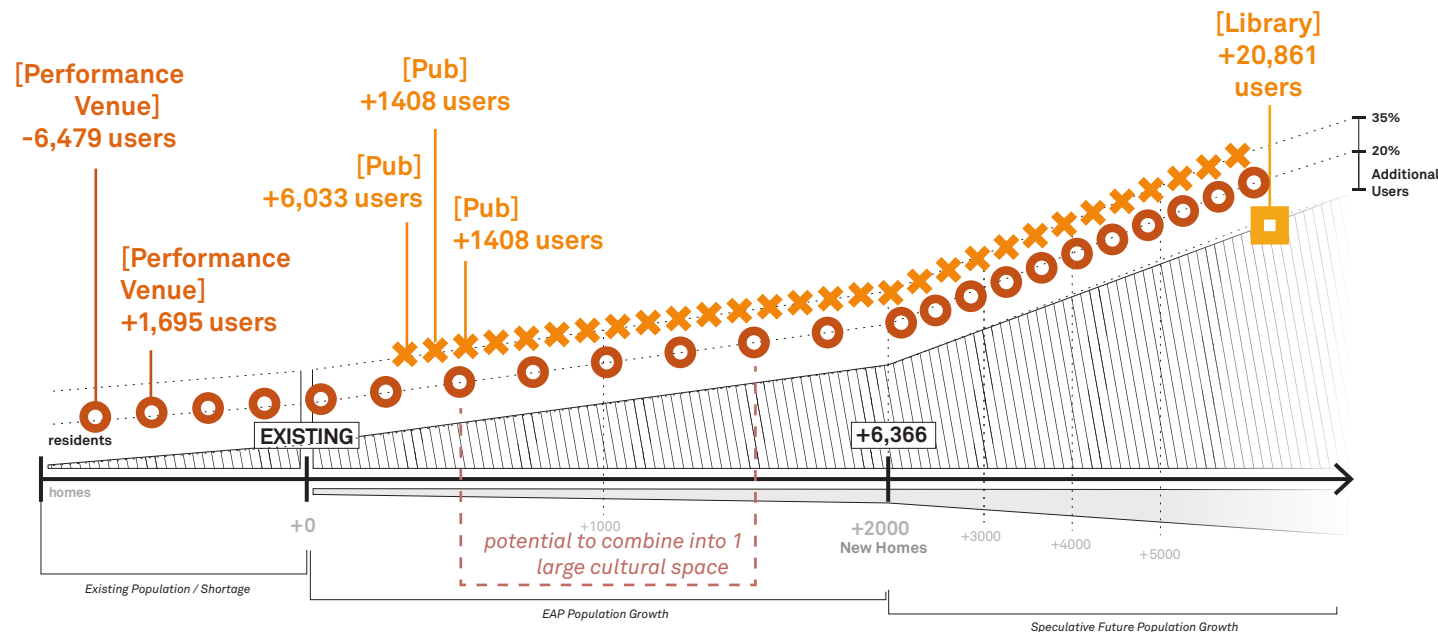
The table below summarises the outputs from the spreadsheet model and considers residential growth in the EAP (c. 2,000 new homes, alongside associated employment growth). It builds on the current position of sufficiency or shortage in provision:

Type:		Study findings (Surplus vs. shortage)	Total Quantum of surplus or shortage (nr. / sqm)	Equivalent Provision	Notes & Reference
Libraries	EAP	Net	N/A	N/A	
	EAP+B	Surplus	1 nr.	c. 200 sqm	
Public House	EAP	Shortage	11 pubs	c. 11,00 sqm	
	EAP+B	Shortage	16 pubs	c. 1,600 sqm	
Cultural Venues	EAP	Shortage	8 nr. small cultural venues	c. 800 sqm	GLA Design Guide - Designing Space for Culture
	EAP+B	Shortage	19 nr. small cultural venues	c. 1,900 sqm	

*Cultural Venues calculation is based on a wide range of different facilities and therefore has a low reliability.

Future Quantitative Analysis: When does population growth trigger the demand for an additional facility?

This diagram shows the points at which the provision of new facilities should be considered across the wider Euston (EAP + buffer). Some facilities are required now (shown as a negative figure), others are required at or beyond the 2000 anticipated new homes + jobs. Demand for the facilities in this category are measured through 'users' - a figure combining uptake from residents and a 20-35% students and workers uplift depending on the type of facility. Pubs 35%, Cultural venues 20%, libraries 0%.



Future Qualitative Analysis: What other factors are important to consider?

Libraries

Given Euston is well served by libraries future population growth should not trigger the demand for new library provision and there should be sufficient capacity within existing supply to meet growing demand. The ongoing expansion of the British Library may further help to meet demand, but community outreach and engagement are essential to ensure local residents feel able to access these new facilities. Libraries also serve as multi-functional community hubs, supporting adult education, cultural programming, and other activities where voluntary sector organisations face space and funding constraints. As such, whilst this is not a priority demand, there may be a case for delivering a community library sooner within Regents Park which is a cold spot.

Public Houses

While there is an existing surplus of pubs both within the EAP boundary and the wider Euston area, employment-driven growth will eventually generate additional demand - estimating a demand for 11 additional small pubs to serve the future population. Much of this future demand is likely to be met by the private sector market; so intervention by LBC is not a priority. However, consideration to how these spaces are inclusive to workers and residents is important.

Existing planning policy also recognises pubs as important social anchor spaces, and diversification into more flexible, multi-functional venues may support their long-term viability and community role. Despite the data-derived demand, national trends of pub closures, alongside cost-of-living pressures and generational shifts (including reduced alcohol consumption among younger groups), may place downward pressure on traditional pub provision.

Cultural Venues (Performance Venues and Exhibition Spaces)

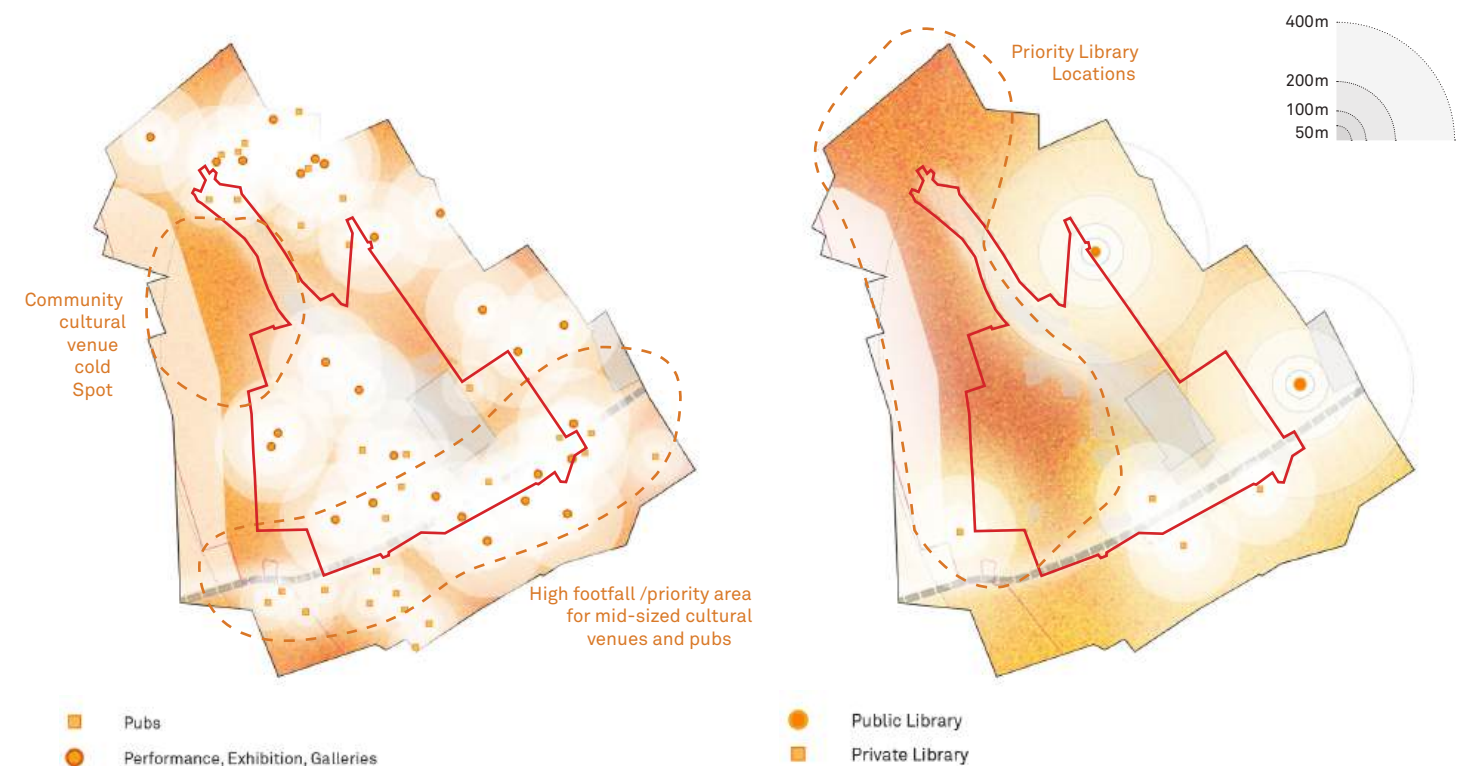
Projected demand for cultural and creative spaces grows significantly with both residential and employment growth - triggering sufficiency within the EAP and resulting in a small shortage. Population growth alone (not considering existing unbalance) triggers the demand for 12 small cultural facilities (when considering existing surplus). However, these figures should be treated with caution given the low reliability of the metric and the wide range of uses captured within this sub-category.

As such, provision should be guided less by quantitative benchmarks and more by how demand is experienced locally, with a clearer understanding of the types of cultural spaces most needed. While small-scale venues (c.100 sqm) may meet part of this demand, there is also a gap at a 'middle-market' level, where larger, higher-quality facilities can serve a wider catchment and support more established organisations.

Although some demand may be met by the private sector, LBC should consider if or how it can support existing providers to expand capacity, diversify programming, and secure long-term stability. This would help bridge the gap between major cultural institutions and hyper-local provision that currently characterises Euston. In this context, existing venues (such as The Place rehearsal space) should be supported / re-provided within the EAP, to ensure their continued presence in the area.

It should also be noted that this assessment focuses on performance and exhibition spaces only, and does not account for ancillary cultural infrastructure - such as creative workspace - which is critical to supporting a sustainable cultural ecosystem.

Heat Maps: Where are the cold spots?



Pubs & Cultural Leisure: Generally clustered around areas of high footfall, but with several smaller scale gallery and exhibition spaces integrated within estates.

Libraries: Public libraries located east of Euston station/tracks but anecdotally serves wider area. With British Library serving a London wide catchment.

HEADLINES & FUTURE CONSIDERATIONS

This section highlights key headlines and priorities for addressing unmet or projected demand. Note that in many cases, it will not be LBC’s responsibility to deliver these uses; however, they may play a role in encouraging delivery through planning levers, partnerships, or funding support. Deliverability refers to the spatial complexity and coordination typically required to deliver each type of infrastructure.

 LIBRARIES

Future Demand for new provision:
Low

Deliverability:
Requires coordination + LA led

Priority Locality:
Regent’s Park

 PUBLIC HOUSES

Future Demand for new provision:
Significant

Deliverability:
Readily achievable + market led

Priority Locality:
Central / Somers Town Locality

 CULTURAL VENUES

Future Demand for new provision:
Moderate

Deliverability:
Requires coordination / Partnership Approach + market led

Priority Locality:
Central locations / Regents Park

Recommendations: *Key challenges, opportunities or strategies*

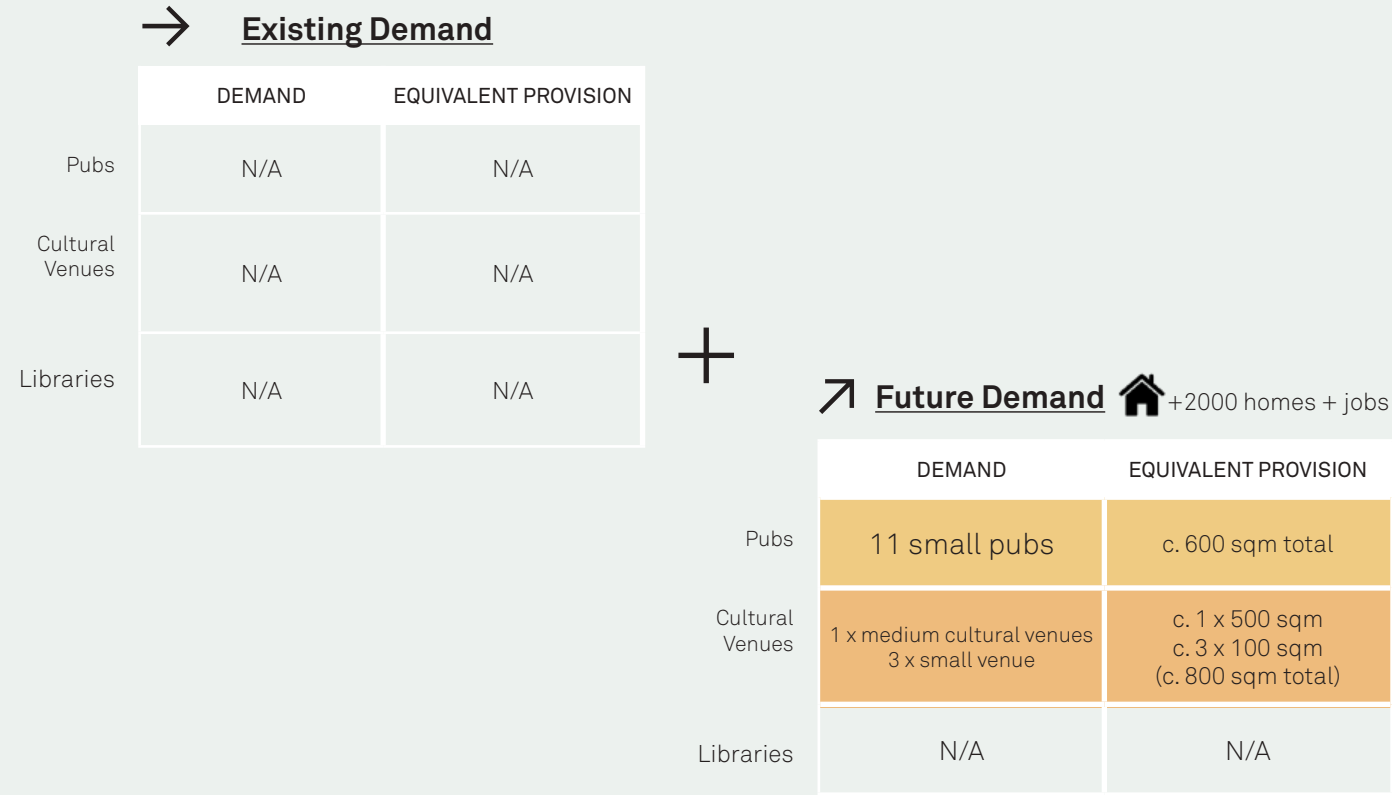
Community-representative cultural provision: While cultural infrastructure is not always easily defined as a discrete facility, future growth should be prioritises community-representative cultural provision at multiple scales, as the market will likely continue to respond to visitor and worker demand. Public spaces for programming and events should be encouraged to support cultural activity, and clustering of cultural uses should be promoted within estates. Further research should be undertaken to understand what (specific) cultural facilities would be valued by Euston residents to ensure provision reflects local needs and delivers meaningful community benefit.

Community libraries: can often double up as community centres while providing fit-for-purpose facilities for adult education, cultural programming, and other community activities that are difficult for VSO to bring forward due to space constraints and funding barriers existing. The demand for a new community library should be tested in Regents Park estate irrespective of the quantitative outputs as part of this study.

Consolidated Demand: *What are the priorities for new infrastructure in Euston?*

To establish a clear basis for negotiation and future feasibility testing, the following “consolidated” need combines both quantitative and qualitative assessments to adjusts the demand figures. Distinct from above it removes the existing unmet demand from projected demand figures and considers the EAP boundary only. Where relevant it suggests alternative types of infrastructure based on qualitative analysis.

- **Public Houses:** No change to model output.
- **Cultural Leisure:** No change to sqm output; however, changes to size of targeted provision - focusing on a range of sized venues.
- **Libraries:** No change to model output.



SPORTS & LEISURE INFRASTRUCTURE



Chalton Street Sports Court - adjacent to New Horizon Youth Centre.



Badminton Courts at Somers town community sports centre



LBC Policy Approach:

Sports & Leisure provision plays an essential role in helping Euston residents lead healthy lives. LBC's policy focuses on leisure and sports provision in relation to improving **population health & wellbeing** – with policies DS1 and SC1 in the new Local Plan⁹ concerned with strengthening the role of sport and leisure through requiring developments to integrate facilities.



LBC's Role & Service Providers

Within LBC, the Sports & Physical Activity and Green Space functions have merged into a single “Leisure Service” team - taking a more holistic approach to the delivery and maintenance of publicly owned spaces and recognising **the role that green space, active travel, recreation and sport all play in supporting physical activity and population health outcomes**. The team receive input from Pro-Active Camden (PAC), the borough's voluntary strategic partnership for sport and

physical activity that brings together organisations committed to providing and increasing opportunities for Camden citizens to be physically active.

There are a **mix of service providers in Euston** including: public sector / VSO – who offer multifunctional spaces where sports programming is delivered free or affordable (this includes the recently opened, but temporary use of Euston Community hub which is located within an old sports hall but is unable to accommodate ball sports beyond badminton); private sector providers who primarily target workers and commuters through market rate membership; and a handful of more affordable Joint Venture (JV) service providers such as GLL.¹⁰



Euston Overview (Literature Review)

Evidence suggests that there is adequate total supply of indoor sports facilities across the

borough¹¹ but that there is **uneven distribution of facilities** – with several large facilities (sports halls and pitches) in the less densely developed northern parts and multiple gyms and studios serving the CAZ in the South. **The Euston area is particularly poorly served**.¹²

The Euston Area Sports Facilities Needs Assessment and Euston Open Space Study suggests that there is an **unmet demand for accessible sports halls with adequate indoor pitches (4-court); high quality outdoor sports provision; and more localised gym and studio provision**. This study also suggests that facilities across Regents Park estate and Somers Town are of a lower quality.

The YMCA, who closed their community-targeted facility at Great Russell Street in early 2025, cited a **lack of youth provision** in the area. As a charitable provider – equipped with a swimming pool, gym, exercise studios and multi-use community spaces – the closure leaves a substantial gap in provision.

The **EAP 2026** identifies leisure uses as part of Euston's future mixed-use neighbourhoods through Objective 3. It also promotes new and enhanced open spaces, walking and cycling infrastructure, and green infrastructure that contribute to health and wellbeing alongside wider leisure provision.



Euston Demographics

Young People: There is a large population of young people in Euston, with 26% and 29% of residents aged 15 to 24 in the EAP boundary and buffer zone respectively.¹³ This is primarily driven by the student population – with over a quarter of residents in the buffer area in full-time education.

Student Population: Evidence suggests that demand for sports facilities (especially indoor and outdoor pitches) is amplified by the large student population. This limits the availability of facilities for other residents while inflating prices.

Deprivation: Data shows that there is lower sports participation in areas of higher deprivation¹⁴ such as parts of our study area.

Workers: The study factors in the additional pressure of the worker population on sports

11 Sport England Sports Facilities Model / Capacity Study for large scale housing growth - wsp
12 LBC, *Infrastructure Delivery Plan*.
13 IGP, *Good Life Euston*.
14 KKP, *Sports Facilities*.

provision. This is expected to increase as a result of future employment-led development.

The demand calculation therefore includes workers and non-resident students as part of the user population, recognising the additional demand they place on indoor and outdoor facilities.



This Study

This study has focused on assessing sports uses where unmet demand has previously been evidenced. These have been broadly consolidated into three subcategories - indoor facilities, outdoor facilities, and gyms / studios. However, other more specialist sports and leisure use should also be considered for Euston, being particularly mindful of anticipated future trends.

The Demand Spreadsheet Model calculates sufficiency of provision based on:

- **Indoor sports:** Using the number of badminton courts as a standardised, flexible unit (as per Sport England guidance). A 4-court sports hall represents a typical community facility. This section also considers other forms of indoor provision such as bookable rooms. The calculation assumes high worker participation.
- **Outdoor sports:** Total sqm of formal pitch space, excluding informal green space where sport may occur. This has been expressed as equivalent number of football pitches. The calculation assumes high worker participation.
- **Gyms / Studios:** Excludes boutique gyms and studios where access is limited, focusing on affordable, community-accessible facilities with (assumed) limited worker demand.

Community Priority & Public Sentiment:

Euston Social Value Charter: “Sports and leisure activities” is listed as a sub-domain under the “Our Spaces and Services Domain”.

RAG / Community Conversations Report: Consultation identified need for improved sports provision, alongside children's play and informal recreation, as a key priority for local residents.

Good Life Euston: ‘Sports and Leisure Activities’ & ‘Health and Wellbeing Services’ is a sub-domain within ‘Our spaces and services’ domain.

- ‘Our Spaces and Services Domain’ of the good life index scored an average of 6.7; with the sub-domain for sports and leisure activities saw the lowest score of 6.2

9 LBC, *Local Plan*.

10 KKP, *Sports Facilities Needs Assessment*.

EXISTING PROVISION & DATA DERIVED DEMAND

Existing Quantitative Analyses: What does the data assessment tell us?

The table below summarises the outputs from the spreadsheet model, using standard benchmarks to assess whether existing supply meets current demand. It considers provision both within the EAP boundary and across the EAP + buffer.

Type:		Study findings (Surplus vs. shortage)	Total Quantum of surplus or shortage (nr. / sqm)	Equivalent Provision	Notes & Reference
Indoor Facilities (Sports Hall)	EAP	Shortage	3 courts = 1 x sports hall	c. 555 sqm	Sport England & Active Places Power
	EAP + B	Shortage	4 courts = 1 x sports hall	c. 690 sqm	
Outdoor Sports Facilities	EAP	Shortage	34,328 sqm	4 football pitches	Sports England; Football Foundation; Fields & Trust Foundation
	EAP + B	Shortage	129,486 sqm	17 football pitches	
Gyms / Studios	EAP	NET	0 nr.	N/A	No high end gyms targeting workers have been included in existing supply.
	EAP + B	Shortage	1 facility	c. 100 sqm	

*Note that the Fields in Trust and Sports England benchmarks used to assess supply of outdoor sports do not account for dense urban contexts such as Euston. This is considered further below.

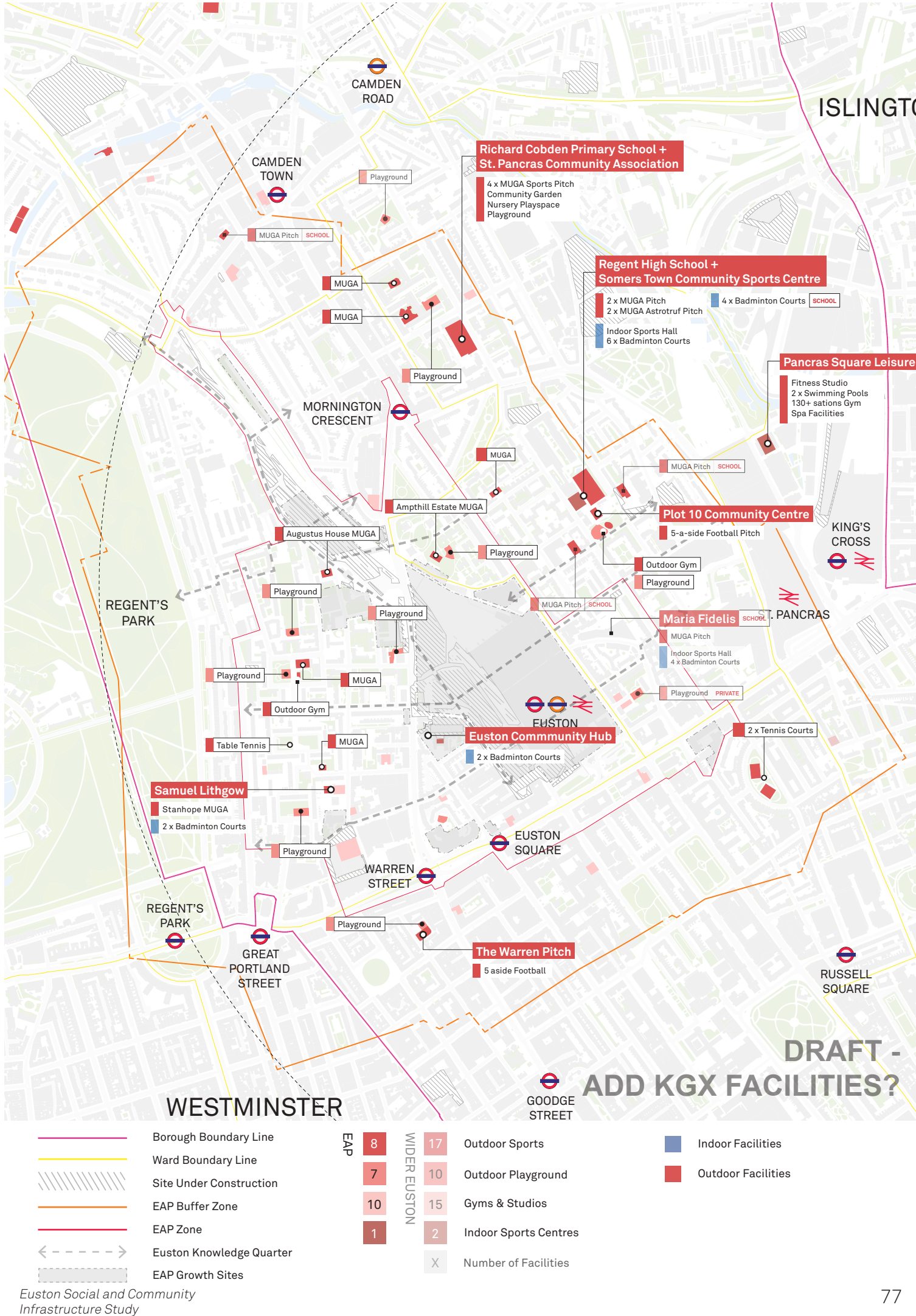
Existing Qualitative Analysis: What does the spatial assessment tell us?

Indoor Facilities:

There is only one ‘public’ purpose built indoor sports facility within the wider EAP area and it is located outside of the EAP boundary - Somers Town Community Sports Centre with six badminton courts, shared with Regent High School). Maria Fidelis Catholic School has four badminton courts and is within the EAP boundary - however, primarily serves the school. These are both located within Somers Town, with none in the Bloomsbury or Regent’s Park locality. There is an anecdotal unmet demand for indoor sports provision given Somers Town Community Centre is being heavily used during the day by Regent High School and in the evenings and weekends by UCL (6–10pm). Both the Regent High School and Somers Town venues are rated below average quality.

Despite sitting outside the buffer, the EAP + buffer assessment includes Pancras Square Leisure that offers high quality facilities (including a pool but no courts, and catering to additional residents and workers). Whilst not quantified separately in our model, pools have also been identified as in demand in Euston following the closure of YMCA (south of buffer). Pool provision should be considered within the broader ‘indoor facilities’ type, despite being measured in courts. Pancras Square Leisure offer a standard 25m pool and a shallower teaching pool (c.350sqm total). Based on the benchmark of 10.23sqm of swimming pool water per 1,000 population; this would be just sufficient to accommodate the wider Euston existing residential population. However, it does not take into account additional pressure from Kings Cross residents, workers or future residential growth. Excluded from this study are Handyside Sports Centre (Kings Cross residents only) and the gym Kings Cross Fitness, deemed to be inaccessible to residents due to location and cost.

More informal indoors sports provision is provided within community spaces. The newly opened Euston Community Hub provides additional indoor space - including badminton courts - on the former Maria Fidelis campus, and the Samuel Lithgow Community Centre offers a small multi-purpose hall currently used for five-a-side football. These kinds of flexible community spaces are increasingly important in



supporting broader physical activity participation beyond formal sport, including exercise classes, dance, rehabilitation activity and community wellbeing programmes.

Discussion with UCL Sports suggests that there is a huge unmet demand for indoor sports facilities from students in the area; with badminton, volleyball, basketball and netball being in particular demand. GLL also recognise that the station creates a physical barrier to accessing Pancras Square Leisure, despite ongoing outreach work to encourage participation from residents.

- Opportunity / Need:** Additional accessible, affordable, indoor sports halls / hub to meet existing student demand and that can be accessible to Regent’s Park residents.

Outdoor Facilities:

There are two outdoor multi-pitch facilities within the wider EAP area: Regent High School and the Somers Town Community Sports Centre share large outdoor pitches (but these are generally not accessible to the public); and the shared pitch at Richard Cobden Primary School and St Pancras Community Association (that appears to be available for external bookings). Both are outside the EAP boundary.

Community / free options include the small but heavily used Warren Sports Pitch in Bloomsbury (operated by FYA), and several basketball courts and smaller MUGAs scattered across the Regent’s Park Estate like the MUGA at Samuel Lithgow Youth Centre. The Football Foundation’s LFFP highlights Regent High School, the Calthorpe Project and Samuel Lithgow Youth Centre as priority projects for investment - reflecting high local demand for improved facilities.

The Fields in Trust benchmark used for the sufficiency calculation is a national aspirational benchmark - which doesn’t take into account the dense urban context of Euston. Outside the buffer, Regent’s Park provides extensive formal grass pitches at ‘The Hub’ including 9-12 football, rugby and cricket pitches across 10ha - which, if factored into the calculation, would reduce existing shortage in the EAP+buffer to c.30,000 sqm and fully meet the shortage in the EAP boundary. Additionally Regent’s Park offers expansive open green space suitable for informal outdoor sport, recreation, walking and wider physical activity. This should be considered when looking at the amount of shortage calculated within the data driven approach.

- Opportunity / Need:** Need for integrated affordable, outdoor facilities; open green space which allows for informal sports; and better access to amenities in Regent’s Park.

Gyms / Studios:

Compared with the Euston Area Sports Facilities Needs Assessment, more gyms and studios were found in the study area - with most facilities clustered around Euston Road and Camden Town High Street, where footfall is highest and workers can easily access. Regent’s Park Estate is generally poorly provided for by private operators, though community centres are assumed to offer low-cost or free classes – including Euston Community Centre which provides family and affordable resident sessions, and the Samuel Lithgow Youth Centre offers gym and classes for women. According to the previous needs assessment, most facilities within the EAP are rated below average, with only two offering pay-and-play access while the rest require full membership. This study considers community gyms and facilities with affordable memberships only, excluding higher-cost boutique gyms. As such, worker demand is not assumed to be a driving demand factor.

While quantitative provision of gyms may appear comparatively strong, this masks a more nuanced gap in accessible indoor physical activity space. Existing provision is weighted toward private gym models focused on cardiovascular and weights equipment, whereas local stakeholders identify demand for more affordable and flexible studios or activity spaces capable of supporting exercise classes, dance, rehabilitation, physiotherapy and other non-competitive forms of physical activity.

- Opportunity / Need:** Accessible, affordable, gym and studio provision that is inclusive to the community and/or support community facilities to keep delivering offer.



Regent’s Park Pitches:
(Outside of EAP boundary & beyond buffer boundary)

Regent’s Park is home to Regent’s Park FC who host a variety of football coaching and children’s sessions. The park accommodates athletics and various other grass sports pitches open to the public.

FUTURE TRENDS & DATA DERIVED DEMAND

Trend Analysis: What broader forces are shaping future demand?

Considering national policy, demographic change, and evolving patterns of use, this table outlines the key upward and downward pressures likely to influence demand for infrastructure over time:

Type:		National	London / GLA	LBC	Drivers / Trends
Indoor Sports Facilities	S - M Term	↗	↗	↗	Participation high but ageing stock; renewal and energy costs drive provision pressure.
	M - L Term	↗	↗	↗	
Outdoor Sports Facilities	S - M Term	↗	↗	↗	Activity levels up; land scarcity and field loss create enduring access pressure.
	M - L Term	↗	↗	↗	
Gyms / Studios	S - M Term	↗	↗	→	Activity levels up;
	M - L Term	↗	↗	↗	

S-M term: 2025-2035 M-L term: 2035-2050 ↗ Increase demand → Stable demand ↘ Decreasing demand
See appendix D for a full analysis on future trends at a national, London and local scale

Future Quantitative Analysis: What does the data assessment tell us?

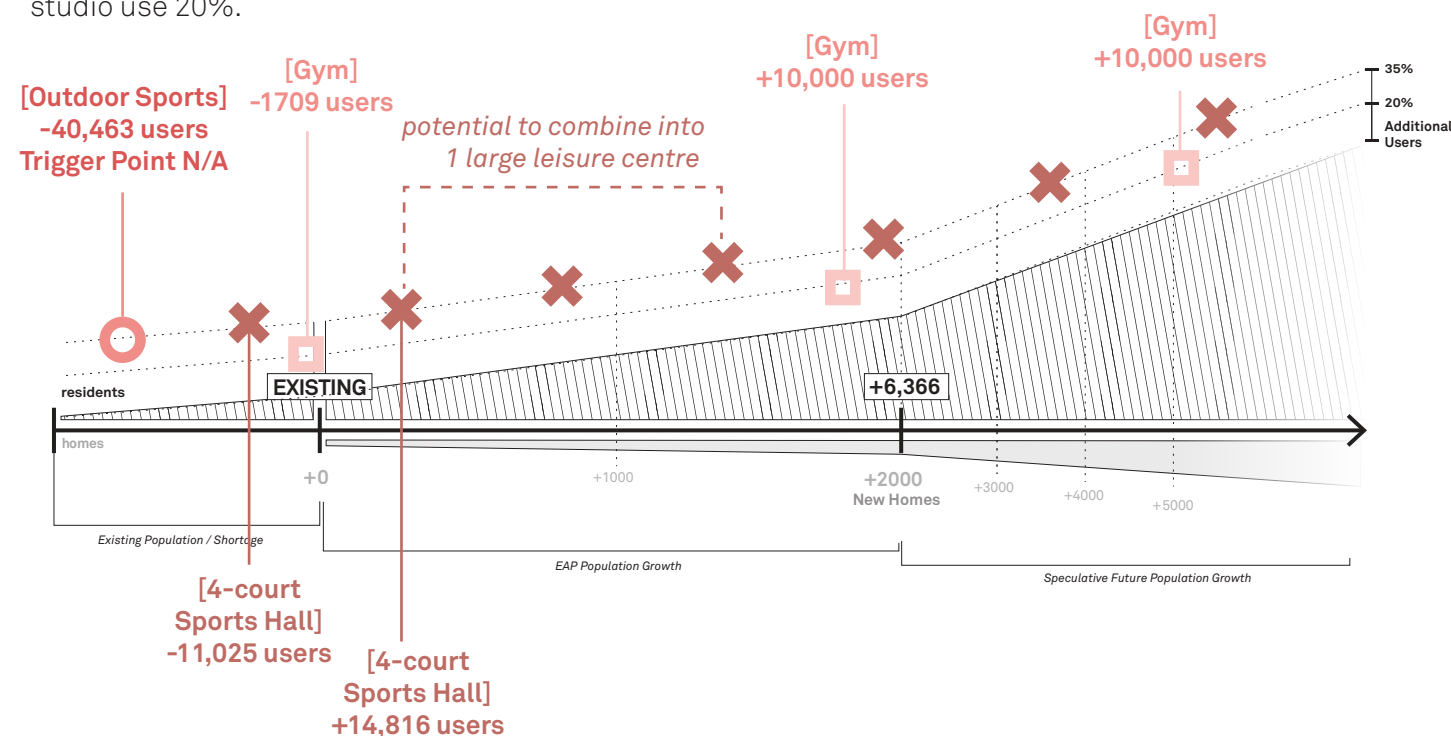
The table below summarises the outputs from the spreadsheet model and considers residential growth in the EAP (c. 2,000 new homes, alongside associated employment growth). It builds on the current position of sufficiency or shortage in provision:

Type:		Study findings (Surplus vs. shortage)	Total Quantum of surplus or shortage (nr. / sqm)	Equivalent Provision	Notes & Reference
Indoor Facilities (Sports Hall)	EAP	Shortage	14 courts = c. 3 sports halls	c. 2,200 sqm	Sport England & Active Places Power
	EAP + B	Shortage	21 courts = c. 5 sports halls	c. 2,775 sqm	
Outdoor Sports Facilities	EAP	Shortage	86,800sqm*	12 football pitches	Sports England; Football Foundation; Fields & Trust Foundation
	EAP + B	Shortage	184,800sqm*	25 football pitches	
Gyms / Studios	EAP	Shortage	1 nr.	c. 100 sqm	No high end gyms targeting workers have been included in existing supply.
	EAP + B	Shortage	2 nr.	c. 200 sqm	

*Note that the Fields in Trust and Sports England benchmarks used to assess supply of outdoor sports do not account for dense urban contexts such as Euston. This is considered further bellow. As is swimming pool demand.

Future Quantitative Analysis: When does population growth trigger the demand for an additional facility?

This diagram shows the points at which the provision of new facilities should be considered across the wider Euston (EAP + buffer). Some facilities are required now (shown as a negative figure), others are required at or beyond the 2000 anticipated new homes + jobs. Demand for the facilities in this category are measured through 'users' – a figure combining uptake from residents and a 20-35% students and workers uplift depending on the type of facility. Sports halls and outdoor sports use 35%, Gyms and studio use 20%.



Future Qualitative Analysis: What other factors are important to consider?

Indoor Facilities:

The scale of projected future shortage in indoor sports provision is driven not only by population and employment growth, but by the need to address an already existing deficit. Providing multiple 4-court halls may be infeasible within the Euston context given the limited land availability and operational challenges, so a single fit-for-purpose indoor sport facility with eight courts as well as other facilities may be more achievable in meeting existing and projected demand. It should also be noted that the Euston Community Hub that currently offers badminton courts is only a temporary project -and on closure will create a greater demand for indoor courts.

While the spreadsheet model focuses on court sufficiency, demand is expected to diversify, highlighting the importance of flexible, multi-purpose space that can accommodate a range of sports, physical activity and wellbeing uses beyond traditional court sports, including exercise classes, dance, rehabilitation and non-pitch activities. that can accommodate a range of activities beyond traditional court sports, including non-pitch uses. Swimming provision is also expected to come under increasing pressure, with population growth alone generating c.50 sqm of additional pool space from residents only - further supporting the case for inclusion within a larger new facility. This pressure is compounded by recent changes to swimming pool provision across Camden, existing demand pressures at nearby facilities, and the needs of organised user groups such as Camden Swiss Cottage Swimming Club.

Outdoor Facilities:

The quantitative assessment identifies a substantial shortfall; however, as highlighted earlier, this calculation has several constraints. It excludes the 10 ha of pitches and informal recreational space at The Hub at Regent's Park, and uses national benchmarks that do not account for the dense urban context of Euston and limited sites for future provision. While LBC does not have a benchmark for assessing formal

sports pitches, the *LBC Open Space Study - Euston Area Plan* references a similar benchmark (of 1.3ha per 1,000 population) for all open space including pitches. Therefore consolidate demand is significantly rounded down from the ambitious national guidance.

Even with this reduction of the ambitious metric, projected growth will place additional pressure on outdoor sports provision, with the scale of identified shortfall reflecting both existing deficits and new demand from residents and workers. Future provision will need to focus on both intensifying use of existing assets and accommodating new demand. There is a strong role for investment in the existing network of MUGAs and smaller community facilities, which are already well distributed and heavily used, to increase capacity and quality. However, these alone will not meet projected demand. Growth should also attempt to creatively incorporate larger, formal pitch provision (e.g. football and tennis) within new development where feasible, despite spatial constraints.

While open green space may help to accommodate some of the identified shortfall through informal sport and recreation this typology is also in shortage and under increasing pressure. As such, both new and enhanced green space, alongside additional formal sports provision, will be required to meet future demand.

Gyms / Studios:

Demand for gyms and studio-based activities is expected to continue to grow, reflecting both population increase and wider participation trends. New provision is likely to be brought forward through the market, particularly in areas with high worker footfall. However, without intervention, there is a risk that future provision will be skewed towards higher-cost, membership-based models that primarily serve the daytime working population. This could reinforce existing inequalities in access, particularly in areas such as Regent's Park Estate, where current provision is more limited and more reliant on community-led or low-cost offers. LBC should consider if or how it can support existing VSO operators, encourage affordable new gym options and support alternative sports studios that meet local demand (e.g.. boxing, dance, or fitness classes).

Heat Maps: Where are the cold spots?



Sports Facilities: Regent's Park locality particularly poorly served by indoor sports facilities. (Given meanwhile nature of Euston Community Hub) Areas well served by MUGAs, but limited large/formal pitches that are accessible.

Hotspots: Fit for purpose hubs located East of Euston Station/tracks. Bloomsbury and Regent's Park locality poorly served.

HEADLINES & FUTURE CONSIDERATIONS

This section highlights key headlines and priorities for addressing unmet or projected demand. Note that in many cases, it will not be LBC’s responsibility to deliver these uses; however, they may play a role in encouraging delivery through planning levers, partnerships, or funding support. Deliverability refers to the spatial complexity and coordination typically required to deliver each type of infrastructure.

**INDOOR SPORTS**

Future Demand for new provision:
Significant

Deliverability:
Requires coordination + Partnership

Priority Locality:
Regents Park Locality / Central

**OUTDOOR SPORTS**

Future Demand for new provision:
Significant

Deliverability:
Requires coordination + Partnership

Priority Locality:
Regent’s Park Estate / Somers Town Locality

**GYM/STUDIOS**

Future Demand for new provision:
Low

Deliverability:
Readily achievable + Market led

Priority Locality:
Central locations

Recommendations: *Key challenges, opportunities or strategies*

- Support existing community sport and physical activity provision:** Support and strengthen low-cost, informal spaces (MUGAs, community centres that offer classes; open green space with “ball games” allowed) to ensure vulnerable groups continue to have accessible options. Improve and deliver new flexible green/open spaces to enable accessible leisure, play, informal sport, walking and wider physical activity for residents.
- Plan for major new facilities:** Prioritise a new multi-use facility / indoor-outdoor hub in partnership with local institutions (e.g. UCL, UAL, SOAS who have an important role in meeting their student demand) and existing partners (e.g. GLL) that balances operational viability with affordable access for residents and students; and alleviates some of the pressures on existing, affordable community operated facilities. Acknowledging the spatial limitations, the delivery of a new leisure facility with a pool should be carefully considered.
- Deliver an all-weather pitch:** Camden does not have a full size synthetic turf pitch which would be a significant asset with a positive impact on sport & physical activity participation and wellbeing.
- Integrate smaller-scale, flexible provision in new developments:** Encourage rooftop courts, adaptable multi-use spaces, making student accommodation gyms public, or re-purposed underused buildings to supplement demand and extend access across the area.
- Explore increased capacity / upgrade outside the buffer boundary:** Engage the Hub and The Royal Parks to understand what, if any, appetite there is to increase capacity of existing provision in regents park to meet Euston shortage. This could be supported the LBC CIL and S106 contributions if prioritised.

Consolidated Demand: *What are the priorities for new infrastructure in Euston?*

To establish a clear basis for negotiation and future feasibility testing, the following “consolidated” demand combines both quantitative and qualitative assessments to adjusts the demand figures. Distinct from above it removes the existing unmet demand from projected demand figures and only considers the EAP boundary. Where relevant it suggests alternative types of infrastructure based on qualitative analysis.

- Indoor Sports:** Rounded up in future scenarios to account for the loss of courts at Euston Community Centre, demand for accessible pool space, and the need for ancillary space.
- Outdoor Sports:** A division of 5 has been applied to all scenarios to reflect the availability of Regents Park pitches at the hub (over 2 km from Euston Station) and to reflect the continued densification (and thereby limited land availability) of Euston; As a benchmark this is more in line with 0.3ha per 100,000 population which has been referenced by OPDC. This remains ambitious and requires further testing.
- Gyms and Studios:** No change to existing model output.

→ Existing Demand					
	DEMAND	EQUIVALENT PROVISION		DEMAND	EQUIVALENT PROVISION
Indoor Sports	4-court hall	c. 1,000 sqm	+	↗ Future Demand 🏠 +2000 homes + jobs	
Outdoor Sports	1 x 3G Football Pitch; 2 x tennis courts;	c. 6,000 sqm			
Gyms / Studios	N/A	N/A			
Indoor Sports	1 x large sports facility + swimming pool	c. 5,000 sqm			
Outdoor Sports	2 x 3G Football Pitch; 3 x tennis courts; 1 x 5-a-side	c. 10,000 sqm			
Gyms / Studios	1 x small gym	c. 150 sqm			

GREEN & OPEN SPACE



Informal productive green space on an estate in Somers Town



Outdoor Playspace in Euston

LBC Policy Approach:

The provision of open green space is vital to the health and wellbeing of residents. LBC's policy commits to protecting, enhancing and improving access to all designated public and private open green spaces.⁹ The Local Plan offers guidance on the **sqm of additional green space that should be aimed for as part of new developments** – recognising the importance of delivering new green space in dense urban environments.

There is particular emphasis on food insecurity and improving social inclusion through food growing and play space provision in the Local plan under Policy SC4 and A2: Open Space. In addition to safeguarding amenity spaces, Policy SC4 commits to **resisting development that would be detrimental to the setting, use and enjoyment of designated open spaces**.¹⁰

LBC's Role & Service Providers

Within LBC, the Sports & Leisure and Open Green Space functions have merged into a single team for a more unified approach to the **role of green space in supporting overall health and wellbeing**.¹¹ **Camden's Grounds Maintenance Service** currently covers over 75 parks and more than 300 green spaces, including housing estate greens, verges, and communal areas. It delivers horticultural services such as gardening, playground and facility inspections, litter removal, hedge trimming, and infrastructure repairs. LBC manages one of its four allotment sites, whereas estate allotments and other private green spaces are managed independently by various organisations. LBC have

a planting strategy with the objective to increase canopy cover across the borough from 23% to 26%, but it is noted that Regents Park ward has only 18.9% cover at present – 938 potential planting sites have been identified to improve cover and mitigate urban heating, air quality and flood risks.

Euston Overview (Literature Review)

LBC is one of the boroughs with the **least access to private green space; but is one of the highest performing boroughs in London on the Healthy Streets scorecard**.¹² Whilst access to open green space is strong in the Northern parts of the borough; the Southern parts have poorer access. LBC's Parks for Health Strategy emphasises **access to green space and health outcomes differ by social deprivation, ethnicity, gender and disability**. Whilst Euston is adjacent to Regent's Park, the railway station and respective physical infrastructure create major barrier and severance zones, which is compounded by the lack of meaningful secondary parks.

The Euston area and its immediate surroundings severely lack valuable, meaningful, open green spaces in contrast to much of the northern wards of LBC. As a result of the on-going and ramping up of construction sites around Euston Station, **valued green spaces have been progressively eroded or lost without adequate re-provision**¹³ – although there is a commitment to re-provision which is described within the analysis below. Evidence from the [Euston Open Space study](#) indicates that both Regent's Park and Somers Town localities experience deficiencies in access to public parks.

¹² LBC, *We Make Camden*.

¹³ Daisy Froud, *Housing Delivery in Euston*.

⁹ LBC, *Local Plan*.

¹⁰ LBC, *Local Plan*.

¹¹ LBI, LBC, *Camden and Islington Parks for Health Strategy 2022 - 2030*.

The **EAP 2026** places a strong emphasis on open space through Section 3.6 (Open Space Strategy) and Strategic Principle EAP5, **seeking to provide new and enhanced open spaces** and green infrastructure that meet demand from new development, improve accessibility and contribute to health and wellbeing.

Euston Demographics

Density & Accessibility: Euston has a large share of high-density housing, with a majority of residents in flats or apartments, suggests a reliance on shared and local amenities. Camden was listed as the 12th highest authority in England in terms of the number of green-space deprived neighbourhoods, with lack of access linked to neighbourhoods of high deprivation.¹⁴

Deprivation: Data from the Index of Multiple Deprivation (2019) indicates that 38.3% of Camden's population lives within the 20% most deprived areas nationally for the living environment domain, with deprivation concentrated in areas close to Central London. Despite Camden being one of London's highest-performing boroughs on the Healthy Streets Scorecard, around 73% of dwellings in Regent's Park and 79% in Somers Town do not have access to private gardens¹⁵, compared with 39% across Camden and a London average of 21%. This is perhaps unsurprising in a dense Central London context, where most homes are flats rather than individual houses. Likewise, an estimated 49% of households are not well provided for with allotment space based on an 800m catchment.¹⁶

¹⁴ LBI, LBC, *Parks for Health*.

¹⁵ LBI, LBC, *Parks*.

¹⁶ LBI, LBC, *Parks*.

Community Priority & Public Sentiment:

Euston Social Value Charter: Open Space and Public Realm is one of the core themes with the objective to 'Deliver safe, inclusive, green and welcoming parks, open spaces and street environments'

RAG / Community Conversations: Safeguarding and re-provision of open green space is a key priority for local residents stating that "current provision is inadequate, and valued spaces have been lost"

Key resident asks include:

- *Investment and provision of a varied, inclusive, characterful and genuinely useful network of spaces.*
- *Areas of green space, "that you can use", and creative thinking and design about inclusion of 'green'.*
- *Great space on the station roof; covering tracks to create new public space; by ideas like vertical gardens.*
- *Providing and actively promoting opportunities for community 'ownership' of spaces*
- *Hands-on spaces that support community growing and volunteering – building community spirit – and that, while being well-maintained, do not look "over-manicured".*

Good Life Euston: Environmental Revitalisation reports on four sub-domains: Clean environments, Safe environments, Welcoming environments, and Sustainable and resilient environments.

- Euston has an average score of 5.96, with a domain range from 5.5 in Mornington West, and 5.6 in Somers Town Amptill to 6.6 in Regent's Park Estate Central. (Difference of 10%)

EXISTING PROVISION & DATA DERIVED DEMAND

Existing Quantitative Analyses: *What does the data assessment tell us?*

Type:		Study findings (Surplus vs. shortage)	Total Quantum of surplus or shortage (nr. / sqm)	Equivalent Provision	Notes & Reference
Outdoor Playspace	EAP	Shortage	9,519 sqm	4 x NEAPs, 8 x LEAPs, 14 x LAPs	Field in Trust Play Space guide
	EAP+B	Shortage	36,763 sqm	4 x MUGAs, 25 x NEAPs, 16 x LEAPs, 20 x LAPs	
Productive Green Space / Growing	EAP	Surplus	5,563 sqm	22 x allotment plots (10-pole plot)	National Allotment Society
	EAP+B	Surplus	1,082 sqm	4 x allotment plots (10-pole plot)	
Public Parks	EAP	Shortage	74,748 sqm	3 x local parks; 3 x Pocket Parks	Proportion of regents park included in EAP + buffer calculation only
	EAP+B	Surplus	37,095 sqm	2 x local parks	

*Multi-use Games Area (MUGAs), (Neighbourhood Equipped Areas for Play (NEAPs) for older more independent children), Locally Equipped Areas for Play (LEAPs) for young and independent children, Local Areas for Play (LAPs) for very young children.

Existing Qualitative Analysis: *What does the spatial assessment tell us?*

Formal Parks / Gardens & Squares:

Within Camden, there is 1.8 hectares of public park per 1,000 population, but this is unevenly distributed. Southern areas of the borough, including Somers Town and Bloomsbury, have poorer access to local green space. Specifically, these localities are underserved for Pocket Parks, Small Local Parks, and Local Parks (using a 400 m catchment standard).

Community feedback highlights a perceived loss of usable local green space, particularly small pocket parks impacted by HS2 which has resulted in the loss of two park (approximately 20,000 sqm). The HS2 Environmental Statement identifies approximately 17,000 sqm of replacement open space as mitigation, although the final quantum, quality and location of this provision are yet to be agreed.

The Open Space Study identifies smaller green spaces in Somers Town and the Regent’s Park Estate as lower quality, although recent interventions, such as the Estate’s Story Trail, may have improved local quality. Regent’s Park and Cumberland Market are consistently identified as valued green spaces.

Regent’s Park (c.147 ha total) provides significant strategic green space, with a 3.2 km catchment that benefits Euston at a borough-wide scale. However, given it sits outside of the EAP, it isn’t accounted for in the quantitative assessment of the EAP - thereby resulting in a large shortage. However, if considered in full within this study, the EAP would have 4.83 ha of green space per 1,000 residents, well above the Camden average (albeit this risks overstating the level of accessible green space, as it primarily functions at a regional rather than neighbourhood scale).

As such, the EAP + buffer analysis includes only the portion of regents park that sits within the buffer (approximately 286,000 sqm), and offers a useful counter to the EAP shortage.

Critically, green space is unevenly distributed, meaning not all residents have accessible local green space, and pockets of under-provision remain. The consolidated demand for this study considers both the value of Regents Park as well as the demand for more distributed provision.

- **Opportunity / Need:** *Green, pedestrian prioritised corridors between parks – particularly to Regents*



Park; softening severance caused by rail. Distributed, accessible, safe and inclusive green space, merging free activation within public realm and commercial functions.

Play Space:

Within the EAP boundary there is approximately 3,000 sqm of play space and 7,000 sqm pitches. Quantitative analysis suggests that this is a major shortage (of approx 9,000 sqm). This has been tested against other benchmark of 0.25 hectare play space per 1,000 population which would result in an even higher shortage. Whilst these benchmarks may be unachievable in the Euston context, there is a clear unmet demand for active play space for all ages.

GLA guidance is that residents should be able to reach a play space within 100m / 400m / 800m without major physical barriers (railway lines, busy roads) that limit safe access. The wider Euston area is served on an 800m catchment and only Bloomsbury is poorly served based on a 400m catchment - suggesting uneven distribution that may reflect the residential demographic. 100m catchment is recommended for children under 5 and on this basis the majority of the area is under performing. Play space is often collocated with green space and other social and community uses like education and community facilities however, multiple playgrounds are of a lower quality.

Existing planning policy expects new development to contribute towards the provision and enhancement of play space. Given the scale of growth anticipated across the Euston area, there is an opportunity to address existing deficiencies through both improvements to existing provision and the delivery of new play spaces.

As discussed in the Education chapter, declining birth rates may moderate future demand for children’s play space despite overall population growth. However, there remains a clear need to improve the quality, accessibility and distribution of existing provision.

- **Opportunity / Need:** Upgrade existing valued play space; deliver additional formal play as well as play integrated within public realm.

Productive Green Space:

Euston Open Space Study assessed supply of allotments as below the proposed quantity standard and suggests Somers town and Bloomsbury experience deficiencies in access. LBC own four allotment sites within the borough – none are located within the EAP + buffer; however there are multiple formal growing spaces in the area managed by community groups and housing associations. The recent closure of Story Gardens (as a productive green space just outside of the EAP boundary) has also had an impact on residents within Somers town albeit the site had London wide reach.

Given Kendall allotment Gardens and Clarence Allotment Gardens are located within the EAP boundary, quantitative analysis suggest allotment provision within the EAP is sufficient. However, anecdotal evidence suggests there are long waiting lists to access formal growing space. There are also multiple initiatives that support residents with more informal planters across estates which has not been captured as part of this study.

- **Opportunity / Need:** Continue more distributed approach to growing space within underused spaces on estates to meet demand.



Cumberland Market Gardens:

(Within EAP boundary)

An open green space situated within Regent’s Park Estate. It features a unique cluster of social cultural infrastructure, serving the wider community. This includes a playground, a MUGA as well as the Third Age Project, and Hpod,



Global Generation: Story Garden

(Outside of EAP boundary)

A community garden and a project by the charity Global Generation It is a sustainable urban oasis that has historically been located behind the British Library in King’s Cross, and it is in the process of moving to a permanent new site on the King’s Cross estate.

FUTURE TRENDS & DATA DERIVED DEMAND

Trend Analysis: What broader forces are shaping future demand?

Considering national policy, demographic change, and evolving patterns of use, this table outlines the key upward and downward pressures likely to influence demand for infrastructure over time:

Type:		National	London / GLA	LBC	Drivers / Trends
Outdoor Playspace	S - M Term	↗	↗	→	Under-provision in dense areas; health and child wellbeing agendas sustain long-term demand growth.
	M - L Term	↗	↗	↗	
Productive Green Space / Growing	S - M Term	↗	↗	↗	Demand exceeds supply; food security and sustainability policies amplify future need.
	M - L Term	↗	↗	↗	
Public Parks	S - M Term	↗	↗	↗	Heavily used and politically prioritised; densification and climate adaptation drive expansion and retrofit needs.
	M - L Term	↗	↗	↗	

S-M term: 2025-2035 M-L term: 2035-2050 ↗ Increase demand → Stable demand ↘ Decreasing demand

See appendix D for a full analysis on future trends at a national, London and local scale

Future Quantitative Analysis: What does the data assessment tell us?

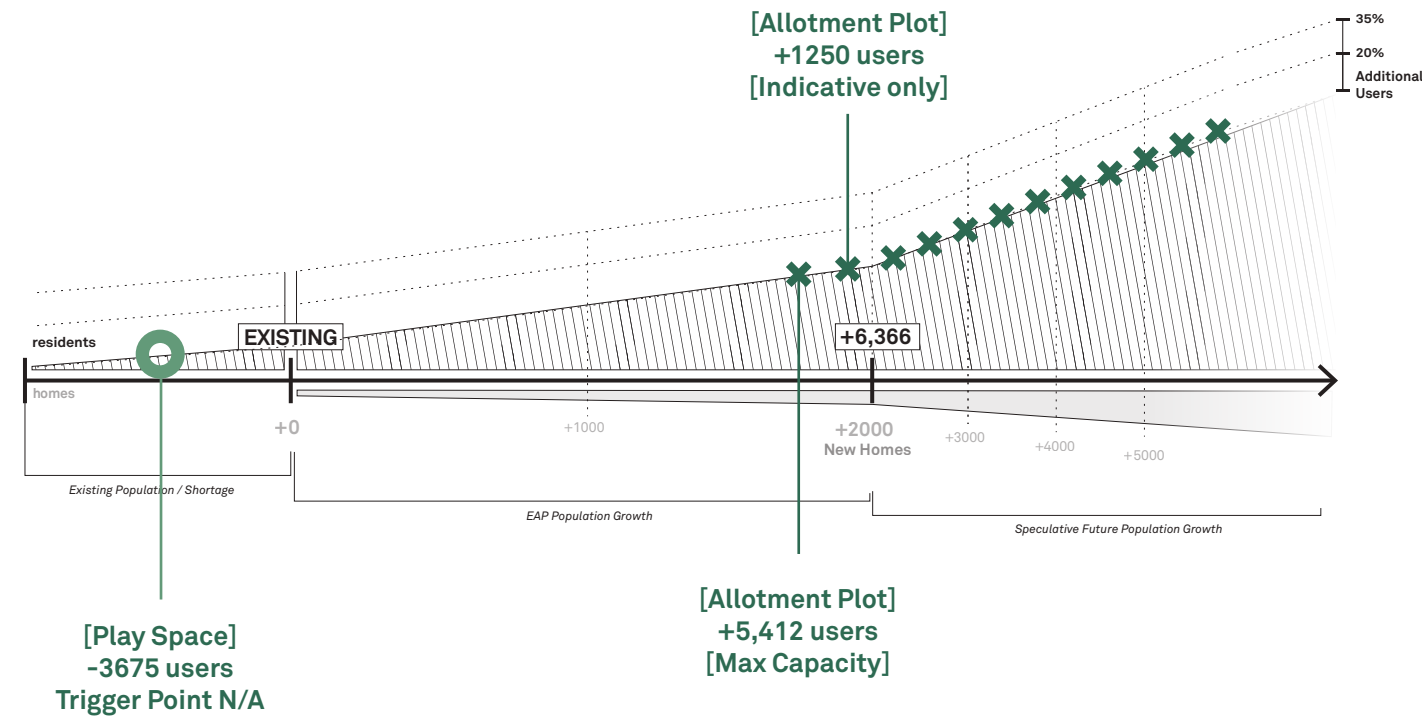
The table below summarises the outputs from the spreadsheet model and considers residential growth in the EAP (c. 2,000 new homes, alongside associated employment growth). It builds on the current position of sufficiency or shortage in provision:

Type:		Study findings (Surplus vs. shortage)	Total Quantum of surplus or shortage (nr. / sqm)	Equivalent Provision	Notes & Reference
Outdoor Playspace *	EAP	Shortage	20,772 sqm	5 x MUGAs, 13 x NEAPs, 13 x LEAPs, 13 x LAPs	Field in Trust Play Space guide
	EAP+B	Shortage	46,832 sqm	10 x MUGAs, 26 x NEAPs, 25 x LEAPs, 25 x LAPs	
Productive Green Space / Growing	EAP	Surplus	4,263 sqm	17 x allotment plots (10 pole)	National Allotment Society
	EAP+B	Shortage	346 sqm	2 x allotment plots (10 pole)	
Public Parks	EAP	Shortage	226,564 sqm	1 x District Park, 1 x Local Parks, 2 x pocket parks	Proportion of regents park included in EAP + buffer calculation only
	EAP+B	Shortage	84,023 sqm	4 x Local Parks	

*Multi-use Games Area (MUGAs), (Neighbourhood Equipped Areas for Play (NEAPs) for older more independent children), Locally Equipped Areas for Play (LEAPs) for young and independent children, Local Areas for Play (LAPs) for very young children.

Future Quantitative Analysis: *When does population growth trigger the demand for an additional facility?*

This diagram shows the points at which the provision of new facilities should be considered across the wider Euston (EAP + buffer). Some facilities are required now (shown as a negative figure), others are required at or beyond the 2000 anticipated new homes + jobs. Demand for the facilities in this category are measured through ‘users’ – a figure combining uptake from residents and a 50% students and workers uplift for public parks.



Future Qualitative Analysis: *What other factors are important to consider?*

Formal Parks / Gardens & Squares:

The existing quantitative shortage of parks and open green space in the EAP boundary is the main driver for the very large quantitative future shortage. In this instance it is very important to consider the wider (EAP + buffer) analysis which includes a portion of Regents park and therefore has a significantly reduced shortage - lowering it to c.84,000 sqm of additional green space required to meet future demand.

LBCs planning guidance (seeking 9 sqm of public open space per resident for schemes over 100 units) should alone result in approximately 40,000sqm if all earmarked growth sites comply – which would contribute significantly to lowering the future shortage. However, other studies have concluded that this may be unachievable and that it will be challenging for LBC to deliver net growth in green space given the densification of the area.

Whilst some of this might be offset by new public realm associated with the British Library expansion, this will be minimal in reducing the area’s shortage. The HS2 Environmental Statement also identifies approximately 17,000 sqm of replacement open space as mitigation for land lost during construction. If delivered, this would make a significant contribution towards reducing the existing deficit, although the final quantum, quality and location of this provision remain to be agreed and have therefore not been relied upon within this assessment.

Play Space:

As outlined in the ‘existing provision & demand analysis’, there is a large existing shortage driving future shortage of playspace. When tested across the other commonly used benchmarks like 0.25 ha play space

per 1,000 population; the future shortage across the EAP + buffer grows to 90,500 sqm. This projected shortage may be moderated by declining birth rates, which are expected to reduce demand for children’s play space despite overall population growth. However, a sustained shortfall in provision is still anticipated.

Given it will be challenging to deliver this amount of formal play in the urban context, future investment should focus on integrating play within the public realm; providing access to existing facilities in school outside typical operating hours and improving green space to accommodate informal play. Qualitative and quantitative analysis has been considered to inform the revised ‘consolidate demand’ figure.

Productive Green Space:

Demand for productive green space / growing space is only triggered with residential growth when considering the wider EAP area. The EAP in isolation is suggested to have sufficient provision. Future shortage for the wider area is minimal (only 350sqm which would equate to c. 1.5 single standard allotment plots).

The Storygarden, which was located in the buffer zone offered c. 4,000 sqm of growing space that served as a park, playspace, community infrastructure and educational space. Whilst this has not been included as supply within the quantitative assessment, there is likely to be a feeling of loss amongst Somers Town residents who valued this as a local green space. This could continue to occur as a quick-win ‘meanwhile’ activation.

The informal growing project currently adopted across estates through providing planters for areas of hard-standing should be encouraged given they are community led and space efficient. This should be encouraged within new developments as well.

Heat Maps: *Where are the cold spots?*



EAP Growth Sites over 100 units	Additional Green Space Required
1. Euston Station +250	5063 m ²
2. Royal Mail Site +140	2835 m ²
3. The Place & Premier Inn +125	2531 m ²
4. 250 Euston Road +115	2329 m ²
6. Cuttings at Park Villages East +350	7088 m ²
8. Cutting at Mornington Terrace +130	2633 m ²
9. Former Maria Fidelis +250	5063 m ²
10. Regent’s Park North +450	9113 m ²
11. Ampthill Estate +120	2430 m ²

Green & Open Space: Heat map showing areas particularly poorly served by formal green space (all types).

Green Space Demand: Additional green space required based on LBC policy of 9 sqm per resident for development over 100 units

HEADLINES & FUTURE CONSIDERATIONS

This section highlights key headlines and priorities for addressing unmet or projected demand. Note that in many cases, it will not be LBC’s responsibility to deliver these uses; however, they may play a role in encouraging delivery through planning levers, partnerships, or funding support. Deliverability refers to the spatial complexity and coordination typically required to deliver each type of infrastructure. Outdoor sports areas and outdoor gyms may be provided within parks and play space, both formally and informally.

**PUBLIC PARKS**

Future Demand for new provision:
Significant

Deliverability:
Requires coordination + LA Led

Priority Locality:
Somers Town, Bloomsbury, Euston Station (within EAP boundary)

**PLAYSPACE**

Future Demand for new provision:
Significant

Deliverability:
Requires coordination + LA Led

Priority Locality:
Somers Town North, Camden Town, Bloomsbury

**PRODUCTIVE GREEN**

Future Demand for new provision:
Moderate

Deliverability:
Requires coordination + LA Led

Priority Locality:
Somers Town, Camden Town

Recommendations: Key challenges, opportunities or strategies

Protect, enhance and strategically expand green space: Given the scale of the identified quantitative deficit and the constraints of a dense urban context, the primary objective should be to prevent any further loss of existing green space through infill or redevelopment. Investment should prioritise upgrading the quality, safety, and usability of existing parks and estate landscapes, addressing maintenance and anti-social behaviour concerns so that spaces feel welcoming and well-managed. While large new parks are unlikely to be achievable, distributed pocket parks and greened public realm in identified cold spots (including Bloomsbury, Regent’s Park Estate North, and Somers Town North) should be delivered where possible, alongside pooled S106/CIL contributions to create more meaningful, multifunctional open spaces. Green space delivered within new developments must be publicly accessible and integrated into the wider neighbourhood network.

Strengthen green corridors and improve access to Regent’s Park: improving safe, legible and pedestrian-friendly green routes - particularly from Somers Town - should be prioritised to better connect residents to Regent’s Park as a major regional asset. The emerging Public Realm Framework should focus on stitching together fragmented spaces into a coherent green network that supports everyday use, biodiversity, and programmed activity. New GI should be installed based on demand data and targeted to address specific challenges (such as flood risk, low canopy cover etc).

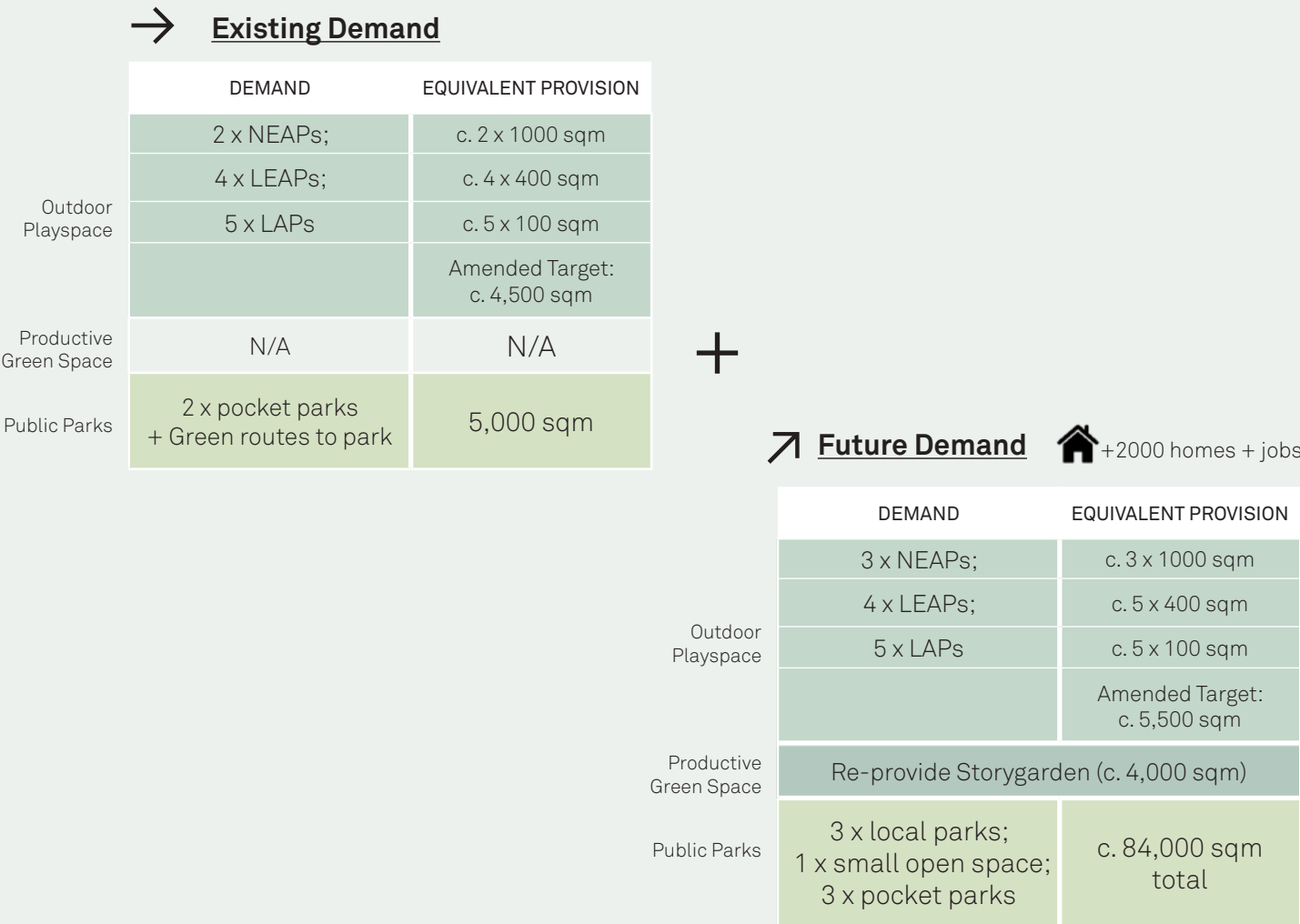
Integrate play, informal recreation and health into the public realm: Given the scale of the identified play space deficit, a flexible approach is required. Play and informal activity should be embedded within estate landscapes, streets and upgraded open spaces rather than relying solely on formal play areas. Provision should cater to older children and young adults, including outdoor gym equipment and informal sports space, and explore widening access to school facilities outside core hours. This approach aligns green infrastructure delivery with preventative health and wellbeing objectives.

Support productive and community-managed green space: Decentralised growing spaces and meanwhile green initiatives should be formally supported and expanded where feasible, recognising their social, environmental and placemaking value. Stewardship models involving community groups or third-sector organisations can improve maintenance, activation and perceptions of safety, while ensuring green spaces remain inclusive and community-focused rather than overly hard-landscaped or commercially driven.

Consolidated Demand: What are the priorities for new infrastructure in Euston?

To establish a clear basis for negotiation and future feasibility testing, the following “consolidated” demand combines both quantitative and qualitative assessments to adjust the demand figures. Distinct from above it removes the existing unmet demand from projected demand figures and only considers the EAP boundary only. Where relevant it suggests alternative types of infrastructure based on qualitative analysis.

- Outdoor Playspace:** Reduced by 50% considering dense urban context. It should be noted that this is not in line with policy targets but is still challenging to achieve within the Euston context.
- Productive Green Space:** No change to existing model output for existing demand; however, prioritise opportunity for reprovision of meanwhile garden on development sites
- Public Parks:** Findings for the EAP+buffer have replaced the EAP boundary - recognising that Regents Park is valued provision which the population within the EAP can access. Two pocket parks have been added to existing demand for Somers Town locality to balance the uneven distribution of green space across the EAP today.



03 PLANNING FOR THE FUTURE

OVERVIEW

This report has largely understood infrastructural supply and demand through specific categories of infrastructure. This lens was used to make sense of the otherwise broad and complex umbrella of 'social infrastructure' in order to plot what kinds of facilities are necessary to serve a growing population in the EAP area.

Yet categories in themselves have their limitations, much like Planning Use Classes and business SIC codes. Many of the facilities included in this study resist neat categorisation, hosting a variety of activity across education, community, cultural, sports and more. Infrastructure inherently does not function in silos. Services are often delivered through shared, multi-purpose, or co-located spaces, and many neighbourhoods rely on complementary mixes of provision rather than stand-alone uses.

This chapter of the study aims to address the missing pieces of this analysis, providing some nuance around the edges of the data. As such, we address the following cross-category analytical lenses:

- **Co-location and Multi-functionality**

How can the right mix of complementary infrastructure achieve Camden's strategic goals?

- **Accessibility and Affordability**

Is there enough accessible and affordable space now and with additional pressure?

- **Emerging social and cultural trends**

How can we anticipate the new forms of infrastructure that will emerge in the future?

- **The impacts of a climate breakdown**

What kinds of infrastructure is necessary for the green transition and how can negative impacts on residents be mitigated?

Of particular importance is how these insights impact how we understand the vision of Euston in 2051. The data shows us what is needed based on our understanding of society and what social infrastructure needs to offer now. How will the needs of future residents differ? And how can we protect the interests of long-standing residents in an area witnessing significant urban development and demographic changes?

These factors provide a baseline consideration that may require further development as part of future studies.

CO-LOCATION AND MULTI-FUNCTIONALITY

Many of the facilities included in this study have been included in one category where they could have been housed in another. These facilities that resist neat categorisation should be celebrated and nurtured, acting as one-stop-shops for a variety of social infrastructures. This is particularly true of community halls and youth centres that host a diverse range of activities throughout the week. Identifying the gaps in spaces and schedules within these existing facilities presents an immediate easy-win opportunity to house some of

the services in shortage across the EAP.

There are also many new opportunities for co-location to consider - particularly for complementary services such as healthcare and community. As the public and charitable funding landscape and individual spending power become increasingly unpredictable, building social infrastructure with diversified business models can ensure they are more likely to survive and continue to serve the needs of residents in the future.

Examples from across Euston:



Third Age Project

Categorised as 'Healthcare' but also supporting activities in Education, Community, Culture and Sports.

Operating for nearly three decades, the Third Age Project is a grassroots non-profit organisation that address loneliness in older adults (aged 60 and up) in the Regent's Park ward area through a range of community activities. The Project is a vital service for low-income adults in the neighbourhood, providing a wide range of social, cultural, educational, healthy living and basic life skill courses, as well as befriending and support services. This includes activities like language lessons, lunch clubs, arts and crafts and exercise classes, as well as culturally targeted activities such as Bollywood dancing and a Bangladeshi Women's Walking Group.



Samuel Lithgow Youth Centre

Categorised as 'Community' but also supporting activities in Healthcare, Culture and Sports.

The Centre is located at the heart of the Regent's Park Ward and serves the whole of the west Euston area. Their main services target disadvantaged young people aged 8 – 19 through three different youth projects, alongside which they offer supporting activities to lone parents and under 5's, the unemployed, BAME groups, women, and senior citizens.

Activities include sports, IT, music, gym, healthy eating and cooking, training, drugs awareness, sex and relationships education (SRE), homework support, mentoring, and employment advice sessions to children / young people. SLYC also offers several sports, leisure, training, health, and fitness activities for the whole community.



Somers Town Community Association

Categorised as 'Community' but also supporting activities in Education, Healthcare and Culture.

The St Pancras and Somers Town Living Centre is one of two community spaces operated by the Somers Town Community Association (STCA) in Euston. STCA also operate a community space at 150 Ossulston St, a one-stop-shop for the community embedded within the ground floor of an estate block. Many residents utilise the services including the Somers Town Job Hub, health and wellbeing programs, Community Cafe, Youth program, and Climate and Sustainability initiatives. While the Centre caters to a majority resident population, they also don't turn anyone away, providing services for families of residents who grew up on the estate as well as being a hub for many refugees arriving in the city via St Pancras.

ACCESSIBILITY AND AFFORDABILITY

Euston's social infrastructure is operated by a range of different providers - each offering access to their facilities at different price points from free to market rate. This is a significant factor in whether the facility is genuinely accessible to residents. Many facilities in high-demand areas such as Euston Road, Bloomsbury, and Camden High Street cater primarily to workers, students, and visitors rather than to the resident population. Our data analysis of supply and demand has factored this in to some degree - for example, boutique gyms such as Barry's have not been counted as part of the overall gym supply. Equally, the study has taken into account the visitor numbers of larger institution such as the British Library that has a London-wide catchment - albeit the new extension is expected to provide additional space targeted at local community.

What is affordable in London today?

The 2025 GLA State of London report states that *'London remains the most unequal region in the UK with respect to household incomes (...) the top decile of earners made 11 times more than the bottom decile.'*

Given the higher levels of deprivation within the EAP + buffer compared with Camden and London averages, it is essential that certain forms of provision remain accessible, affordable, and rooted in local neighbourhoods, protected against demographic shifts. Otherwise, any projected surplus will not be experienced as a surplus by residents.

Existing accessible facilities are already pushing the upper end of affordability for many Euston residents - with activities such as swimming increasingly expensive nationwide as a product of high overheads.

Key to ensuring accessibility today are the "one-stop shops," providing not only affordable programming but also access to wider services under one roof. Their value is difficult to quantify due to the diversity of services and spaces. For example, Samuel Lithgow Youth Centre hosts activities for young people, a daytime gym used by

local ethnic minority women, and offers discreet consultation space for healthcare outreach. In addition, it is important to recognise where accessible public spaces can complement more formal, fit-for-purpose facilities that are otherwise inaccessible to local communities. For example, a pocket park can function as an informal football pitch and a community square can accommodate cultural events.

Examples of affordable facilities



Estate courtyards and green spaces repurposed for outdoor exercise classes, play-on-the-way, or community gardening. E.g. Caldwell Gardens Gym.



Halls made available out-of-hours for community. Library foyers and meeting rooms used for warm spaces, digital skills support, homework clubs, or quiet study. E.g. Lea Bridge Library.



Community-run sports, parent meet-ups, or local events in public parks. E.g. Football in Markfield Park.



Community kitchens in estates or centres supporting low-cost communal meals, cooking classes, and food distribution. E.g. SPCA.

EMERGING SOCIAL AND CULTURAL TRENDS

As we have seen in the increase in work-from-home since Covid-19, we cannot take our current expectations of everyday lifestyles as a given. Where this document outlined the projected requirements for specific typologies of provision, the way that these facilities are delivered can vary significantly based on resident and institutional demand, site capacities and anticipated trends and growth areas. For example, we provide a quantum of required space in the category of 'outdoor sports', but this could be delivered across a range of types of amenities including MUGAs, tennis courts, sports pitches and parks. Indeed, this could also account for the emerging markets of paddle /pickleball.

The same can be said of cultural spaces. In our analysis we break down required provision across typologies such as galleries, rehearsal spaces, cultural venues and pubs. Yet as the landscape of cultural funding changes and the way we consume culture adapts to new technologies and social conventions, these spaces in themselves could need to be reinvented. For example, anecdotal evidence suggests that young people don't go to pubs as frequently as they did a decade ago. How do these typologies need to adapt to continue to offer valuable cultural space to residents in the future? Many of these facilities are also delivered by the market, so are driven by the profitability of the business rather than providing social good.

It remains to be seen how the rollout of emerging AI technologies will impact the way that citizens



Image: Pickleball players in a sports hall.

experience social infrastructure in the future. There are already examples of key infrastructure in the UK adopting new technologies to improve efficiency such as the NHS move to digital triaging for GP appointments. It is also unclear how this will impact what constitutes leisure activity.

Industry leaders insist that innovation will lead to societal change, but each new platform comes with its own risks. Euston is in the rare position of hosting the London AI campus and Google and Meta in close proximity which presents an opportunity for residents to access new technologies and teaching as part of social value commitments. Equally, it is important for local authorities to consider the negative impacts of adopting technology and ensuring that residents without internet literacy do not slip through the cracks.



Image: Lesson at the London AI campus.

04 CONCLUSION

This study has sought to assess the existing capacity of social and community infrastructure across Euston, in order to benchmark current provision, identify unmet demand, and project future demand as development comes forward across the area.

It provides an initial evidence base to support spatial planning, capacity testing, feasibility work, further research, and early-stage negotiation. However, as a high-level, data-driven study, the methodology has a number of limitations. While quantifying demand across the EAP is useful for strategic planning, it cannot fully capture the nuance of how demand is experienced across different infrastructure categories, nor reflect the operational, qualitative, and place-based factors that influence how facilities function in practice. It also cannot fully anticipate changing patterns of use, evolving service models, market forces, funding constraints, and wider social, economic and technological change that may influence future infrastructure demand.

Despite these limitations, the study plays an important role in establishing a starting point for better understanding of demand. It highlights where pressures are likely to emerge or intensify, and where intervention, coordination, and investment will be required. Moving forward, LBC - working collaboratively with developers, service providers, and communities - will play a key role in interpreting and applying this evidence to ensure that infrastructure delivery responds to both existing and future populations in an equitable and deliverable way.

The following recommendations suggest some of the ways in which LBC and MHCLG may choose to use this evidence to inform strategic planning across the EAP. They should be considered within the context of ongoing work by Government, the Euston Housing Delivery Group, the Greater London Authority and LBC to explore opportunities for additional housing and regeneration beyond the current EAP assumptions, which may generate further demand for social and community infrastructure over time.

RECOMMENDATIONS & NEXT STEPS

- **Further understand how this aligns with lived experience:** LBC has a strong and growing track record of community engagement. While this study has reviewed existing engagement outputs and incorporated community priorities where possible, its findings should be further tested against residents' lived experience. This will help to validate where identified demand aligns with how demand is felt on the ground, and where additional nuance or adjustment may be required. This should include engagement with service providers which will build a stronger picture of what factors (infrastructural, labour, funding etc) are limiting their ability to meet growing future demand.
- **Address severance and improve connectivity between localities:** Euston is currently characterised by significant physical and perceptual severance, which limits movement between neighbourhoods and reinforces siloed patterns of access to infrastructure. Future masterplanning should actively seek to reduce this fragmentation by improving connectivity between localities, enabling residents to access a wider range of services within reasonable proximity. Designing for better integration - through movement routes, public realm, and the distribution of facilities - will be critical to ensuring that infrastructure functions as part of a cohesive network rather than isolated clusters.
- **Recognise the importance of funding and access to provision:** For many infrastructure types, delivery is shared across public sector, voluntary and community sector (VCS), and private sector providers (e.g. dentists, adult education, sports facilities, cultural venues). Local residents are often priced out of private provision. While LBC is neither best placed nor able to deliver all services directly, there is an important role in exploring creative solutions including funding streams, partnerships, and policy levers - and in working with private providers to explore more accessible offers, outreach, and community-facing models.
- **Understand spatial implications and delivery approaches:** Building on the evidence in this study, there is a need to further explore the spatial implications of meeting future demand. This includes identifying where provision should be located, how it can be accessed, and what forms it should take. Consideration should be given to delivery models that do not rely solely on new standalone facilities, including co-location, intensification of existing assets, and distributed or "doorstep" provision. This work will support clearer asks in discussions with development partners and enable more robust feasibility and option testing across earmarked growth sites.
- **Sense-check and refine ambitious outputs:** In some instances, the quantitative analysis indicates very high levels of surplus or shortage. These outputs should be treated with caution and tested further through more detailed, sector-specific studies. Such work can build on this baseline analysis while incorporating more granular data, operational insight, and service-specific benchmarks to arrive at more realistic and actionable conclusions.
- **Respond proactively to areas of significant unmet demand:** For infrastructure categories with substantial existing shortfalls (such as indoor and outdoor sports provision and playspace) LBC should begin to explore how demand can be met both within and beyond the immediate study area. Early engagement with development partners and operators will be important to understand appetite for partnership approaches, particularly where the areas commercial growth allows for viable delivery models that also meet social need.

APPENDICES

SUPPORTING DOCUMENTS / TOOLS:

- Euston Social Infrastructure Demand Model Instructions (pdf) - *Pragmatix Advisory*
- Uplift Inputs Spreadsheet (excel) - *Pragmatix Advisory*
- Euston Social Infrastructure Demand Spreadsheet Model / tool (excel) - *Pragmatix Advisory*

APPENDICES:

- Appendix A. Methodology (pdf) - A00
- Appendix B. Area Mapping (pdf) - A00
- Appendix C. Supply Dashboard (excel) - A00
- Appendix D. Trend forecasting (excel) - A00
- Appendix E. Socioeconomic Baseline report (pdf) - Pragmatix Advisory
- Appendix F. Engagement Log (excel) - A00
- Appendix G: Space Equivalent Provision (excel) - A00

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