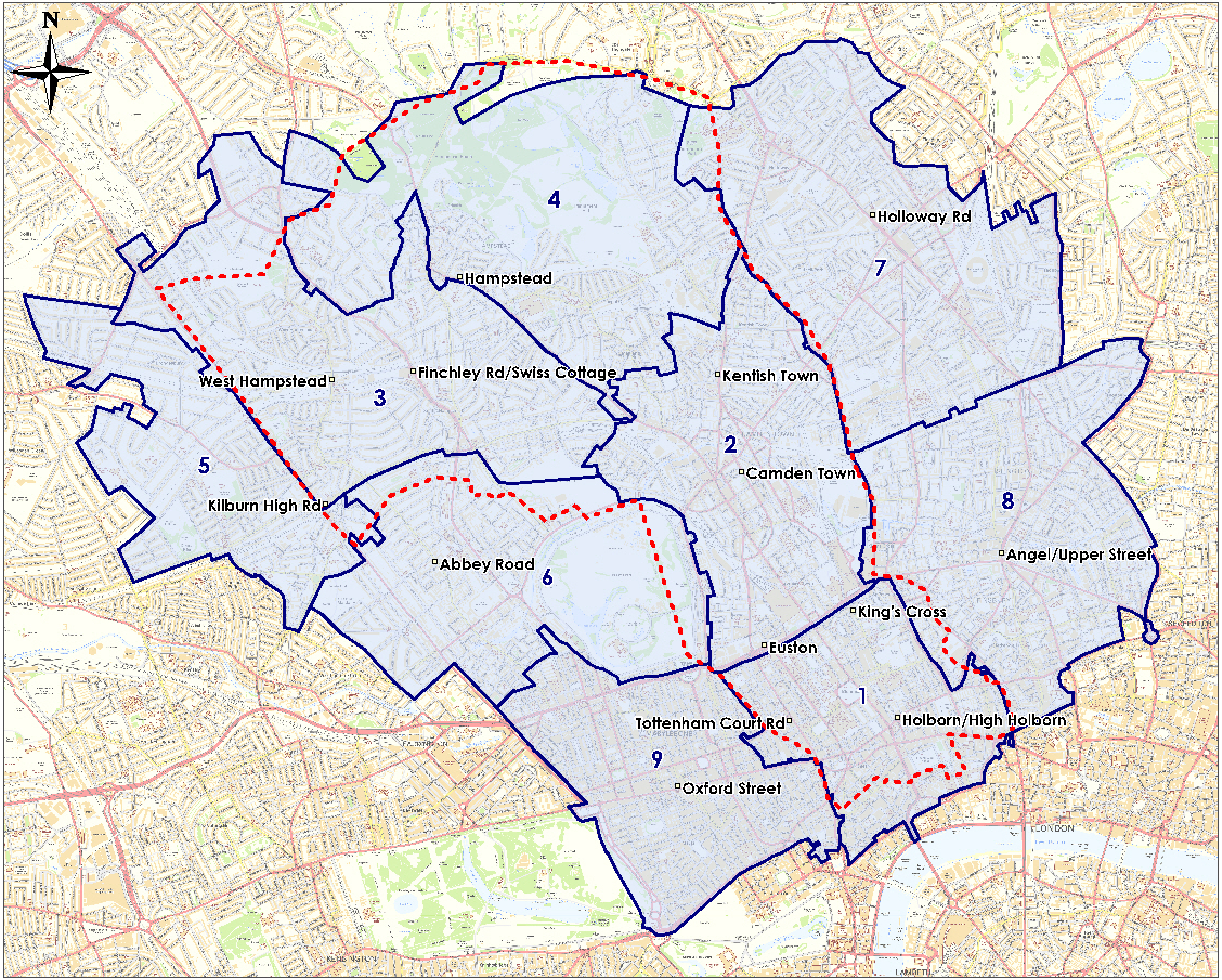
Camden Town Centre and Retail Study 2013

Plans



GVA

Plan 1 - Household telephone survey area

Key

Camden Borough boundary

Survey Area

Survey Zone

Camden Retail and Town Centre Study 2013

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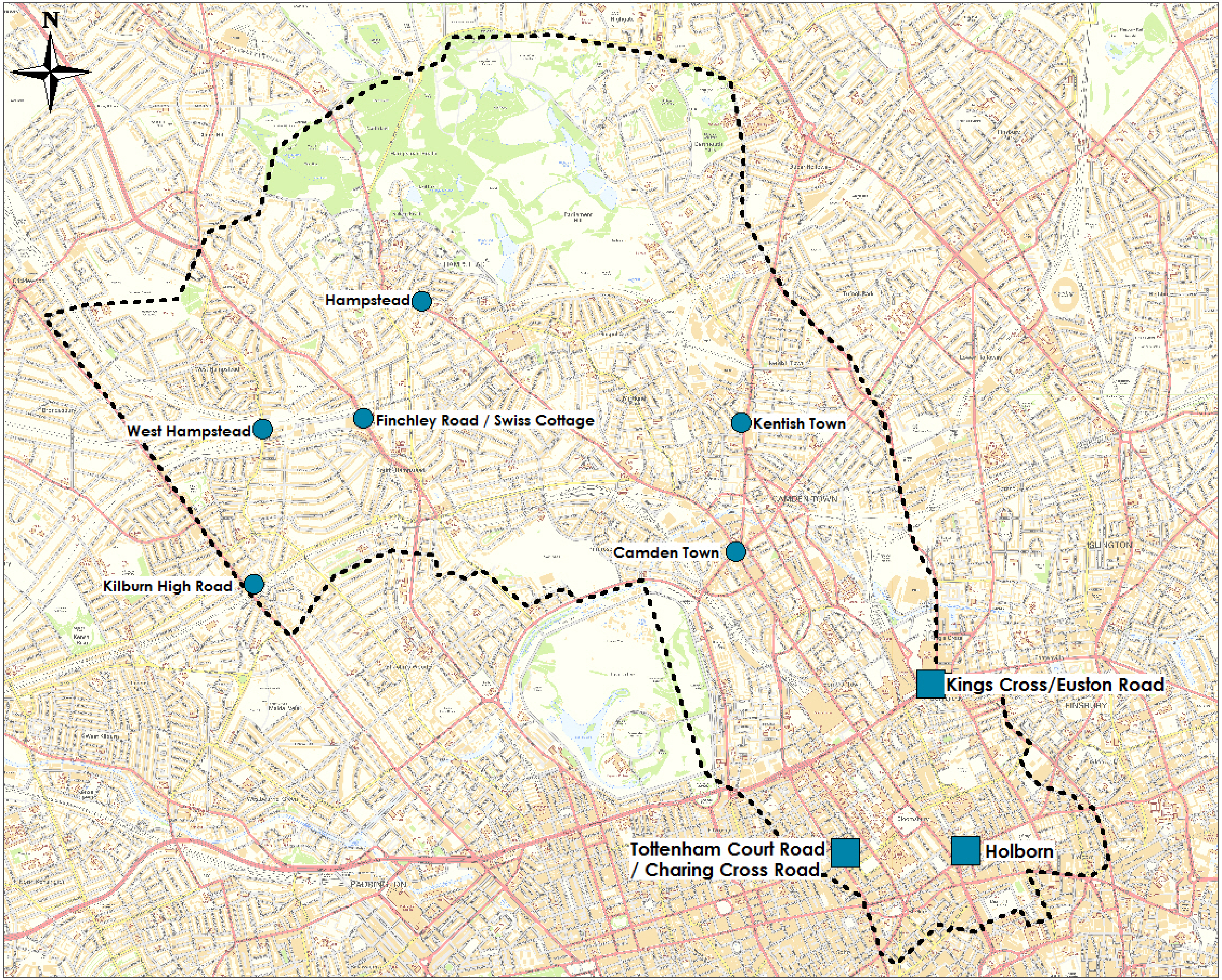


GVA

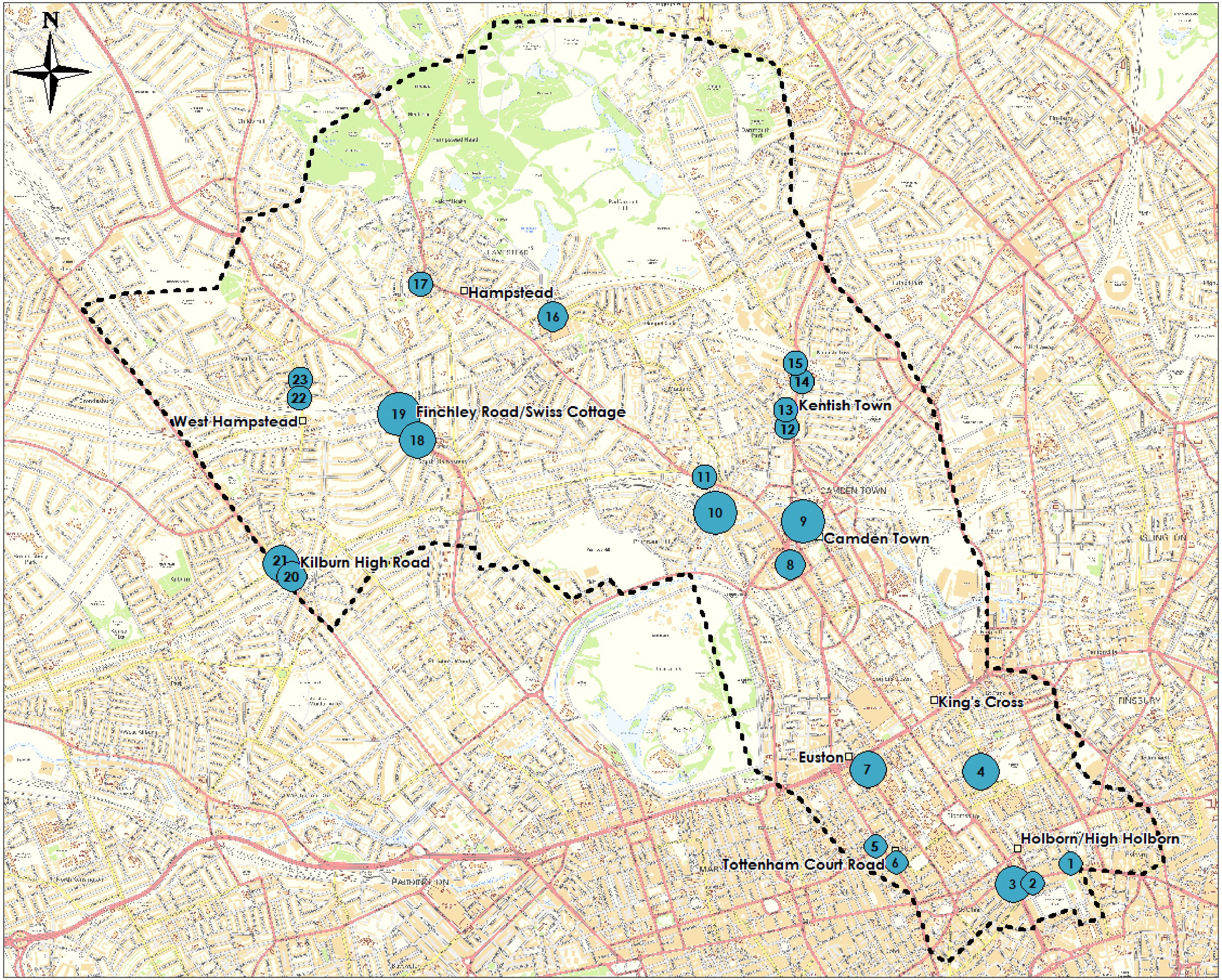
Plan 2 - Camden retail hierarchy

Key

Camden Borough boundary

Central London Frontage

Town Centre



GVA

Plan 3a - Key foodstore attractors

Key

Camden Borough boundary

Foodstore

Size (total net floorspace)

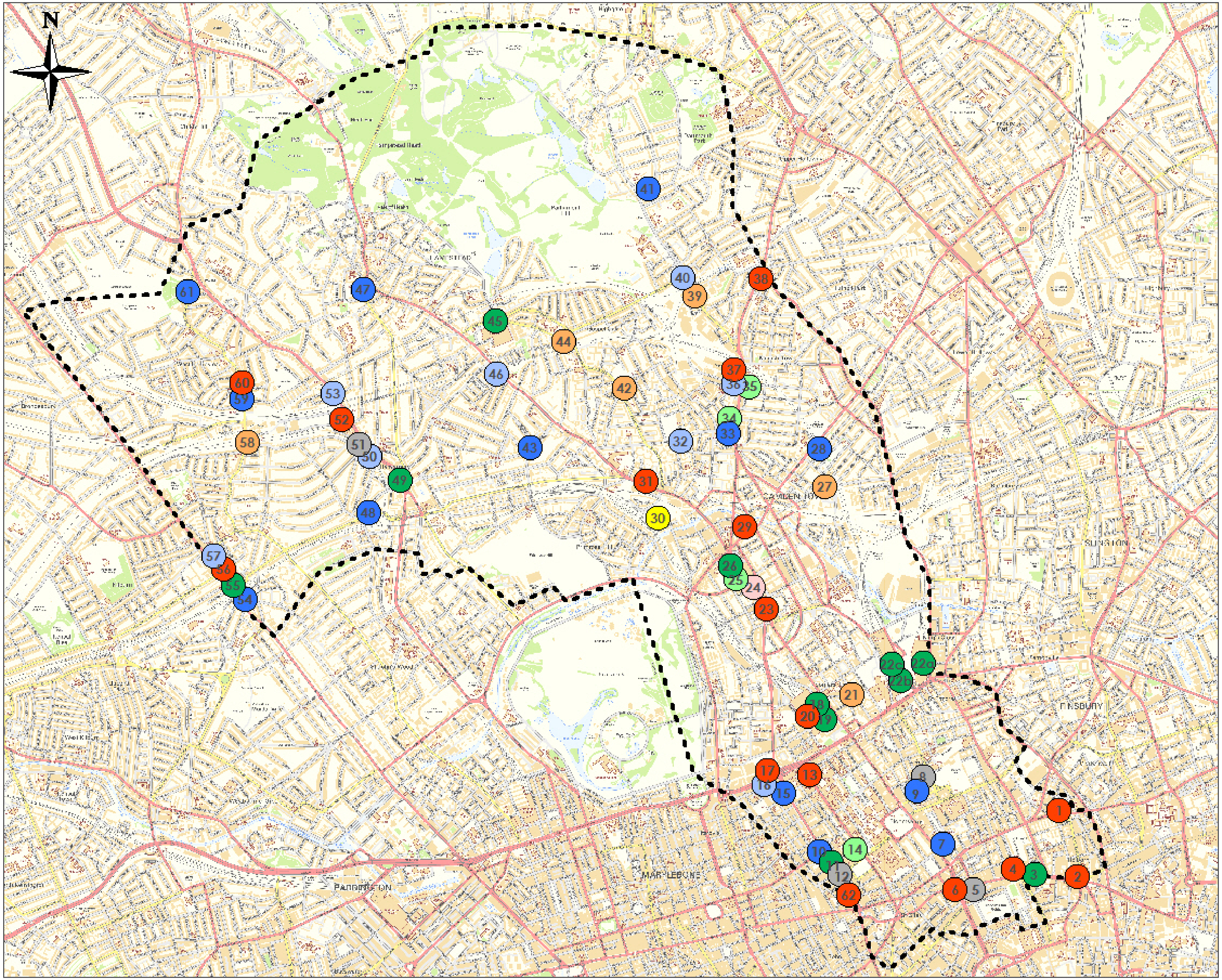
<500 sq m

500 - 1,000 sq m

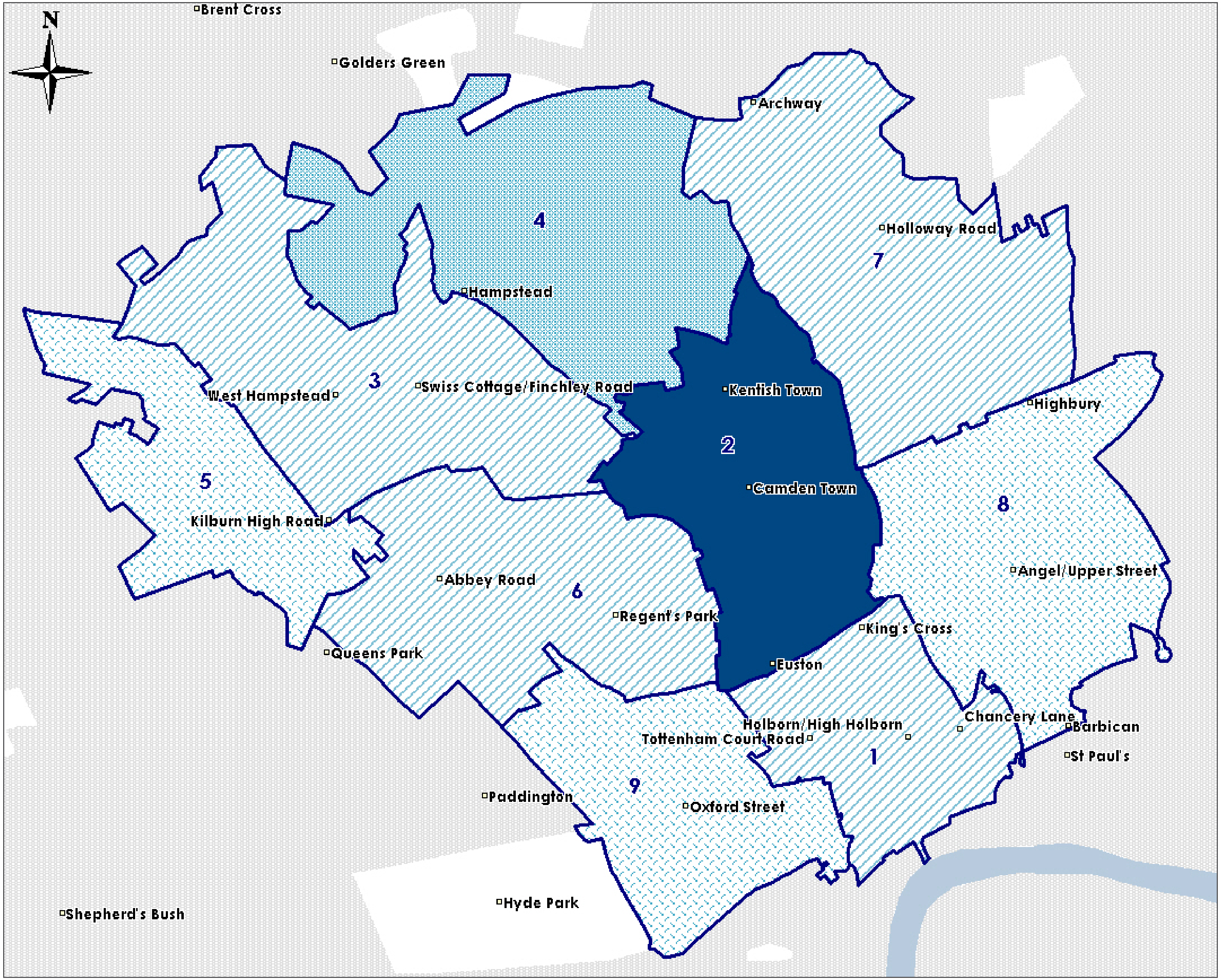
1,000 - 3,000 sq m

> 3,000 sq m

Ref	Store/Address
1	Sainsbury's Local, Mid City Place, High Holborn, HOLBORN
2	Little Waitrose, High Holborn, HOLBORN
3	Sainsbury's Central, Kingsway, HOLBORN
4	Waitrose, The Brunswick (near Russell Square), BLOOMSBURY
5	Tesco Metro, Goodge Street, TOTTENHAM COURT ROAD
6	Waitrose, TOTTENHAM COURT ROAD
7	Sainsbury's Local, Warren Street, TOTTENHAM COURT ROAD
8	Marks and Spencer, Camden High Street, CAMDEN TOWN
9	Sainsbury's, Camden Road (large Sainsbury's), CAMDEN TOWN
10	Morrisons, Chalk Farm Road, CAMDEN TOWN / CHALK FARM
11	Sainsbury's Local, Chalk Farm Road, CHALK FARM
12	Tesco Express, Kentish Town Road, KENTISH TOWN
13	Co-op, Kentish Town Road/Prince of Wales Road, KENTISH TOWN
14	Co-op, 250-254 Kentish Town Road (north), KENTISH TOWN
15	Sainsbury's Local, Kentish Town Road, KENTISH TOWN
16	Marks and Spencer, Simply Food, Pond Street, Hampstead, HAMPSTEAD
17	Tesco Express, Heath Street, HAMPSTEAD
18	Waitrose, Finchley Road, FINCHLEY ROAD / SWISS COTTAGE
19	Sainsbury's, o2 Centre, Finchley Road, FINCHLEY ROAD / SWISS COTTAGE
20	Marks and Spencer, Kilburn High Road, KILBURN
21	Sainsbury's, Kilburn High Road, KILBURN
22	Tesco Express, West End Lane, WEST HAMPSTEAD
23	Sainsbury's Local, West End Lane, WEST HAMPSTEAD


N
Plan 3b - Significant foodstore provision in the borough
Key
Camden Borough boundary
Foodstore
Operator
Co-op
Lidl
Marks & Spencer
Morrisons
Nisa
Sainsburys
Tesco
Waitrose
Other (e.g. Costcutter, Iceland and Budgens)

Ref	Store / Address
1	Sainsbury's Local, Jameson House, Clerkenwell Road, CLERKENWELL
2	Sainsbury's Local, Fetter Lane, HOLBON
3	Marks and Spencers, Chancery Lane, HOLBORN
4	Sainsbury's Local, Mid City Place, High Holborn, HOLBORN
5	Little Waitrose, High Holborn, HOLBORN
6	Sainsbury's Central, Kingsway, HOLBORN
7	Tesco Express, Southampton Row, HOLBORN
8	Waitrose, The Brunswick (near Russell Square), BLOOMSBURY
9	Tesco Express, Bernard Street, RUSSELL SQUARE
10	Tesco Metro, Goodge Street, TOTTENHAM COURT ROAD
11	Marks and Spencers, TOTTENHAM COURT ROAD
12	Waitrose, TOTTENHAM COURT ROAD
13	Sainsbury's Local, Warren Street, TOTTENHAM COURT ROAD
14	Co-op, 12-20 Store Street / Gower Street, TOTTENHAM COURT ROAD
15	Tesco Express, 124-125 Tottenham Court Road (north, near Warren Street Station), WARREN STREET
16	Londis, Euston Road, TOTTENHAM COURT ROAD
17	Sainsbury's Local, Euston Tower, Euston Road, WARREN STREET
18	Marks and Spencer, Simply Food, Euston Station (smaller store, Platform 8-11), EUSTON
19	Marks and Spencer, Simply Food, Euston Station (main store), EUSTON
20	Sainsbury's Local, Euston Station, EUSTON
21	Nisa, Chalton Street, near EUSTON
22a	Marks and Spencer Simply Food, King Cross Station, KINGS CROSS
22b	Marks & Spencer Simply Food, St Pancras Station, KINGS CROSS
22c	Marks & Spencers, St Pancras Station, KINGS CROSS
23	Sainsbury's Local, Camden High Street, MORNINGTON CRESCENT / CAMDEN TOWN
24	Lidl, Camden High Street, CAMDEN TOWN
25	Co-op, Camden High Street, CAMDEN TOWN
26	Marks and Spencer, Camden High Street, CAMDEN TOWN
27	Nisa, Agar Grove, KINGS CROSS
28	Tesco Express, Camden Road, Esso Petrol Station, CAMDEN TOWN
29	Sainsbury's, Camden Road (large Sainsbury's), CAMDEN TOWN
30	Morrisons, Chalk Farm Road, CAMDEN TOWN / CHALK FARM
31	Sainsbury's Local, Chalk Farm Road, CHALK FARM
32	Costcutter, Prince of Wales Road, KENTISH TOWN
33	Tesco Express, Kentish Town Road, KENTISH TOWN
34	Co-op, Kentish Town Road/Prince of Wales Road, KENTISH TOWN
35	Co-op, 250-254 Kentish Town Road (north), KENTISH TOWN
36	Iceland, Kentish Town Road, KENTISH TOWN
37	Sainsbury's Local, Kentish Town Road, KENTISH TOWN
38	Sainsbury's Local, Fortress Road, TUFNELL PARK
39	Nisa, Highgate Road, GOSPEL OAK / KENTISH TOWN
40	Costcutter, Highgate Road, KENTISH TOWN / GOSPEL OAK
41	Tesco Express, Swains Lane / Highgate Road, DARTMOUTH PARK
42	Nisa, Queens Crescent, GOSPEL OAK
43	Tesco Express, Englands Lane, BELSIZE PARK
44	Nisa, Dunboyne Road, GOSPEL OAK / BELSIZE PARK
45	Marks and Spencer, Simply Food, Pond Street, Hampstead, HAMPSTEAD
46	Budgens, Haverstock Hill, BELSIZE PARK
47	Tesco Express, Heath Street, HAMPSTEAD
48	Tesco Express, Belsize Road, SOUTH HAMPSTEAD
49	Marks and Spencer, Finchley Road, FINCHLEY ROAD / SWISS COTTAGE
50	Iceland, FINCHLEY ROAD / SWISS COTTAGE
51	Waitrose, Finchley Road, FINCHLEY ROAD / SWISS COTTAGE
52	Sainsbury's, o2 Centre, Finchley Road, FINCHLEY ROAD / SWISS COTTAGE
53	Costcutter, Finchley Road, FINCHLEY ROAD / SWISS COTTAGE
54	Tesco Express, Kilburn High Road, KILBURN
55	Marks and Spencer, Kilburn High Road, KILBURN
56	Sainsbury's, Kilburn High Road, KILBURN
57	Iceland, Kilburn High Road, KILBURN
58	Nisa, West End Lane, WEST HAMPSTEAD
59	Tesco Express, West End Lane, WEST HAMPSTEAD
60	Sainsbury's Local, West End Lane, WEST HAMPSTEAD
61	Tesco Express, Fortune Green Road, FORTUNE GREEN
62	Sainsburys Central, TOTTENHAM COURT ROAD



GVA

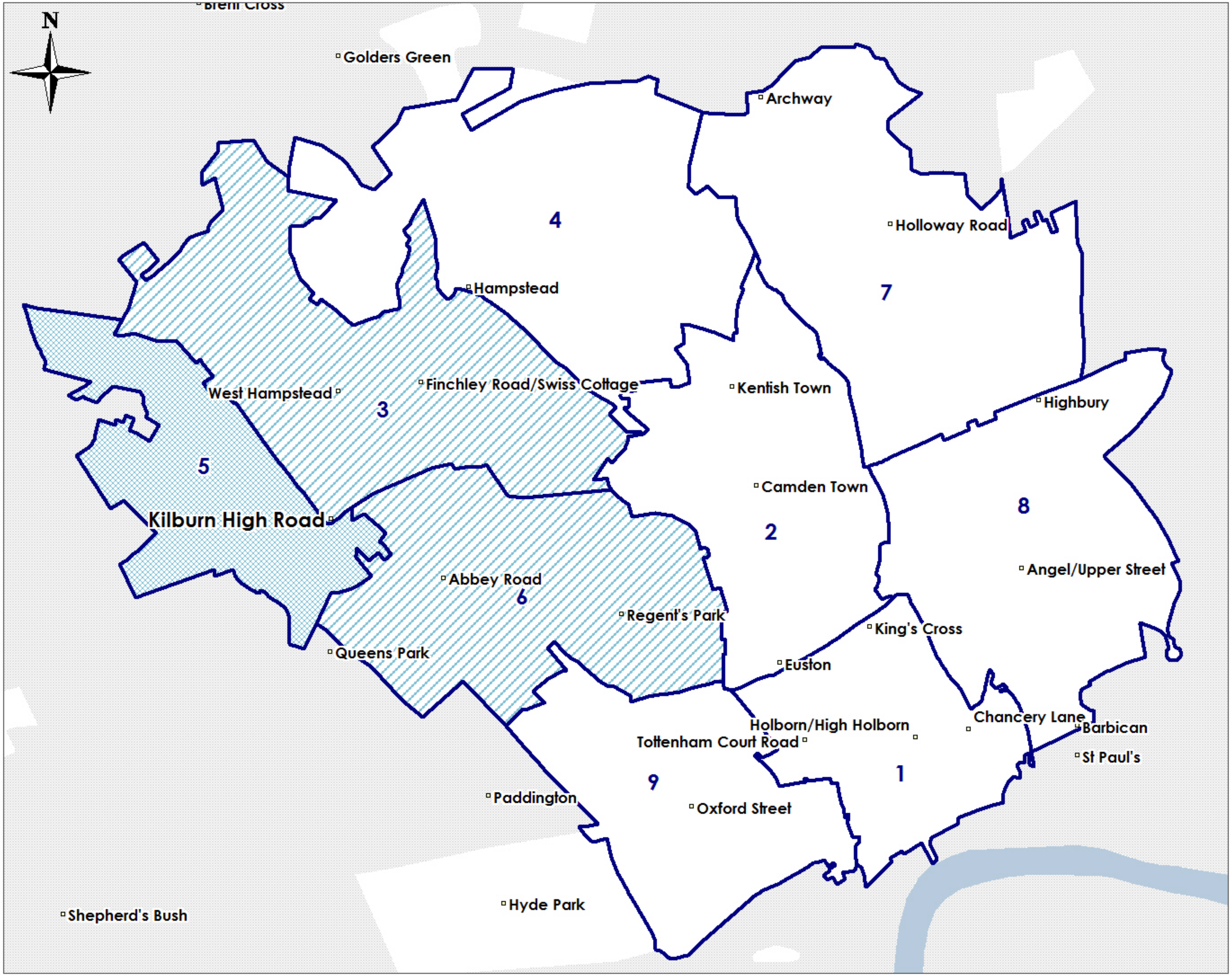
Plan 4a - Camden Town Convenience Goods Market Share

Key

Study Area & Survey Zones

Comparison Goods Market Share (%)

- 0.1 - 4.9
- 5 - 14.9
- 15 - 29.9
- 30 - 44.9
- 45 - 59.9
- 60 - 74.9



GVA

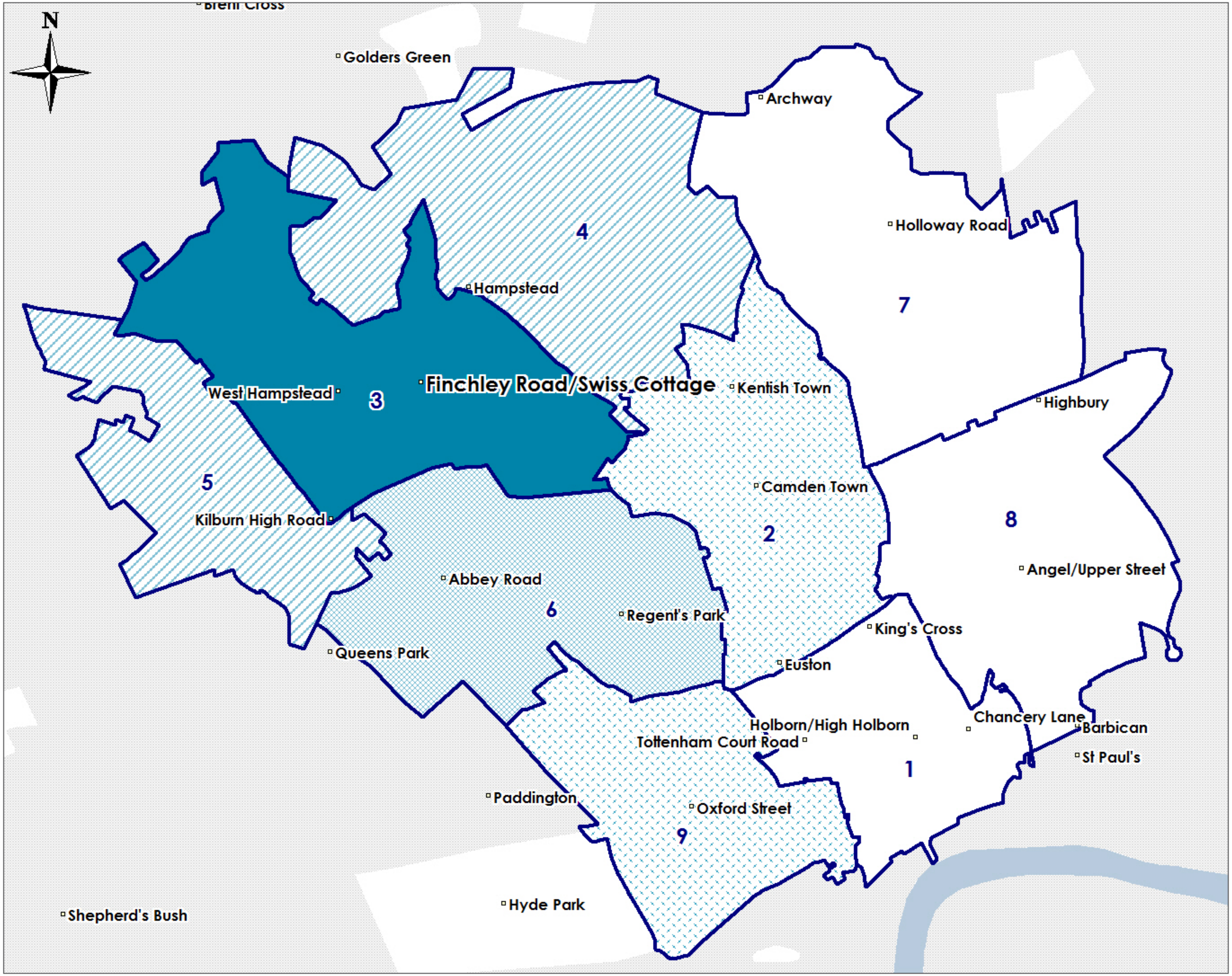
Plan 4b - Kilburn High Road convenience goods market share

Key

Study Area & Survey Zones

Comparison Goods Market Share (%)

- 0.1 - 4.9
- 5 - 14.9
- 15 - 29.9
- 30 - 44.9
- 45 - 59.9
- 60 - 74.9



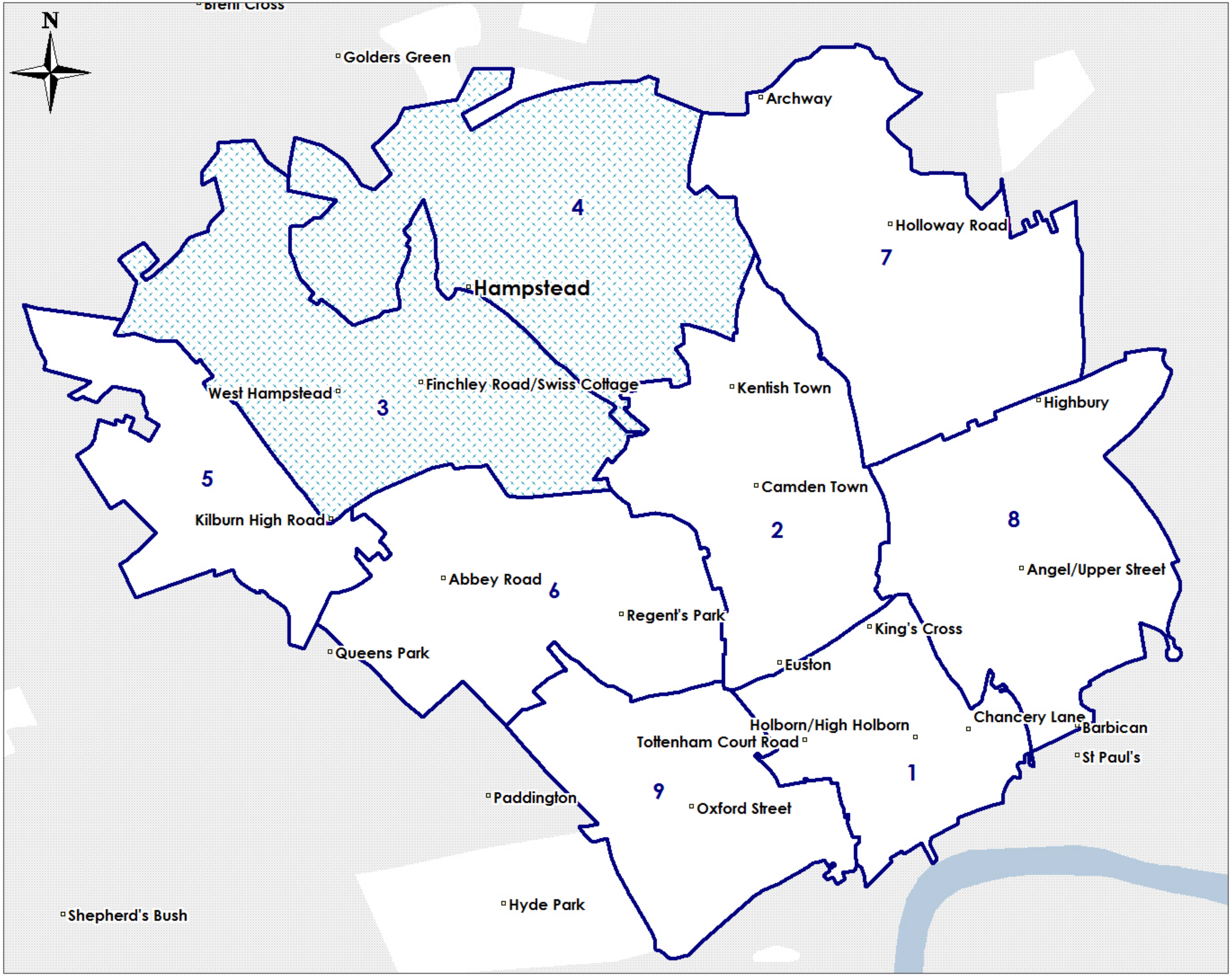
Plan 4c - Finchley Road / Swiss Cottage convenience goods market share

Key

Study Area & Survey Zones

Comparison Goods Market Share (%)

- 0.1 - 4.9
- 5 - 14.9
- 15 - 29.9
- 30 - 44.9
- 45 - 59.9
- 60 - 74.9



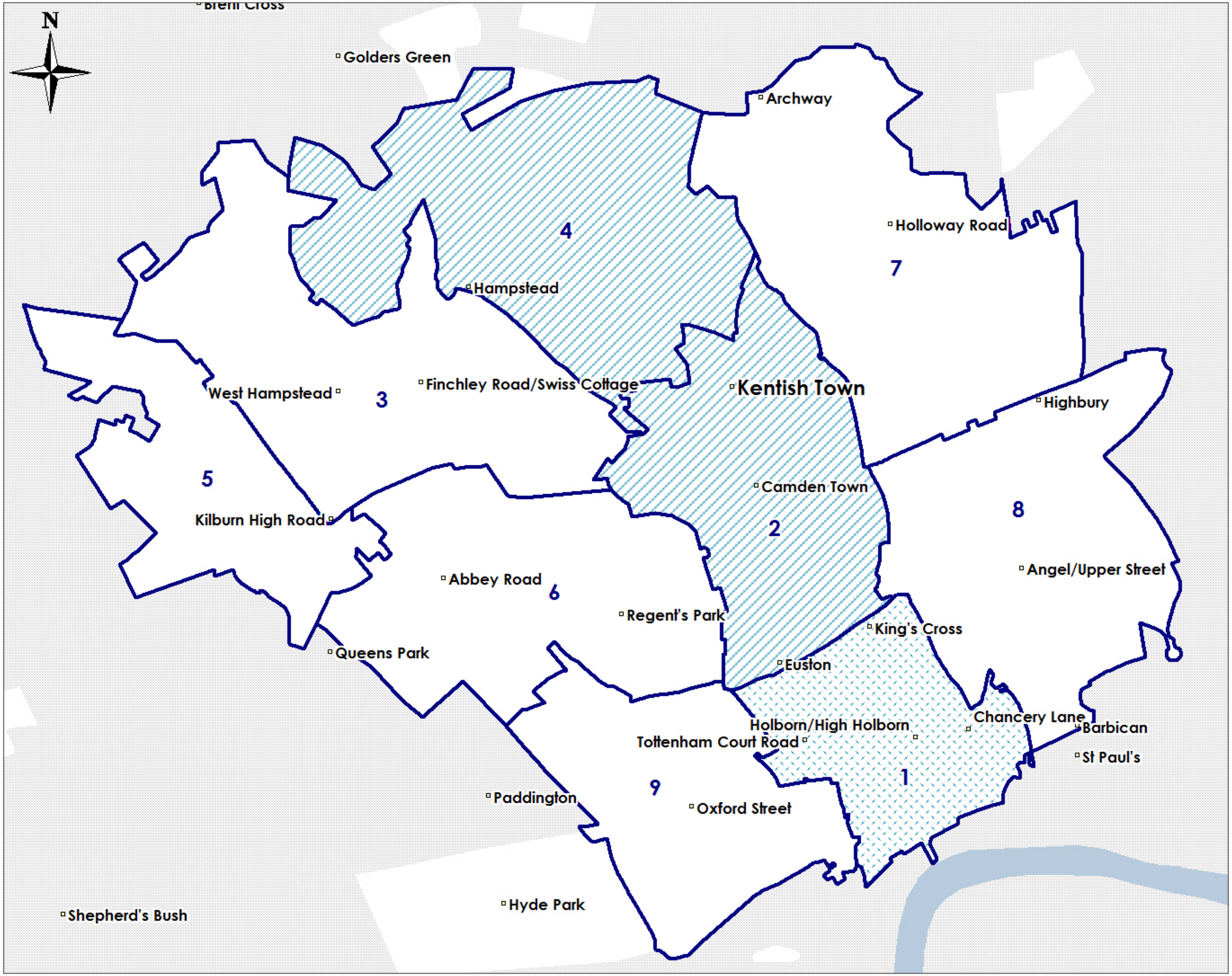
Plan 4d - Hampstead convenience goods market share

Key

Study Area & Survey Zones

Comparison Goods Market Share (%)

- 0.1 - 4.9
- 5 - 14.9
- 15 - 29.9
- 30 - 44.9
- 45 - 59.9
- 60 - 74.9



Plan 4e - Kentish Town convenience goods market share

Key

Study Area & Survey Zones

Comparison Goods Market Share (%)

- 0.1 - 4.9
- 5 - 14.9
- 15 - 29.9
- 30 - 44.9
- 45 - 59.9
- 60 - 74.9

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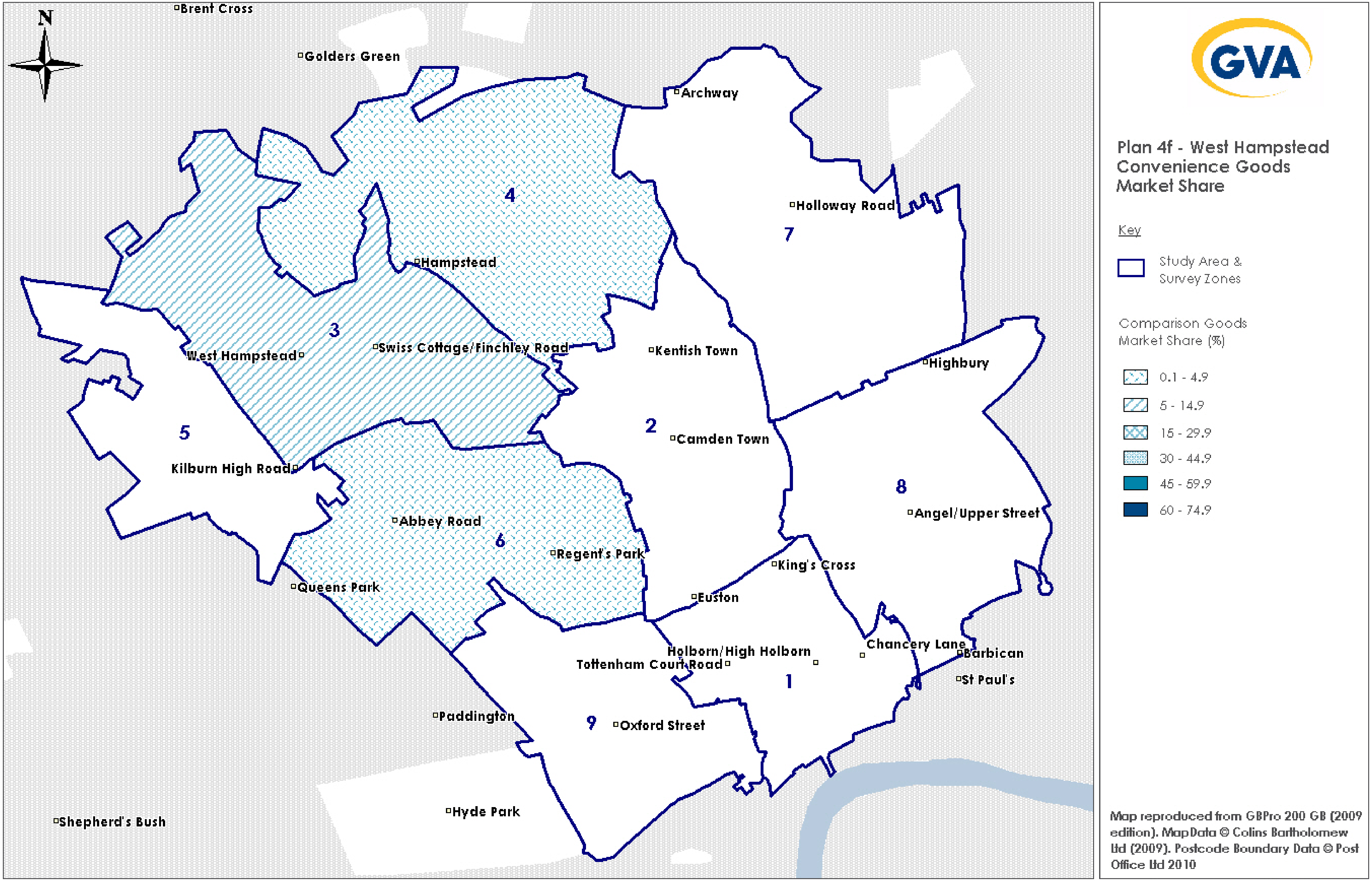

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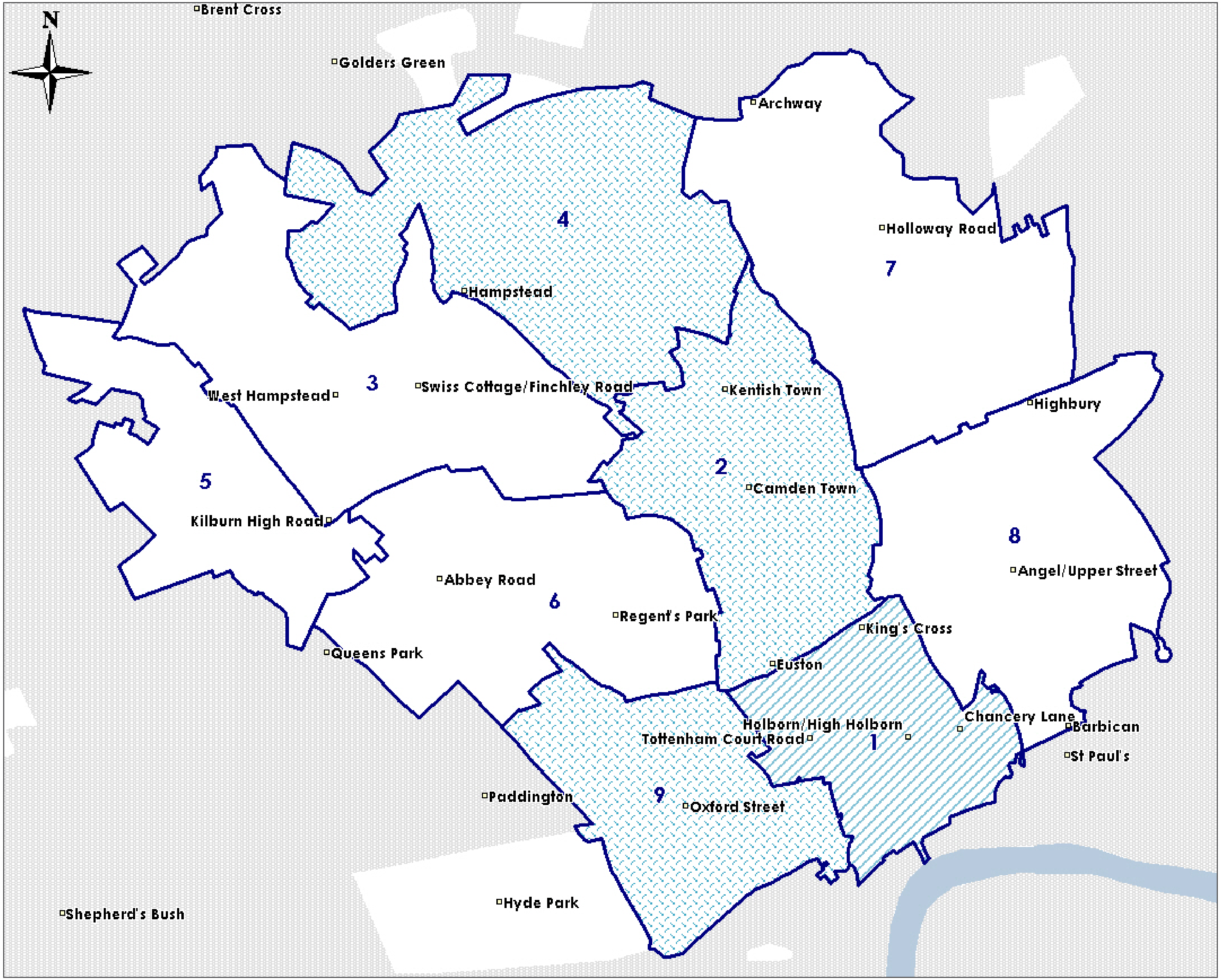

GVA

Plan 4g - Tottenham Court Road Convenience Goods Market Share

Key

Study Area & Survey Zones

Comparison Goods Market Share (%)

- 0.1 - 4.9
- 5 - 14.9
- 15 - 29.9
- 30 - 44.9
- 45 - 59.9
- 60 - 74.9

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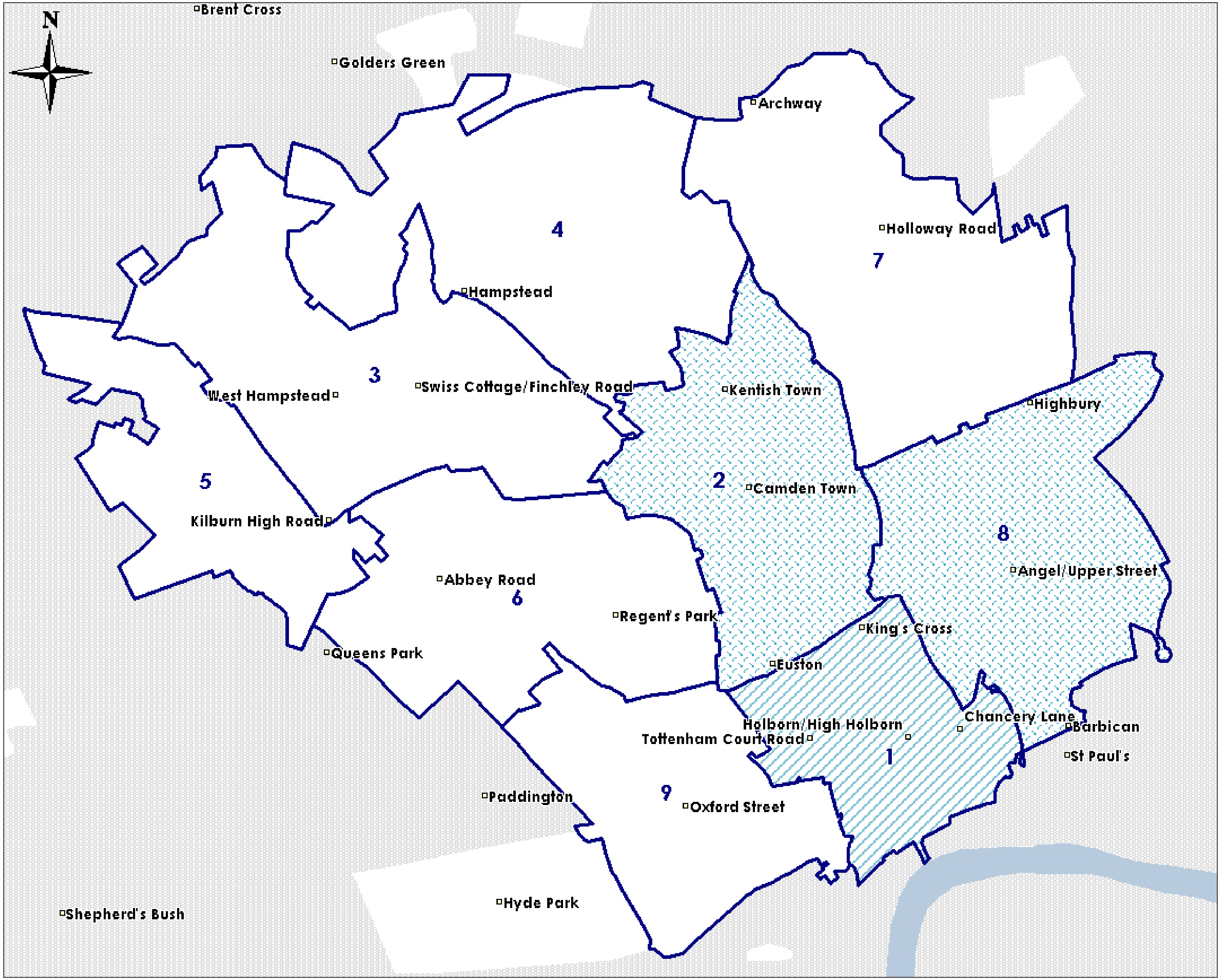

Plan 4h - Holborn Convenience Goods Market Share

Key

Study Area & Survey Zones

Comparison Goods Market Share (%)

0.1 - 4.9

5 - 14.9

15 - 29.9

30 - 44.9

45 - 59.9

60 - 74.9

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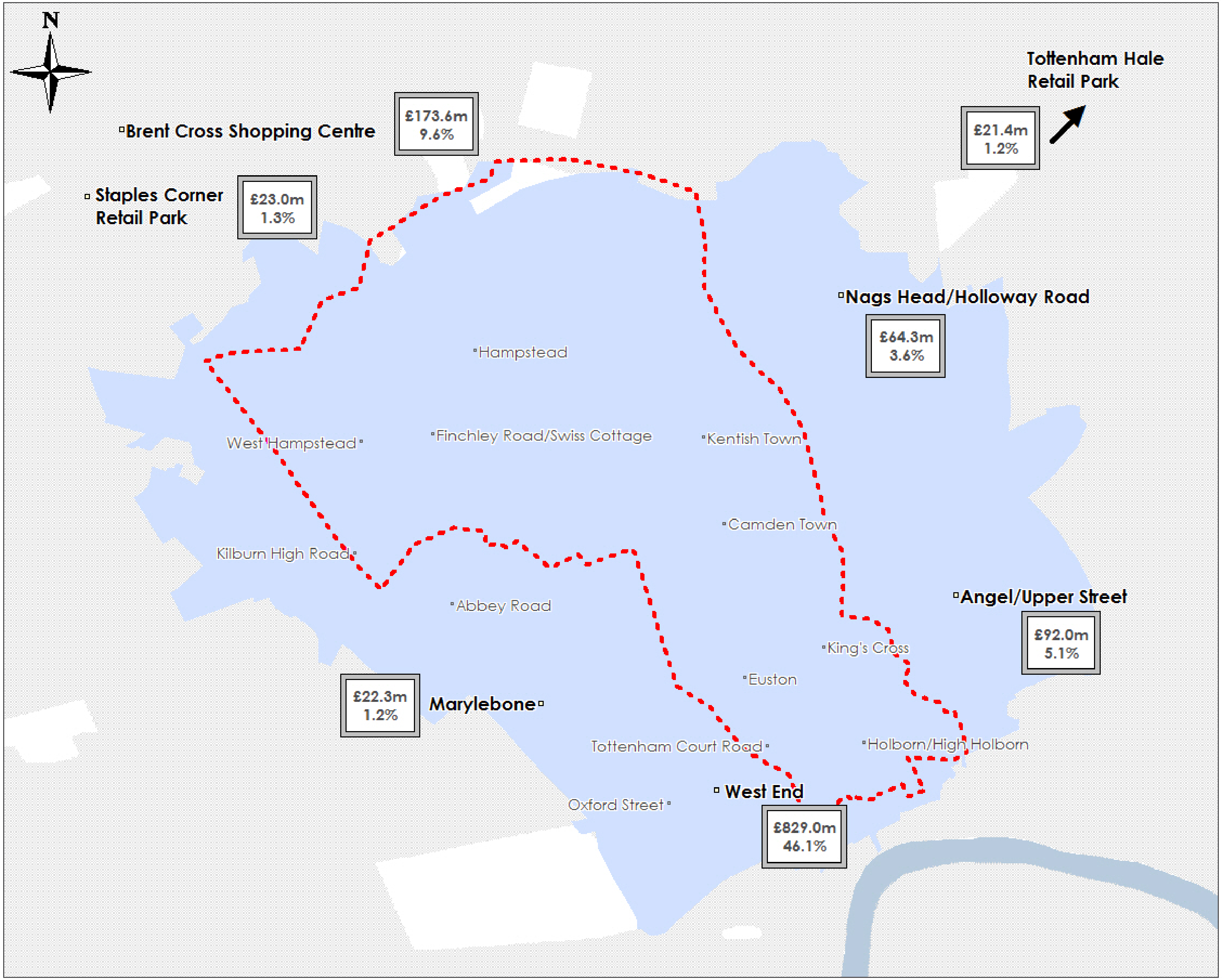

GVA

Plan 5 - Comparison goods expenditure leakage

Key

Camden Borough boundary

Survey Area

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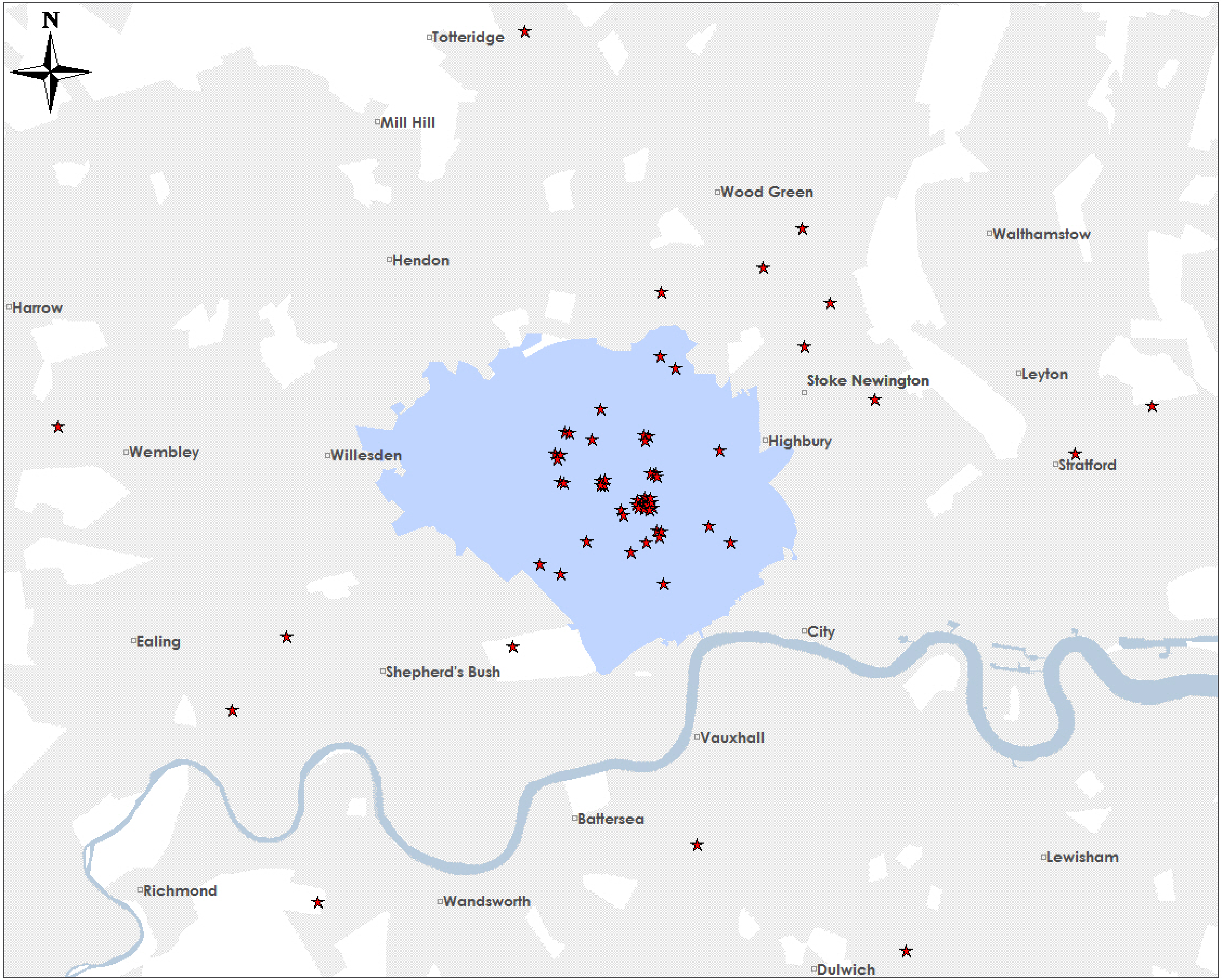
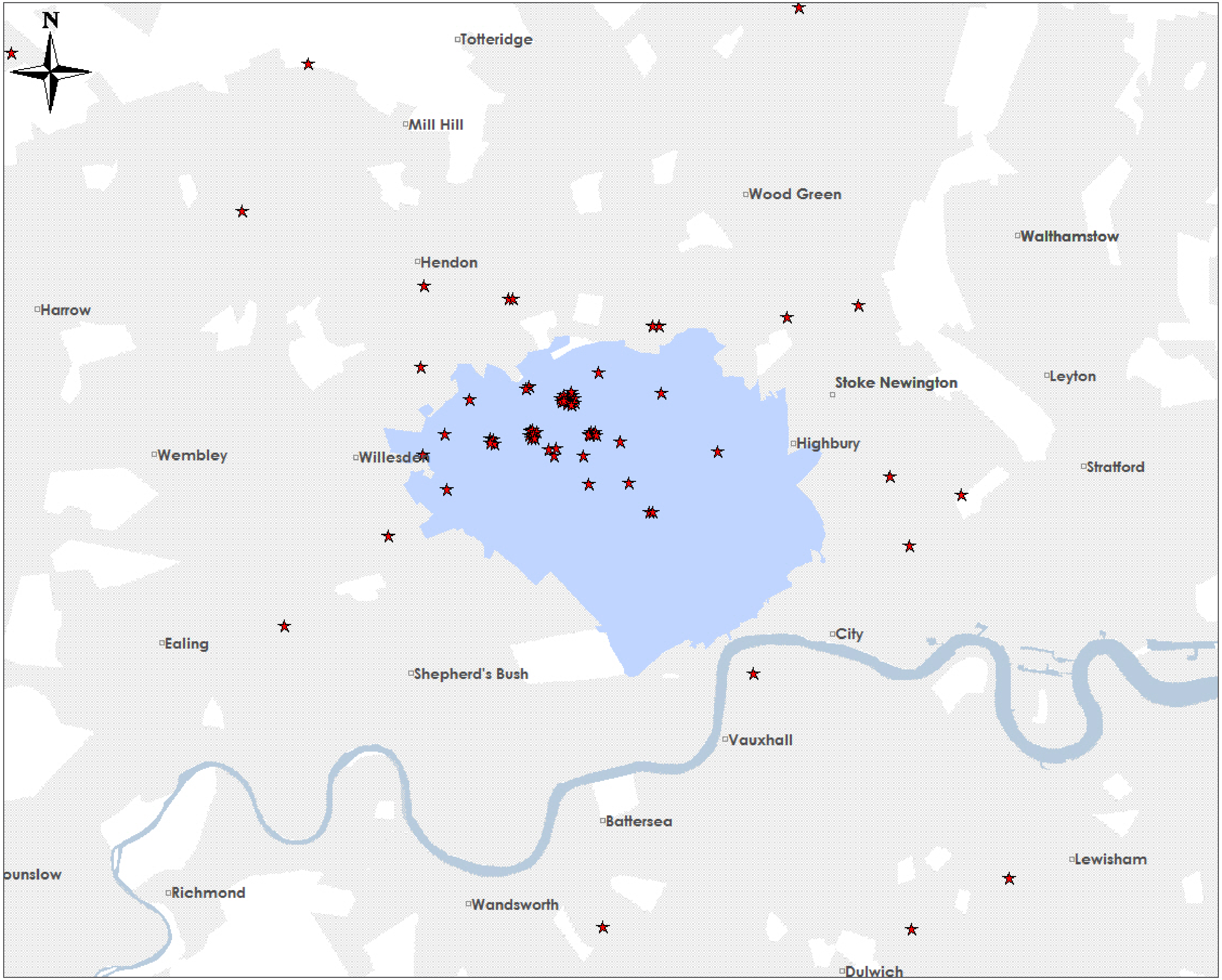


Plan 6a - Camden Town In-centre survey shopper catchment

Key

- Survey Area
- ★ Shopper postcodes

Approximate proportion of Camden shoppers visiting from outside the Survey Area = 51%



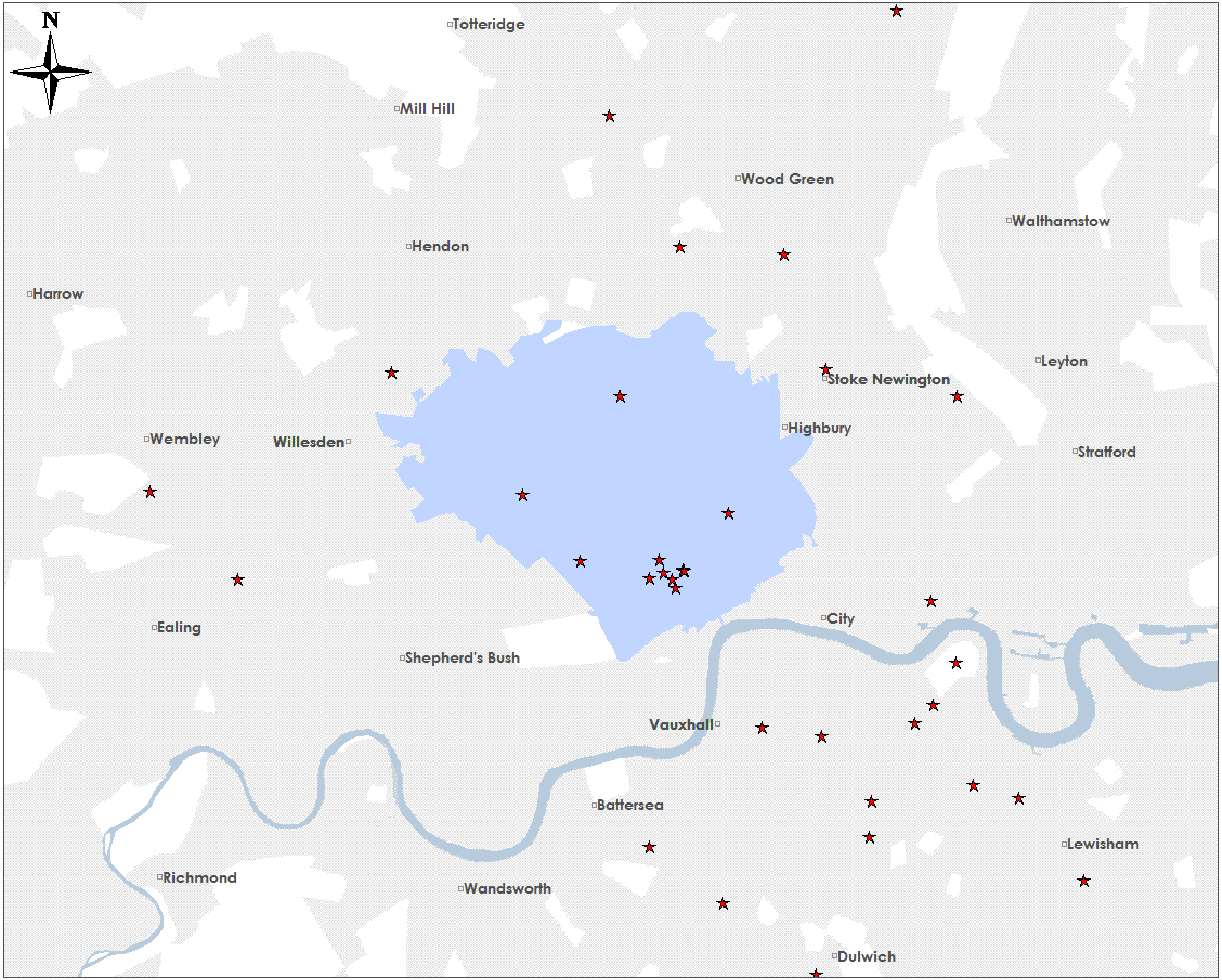
Plan 6b - Hampstead In-centre survey shopper catchment

Key

Survey Area

Shopper postcodes

Approximate proportion of Hampstead shoppers visiting from outside the Survey Area = 48%



Plan 6c - Tottenham Court Road In-centre survey shopper catchment

Key

Survey Area

Shopper postcodes

Approximate proportion of Tottenham Court Rd shoppers visiting from outside the Survey Area = 87%

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Camden Town Centre and Retail Study 2013

Appendices

Camden Town Centre and Retail Study 2013

Appendix 1

Town Centre Audits

1. Town Centre Audits

1.1 In this appendix we set out our qualitative review of the six town centres identified in Camden’s retail hierarchy; Camden Town, Hampstead, Kentish Town, Kilburn High Road, Finchley Road/Swiss Cottage and West Hampstead (Core Strategy Policy CS7).

1.2 We have also undertaken a qualitative audit of retail provision within two Central London Frontages in Camden: Tottenham Court Road and Holborn. The Core Strategy identifies that Central London Frontages serve a similar function to town centres, and Tottenham Court Road is identified to serve a London-wide and national retail role, as well as serving the day to day needs of local residents and workers.

1.3 Our analysis draws on the results of our own site visits in January 2013, the results of the household telephone survey and in centre surveys, as well as other published data sources including Experian Goad, Focus and EGi.

1.4 The town centre and central London frontage audits review a number of key indicators of town centre vitality and viability to identify the current health of the centres and to assess the current role these centres perform.

2. Camden Town

2.1 Camden Town is the largest town centre in the Borough and is internationally renowned as a tourist destination; famous for its extensive range of markets, its wealth of independent retailers and creative industries, as well as legendary music and entertainment venues. Camden is a vibrant town centre, with three distinctive character areas.

2.2 Firstly, the central Camden area (north of Camden underground station, including Camden High Street up to the railway bridge), which includes the commercial heart of Camden and most of the markets. There are a number of markets within Camden Town, including Camden Lock Market, Hawley Wharf/Camden Lock Village, Buck Street Market and Inverness Street (discussed in more detail below). In addition Stables Market is situated just north of the railway bridge, but is considered alongside the other markets in this Town Centre Audit.

2.3 Secondly, the northern area (comprising Chalk Farm Road up to Chalk Farm underground station), which provides a range of specialist shops, pubs and restaurants.

2.4 Thirdly, the southern section (south of Camden underground station including Camden High Street south to Mornington Crescent underground station), provides a more traditional high street catered towards local needs.

Town Centre Boundary and Frontages

2.5 The Camden Proposals Map defines the Camden Town centre boundary as extending south from Chalk Farm station to Mornington Crescent station. The town centre boundary also extends west from the main frontages to incorporate the Morrisons supermarket, Parkway, and other streets adjoining the High Street. The centre extends eastwards to include the Hawley Wharf area, Hawley Crescent, Buck Street, southern sections of Kentish Town Road and Camden Road and streets adjoining the High Street.

2.6 The Camden Planning Guidance CPG5 defines town centre frontages. Two core frontages are identified, running north and south of Jamestown Road. Within the northern core frontage the Council will not permit development resulting in the number of A1 retail units falling below 50% of the total frontage. Within the southern core frontage, the Council will not permit development resulting in the number of A1 retail units falling below 75% of the total frontage. A maximum of 20% of all core frontages will be permitted to be in Class A3, A4 or A5 food and drink use.

2.7 Secondary frontages incorporate the Roundhouse, the markets, Hawley Road, Kentish Town Road, Camden Road (including the Sainsbury's supermarket), the Mornington Crescent area of Camden High Street and peripheral areas within the town centre boundary. The Council generally resist proposals resulting in less than 50% of the premises in a frontage being in A1 retail use.

2.8 Sensitive frontages have also been identified along streets on the edge of the town centre which have significant proportions of residential units above or opposite the retail frontage. Sensitive frontages include Morrisons south-eastern boundary, western Parkway, Arlington Road, Camden Road, Kentish Town Road and Hawley Road. Within these areas the proportion of a frontage in food and drink uses must not exceed 30%.

Diversity of Uses

2.9 The Experian Goad category report for Camden Town (July 2012), identifies a total of 110,703 sqm gross ground floor floorspace for retail and service units (including retail service, leisure and financial and business services), comprising 657 units. Table 2.1 below sets out the composition of the number of units in Camden Town.

Table 2.1: Camden Town Centre Composition of Units

	Number of Units	% of Total	UK Average (%)	Variance
Convenience	53	8.07	8.02	0.05
Comparison	225	34.25	33.03	1.21
Service	336	51.14	46.56	4.58
Vacant	40	6.09	12.23	-6.14
Miscellaneous	3	0.46	0.16	0.30
TOTAL	657	100	100	-

Source: Experian Goad Category Report (July 2012)

2.10 Within Camden Town there is a strong convenience goods offer including the second and third largest supermarkets in the Borough, which are both just above 3,000 sqm net. The main supermarket is the Sainsbury's supermarket on Camden Road. The store has a total net convenience goods sales area of 2,196 sqm net and provides a bakery, fishmongers, butchers, hot food counter, delicatessen, salad bar and click and collect services. The other main supermarket is the Morrisons at Chalk Farm which has a slightly smaller proportion of convenience goods, totalling 2,054 sqm net. The store also provides an in store pharmacy, café, bakery, butchers, fishmongers, hot food counter, a delicatessen, a florists, dry cleaning and a petrol station.

2.11 In addition, there are several smaller supermarkets including Marks and Spencer Simply Food (881 sqm net sales area), Co-op (866 sqm net sales), Lidl (449 sqm net sales), Sainsbury's Local (218 sqm net sales) on Camden High Street, and a Sainsbury's Local (273 sqm net) on Chalk Farm Road. Convenience goods provision in Camden is also supplemented by a variety of market stalls a number of shops including local bakers, butchers, newsagents, green grocers, delicatessens, health food stores and off licences. In total 24,461 sqm gross convenience goods floorspace is identified in the centre, which is significantly above the national average.

2.12 The proportion of comparison goods units in Camden is in line with the national average, and represents a broad and wide retail ranging offer. There is a strong focus on fashion provision in the town, with a significant proportion of clothing (including ladies wear and mens wear), footwear and accessory market shops and traditional high street shop units. The comparison offer also includes a high number of craft and gift shops and stalls, which reflect the nature the markets and cater to a local visitor and international tourist market.

2.13 Whilst the number of comparison units is in line with the national average, the comparison goods floorspace in the centre totals 26,682 sqm gross, which is proportionally below the national average. This indicates that the existing retail provision is characterised by a high proportion of small shops with small floorplates. It is also important to note that the number of comparison units counted by Experian Goad does not include individual free standing and permanent market stalls within the market complexes which enhance the overall comparison goods offer (for example there are c.700 market stalls in the Stables Market).

2.14 The proportion of service units in Camden is above the national average. Whilst the proportion of retail service and financial and business services units are below the national average, the proportion of leisure service units is particularly high. This reflects one of the unique characteristics and attractions of Camden; the abundance of the food, drink and entertainment offer.

2.15 Camden has 210 units in leisure use (including Class A3, A4 and A5), including high proportions of cafes, restaurants, pubs, bars and clubs. These provide a varied day time and evening offer including independent cafes in the markets and along Regents Canal, small restaurants along Parkway, pubs and restaurants along Chalk Farm Road, chain restaurants and coffee shops, and long established music and arts venues (such as The Roundhouse, the Jazz Café, Koko and The Electric Ballroom). In addition there is an Odeon cinema on Parkway, which attracts 13% of all cinema trips undertaken by respondents to the household telephone survey.

Retailer Representation

2.16 The Experian Goad category report (July 2012) identified a total of 148 multiple retailers in Camden (24% of all occupied retail and service units). This is a comparatively low proportion of multiple retailers for a centre of this size, and illustrates the strength and attraction of the independent retail offer of Camden Town.

2.17 Multiple retailers are predominately located on Camden High Street, and include comparison retailers such as H&M, Carphone Warehouse, Sports Direct, Maplin, Waterstones, Office, American Apparel, Ryman and Argos and convenience operators including Marks and Spencer, Sainsbury's Local, Co-op and Lidl.

2.18 Approximately 29% of Camden's leisure service offer is from multiple retailers, with operators such as Wagamama, Strada, Pizza Express, KFC, Prêt a Manger, Byron Burger, Lloyds Bar and McDonalds all represented in the town. Other key multiple retailers in Camden include high street banks (including Santander, Halifax and Natwest) and Mecca Bingo.

2.19 The majority of the outlets in the centre are independent retailers, and these are one of the principal attractions of the centre, providing Camden's unique selling point and drawing significant numbers of international tourists to Camden each year

2.20 The independent retailers provide a diverse range of shops and services, including; unique fashion retailers, vintage clothing stores, bakers, delicatessens, grocers, specialist furniture, gift shops, antiques, craft stalls, novelty goods, art, book shops and tattoo and piercing studios. In addition to the shop units identified by Experian Goad there are numerous stalls and market units, providing additional comparison goods as well as speciality food stalls selling wide ranging cuisine.

2.21 The Focus database identifies a total of 14 retailer requirements for between 1,389 sqm and 2,634 sqm gross in Camden in January 2012. As highlighted in Table 2.2 below, the majority of these requirements are for comparison and leisure service units. Comparison retailers looking to acquire units in Camden include Warren James jewellers, Westside Urban Boutique and Blue Inc. Convenience goods requirements including Planet Organic and Dr China. In the service sector, retailers with requirements include Hairmasters, Papa Johns, Tapeo and Costa.

Table 2.2: Published Requirements for Camden

	No of Units	Min. Floorspace (sqm gross)	Max. Floorspace (sqm gross)
Comparison	6	571 sqm	1,166 sqm
Convenience	2	260 sqm	353 sqm
Leisure Services	5	465 sqm	929 sqm
Retail Services	1	93 sqm	186 sqm
TOTAL	**14**	**1,389 sqm**	**2,634 sqm**

Source: Co-Star Focus Database (January 2013)

Vacancies

2.22 The most recent Experian Goad report (July 2012) identified 40 vacant units in Camden, which is approximately half the number of units in comparison to the national average vacancy rate. The vacancy rate is also c. 2% below the Greater London regional average. In general there are a higher proportion of vacant units clustered towards the southern end of Camden High Street and Mornington Crescent station, however there are vacant properties dispersed throughout the centre.

2.23 In terms of floorspace vacant units in Camden comprise 4,450 sqm gross (4% of total retail and service floorspace). This has decreased since the 2008 Retail Study where 5,660 sqm of vacant floorspace was identified (10% of total floorspace). This decrease in vacancy levels demonstrates that Camden's performance has improved despite the economic recession, reflecting the centre's continued popularity with retailers, shoppers and tourists.

2.24 Overall the vacancy rates indicate that Camden is performing strongly, and we note that some vacant units identified by Goad in July 2012 have since been re-let to new operators, indicating a quick take-up of vacant units.

Environmental Quality

2.25 The environmental quality is varied throughout Camden Town, with several areas having their own distinctive characteristics. We review these areas below:

Camden High Street (North of Camden Town Station)

2.26 This section of Camden High Street features larger retail shop units in the south which have been secured through the amalgamation of smaller units, which are mainly occupied by multiple retailers. Heading north towards the markets, the size of the units decreases and the street is dominated by small independent retail units. Shop units are well maintained and have very distinctive painted exteriors, décor and advertising including external sculptures and artwork which reinforces Camden's eclectic and vibrant style. Tree planting in this area adds to the overall quality in the appearance of the street.

2.27 Following streetscape improvements in this area (including widened footways, de-cluttered pavements, new paving and repositioned street lighting), this area of the town is particularly attractive. As a key route from the underground to the markets, this street has high levels of pedestrian activity and the street improvements facilitate easy movement through the street.

The Markets

2.28 The markets have their own individual characteristics, offers and vibrancy. Camden Lock Market on the western side of Camden High Street opened in 1975 and provides permanent shops and temporary market stalls within former timber yard buildings, courtyards, and a glass-roofed central market hall. The Lock Market provides arts and crafts, fashion and food and drink and is an attractive, pleasant and well maintained market shopping environment fronting Regents Canal.

2.29 To the north of the Lock Market is the Stables Market contains a labyrinth of market shops and stalls within arches of the railway and the vaults and catacombs of a former horse hospital which dates back 200 years. It is the largest market in Camden and has recently been extended, and now contains c. 700 shops and stalls which provide a mix of antiques, vintage clothing, food and drink, furniture and accessories. Overall, the Stables provide a unique shopping experience within an architecturally interesting setting.

2.30 Hawley Wharf/Camden Lock Village is located on the eastern side of Camden High Road opposite Camden Lock Market. Part of the Lock Village was destroyed in a fire in 2008, and the market was rebuilt in 2009. The Lock Village provides hot food stalls, with seating overlooking Regents Canal. Around 500 comparison shops and stalls are provided within permanent huts running in rows parallel to the waterfront, which provide an attractive and relatively spacious, open air shopping environment.

2.31 The Camden Buck Street Market is a tightly packed concentration of rows of c.200 open air market stalls providing mainly clothing, jewellery and accessories. Inverness Street is a pedestrianised street lined by market stalls providing fruit and vegetables, clothing and accessories which dates back to the 20th century. Both of these markets provide distinctive retail offers and providing alternatives to the three larger markets.

Chalk Farm Road

2.32 Chalk Farm Road provides a continuation of the quirky specialist independent retailers and shop units prevalent on Camden High Street (north). Interesting exterior artwork and sculptures above shop units add interest to the character of the area, which provides retail units on the eastern side of the street. On the western side of the street is a wall which encloses the Stables Market, but this does not have a detrimental impact on the streetscape in this area. Footfall is quieter in this area than the central core and markets, which results in a more pleasant and relaxed shopping environment.

Camden High Street (South of Camden Town Station)

2.33 South of Camden Town station, Camden High Street is dominated by a mix of larger units of multiple retailers at the northern end, with independent retailers more focused at the southern end of the street towards Mornington Crescent in smaller units. Traffic is noticeably more dominant in this area and combined with narrower pavements results in a less accessible shopping environment for pedestrians.

2.34 The buildings, shop fascias and signage are more mismatched within this area, containing a variety of traditional Victorian buildings, and more modern buildings. There are noticeably less tourists within this part of Camden and more local residents and workers. Overall, this area is generally well kept but has a less pleasant environment than the northern end of the town and would benefit from investment and improvements to frontages to match the quality of the rest of the centre.

Parkway

2.35 The retail and leisure units on Parkway have a very distinctive character, with a narrower tree-lined road and small independent cafes which provide on street seating. Parkway falls within a Conservation Area and the area provides an aesthetically attractive setting, away from the hub of activity in the centre of the town. The street and shop units are well maintained, providing an architecturally attractive street frontage. The road is a key route in to Camden from west London and is busy at times which can distract from the character of the area.

Kentish Town Road / Hawley Crescent / Camden Road

2.36 This area contrasts with the surrounding shopping streets, and is more diverse in nature. There are small independent shop units, but also a number of larger buildings providing a mix of retail, office (such as MTV Studios), educational (The Open University), residential and religious uses. Footfall is lower in these secondary areas and the environmental quality in the area is poor.

Accessibility

2.37 Camden is a highly accessible centre, benefiting from three underground stations on the Northern Line: Camden Town in the heart of the centre, Chalk Farm in the north and Mornington Crescent in the south. The PTAL rating peaks at 6b (excellent) at Camden Town and Mornington Crescent stations, Camden Road and Kentish Town Road. A marginally lower excellent PTAL rating of 6a is recorded throughout the rest of the centre including Chalk Farm station, Parkway and Morrisons.

2.38 Twelve bus routes run through Camden during the day and night connecting the centre to central London, the wider borough and the surrounding area. Car parking is limited throughout the centre and is heavily restricted along the high street. Car parking is available at the Morrisons, Sainsbury's and Marks and Spencer's supermarkets.

2.39 Since the previous Retail Study, upgrades have been made to Camden High Street north, which is an area particularly busy with tourists at the weekend. The street improvements feature widened pavements and narrowed highways which have improved safety and accessibility from Camden Town station to Regent's Canal.

2.40 One way systems are in place to calm traffic through the centre, although traffic in the centre can remain busy at peak times, which can restrict accessibility particularly around the main junction at Camden Town station (Britannia Junction). Public consultation was held in 2010 regarding improvements Britannia Junction which put forward proposals to widen footways to create an enlarged public space and improved pedestrian environment.

2.41 Results from the household telephone survey identified that of those respondents who stated that they visit Camden Town most often, 34% of respondents travelled to the centre by bus, 31% walked, 14% travelled by car and 7% used the London Underground. The in-centre shopping survey also identified similar travel patterns to Camden Town (33% walked, 27% travelled by bus, 13% by car), however the proportion using the underground was higher (16%), reflecting the proportion of tourists answering the in-centre survey who are visiting the centre from outside the local area.

Customer Views and Behaviour

2.42 The household telephone survey, undertaken in January 2013, included various attitudinal questions about the frequency of visits to Camden Town, the reasons for visiting the centre and likes and dislikes about the centre. The key findings from the telephone and in-centre surveys are summarised below:

- A quarter of respondents to the telephone survey stated that they visit Camden Town ‘most often’ out of all the centres in Camden and is therefore the most frequently visited of the centres in the Borough. Of those who visit Camden most often, the highest proportions are drawn from zone 2 (69%), zone 4 (37%) and zone 7 (33%).
- Of these respondents, the majority visit once a week (22%), whilst 21% visit 2-3 times a week and 16% visit the centre daily. Of those who visit Camden Town most often, the centre is a popular destination for both non-food and food shopping (73% and 71% respectively).
- Of the telephone respondents who visit Camden most often, 28% like Camden because it is ‘close to home’ and 25% visit because of the ‘good range of chain and well known stores’. A slightly smaller proportion like it because of the ‘good range of independent stores’ (18%) and the ‘markets’ (11%).
- The majority of telephone survey respondents disliked ‘very little’ about the town centre (39%). The main dislikes of Camden Town are that it is ‘too busy’ (26%), it is ‘run down, dirty and unattractive’ (10%) and that it ‘feels unsafe’ (5%). In relation

to perceptions of safety at night. Camden Town had the highest proportion of telephone respondents stating that they felt either 'unsafe' or 'very unsafe' in the whole survey area (18%), whilst 38% of respondents felt 'safe' and 19% 'very safe'.

- The strength of the leisure attraction in Camden is evident, with 42% of telephone respondents who visit the centre 'most often' undertaking daytime and evening eating. 36% of these respondents visit the town for evening drinking or cultural activities (cinema and concerts).
- Respondents would visit Camden more often in the daytime if there were 'more chain/well known stores' (7%), 'more independent shops' (6%), 'more security and better personal safety' and 'more department stores' (5%), a 'better, cleaner environment' and 'easier, more parking' (3%). To make respondents visit Camden more often in the evenings, the main issues highlighted were 'more security and better personal safety' (6%) and 'more restaurants' (5%).

2.43 In addition an in-centre shopper survey of 100 people was undertaken in January 2013 which also included attitudinal questions about the provision of shopping and leisure facilities in Camden Town, and included responses from tourists from the UK and abroad. The in-centre survey was undertaken across the whole of the town centre on one day during the week and on a Saturday. The key findings of the in-centre survey are summarised below:

- 45% of respondents identified themselves as 'local residents', 24% as 'workers', 14% as 'tourists from overseas' and 10% as 'tourist from the UK'. Analysis of the postal sectors provided by respondents indicates that 51% of respondents to the in-centre survey live outside the telephone survey area, including 14 people who live overseas.
- When asked what the main purpose of their visit to Camden, 28% of respondents stated 'work and business' (this was the most common result for surveys undertaken both during the week and the weekend), followed by 19% for 'food shopping', 11% for 'non-food shopping' and 10% for 'sight-seeing and tourism'.
- Over half of respondents to the in-centre survey visit the Sainsbury's Camden Road most often for their main food shopping (53%), whilst 18% visit Morrisons and 7% visit Lidl. For top-up food shopping, Sainsbury's Camden Road attracted the highest proportion of respondents (24%), followed by Marks and Spencer (18%), Morrisons (13%) and the Co-op (7%).

- 21% of visitors intend to spend between 1 and 2 hours in Camden, whilst 19% of respondents intend to spend the whole day in the town centre. On average respondents to the in-centre survey visit Camden more frequently than those questioned in the telephone survey, with 30% visiting Camden 'daily', 18% visiting '2-3 times a week' and 15% visiting 'weekly'.
- The main things that respondents to the in-centre survey liked about Camden are that it is 'close to home' (22%), 'pleasant and attractive environment' (19%), the 'good range of multiple retailers (14%), the 'good selection of non-food shops' and 'smaller independent and specialist retailers' (13%) and Camden's 'diversity' (10%).
- The main dislikes are that Camden is 'too crowded' (30%), 'too many tourists' (23%), 'unattractive environment' (20%), 'too much traffic' and 'doesn't feel safe' (both 13%) and 'difficult and expensive to park' (11%).
- Improvements to Camden Town which would encourage respondents to the in-centre survey to visit more often include 'safer environment' (23%), 'better quality environment' (13%), 'better parking' (11%), 'special events and promotions' (9%), and 'entertainment provision' (8%).

2.44 Respondents to the in-centre survey were asked to rate the provision of shops and services in Camden Town. Taking a mean score of the rankings of shop and service provision (scores: very strong = 2, good = 1, average = -1 and weak = -2) it is evident that Camden Town is perceived to have the highest ratings for its daytime eating and drinking facilities (0.66), local service provision (hairdressers, banks etc.) (0.55), independent retailers (0.53) and night time eating and drinking facilities (0.51). The centre has average ratings in relation to its overall environment (0.34) and the provision of chain shops (0.16). Overall Camden is perceived to have low rankings for perceptions of safety (-0.32) and a poor provision of high end/niche shops (-0.43).

Proposals and Commitments

2.45 In January 2013, planning permission was granted following the signing of a S106 Agreement for the redevelopment of Camden Lock Village at Hawley Wharf (application ref. 2012/4628/P). This latest proposal on the site includes the provision of mix of uses including employment, housing, retail market (7,146 sqm GEA), cinema and a produce market (959 sqm GEA). The site is allocated in the adopted Camden Site Allocations DPD (September 2013) for mixed use development including residential, retail markets, other appropriate town centre uses, employment floorspace, community uses and public spaces.

2.46 Planning permission was granted in 2009 for an extension to the Morrisons supermarket for additional A1 floorspace and alterations to the bus turning area. The proposals include the provision of 1,156 sqm net additional retail floorspace.

2.47 The adopted Camden Site Allocations DPD (September 2013) identifies the Roundhouse Car Park site for mixed use development, including a range of arts, entertainment, cultural, workshops and residential uses. In addition, a site at 34 Chalk Farm Road is allocated for residential uses, with an open frontage along Chalk Farm Road.

Summary

- Camden is a successful, vibrant and unique retail and leisure destination, combining an eclectic mix of bohemian shops, thriving street markets and legendary music and entertainment venues which attract tourists, as well as shops and services catering to the needs of local residents and workers. There is a particularly strong leisure offer including restaurants, cafes, bars and clubs which make Camden a distinctive daytime and evening visitor destination in its own right.
- The centre has a good diversity of food, non-food and service uses, and a low level of vacant units indicating that the centre is performing well and there is strong demand for retail space in the centre. Over three quarters of the units in Camden are operated by independent retailers, which is key strength to the performance of the town. This also demonstrates the importance of providing small units and stalls to accommodate start-up businesses to encourage the continued development of a range of artistic and innovative independent retailers continue to locate in the Camden.
- Findings from the household telephone survey indicate that a quarter of respondents visit Camden Town most often out of all the centres in the survey area. The results of the in-centre survey identified that 51% of respondents visited Camden from outside the study area (including 14 who live overseas). This demonstrates the popularity of Camden as a retail and leisure destination for local residents and as an important visitor and tourist destination.

- Results of the household telephone survey and in-centre survey show that people chose to visit Camden Town primarily because it is close to home, it has a good range of chain stores and independent retailers, and to visit the markets.
- The findings of the surveys also corroborate the importance of the leisure offer in Camden Town, with daytime and evening eating, evening drinking and evening cultural activities all attracting a high proportion of telephone survey respondents to visit the centre. Accordingly, it will be important to maintain an appropriate range and provision of food, drink and entertainment uses in Camden over the plan period.
- Key issues identified in the surveys suggest that there is scope to increase security and improve perceptions of safety in Camden Town. Further enhancements to the quality of the environment in the town centre, particularly south of Camden Town underground station, should also be considered.
- Overall, Camden Town appears to be a vital and viable town centre, which continues to attract strong levels of retailer demand and low vacancy rates, despite the continued recession. Over the plan period, it will be crucial for Camden to maintain its unique provision of markets and breadth of independent retailers to continue to attract local residents and tourists to visit and spend time in the centre. The proposed redevelopment of Camden Lock Village at Hawley Wharf to provide improved and extended market stall provision and other town centre uses presents an opportunity to ensure that Camden Town continues to attract and accommodate new retailers.

3. Kilburn High Road

3.1 Kilburn High Road town centre is located in the north west of the Borough on the border with the London Borough of Brent. Kilburn High Road provides a day to day shopping offer, and is pitched towards the lower end of the market. The centre is the second largest town centre in the London Borough of Camden and provides a varied shopping environment along a linear High Road, meeting a wide variety of local needs.

Town Centre Boundary and Frontages

3.2 The defined town centre boundary for Kilburn High Road extends from Maygrove Road and Kilburn underground station in the north to Kilburn Priory and the Marriott Hotel in the south. The main High Road is also the borough boundary between Camden and Brent, and accordingly only the eastern half of the street is identified within Camden's town centre boundary.

3.3 The Council identify the core shopping area falling between Gascony Avenue in the north and Belsize Road in the south. Within the core retail frontage, the Council see to ensure that the retail frontage provides a minimum of 75% Class A1 uses. To the north and south of the core retail frontage, the remaining units are identified as secondary retail frontages. Within the secondary frontages, the Council will seek to ensure that 50% of the frontage remains in Class A1 uses.

Diversity of Uses

3.4 The most up to date Experian Goad category report for Kilburn High Road incorporates both sides of the High Road, thereby also including half of the centre which is located within the London Borough of Brent. The diversity of uses therefore applies to the entirety of the town centre, in order to accurately assess the complete role that Kilburn High Road centre currently performs.

3.5 The Experian Goad category report for Kilburn High Road town centre (January 2012) identifies a total of approximately 73,180 sqm gross of ground floor floorspace for retail and service (retail, leisure and financial/business services), comprising 431 units. Table 3.1 below sets out the composition of the number of units in Kilburn High Road.

Table 3.1: Kilburn High Road Town Centre Composition of Units

	Number of Units	% of Total	UK Average (%)	Variance
Convenience	49	11.37	8.02	3.35
Comparison	104	24.13	33.03	-8.90
Service	228	52.90	46.56	6.34
Vacant	46	10.67	12.23	-1.55
Miscellaneous	4	0.93	0.16	0.77
TOTAL	431	100	100	-

Source: Experian Goad Category Report (January 2012)

3.6 Within the London Borough of Camden vicinity of Kilburn High Road there are three main foodstores (Sainsbury's, Marks and Spencer, and Tesco Express). Sainsbury's is the largest foodstore in the centre, and provides c. 1,337 sqm net sales floorspace and an in-store bakery. The Marks and Spencer foodhall provides 771 sqm net sales floorspace (including an in-store bakery) and Tesco Express is situated south of Kilburn High Road Station and has a net sales area of 226 sqm net.

3.7 On the western side of Kilburn High Road, in the Borough of Brent, there is a Sainsbury's Local foodstore which comprises 238 sqm net sales floorspace. In addition to this foodstore provision there is an Iceland, as well as independent retailers including a bakers, three butchers, convenience stores, a fishmongers, two greengrocers, two health food stores and off licences within the centre. In total, convenience retail floorspace totals 10,628 sqm gross, which at 15% of the total retail and leisure floorspace in the centre is in line with the national average.

3.8 There is currently a deficiency of comparison goods units and floorspace within Kilburn. Experian estimate that 19,445 sqm gross floorspace is occupied for comparison goods floorspace, which is 10% lower than the national average proportion of comparison floorspace. The weak comparison goods offer in the centre is dominated by low end comparison goods uses, including discount fashion, charity shops, hardware stores, newsagents and phone shops. There is a below average representation of electrical shops, ladies wear retailers, bookshops and jewellers.

3.9 Kilburn High Road has a strong representation of service units, which comprise half of the total amount of floorspace available within the centre (37,561 sqm gross). Kilburn has good representation within the retail service, leisure service and financial and professional service sectors. Within the retail service sector there is a particularly high number of dry cleaners and health and beauty shops. Within the leisure sector, there are a high number of cafes, bars, betting offices, restaurants and fast food takeaways. The financial sector includes a good representation of financial services, business services and property services. The breadth and variety of Kilburn High Road's service offer is one of the key strengths of the centre and includes the Tricycle Theatre, pubs, a nightclub and restaurants.

Retailer Representation

3.10 The Experian Goad category report (January 2012) identified a total of 88 multiple retailers in Kilburn High Road. Multiple retailers therefore account for 23% of all occupied retail and service units, which is the second lowest proportion of multiples after West Hampstead. The multiple retailers in Kilburn are principally located within the core retail frontage, however there are multiple retailers disbursed throughout the centre. In addition to the main foodstore operators in the centre, multiple retailer representation in Kilburn is targeted towards the lower end of the market. The main multiple retailers in the centre include Primark, JD Sports, Barratts, Greggs, T Mobile, Subway, Poundland, TK Maxx, Paddy Power, KFC and Sport Direct.

3.11 Over three quarters of the occupied shops in Kilburn are run by independent retailers. The independent retailers in Kilburn provide a range of retail and service uses, providing a varied mix of higher end and lower end offers. There are a number of independents (particularly in the service sector) which provide a good quality offer and enhance the overall attraction of the centre, such as The Tricycle Theatre, Rafkins Hotel, North London Tavern, Macs Salon, Barraco Café, Love and Liquor and Belvedere Traditional delicatessen.

3.12 However, the majority of the independent retailers are characterised by bargain retailers providing low-priced clothing, discount home and hardware stores, fast food takeaways, nail salons, laundrettes and pound shops. In general, these retailers occupy small retail units, which are poorly maintained, reflecting their lower quality offer.

3.13 In terms of retailer requirements, the Focus database identifies 10 retailer requirements for between 1,268 and 2,518 sqm gross in Kilburn in January 2013. As highlighted in Table 3.2 below, these requirements are mainly for comparison goods and leisure service units. There are requirements from Warren James, Card Factory, Brighthouse, Topps Tiles, Holland and Barrett, Wenzels, Strada, Costa, Chicken Cottage and Talarius amusements.

Table 3.2: Published Requirements for Kilburn

	No of Units	Min. Floorspace (sqm gross)	Max. Floorspace (sqm gross)
Comparison	4	631 sqm	1,412 sqm
Convenience	2	121 sqm	251 sqm
Leisure Services	4	516 sqm	855 sqm
TOTAL	**10**	**1,268 sqm**	**2,518 sqm**

Source: Co-Star Focus Database (January 2013)

Vacancies

3.14 The Experian Goad survey undertaken in January 2012 identified 46 vacant retail units in Kilburn High Road. Our site visit in January 2013 identified that some of the previously vacant units had become occupied, however in addition a significant number of units had also become vacant, which has resulted in an overall increase in the number of vacant units to 65 units (15% of all units). The most up to date vacancy rate in Kilburn is approximately double the Greater London regional average (Greater London average vacancy rate is currently c. 12%). The majority of the vacant units in the centre are small sized stores which are of poor appearance and detract from the overall character of the High Road.

3.15 Vacant units are prevalent throughout the length of the centre, however they tend to be clustered towards the northern part of the town centre in the secondary areas. We note that the former Peacocks store on the High Road has been replaced by an Aldi foodstore in spring 2013 (the store opened after the household telephone survey was undertaken). The High Road has suffered as a result of many independent retailers closing stores in the town, in addition to some multiple retailers who have entered administration or chosen to scale down their property portfolios (e.g. Footlocker and Clinton Cards have closed their stores). Store closures on Kilburn High Road reflect wider national trends of retailers struggling to remain profitable and operational as a result of the recession.

Environmental Quality

3.16 The environmental quality of the centre varies from north to south. In the north, the area is characterised by small, independent retail units which are poorly maintained, with dilapidated facades. There are also more vacant units within this area, and the roller shutters and boarded up windows detract from the high architectural quality of many of the buildings, resulting in a poor quality environment and inactive frontages at ground floor level. Investment in shopfronts in the northern part of the town would help to improve the street scene.

3.17 Towards the retail core, the character and appearance of the centre improves, with a higher concentration of multiple retailers who appear to routinely maintain their shop facades and provide window displays. Retailers such as Costa and the Betsy Smith provide some outdoor seating in this area and independent retailers sell goods outside as extensions to their shop and street traders sell fresh fruit and vegetables on Birchington Road and Brondesbury Villas, which all add to the vibrancy of the shopping environment.

3.18 In the area around Kilburn High Road Overground station and Kilburn Park Underground station southwards, the quality of the public realm, architecture and shopping environment significantly improve. A number of relatively modern buildings, such as the Marriott Hotel, Kilburn Library, Tesco and Starbucks sit alongside well maintained historic buildings to provide a pleasant retail environment. Wider pavements in this area enable retailers to provide outside seating which provides vitality to southern Kilburn High Road.

3.19 The centre is particularly busy in the daytime during the week and at weekends, which adds to the vitality of the centre. Overall the town centre is reasonably well maintained, with street bins minimising litter and low levels of graffiti. However, poorly maintained pavements, the busy A5 dissects the centre, heavy volumes of traffic and pollution, and lack of public open space result in an average quality shopping environment.

Accessibility

3.20 Kilburn High Road is a long and dispersed town centre, however the centre benefits from four train stations: Kilburn underground (Jubilee line) and Brondesbury overground in the north of the centre and Kilburn High Road overground and Kilburn Park underground (Bakerloo) in the south. The PTAL rating for Kilburn High Road is 6a (excellent).

3.21 As a main arterial route between central and north London, there are also seven bus routes which run through Kilburn. The A5 is heavily congested throughout the day, making access by private car difficult; however, this benefits pedestrians, who are able to cross the street at pedestrian crossings between the slow moving traffic.

3.22 Respondents to the household telephone survey identified that of those who visit Kilburn most often, 51% normally walk to the centre which illustrates the relatively local catchment area that Kilburn serves. 32% of respondents travel to the centre by bus, while 7% travel by car (as a driver) and 3% travel by car (as a passenger).

Customer Views and Behaviour

3.23 The household telephone survey undertaken in January 2013 included various attitudinal questions about the frequency of visits to Kilburn High Road, the reasons for visiting the centre and likes and dislikes about the centre. The key findings from the telephone and in-centre surveys are summarised below:

- 9% of respondents to the household telephone survey stated that they visit Kilburn High Road 'most often' out of all the centres in Camden. Of those who visit Kilburn most often, the highest proportions are drawn from zone 5 (66%), zone 6 (22%) and zone 3 (12%).
- Of these respondents, the majority visit Kilburn once a week (22%), while 21% visit 2-23 times a week and 16% visit every day. Those who use the centre, primarily do so to undertake food shopping (78%) or non-food shopping (77%). A lower proportion of people visit for daytime eating (35%), evening eating (26%), daytime drinking (22%), evening drinking (20%) and evening cultural activities such as the theatre (19%).
- The telephone survey respondents who visit Kilburn most often cited that they like the centre because it is 'close to home' (39%), it has a 'good range of chain/well known shops' (28%) and a 'good range of independent shops' (21%).
- The majority of respondents disliked 'very little' about the town centre (35%). The main dislikes about Kilburn cited by respondents to the telephone survey are that it is 'run down, dirty and unattractive' (15%), 'too busy' (14%), 'traffic congestion' (11%), and 'poor range of chain/well known stores' (6%).
- When asked about perceptions of safety in Kilburn during the evening only 14% stated that they felt 'very safe', which is the lowest of all the centres in Camden. Combining the proportion of those who felt 'safe' (42%) and those who felt very

safe, Kilburn has the lowest proportion of people feeling safe out of all the centres in Camden. 16.3% of respondents felt either unsafe or very unsafe in Kilburn in the evening, which is only marginally lower than perceived at Camden Town.

- Half of respondents to the household survey stated that 'nothing' would make them visit Kilburn more often in the daytime. Respondents would visit during the day more often if there were 'more chain/well known stores' (6%), 'better, cleaner environment' (5%), 'cheaper prices' (4%), 'more department stores', 'more independent shops', 'less traffic' and an 'Aldi supermarket' (all at 3%).
- 68% of respondents stated that 'nothing' would make them visit Kilburn High Road more often in the evening. 10% suggested that 'more restaurants' would make them visit the centre more often in the evening and 7% stated 'more security/better personal safety'.

Proposals and Commitments

3.24 No specific site allocations have been put forward for Kilburn town centre within the Council's adopted Site Allocations DPD. We are not aware of any extant planning permissions over 200 sqm for additional convenience or comparison goods floorspace within Kilburn High Road town centre, although as previously stated the former Peacocks unit has since reopened as an Aldi foodstore.

3.25 On the edge of Kilburn High Road town centre the draft Site Allocations DPD identified the **Belsize Road car park** as a site to provide a mix of residential and retail uses, the site is 300m from the High Road and therefore considered to be edge of centre for the purposes of the sequential test. Planning permission has been granted for the redevelopment of the site (2012/0096/P) to include a mix of residential and retail uses, and will provide a net uplift of 325 sqm net retail floorspace (for convenience goods).

3.26 We note that on the west side of Kilburn High Road, the former Gaumont State Cinema and Bingo Hall (currently vacant) and Kilburn Square are both allocated for redevelopment to provide a mix of retail, other town centre uses, community and residential uses within the London Borough of Brent Site Specific Allocations DPD (adopted 2011).

Summary

- Kilburn High Road is a traditional linear high street, which performs a mainly functional role catering to the needs of local residents. Kilburn High Road is considered to be performing well in relation to the provision of convenience and service units, benefiting from the provision of three foodstores in the centre and a high proportion of retail, financial and leisure services. The leisure offer in the centre is particularly important to the strength of the centre and includes the Tricycle Theatre, pubs, restaurants and a nightclub.
- The comparison retail provision in the centre could be improved and is currently below the national average in terms of units and floorspace. The offer is dominated by discount retail, mainly providing poor quality independent and multiple retailers who are targeted towards the lower end of the market.
- Overall, the vacancy rate in the centre is broadly in line with the national average, although we note that there has been an increase in the number of vacant units in the centre over the last year and the vacancy level is now nearly double the average for Greater London. Increasing vacancy levels reflect wider national retail trends as retailers continue to struggle in the economic climate.
- The centre is easily accessible and is functioning reasonably well; however, the centre does have weaknesses. The environmental quality of the centre varies from north to south, and the centre would benefit from shopfront improvements to improve the street scene, particularly in secondary areas which are blighted by vacancies and lower quality retail units. In addition, the busy A5 which dissects the centre has problems with congestion detract from the quality of the centre.
- Results from the household telephone survey indicate that people chose to visit Kilburn most often because of the close proximity of the centre, reflecting the local shopping role that the centre currently plays. Respondents also considered that Kilburn has a good range of multiple and independent retailers.
- In terms of dislikes, respondents to the household survey identified that the centre appears to be run down, is too busy and that there is too much traffic congestion. Overall respondents stated that they would be more likely to visit Kilburn if there were more chain stores, if the environment was more attractive, if there were more restaurants and if the centre felt safer.

- A key issue identified in the household telephone survey is the low proportion of people who perceive Kilburn to be safe during the evenings. Out of all the centres in the Borough, only Camden Town is perceived by more respondents to be unsafe or very unsafe than Kilburn. Addressing perceptions of safety in the centre would encourage people to visit the centre more often, particularly at night, to create a more vibrant centre.
- Over the plan period, it will be important for the centre to increase its comparison goods representation and to improve the overall quality in the retail and service offer. The centre would benefit from consolidation of the retail offer, which at present is diluted along the length of Kilburn High Road. Increasing the mix of alternative town centre uses in the more secondary retail areas may increase activity along these frontages, and focus retail activity in the core of the centre. In addition, improvements to the quality of the public realm and shopfronts would also add to the overall attraction of Kilburn High Road.

4. Finchley Road/Swiss Cottage

4.1 Finchley Road/Swiss Cottage is located to the north west of Camden borough and is the third largest town centre in the Borough after Camden Town and Kilburn High Road. Finchley Road/Swiss Cottage provides a significant convenience goods role in the Borough, serving local needs and those from a wider catchment; however, the centre has a more limited comparison role. The linear centre runs along the busy A41 Finchley Road, and the main retail offer is provided in the O2 Centre.

Town Centre Boundary and Frontages

4.2 The defined town centre boundary for Finchley Road/Swiss Cottage extends along Finchley Road from south of Swiss Cottage underground station to Finchley Road and Frognal overground stations in the north.

4.3 The Council identify the core frontage extending north of Swiss Cottage station, mainly along the west side of Finchley Road, as far as Finchley Road Station. The Council seek to ensure that the core frontage provides a minimum of 75% Class A1 uses. The remainder of the centre is allocated as secondary frontage. The Council seeks to ensure that the secondary frontage provides a minimum of 50% Class A1 uses. Some frontages in Finchley Road/Swiss Cottage already fall below these thresholds; in such cases no further loss of A1 will be permitted.

4.4 In order to protect shopping facilities, maintain the character of the centre, and avoid cumulative impacts on the amenity of residents, the Council will allow a maximum of 20% of the total premises within the designated core frontages to be in food, drink or entertainment use. New or expanded food, drink or entertainment uses should be small in scale (max. 100 sqm). The Council will seek to restrict these uses to no more than two consecutive units; however, they will consider the nature of individual proposals.

4.5 Due to the large amount of housing above shop premises in the centre, the Council does not consider it to be appropriate to allow for any new or expanded nightclubs in the area.

Diversity of Uses

4.6 It must be noted that details of floorspace figures and numbers of units have been obtained using the latest available data from Experian Goad. The Goad category report for Swiss Cottage extends slightly further than the defined Finchley Road/Swiss Cottage town centre boundary from the LDF and includes Fairfax Road. Furthermore, the Goad category report does not include the entirety of the O2 centre i.e. Homebase and the upper floor.

4.7 The most up to date Experian Goad category report for Finchley Road/Swiss Cottage (July 2012), identified a total of approximately 61,808 sqm gross of ground floor floorspace for retail and service (retail, leisure and financial/business services), comprising 267 units. Table 4.1 below sets out the composition of the number of units in Finchley Road/Swiss Cottage.

Table 4.1: Finchley Road/Swiss Cottage Town Centre Composition of Units

	Number of Units	% of Total	UK Average (%)	Variance
Convenience	23	8.61	8.02	0.60
Comparison	58	21.72	33.03	-11.31
Service	158	59.18	46.56	12.62
Vacant	26	9.74	12.23	-2.49
Miscellaneous	2	0.75	0.16	0.59
TOTAL	267	100.00	100.00	-

Source: Experian Goad Category Report (July 2012)

4.8 There are three main food stores within Finchley Road/Swiss Cottage; Sainsbury's, Marks & Spencer and Waitrose. Sainsbury's, located within the O2 Centre, has a total 4,227 sqm net retail floorspace and provides an in-store delicatessen, bakery, hot food counter, salad bar, fishmonger, butcher, pharmacy, travel money, café and TU clothing range. Waitrose is located adjacent to Finchley Road station and extends to a total 2,139 sqm net retail floorspace. The foodstore provides an in-store rotisserie, delicatessen, bakery, cheese counter, salad bar and butchers. Marks & Spencer Simply Food is located towards the south of the centre, near to Swiss Cottage station. In addition to this foodstore provision, there is an Iceland, as well as independent delicatessens, green grocers and convenience stores. In total, convenience retail floorspace in Finchley Road/Swiss Cottage extends 14,131 sqm gross, which at c. 23% of the total retail and service floorspace in the centre is c. 8% above the national average.

4.9 There is currently a deficiency of comparison goods units and floorspace within Finchley Road/Swiss Cottage. Experian estimate that 14,279 sqm gross floorspace is occupied for comparison good floorspace; c. 14% below the national average. The comparison goods offer in the centre is dominated by a high proportion of furniture stores (16 units). In comparison to the national average, there are a very low proportion of children's, men's and women's clothing shops (3 units) and jewellery shops (1 unit). A Homebase unit (c. 3,695 sqm GIA) is located next to the O2 shopping (this unit is not included within the Experian Goad category report figures).

4.10 Finchley Road/Swiss Cottage has a strong representation of service units, which comprises approximately half of the total floorspace available within the centre (c. 31,438 sqm). Swiss Cottage has a particularly high proportion of retail (c. 17% of all units) and leisure units (c. 26% of all units). Within the retail service sector there are relatively high numbers of health and beauty units, opticians, dry cleaners/laundrettes and alterations services. The number of financial and business service units is in line with the national average. In terms of leisure service provision, there are a relatively high number of cafes and restaurants in Finchley Road/Swiss Cottage in comparison to the national average; however, there are very few fast food takeaways or public houses. There is a large Vue cinema, located in the o2 Centre, and an Odeon IMAX Cinema, located adjacent to Swiss Cottage underground station.

Retailer Representation

4.11 The Experian Goad category report (July 2012) identified a total of 71 multiple retailers in Finchley Road/Swiss Cottage (29% of all occupied retail and service units). The multiple retailers in Finchley Road/Swiss Cottage are dispersed throughout the centre but primarily along the core shopping frontage. Generally, multiple retailer representation appears to target the lower end of the market, with main multiple retailers in the centre including Holiday Inn, Virgin Active, Habitat, Bathstore.com, Subway, Chicken Cottage, Halifax, HSBC, Vodaphone, WHSmith, Santander, Argos, Superdrug, KFC and Mac Donald's. However, new occupiers to the centre appear to target a higher consumer market, for example Oliver Bonas and Paper Chase have recently opened in the O2 Centre.

4.12 Over 70% of the occupied shops in Finchley Road/Swiss Cottage are run by independent retailers. The independent retailers in Finchley Road/Swiss Cottage provide a range of retail and service uses providing a varied mix of specialist and lower end offers. There is an above the national average proportion of convenience sector and below the national average proportion of comparison sector independent retailers in Finchley Road/Swiss Cottage. There are also a high proportion of retail and financial/business service sector independent retailers. These include beauticians, laundrettes and estate agents.

4.13 In terms of retailer requirements, the Focus database identifies only 6 requirements for between 162 and 837 sqm gross in Finchley Road/Swiss Cottage in February 2013, the lowest number of requirements of the six main town centres. As highlighted in Table 4.2 below, these requirements are a mixture of comparison, convenience and leisure services units, including requirements for Strada, Cook Trading, Mary's Living and Giving, Card Factory, Menchies and a hot food take away unit.

Table 4.2: Published Requirements for Finchley Road/Swiss Cottage

	No of Units	Min. Floorspace (sqm gross)	Max. Floorspace (sqm gross)
Comparison	2	46	232
Convenience	1	70	140
Leisure Services	3	46	465
TOTAL	**6**	**162**	**837**

Source: Co-Star Focus Database (February, 2013)

Vacancies

4.14 The Experian Goad survey undertaken in July 2012 identified 26 vacant units in Finchley Road/Swiss Cottage. Our site visit in January 2013 identified that some of the previously vacant units had become occupied, although some additional units have also become vacant. This results in an overall decline in the number of vacant units to 18 units (C. 7% vacancy rate). The decrease in vacancy rate in Finchley Road/Swiss Cottage demonstrates that performance has improved despite the economic recession. Furthermore, the vacancy rate is c. 1% below the regional Greater London average, which indicates that the centre is performing strongly.

4.15 Vacant units are scattered throughout the length of the centre and vary in size, between 20 and 400 sqm gross floorspace. There is a high vacancy rate within the o2 centre (c. 17%); however this has declined since the previous Goad survey (25%).

Environmental Quality

4.16 Finchley Road/Swiss Cottage is situated along a main road. This linear centre suffers from a physical barrier dividing Finchley Road (A41). The west side of the road, the core retail frontage, offers a more pleasant shopping experience than the east. However, the pavement level dips below road level towards the middle of the centre which creates a subdued atmosphere, separated from the east of the centre.

4.17 The majority of units to the south of the centre have retail at ground floor and 4/5 storey residential above. The wide road ensures that these tall buildings do not oppress the shopping environment; however, the busy main road distracts from the shopping environment. The architectural style of buildings considerably improves to the north of Fairfax Road.

4.18 As a whole, the unit facades appear dilapidated in the centre. Investment in these would raise the environmental quality of the centre. The O2 Centre is more aesthetically pleasing and provides a focal point for the centre.

Accessibility

4.19 Due to the centres location on the A41, Finchley Road/Swiss Cottage is easily accessible by car. The O2 Centre provides parking facilities which enables shoppers to park easily to undertake weekly shopping trips and purchase DIY type bulky goods from Homebase. This encourages car use, but also encourages shoppers to visit the centre.

4.20 The centre benefits from a PTAL rating of 6b (excellent). The centre can be accessed by both Swiss Cottage (south) and Finchley Road (north) underground stations. Both stations are located on the Jubilee Line and have direct trains to Bond Street, Green Park, Westminster, and London Bridge etc.

4.21 Finchley Road and Frognal railway station is located to the north of the centre. The station is on the North London Line and connects to Richmond, Clapham Junction and Stratford. The centre is served by nine bus services running throughout the day, and 4 night buses. The buses services link Swiss Cottage with North Finchley, East Finchley, Kings Cross, Chancery Lane, Oxford Circus, Victoria, Lancaster Gate, Shepherds Bush, West Hampstead. Brent Cross and more.

4.22 Results from the household telephone survey show that approximately 33% of the respondents walk to the centre, c. 23% travel by car and c. 22% by bus. Approximately 5% of respondents travel by train (either underground or overground).

Customer Views and Behaviour

4.23 The household telephone survey, undertaken in January 2013, included various attitudinal questions about the frequency of visits to Finchley Road/Swiss Cottage, the reasons for visiting the centre and likes and dislikes about the centre. The key findings from the telephone survey are summarised below:

- 11% of respondents to the survey stated that they visit Finchley Road/Swiss Cottage 'most often', thereby making the centre the third most frequently visited.
- Over 70% of respondents visit Finchley Road/Swiss Cottage more than once a week, which indicates people visit the centre for day to day needs.
- The majority of respondents like the centre due to its proximity to home (c. 43%). Respondents also like the centre because of the range of multiple (c. 20%) and independent retailers (c. 12%). Respondents believe that the centre has a good range of services, namely restaurants. Respondents dislike the centre because of traffic congestion (c. 14%). However, many respondents (c. 44%) stated that there was 'nothing/very little' that they dislike about Finchley Road/Swiss Cottage.
- The majority of respondents use Finchley Road/Swiss Cottage for food and non-food shopping (c. 58% and c. 76% retrospectively). Many also use the centre for daytime and evening eating (c. 25% and 23% retrospectively), drinking (c. 14% and 17% retrospectively), cultural activities (c. 28% and 37% retrospectively) and sporting activities (c. 18% and 10% retrospectively). Approximately 66% of respondents feel safe in Finchley Road/Swiss Cottage; however, 26% do not visit the centre in the evening.

Proposals and Commitments

4.24 There are a number of future development sites within Finchley Road/Swiss Cottage for redevelopment. The following sites are identified within the adopted Camden Site Allocations DPD (September 2012):

4.25 **O2 Centre Car Park** – The car park to the rear of the o2 Centre has been allocated for further mixed use development, comprising residential, retail and community floorspace.

4.26 **100 Avenue Road** – The land south of Swiss Cottage underground station, adjacent to the Hampstead Theatre, is allocated for mixed used development to comprise residential and employment town centre uses, and small scale retail floorspace at ground floor level. This 4,100 sqm site is currently in use as office and retail floorspace.

4.27 There is an extant planning consent for the partial change of use of Virgin Active (Class D2) to a retail unit (Class A1) in the **O2 Centre**. The proposal, granted in January 2010, will provide 583 sqm of retail floorspace (App. Ref: 2009/3906/P).

Summary

- Finchley Road/Swiss Cottage is a linear high street along a major road network and caters to the needs of local residents as well as serving a wider catchment (particularly for food and bulky DIY goods).
- The centre is considered to be performing well in relation to the provision of convenience and service units, benefiting from the provision of two large foodstores and a high proportion of retail and leisure services. In terms of floorspace, the convenience and retail service offer is particularly strong in Swiss Cottage.
- The comparison retail offer in the centre is weak and below the national average in terms of unit and floorspace. The offer is dominated by home furnishing operators, with a limited clothing offer. There is scope to improve the comparison goods offer in the centre.
- Overall, the vacancy rate in the centre is broadly in line with the Greater London regional average and we have noted a significant decline in vacancy since July 2012. This demonstrates that the centre is performing well, even in light of the economic climate. A high vacancy rate on the upper floor of the O2 Centre remains, despite the strong performance of the centre on a whole.
- The centre is easily accessible by public transport and by car, but the linkages within the centre are weak due to the physical barrier dividing Finchley Road. The environmental quality is poor throughout the centre, with low quality shopfronts appearing dilapidated. Investment in the area would raise the quality of the environment in Finchley Road/Swiss Cottage.

- Results from the telephone survey indicate that people chose to visit Finchley Road/Swiss Cottage the most because of the centres' close proximity to home, reflecting the local shopping role that the centre currently plays. Respondents also consider Finchley Road/Swiss Cottage to have a good range of independent and multiple retailers as well as leisure service offer.
- In terms of dislikes, respondents from the household survey identified that the centre is heavily congested with traffic. Furthermore, a quarter of all respondents stated that they would not visit the centre at night because of concerns over safety in the centre.
- Over the plan period, it is important for the centre to increase its comparison goods representation and to improve the environmental quality of the centre. Investment in the quality of the public realm and shopfronts would add to the overall attraction of Finchley Road/Swiss Cottage.

5. Hampstead

5.1 Hampstead is the most northern town centre in the borough and is the second smallest town centre (after West Hampstead). Hampstead provides a high quality retail and leisure offer, reflecting the affluence of the local catchment area. The history of the town, its attractive 'village' environment and proximity to Hampstead Heath also draw a significant number of tourists to visit Hampstead.

Town Centre Boundary and Frontages

5.2 The Camden Proposals Map defines the Hampstead town centre boundary extending from Heath Street (south of Hampstead Square to Perrin's Walk), along Hampstead High Street eastwards to Rosslyn Hill (including part of Downshire Hill). Core frontages are defined in the Camden Planning Guidance CPG5 along Hampstead High Street, Perrin's Court, Flask Walk and part of Heath Street. Secondary frontages extend along the remaining frontages within the town centre boundary.

5.3 Some sections of the secondary frontage do not include significant proportions of retail uses. For example, the frontage at Downshire Hill provides no retail services, the eastern side of Holly Bush Lane provides the rear access points for units fronting Heath Street and Holly Hill, and the northern section of Heath Street provides nine comparison and service units, alongside four vacant units interspersed with a number of residential properties, offices, a church and a dental practice.

5.4 Some areas of the primary frontage are within a more secondary location, for example the eastern side of Heath Street (south of Oriel Place), and Flask Walk.

Diversity of Uses

5.5 Similarly to the previous retail study, details of floorspace figures and number of units have been obtained using the latest available data from Experian Goad. It is important to note that the Goad category report for Hampstead covers a slightly smaller area than the defined Hampstead town centre boundary from the LDF (excluding those units on Heath Street north of Heath Street Baptist Church).

5.6 The Experian Goad category report for Hampstead town centre (July 2012) identifies a total of approximately 21,238 sqm gross of ground floor floorspace for retail and service (retail, leisure and financial/business services), comprising 196 units. Table 5.1 below sets out the composition of the number of units in Hampstead.

Table 5.1: Hampstead Town Centre Composition of Units

	Number of Units	% of Total	UK Average (%)	Variance
Convenience	12	6.12	8.02	-1.91
Comparison	88	44.90	33.03	11.86
Service	86	43.88	46.56	-2.68
Vacant	10	5.10	12.23	-7.13
Miscellaneous	0	0	0.16	-0.16
TOTAL	196	100	100	-

Source: Experian Goad Category Report (July 2012)

5.7 The main convenience goods offer in Hampstead is the Tesco Express on Heath Street (253 sqm net sales), which is the only supermarket in the town centre. The limited convenience goods offer in the town is supplemented by three bakers, a butchers, a convenience store, a greengrocers, a delicatessen, two markets, two off licences and a cobblers. The majority of these units are independent retailers, providing a high quality offer of fresh produce. There is 1,784 sqm gross convenience goods floorspace in the centre, which represents 8.4% of the total retail and service floorspace in the centre and is below the national average of 14.49%.

5.8 Comparison retail provision in the town is strong; the proportion of comparison units is well above the national average and the proportion of floorspace is slightly above the national average (totalling 8,380 sqm gross). Hampstead provides a broad retail offer including a mix of multiple retailers and independent retailers, the vast majority of which are catered towards the high end retail market. The town centre has a particularly strong representation of ladies and mens wear and accessories, art shops/galleries and homeware shops, and has a below average representation of charity shops.

5.9 The proportion of service units in Hampstead is slightly below the national average. Analysing the sector in further detail it is evident that the town has a good level of retail service provision (e.g. dry cleaners, health and beauty and opticians) and a reasonable level of financial/business service units (e.g. property services and banks).

5.10 However, there is a below average proportion of leisure service units. Whilst Hampstead has an above average proportion of restaurants and cafes, the town has a below average representation of bars, wine bars, fast food restaurants, hotels and pubs. Whilst the prevalence of some of these uses (e.g. takeaways) may not be desirable, there appears to be a deficiency in terms of Class A4 uses in the town centre. We note however, that there are also several pubs in the wider area which fall outside of the town centre boundary.

Retailer Representation

5.11 The Experian Goad category report (July 2012) identified a total of 73 multiple retailers in Hampstead (39% of all occupied retail and leisure units). These multiple retailers are relatively disbursed throughout the centre and include high end fashion retailers such as Reiss, Nicole Farhi, Zadig and Voltaire, and Whistles as well as other retailers including Petit Bateau, French Connection, Zara Home, Fired Earth, Gap, Waterstones, Ryman, Boots and The Body Shop.

5.12 A number of chain cafes and restaurants are located within the town including Café Rouge, Gaucho, Wagamama, Starbucks and Pizza Express. Other key multiple retailers in the town include high street banks (Natwest, HSBC, Lloyds TSB and Barclays), and estate agents (including Goldschmidt, Foxtons, Savills and Knight Frank).

5.13 Independent retailer representation in Hampstead is strong and provides a good range of convenience, comparison and service units, including fashion boutiques, niche gift shops, specialist food and drink shops, cafes and restaurants, most of which tend to provide a high end, quality retail offer. The number of independent retailers adds to the vibrancy, diversity and uniqueness of the centre and is a key strength. The Everyman cinema on Holly Bush Lane is one of Britain's oldest independent cinemas and provides an important leisure destination in the town (the results of the household telephone survey indicate that the cinema attracts 4% of all respondents in the survey area).

5.14 The Focus database identifies a total of 26 retailer requirements for between 2,454 and 5,279 sqm gross in Hampstead in January 2012. This is the highest number of retailer requirements for accommodation out of all of the centres in Camden, demonstrating that the centre is performing very strongly and that there is currently an under provision of retail floorspace in the centre.

5.15 As highlighted in Table 5.2 below, the majority of these requirements are for comparison units, and include requirements from high end fashion and skincare retailers such as Phase Eight, Jojo Maman Bebe, Teokath of London and Liz Earle. There are also retailer requirements from more mainstream retailers such as Holland and Barrett, Topps Tiles, Claire's Accessories and Steamer Trading.

5.16 There are three convenience requirements for Jungs (patisserie), Olio and Farina (Italian speciality foods) and The Whisky Shop. There is also a strong demand for leisure service floorspace from restaurant and café operators including new Spanish and Thai restaurant chains, as well as established eating and drinking chains such as Costa coffee, Strada and new start-ups such as The Pantry Cafe.

Table 5.2: Published Requirements for Hampstead

	No of Units	Min. Floorspace (sqm gross)	Max. Floorspace (sqm gross)
Comparison	14	1,288 sqm	3,040 sqm
Convenience	3	214 sqm	427 sqm
Leisure Services	8	859 sqm	1,626 sqm
Retail Services	1	93 sqm	186 sqm
TOTAL	**26**	**2,454 sqm**	**5,279 sqm**

Source: Co-Star Focus Database (January 2013)

Vacancies

5.17 Only 10 vacant units were identified by Experian Goad in July 2012, which represents half the proportion of vacant units in comparison to the national average. The vacancy rate in Hampstead is also c. 3% below the Greater London regional average. In terms of vacant floorspace, this equates to only 4.72% of the total floorspace in the town centre (well below the national average). In addition, 4 vacant units were identified at the northern end of Heath Street (not included within the Goad survey).

5.18 These low vacancy levels indicate that Hampstead is continuing to perform strongly despite the economic downturn. The low vacancy rates demonstrate the attractiveness of Hampstead as a shopping destination for residents and tourists and also show the demand from retailers to have store presence in the town. Such low vacancy levels can however be symptomatic of a lack or under provision of retail space, demonstrated by the small floorplates of the existing vacant units, which are not suitable for modern retailers.

Environmental Quality

5.19 Hampstead is an attractive town centre, which provides an upmarket shopping environment. Hampstead town centre is of cultural, historic and architectural importance and accordingly the whole of the town centre is allocated as a Conservation Area. In addition, numerous properties along Heath Street and Hampstead High Street are statutorily listed. The character of the town centre has been protected through planning controls and it is evident that many multiple retailers have used bespoke signage on their frontages to provide a sympathetic design to the historic fabric of the town.

5.20 Wide, tree lined streets and wide pavements characterise the eastern part of Hampstead High Street which is set on a relatively steep incline and contains a mixture of architectural styles and features cafes providing outdoor seating. The western part of Hampstead High Street narrows towards the junction with Heath Street but also benefits from wide pavements.

5.21 The southern part of Heath Street provides a quieter retail area with more even topography providing smaller traditional style shop units than the main High Street. Between Heath Street and Hampstead High Street are two pedestrian walk ways at Perrins Court and Oriel Place which provide further variety to the overall offer of the town centre and include a number of small independent cafes and restaurants with outdoor seating.

5.22 The northern part of Heath Street from the underground station has a steep incline and pavements in this part of the town are narrower, particularly in the northern part of the town centre. The architecture in this section of the town is more varied, with modern developments and frontages such as 58-62 Heath Street and Zara Home, sitting alongside more traditional retail units. North of the Heath Street Baptist Church the area has a less distinctive retail character as a result of the number of residential properties in this location.

5.23 Overall, the town centre is clean and well maintained throughout, with no sign of graffiti or vandalism. The shop frontages are well kept and add to the visual appeal of the centre.

Accessibility

5.24 Hampstead town centre is easily accessible by public transport and benefits from a PTAL rating of 4 (good) throughout the majority of the town centre and decreasing to a rating of 3 (moderate) at the northern end of Heath Street. Hampstead underground station is served by the Northern Line and located in the middle of the town centre. Three day time bus routes and one night bus route runs through the town centre providing local connections to Swiss Cottage, Muswell Hill, Golders Green and central London.

5.25 Within the town centre, Hampstead High Street and Heath Street are busy arterial routes, which have a steady flow of traffic. There are no public car parks in the centre, and only limited on-street car parking is provided. At times the centre can be quite congested and this restricts pedestrian accessibility throughout the centre. Although there are several pedestrian and zebra crossings, waiting for safe opportunities to cross these roads can impede ease of access to shops and affect the overall shopping experience.

5.26 Results from the household telephone survey identified that of those respondents who stated that they visit Hampstead most often, 42% of respondents walked to the centre, 21% travelled by car, 18% travelled by bus and 5% used the London Underground. Hampstead and Swiss Cottage/Finchley Road centres attract the highest proportions of visitors who normally travel by car.

5.27 The in-centre shopping survey also found that the majority of respondents walked to Hampstead (51%), and that the second most popular transport mode was travelling by car (18%). However, a higher proportion of visitors travelled by London Underground (15%), which is likely to be attributable to visitors to the centre travelling from outside the survey area.

Customer Views and Behaviour

5.28 The household telephone survey, undertaken in January 2013, included various attitudinal questions about the frequency of visits to Hampstead, the reasons for visiting the centre and likes and dislikes about the centre. The key findings from the telephone and in-centre surveys are summarised below:

- 8% of respondents to the telephone survey stated that they visit Hampstead ‘most often’ out of all the centres in Camden. Of those who visit Hampstead most often, the highest proportions are drawn from zone 4 (25%) and zone 3 (24%) and lower proportions from the other zones.

- The majority of visitors who visit Hampstead most often, do so once a week (20%), whilst 19% visit every day and 18% visit 2-3 times a week. Those who visit Hampstead most often, do so to undertake daytime eating (74%), non-food shopping (73%), evening eating (60%) and evening drinking (57%). A smaller proportion visit for food shopping (52%), which makes Hampstead the second lowest centre of attracting trips for food shopping (behind Tottenham Court Road). This reflects the comparatively poor convenience goods offer in the town centre.
- Of the telephone respondents who visit Hampstead most often, a quarter of respondents liked the 'attractive environment', 24% like to visit because it is 'close to home', 19% like the 'good range of independent stores' and 15% like the 'good range of chain/well known stores'.
- The majority of respondents to the telephone survey disliked 'very little' about Hampstead. The main dislike about Hampstead is that it is 'difficult to park cars' (12%), which reflects the high proportion of people who visit the centre by car and the low provision of public car parking. Other dislikes included 'traffic congestion' (7%), 'too expensive' and 'too many phone shops' (both 6%), and 'expensive to park (5%).
- Respondents would visit Hampstead more often in the daytime if there was 'easier/more parking' (12%), 'more independent shops' and 'more chain stores' (both 7%), and 'more foodstores' and 'cheaper parking' (both 5%). In the evening, respondents would visit Hampstead more often if there were 'more restaurants' (12%), 'cheaper parking', 'more/easier parking', 'more pubs and bars' and 'more places to sit' (all 3%).
- In terms of safety, 86% of respondents who visit Hampstead most often felt 'very safe' or 'safe' in the centre in the evening. No respondents stated that they felt unsafe in Hampstead during the evening.

5.29 In addition an in-centre shopper survey of 99 people was undertaken in January 2013 which also included attitudinal questions about the provision of shopping and leisure facilities in Hampstead, and included responses from tourists from the UK and abroad. The in-centre survey was undertaken across the whole of the town centre on one day during the week and on a Saturday. The key findings of the in-centre survey are summarised below:

- 59% of respondents identified themselves as 'local residents', 26% as 'workers', 5% as a 'tourist from the UK' and 3% as 'tourist from overseas'. Analysis of the postal sectors provided by respondents indicates that 48% of respondents to the in-centre survey live outside the telephone survey area, including 3 respondents who live overseas.
- When asked what the main purpose of their visit to Hampstead is, 29% of respondents stated 'work and business' (this was the most common result for surveys undertaken both during the week and the weekend), followed by 11% for 'meeting friends and socialising', 9% for 'non-food shopping' and 7% for 'food shopping'.
- The highest proportion of respondents to the in-centre survey undertake their main food shopping outside the survey area, with 16% of people choosing to shop at Waitrose in Finchley Road and 16% shopping online. Only 14% of those surveyed undertake their main food shop at Tesco Express Heath Street, the only supermarket in the town centre, whilst 9% shop at Sainsbury's Finchley Road and 7% at Marks and Spencers Pond Street (Hampstead Heath). It is evident that Tesco Express Heath Street provides more of a top-up shopping role, attracting 41% of top up shopping trips, whilst Marks and Spencer Pond Street attracts 14%.
- The majority of visitors intend to spend all day in Hampstead (16%), however there are also a high proportion to intend to make a shorter trip of between 30-44 minutes (14%). On average, most respondents visit Hampstead daily (35%), a quarter visit 2-3 times a week and 13% visit weekly.
- The main things that in-centre survey respondents liked about Hampstead is the 'pleasant/attractive environment' (41%), 'close to home' (32%), 'good selection of non-food shops' (16%), 'good selection of food shops' (12%) and 'close to work' (10%).
- 29% of people disliked 'nothing in particular' about Hampstead, and 13% thought it was 'too expensive', however the main dislikes about Hampstead related to cars, with 12% of respondents stating that there was 'too much traffic' and 'difficult/expensive to park'. Other issues raised were the 'poor selection of non-food shops' and 'too many mobile phone shops' (6%).
- Respondents would be encouraged to visit Hampstead more often if there is 'more independent retailers' (13%), 'more/better parking' (12%) and 'less traffic' (5%).

5.30 Respondents to the in-centre survey were asked to rate the provision of shops and services in Hampstead. Taking a mean score of the rankings of shop and service provision (scores: very strong = 2, good = 1, average = -1 and weak = -2), it is evident that Hampstead is perceived to have very high ratings for its overall environment (1.29) and perceptions of safety (1.22). The centre has good ratings for its daytime eating and drinking facilities (0.86), provision of high end/niche shops (0.79) local service provision (hairdressers, banks etc.) (0.77), and night time eating and drinking facilities (0.56). The centre has reasonable ratings for provision of independent retailers (0.36) and low rankings for the provision of chain shops (0.13).

Proposals and Commitments

5.31 No specific site allocations have been put forward for Hampstead town centre within the Council's adopted Site Allocations DPD. The historic nature of the town (including the limitations of the Conservation Area and the prevalence of Listed Buildings) means that opportunities to expand the town centre or to create additional retail floorspace are limited. Therefore, within Hampstead there are very few opportunities for the 26 retailers with requirements to operate stores within the town centre.

5.32 We are not aware of any extant planning permissions over 200 sqm for additional convenience or comparison goods floorspace in Hampstead town centre.

Summary

- Overall, Hampstead is performing very strongly against a number of key indicators. The centre is the most attractive all Camden's town centres, boasting a mix of traditional architecture, a village like atmosphere and shops catered towards upmarket clientele. There is a good mix of multiple and independent retailers which brings vibrancy and vitality to the centre.
- Hampstead benefits from a particularly strong high end comparison goods offer, and survey results demonstrate that Hampstead is renowned for its boutique and niche shops, with comparison goods shopping for both high end multiple and independent retailers both key draws to the centre.
- However, the convenience goods offer of the town is more limited, with only one small supermarket serving the centre. The qualitative results from the in-centre survey identify that Tesco Express Heath Street performs more of a top up shopping role, with main food shopping predominantly being undertaken outside Hampstead town centre.

- Analysis of the in-centre survey results identified that 48% of respondents lived outside the study area, including 3 people who live overseas. As a significant tourist destination there is a strong café and restaurant offer in the town; however, closer analysis reveals a below national average proportion of bars and pubs which indicates a deficiency of Class A4 provision. A high proportion of in-centre survey respondents were visiting Hampstead to meet friends and socialise, reflecting the importance of Hampstead's leisure offer.
- The attractiveness of the centre is the most frequent cited positives about Hampstead, with respondents to the surveys also liking the close proximity to home, and the good range of both multiple and independent retailers.
- Respondents to the household and in-centre surveys highlight that car parking and traffic are the main issues in Hampstead, reflecting the high proportion of visitors who usually travel to Hampstead by car. Addressing car parking provision or reducing the number of journeys made by car will be a key issue in Hampstead over the plan period.
- Hampstead has a low vacancy rate, which demonstrates the strength of retail demand in the centre, but this also highlights the lack of available space to extend the provision of retail floorspace. There is a very strong demand particularly in the comparison and restaurant sectors for new floorspace, with 26 retailer requirements identified in the centre.
- It will be crucial over the plan period to ensure that Hampstead continues to perform strongly within the Borough, serving both the needs of local residents and visitors. It will become increasingly important to maintain the centre's 'village' atmosphere and strength of the mix of multiple and independent retailers as key attractions to the town, whilst also addressing the deficiencies in convenience and eating/drinking provision.

6. Kentish Town

6.1 Kentish Town is located to the east of the borough and north of Camden town centre. Kentish Town provides a day to day shopping offer serving local needs, and is pitched towards the mid to low end of the market. The centre is the third smallest town centre in Camden and provides a varied shopping environment along the linear Kentish Town Road.

Town Centre Boundary and Frontages

6.2 The Camden Proposals Map defines the town centre boundary for Kentish Town extending the length of Kentish Town Road from Hawley Road northwards to Fortess Road.

6.3 The Camden Planning Guidance CPG5 identifies the core shopping frontage falling between Royal College Street in the south and Fortess Road in the north. Within this area, the Council seek to ensure that the retail frontage provides a minimum of 75% Class A1 uses. To the north and south of the core retail frontage, the remaining units are identified as Secondary retail frontages. Within the secondary retail frontages, the Council will seek to ensure that 50% of the frontage remains in Class A1 uses.

Diversity of Uses

6.4 Similar to the previous retail study, details of floorspace figure and number of units have been obtained using the latest available data from Experian Goad. It is important to note that the Goad category report for Kentish Town covers a slightly smaller area than the defined town centre boundary identified in the LDF.

6.5 The Experian Goad category report for Kentish Town (December 2010) identifies a total of approximately 30,379 sqm gross ground floor floorspace for retail and service (retail, leisure and financial/business services), comprising 180 units. Table 6.1 below sets out the composition of the units in Kentish Town.

Table 6.1: Kentish Town Centre Composition of Units

	Number of Units	% of Total	UK Average (%)	Variance
Convenience	20	11.11	8.02	3.09
Comparison	34	18.89	33.03	-14.14
Service	109	60.56	46.56	13.99
Vacant	16	8.89	12.23	- 3.34
Miscellaneous	1	0.56	0.16	0.40
TOTAL	180	100.00	100.00	-

Source: Experian Goad Category Report (December 2010)

6.6 There are four main convenience goods units in Kentish Town. Sainsbury's Local is located opposite the underground station, on Kentish Town Road (c. 232 sqm net sales); Co-op foodstore is located opposite the Islip Street junction and provides c. 219 sqm net sales area; another Co-op Foodstore is located further south (near Anglers Lane) and extends c. 362 sqm net sales area; and a Tesco Express is located towards the south of the centre (c. 185 sqm net sales area). In addition, there is an Iceland and a number of independent retailers, including a bakery, health food shop, fishmonger, delicatessen, green grocers, convenience stores and off licences. In total, convenience retail floorspace comprises 5,203 sqm gross, which at c. 17% of the total retail and leisure floorspace in the centre is above the national average (14.48%).

6.7 There is currently a deficiency of comparison goods units and floorspace within Kentish Town. Experian estimates that 5,426 sqm gross floorspace is occupied for comparison goods floorspace, which proportionally is c. 20% below the national average. The weak comparison goods offer in the centre is dominated by low end comparison goods uses, including charity shops, discount hardware stores and discount fashion.

6.8 Kentish Town has a strong representation of service units, which comprise c. 60% of the total amount of retail and service floorspace available within the centre (17,893 sqm gross). Within the retail service sector there is a particularly high number of dry cleaners and travel agents. The financial service sector comprises a high representation of building and legal services and the leisure sector comprises a high number of cafes, fast food takeaways, betting shops and restaurants. Furthermore, the HMV Forum theatre and concert venue, and Bull and Gate public house in the north of the centre, attracts visitors into Kentish Town.

Retailer Representation

6.9 The Experian Goad category report (December 2010), identified a total of 46 multiple retailers in Kentish Town (61% of which are occupied by service units). The multiple retailers in Kentish Town are principally located within the core retail frontage. Multiple retailers in the centre include Greggs, Pound Stretcher, Carpetright, William Hill, Ladbrokes, Superdrug, Costa, Nando's and Pizza Express.

6.10 Over 70% of the occupied shops in Kentish Town are run by independent retailers which provide a range of retail and services uses. Circa 70% of all the independents units are service uses, with a third of all the independent units occupied by leisure services. There are a particularly high number of independent cafes and fast food takeaways in Kentish Town. The majority of independent operators are characterised by bargain retailers providing low-priced goods and services.

6.11 In terms of retailer requirements, the Focus database identifies eight retail requirements for between 195 and 650 sqm gross in Kentish Town, in February 2013. As highlighted in Table 6.2 below, these requirements are mainly for comparison good units. These requirements are by Mary's Living and Giving Card Factory, Holland & Barrett, Rush Hair, Traid, Café Nero, Fonehouse Group Ltd and a charity shop.

Table 6.2: Published Requirements for Kentish Town

	No of Units	Min. Floorspace (sqm gross)	Max. Floorspace (sqm gross)
Comparison	6	28	232
Retail Service	1	93	232
Leisure Services	1	74	186
TOTAL	**8**	**195 sqm**	**650 sqm**

Source: Co-Star Focus Database (February, 2013)

Vacancies

6.12 The Experian Goad survey undertaken in December 2010 identified 16 vacant retail units in Kentish Town. Our site visit in January 2013 identified that some of the vacant units have since been occupied by retailers such as Costa, Prêt a Manger, Co-op, Oxfam. In addition, a number of units have since become vacant, which has resulted in an overall increase in the number of vacant units to 17 units (c. 9% of all units).

6.13 The current vacant units vary in size and are dispersed throughout the centre. Despite the slight increase in the number of vacant units within the centre, the vacancy rate remains below the national and Greater London regional average (c. 12% and 9% retrospectively). This indicates that Kentish Town continues to perform strongly despite the economic downturn.

Environmental Quality

6.14 The quality of the centre varies throughout. The north of the centre is characterised by few larger units comprising HMV Forum Theatre, CW Plant Hire, The Bull and Gate public house, a Warehouse and a mixed use development site. The mixed use development site is situated between Fortess Road and Highgate Road comprises residential and retail units. The residential element has been occupied for some time, but the retail units have yet to be let and fitted out. There are also several small retail units in this area which are poorly maintained with dilapidated facades. Investment in shop fronts in the northern part of the town would help to improve the appearance and lift the quality of area.

6.15 The central area, namely the core frontage, is of a higher quality with terraces of traditional high street buildings which are interspersed with post war buildings. The core frontage, particularly close by the Kentish Town station, is characterised by many small coffee shop units. Retailers such as Prêt a Manger, Tolli Italian Patisserie and Coffee Bar, Flapjacks Café, Costa Coffee are located opposite the station entrance. A market stall is located close by the station offering fruit and vegetables. A florist, butchers, fishmongers and bakery, as well as Sainsbury's Local, Iceland and Co-op Foodstore are also located within close proximity to the station, offering local residents access to every-day amenities. Street traders are situated south of the station, offering fresh produce. Wide pavements within the centre enable these traders to operate without disrupting pedestrian access. This adds to the vibrancy of the shopping environment.

6.16 To the south of the centre, post war architecture is apparent and many shop facades appear dilapidated; investment in this area would significantly improve the quality of the centre. There are however, few units of high quality scattered throughout the centre, which improves the appearance of this area. The units within the south of the centre vary in size, shape, scale and quality.

6.17 A variety of transport and public realm improvements are expected in Kentish Town over the next two years, including the installation of Legible London way-finding signs and the introduction of the Mayors cycle hire scheme. This will help to improve the overall quality of the environment within the centre. Overall the town centre is reasonably well maintained, with public realm improvements and art work. However, poorly maintained shop facades and boarded up units result in an average quality shopping environment to the north and south of the station. The area surrounding the station offers a good quality shopping offer for local residents on a day-by-day basis.

Accessibility

6.18 Kentish Town is a linear centre with an underground and rail station located to the north and overground station to the west of the centre. The underground is on the High Barnet branch of the northern line, providing good access into Central London. The PTAL rating for Kentish Town is 6a (excellent).

6.19 There are five bus routes which run through Kentish Town, three of which run throughout the night alongside an additional night bus. Traffic is free flowing along Kentish Town Road; however, there is limited opportunity to park within the centre.

6.20 Many visitors travel to the centre by foot. The Council are currently installing 'Legible London' pedestrian way-finding signs, which will help improve pedestrian access within the centre. There are a number of pedestrian crossings along Kentish Town Road which maintain pedestrian safety in the centre.

Customer Views and Behaviour

6.21 The household telephone survey undertaken in January 2013 included various attitudinal questions about the frequency of visits to Kentish Town, the reasons for visiting the centre and likes and dislikes about the centre. The key finding from the telephone survey are summarised below:

- 7% of respondents to the survey stated they visit Kentish Town 'most often' of the Borough centres.
- Circa 77% of people that visit Kentish Town do so more than once a week. This confirms our assumptions that the majority of visitors to the centre are local residents fulfilling local needs, such as food shopping, working, leisure activities. All of the respondents visit Kentish Town at least once every 2 – 3 months.

- The most popular mode of transport into the centre is to walk (c. 68%). Furthermore, c. 13% travels by car, c. 11% by bus, and 6% by bicycle. None of the people surveyed in the household survey travel to the centre by underground or overground, reflecting the relatively localised catchment area.
- When asked what they like about the centre; many people stated the close proximity to work (c. 32%) and the range of independent shops (c. 30%). Some respondents believe that there is good range of multiple retailers (c. 10%) and some find the centre attractive (c. 9%).
- When asked what they dislike about the centre; c. 13% of respondents commented on the traffic congestion, 9% of respondents find the centre run down and dirty and c. 5% of respondents find the centre too busy. Furthermore, c. 44% of respondents stated that there is nothing/very little they dislike about the centre. Circa 70% of respondents feel safe in Kentish Town, although c. 14% of respondents will not visit the centre during the evening.
- The majority of respondents who visit Kentish Town centre most often stated that they use the centre for food and/or non-food shopping (c. 79% and c. 67% retrospectively). Many respondents visit the centre for daytime eating (c. 46%), drinking (c. 35%) and sports activities (c. 34%). The centre is also popular for evening eating (44%) and drinking (c. 40%). Circa 10% of respondents visit nightclubs and/or late night venues in the centre. These results indicate that people visiting the centre undertake a wide range of shopping and leisure activities.
- The survey results suggest that very little would attract respondents to visit the centre more often during the daytime; c. 51% stated that 'nothing' would do so. However, c. 13% stated more independent shops; c. 7% stated better parking, c. 5% stated more multiple retailers and c. 6% stated a specific retailer would make them visit the centre more often. 67% of respondents stated that 'nothing' would make them visit the centre more during the evening, whilst c. 14% stated more restaurants and 4% stated a cinema would attract them during this time.

Proposals and Commitments

6.22 The adopted Site Allocations Document does not propose any further retail development within Kentish Town or the local vicinity. Planning permission was granted in September 2005 for circa 607 sqm gross retail at ground floor level and 33 residential units at Fortess Road. The ground floor retail element of the scheme is currently advertised for letting and the residential development above has been completed and occupied for some time.

Summary

- Kentish Town is a traditional linear high street that performs a mainly functional role catering for the needs of local residents. The centre is considered to be performing well in relation to the provision of convenience and service units; however, there is limited comparison goods retail floorspace (c. 20% below national average levels). The town benefits from the operation of 4 main food stores in the centre although these are of relatively limited scale,
- The below average provision of comparison units in Kentish Town is accentuated by the low quality of existing retailers. The comparison offer is dominated by discounted goods units, such as charity shops, home wares and fashion. Existing units are small in size and therefore attracting new multiple retailers into the centre to improve the quality of offer may be dependent on the amalgamation of units to provide larger floorplates.
- Overall, the vacancy rate in the centre is below the national and regional average. We note that there has been a slight increase in the number of vacant units in the centre over the last year, which reflects wider national retail trends as retailers continue to struggle in the economic climate and does not raise significant concern.
- Results from the household telephone survey indicate that people mainly use Kentish Town for food and/or non-food shopping. People like the close proximity to work and the range of shops available within the centre. In terms of dislikes, respondents identified that the centre appears run down and busy in terms of both pedestrians and congestion.
- The centre is easily accessible and is functioning reasonably well; however, the centre does have weaknesses. The environmental quality of the centre varies throughout, and the centre would benefit from shopfront improvements to improve the street scene, particularly along the secondary frontages which are blighted by lower quality retail units.
- Over the plan period, it will be important for the centre to increase its comparison goods representation and to improve the overall quality in the retail and service offer. At present the retail offer is diluted along the length of Kentish Town centre. The centre would benefit from a more consolidated retail core, and greater land

use flexibility in the more peripheral areas. Increasing the mix of alternative town centre uses within the secondary retail frontages may increase activity along these frontages and focus retail activity in the core of the centre. In addition, improvements to the quality of the public realm and shopfronts would also add to the overall attraction of Kentish Town.

7. West Hampstead

7.1 West Hampstead is located in the north west of the borough, between Finchley Road/Swiss Cottage to the east and Kilburn to the west. The centre is linear in nature and the smallest town centre in the London Borough of Camden. West Hampstead is allocated as an Area of Intensification in the London Plan 2011.

Town Centre Boundary and Frontages

7.2 The Camden Proposals Map defines the town centre boundary of West Hampstead extending along West End Lane with a small extension into Broadhurst Gardens at the south.

7.3 The Camden Planning Guidance CPG5 identifies the core frontage extending along the east of the West End Lane north of the Midland Mainline and Thameslink railways. The Council will not permit development which results in the number of ground floor premises in shop use falling below 75%. The rest of the centre, the west of the main road and south of the railway line, are designated as secondary frontages. The Council will not permit development which results in the number of total premises in shop use falling below 50% along the secondary frontages. Where the number of retail premises in these frontages is already less than the minimum requirement of 75% and 50%, no further loss of retail will be permitted.

7.4 The Council recognises that food and drink uses make a positive contribution to the overall mix of uses and the vitality of West Hampstead town centre. The Council will consider the impact of any further food, drink or entertainment uses on the retail character and function of the centre, the overall mix of uses in the centre and the local amenity. Permission for development of food, drink and entertainment uses may be granted to a maximum of 25% of total uses in each individual frontage. Where the number of these already exceeds 25%, no further developments will be permitted. The Council will not permit developments which result in more than two of these uses located consecutively in a frontage.

Diversity of Uses

7.5 The most up to date Experian Goad category report for West Hampstead (July 2012), identified a total of approximately 19,222 sqm gross of ground floor retail floorspace for retail and service uses (retail, leisure and business/financial services), comprising 156 units. West Hampstead is the town centre with the lowest level of retail and leisure floorspace. Table 7.1 below sets out the composition of the number of units in West Hampstead.

Table 7.1: West Hampstead Town Centre Composition of Units

	Number of Units	% of Total	UK Average (%)	Variance
Convenience	17	10.90	8.02	2.88
Comparison	28	17.95	33.03	-15.08
Service	101	64.74	46.56	18.18
Vacant	10	6.41	12.23	- 5.82
Miscellaneous	0	0.00	0.16	- 0.16
TOTAL	156	100.00	100.00	-

Source: Experian Goad Category Report (July 2012)

7.6 There are three food stores within West Hampstead. Nisa is located to the south of the centre close to West Hampstead underground station; Tesco Express is located within the core shopping frontage, on the junction of Lymington Road (c. 371 sqm); and Sainsbury's is located within the core shopping frontage, on the junction of Fawley Road (c. 195 sqm) and is the main convenience goods provision in the centre providing an in-store bakery. In addition to these food stores, there are independent bakeries, delicatessens and green grocers as well as convenience stores and off licenses. In total, convenience retail floorspace in West Hampstead extends 2,146 sqm gross, which at c. 11% of the total retail and service floorspace in the centre is c. 3% below the national average.

7.7 There is currently a deficiency of comparison goods units and floorspace within West Hampstead. Experian estimates that 2,926 sqm gross floorspace is occupied for comparison goods floorspace, which is c. 21% below the national average. Within the comparison goods provision, there are a significant number of charity shops, and a very low proportion of clothes shops and it is likely that the poor comparison goods offer reflects the strong comparison provision in larger and higher order centres elsewhere.

7.8 West Hampstead has a strong representation of service units, which comprise c. 65% of the total floorspace within the centre (12,393 sqm). West Hampstead has a particularly high proportion of leisure (34% of all units) and financial/business service (18% of all units) units; 85% of all the business/financial service units are operating as property services. The leisure service sector is dominated by bars, restaurants, cafes and fast food takeaways.

Retailer Representation

7.9 The Experian Goad category report (July 2012) identified a total of 29 multiple retailers in West Hampstead (20% of all occupied retail and service units); the lowest proportion of multiple retailers in the Borough's town centres. Multiple retailers are predominately located towards the north of the centre. They include Café Nero, Pizza Express, Dominos, Nando's, Oxfam, Gourmet Burger Kitchen, Barclays, Scope, Cancer Research, Cycle Surgery, Costa and Ladbrokes. There are only 7 comparison goods multiple retailers within West Hampstead, 6 of which are charity shops.

7.10 Approximately 80% of the occupied units in West Hampstead are occupied by independent retailers. The independent retailers in West Hampstead provide a range of convenience goods and retail, leisure and financial/business services. In particular, there are a high proportion of restaurants, cafes, dry cleaners/laundrettes and beauticians/hair dressers. There is a below the national average proportion of independent comparison units.

7.11 In terms of retail requirements, the Focus database identifies 9 requirements between 171 sqm and 837 sqm in West Hampstead in February 2013. As highlighted in Table 7.2 below, these requirements are a mixture of comparison, convenience and leisure service units. There are requirements for Gails Baker, Strada, Cook Trading, Neal's Yard Remedies, Menchies, Café Nero, Fonehouse Group Ltd, JoJo Maman Bebe and an unnamed charity shop.

Table 7.2: Published Requirements for West Hampstead

	No of Units	Min. Floorspace (sqm gross)	Max. Floorspace (sqm gross)
Comparison	4	27	93
Convenience	2	70	279
Leisure Services	3	74	465
TOTAL	**9**	**171**	**837**

Source: Co-Star Focus Database (February 2013)

Vacancies

7.12 The Experience Goad survey undertaken in July 2012 identified 10 vacant units in West Hampstead. Our site visit in January 2013 identified that some of the previously vacant units have been occupied, however a number of additional units have become vacant. This results in an overall increase in the number of vacancy rate to 13% (21 units). This vacancy rate is higher than the Greater London regional average, but generally in line with the national average. The majority of the vacant units are within the north and south of the centre, along the secondary frontages; however 3 are located within the core shopping frontage. The increase in vacancy rate is reflective of wider national trends but may also suggest that greater land use flexibility is required to enable vacant units to be brought back into economic use.

Environmental Quality

7.13 The underground and overground stations are situated towards the south of West Hampstead town centre. At busy periods, such as rush hour, the pedestrian flow between these stations is very high. This poses a potential safety risk for pedestrians. Further south from the stations, the facades appear dilapidated and the centre appears to lack attraction. The units are small in size and many units are vacant. The whole of this area, including the two stations, is allocated as secondary frontage.

7.14 The buildings in the middle of the centre appear modern. The core retail frontage is focused around the north east of the centre, at which the public realm and architecture is of the highest quality. The pavements in this area are wider, which provides a pedestrian friendly shopping environment in the centre. There are many trees, as well as a small area of open space at the north of the centre, which provides a pleasant environment for visitors.

7.15 Overall, the majority of the south of the centre appears dilapidated, which contrasts with the buildings of architectural significance to the north of east of the centre. The centre would benefit from upgrade works to the environmental quality in order to boost vibrancy across the whole centre.

Accessibility

7.16 West Hampstead is easily accessible by public transport and benefits from a PTAL rating of 6b (excellent). The centre is accessible by overground and underground services, as well as a number of bus connections. The underground station is on the

Jubilee line, and therefore provides direct routes into the larger centres of Swiss Cottage, Finchley Road and Kilburn as well as the West End and Mayfair.

7.17 The centre is served by four buses throughout the day and two night buses. These connect West Hampstead to Waterloo, Brent Cross, Oxford Circus and Archway.

7.18 Local residents are most likely to walk to the centre (c. 67%). However, others travel by car (c. 11%), underground (c. 10%) and bus (c. 7.9%).

Customer Views and Behaviour

7.19 The household telephone survey included various attitudinal questions about the frequency of visits to West Hampstead town centre, the reasons for choosing to visit the town, as well as likes and dislikes about the centre. The key findings from the survey are summarised below:

- Only 4% of respondents visit West Hampstead ‘most often’, therefore it is the least frequently visited centre. Approximately 84% of these respondents visit West Hampstead once a week or more.
- The majority of respondents visit West Hampstead to do food and/or non-food shopping (c. 76% and 36% retrospectively). Many respondents also use the centre for daytime and evening eating (c. 61% and 65% retrospectively), drinking (c. 44% and 63% retrospectively), cultural activities (c. 13% and 14% retrospectively) and sports activities (c. 16% and 15% retrospectively). 20% of respondents visit nightclubs and light night venues in West Hampstead. This represents the strength of the leisure offer.
- Approximately 88% of respondents feel safe in West Hampstead, although 8% do not visit the centre during the evening.
- Respondents stated that they like the range of independent and multiple retailers in West Hampstead (c. 22% and 25% retrospectively). They also like the proximity of the centre to their home and work place. On the other hand, respondents stated that they do not like the traffic in the centre (c. 8%).
- Respondents stated that a better range of shops and more convenient parking facilities would increase their likeliness to visit the centre during the daytime. It appears that more leisure facilities, such as a cinema, may increase the visitor population in the centre during the evening.

Proposals and Commitments

7.20 There are a number of future development sites within West Hampstead for redevelopment. The following sites are identified within the adopted Camden Site Allocations DPD (September 2012):

7.21 **156 West End Lane** - An allocation at the Travis Perkins unit is due to come forward for mixed use development comprising residential, retail, community and employment floorspace. The 6,000 sqm development site is currently operating as a builder's merchant, offices, showroom and service yard.

7.22 **187-199 West End Lane** – The development site, allocated within the DPD, was granted planning permission in March 2012. The development proposals comprise the erection of seven new buildings between five and twelve storeys in height, to provide approximately 200 residential units; 704 sqm net additional retail uses and employment/healthcare floorspace (App. Ref: 2011/6129/P).

Summary

- West Hampstead is the smallest Town Centre assessed in the study and therefore, unsurprisingly, attracts a smaller proportion of frequent visitors, with residents more likely to visit larger, higher order centres, particularly for comparison goods shopping.
- The strength of West Hampstead's offer is its service provision, particularly the leisure sector which draws high proportions of visitors. In contrast, West Hampstead has a limited offer of comparison retailers within the centre.
- The centre is served by three main foodstores distributed throughout the centre; however, these are of a small scale and have a local catchment.
- There are a high proportion of independent retailers within the centre; this is reflected in the results from the household telephone survey as respondents stated that they would like a better range of retailers within the centre.
- Since July 2012, there has been an increase in the proportion of vacant units in the centre; however, there is a relatively good level of retailer demand. Vacant rates should be monitored to ensure policy provides enough flexibility to bring vacant units back into beneficial use.
- The centre has good accessibility and strong links the with wider Greater London area; however, the centre would benefit from investment to upgrade the

dilapidated retail frontages in order to increase the environmental quality of the centre.

- It is, however, evident that investment is coming forward within the Area for Intensification. Two large development sites are allocated for mixed use redevelopment within the adoptd Camden Site Allocations DPD which provides an opportunity to enhance overall retail and leisure offer in the centre.

8. Tottenham Court Road Central London Frontage

8.1 Tottenham Court Road is located adjacent to the West End and has traditionally been renowned for its specialist retail role providing concentrations of furniture and electrical shops, Charing Cross Road is well known for specialist bookshops and Denmark Street for its niche music stores. The Council identify the area around Tottenham Court Road station as a Growth Area, and the area is identified as suitable to accommodate additional retail provision.

8.2 Tottenham Court Road is identified as an Opportunity Area in the London Plan to provide around 5,000 new jobs and 420 new homes as part of the regeneration of the St Giles area following the implementation of Crossrail at Tottenham Court Road station. The frontage also falls within the London Plan West End Special Retail Policy Area (WESRPA) which seeks to support the area's retail and leisure provision of national, city-wide and local importance, maximising the benefits arising from the implementation of Crossrail at Tottenham Court Road.

Central London Frontage Boundary

8.3 The Proposals Map (2010) identifies that the Central London Frontage extends south from Euston Road along Tottenham Court Road to St Giles Circus, including the immediately adjoining area of New Oxford Street, and the eastern side of Charing Cross Road to Cambridge Circus.

8.4 The Tottenham Court Road Growth Area extends further east along New Oxford Street to Museum Street, and to the west the centre borders the City of Westminster, which also incorporates part of the Growth Area.

Diversity of Uses

8.5 Similarly to the previous retail study, there are is no Experian Goad data available to identify the diversity of uses within the centre. We have therefore undertaken an audit of the centre as part of our site visit in January 2013, which identifies the following composition of units in the Tottenham Court Road Central London Frontage (including part of New Oxford Street and Charing Cross Road), set out below in Table 8.1.

Table 8.1: Tottenham Court Road Central London Frontage Composition of Units

	Number of Units	% of Total	UK Average (%)	Variance
Convenience	11	6.79	8.02	-1.23
Comparison	72	44.44	33.03	11.41
Service	69	42.59	46.56	-3.97
Vacant	10	6.17	12.23	-6.05
Miscellaneous	0	0	0.16	-0.16
TOTAL	162	100	100	-

Source: UK average taken from Experian Goad (January 2012), number of units taken from GVA site visit

8.6 There are five convenience stores on Tottenham Court Road, the largest of which is the Sainsbury's Local at the northern end of Tottenham Court Road near Warren Street underground (c. 1,147 sqm net sales). The store also provides an in store bakery, hot food counter, salad bar, electricals and Click and Collect services. A smaller Sainsbury's Central store is located in the south of Tottenham Court Road (c.816 sqm net sales), and provides a bakery, hot food counter, salad bar and Click and Collect services.

8.7 In addition to these stores is a Little Waitrose with a bakery and a salad bar (306 sqm net), a Marks and Spencer's Simply Food with a bakery (505 sqm net) and a Tesco Express (182 sqm net). In addition to this small supermarket offer there are two newsagents, confectioners, two bakers and a health food shop. These convenience goods shops predominantly cater towards the needs of local workers and shoppers

8.8 The main strength of Tottenham Court Road is its high proportion of comparison goods units, which is c. 11% above the national average. Of the comparison goods units identified, 24 units are for the sale of electrical items (mainly towards to southern end of the street), whilst 18 units are predominantly for the sale of furniture items (towards the north of the street); two retail sectors which have been prevalent and well established in the area for many years. In contrast to the rest of the West End, comparison goods units in the Tottenham Court Road Central London Frontage are less fashion and clothing orientated, and, apart from specialist electricals and furniture shops, provide a range of stationers, pharmacies, gifts and phone shops.

8.9 The proportion of service units in the Central London Frontage is below the national average. Analysing the sector in further detail, the proportion of leisure service units is above the national average, whilst the retail service and financial and professional service sectors have a below average number of units. Across this Central London Frontage there are approximately 31 restaurants and cafes, 7 pubs and bars, as well as betting shops, takeaways, cinema, theatre and hotel, reflecting a strong leisure offer. There is a below representation of retail service units (e.g. no post offices, dry cleaners or travel agents), reflecting the centre's role as national shopping destination rather than catering to local resident needs.

Retailer Representation

8.10 The January 2013 site visit identified 100 multiple retailers in the Tottenham Court Road Central London Frontage (66% of all retail and service units), which represents the second highest proportion of multiple retailers after Holborn. Multiple retailers are dispersed along Tottenham Court Road, Charing Cross Road and New Oxford Street. There are a number of furniture multiple retailers (including Dwell, Habitat, Multiyork, Dfs, Dreams and Boconcept), as well as electrical multiple retailers (including PC World, Maplin, Bose, Samsung and Sony), as well as mainstream high street retailers (such as Sainsbury's, Barclays, Boots, Primark, Argos, Café Nero, Robert Dyas, Joy, HSBC, Itsu, TK Maxx, Prêt a Manger and Vodafone).

8.11 There are also a number of independent retailers in the area specialising in electrical equipment, music and musical instruments, cafes, interior design, newsagents and pubs. These retailers tend to occupy smaller retail units, with less well maintained shopfronts.

8.12 The Focus database identifies a total of 16 retailer requirements for retail units on Tottenham Court Road totalling between 1,590 and 3,149 sqm gross in February 2013. For Charing Cross Road a total of 8 retailer requirements were identified totalling between 732 and 1,266 sqm gross.

8.13 As highlighted in Table 8.2 below, the majority of these requirements are for leisure service units, and include requirements from restaurants and cafes such as Kanapina, Chop'd, Costa, Taco Bell, Adobo and Apostrophe. There are also retailer requirements from furniture retailers Hay (Danish retailer seeking British flagship store) and Butlers Furniture, as well as golf, art and bakeries.

Table 8.2: Published Requirements for Tottenham Court Road and Charing Cross Road

	No of Units	Min. Floorspace (sqm gross)	Max. Floorspace (sqm gross)
Comparison	5	830 sqm	1,633 sqm
Convenience	3	404 sqm	506 sqm
Leisure Services	15	1,083 sqm	2,183 sqm
Financial Services	1	5 sqm	93 sqm
TOTAL	**24**	**2,322 sqm**	**4,415 sqm**

Source: Co-Star Focus Database (February 2013)

Vacancies

8.14 The audit of Tottenham Court Road in January 2013 identified 10 vacant units, which is below the national and regional average, and indicates that the Central London Frontage is relatively healthy. However, four vacant units are located on the eastern side of Tottenham Court Road between Bayley Street and Bedford Avenue, which may reflect the poor exterior appearance of this block and the low quality retail units in this location. These vacant units were previously occupied by electrical retailers and their vacancy also reflects national trends in this declining sector.

Environmental Quality

8.15 The quality of the public realm varies throughout the Central London Frontage. In the south, Charing Cross Road and St Giles currently suffers from blight resulting from the redevelopment of Tottenham Court Road station and the Crossrail development, which represents large scale investment and regeneration programs which once complete will provide significantly increased passenger capacity, which present a major opportunity to capture increased footfall levels and retail and leisure spend in the St Giles Area.

8.16 Until Crossrail is completed in 2018, construction works will fragment Charing Cross Road from the rest of the centre, however the road still provides a key route to Theatreland to the south and provides a pleasant shopping environment. Denmark Street and its world famous specialist music shops, has a very distinctive character from the rest of St Giles, with a narrow street and small shop units.

8.17 Five shop units along New Oxford Street fall within the boundary of the Central London Frontage, however these retail units are fragmented from the main West End retail provision on Oxford Street, and the rest of Tottenham Court Road. There is no distinctive retail character to the east of these shops and therefore this appears to be a natural boundary to the Central London Frontage. Traffic is relatively heavy in this location and has a negative impact on the quality of the public realm in this area.

8.18 The southern section of Tottenham Court Road is characterised by larger retail floorplates occupied by multiple retailers. Many of these units have been created through the amalgamation of smaller retail units, reflecting requirements of modern retailers for units with larger floorspace (for example the recently opened four storey flagship Primark store at 14-28 Oxford Street and Tottenham Court Road).

8.19 There are a mix of architectural styles along the street, however some of the blocks have a dated exterior appearance (for example the St Giles Hotel and between Bayley Street and Bedford Avenue), and the retail units at street level have low quality facades and are in a poor state of repair. Electronics retailing is more prevalent in this area and there are also more vacant units in this area than the rest of the frontage. Wide pavements in this area enable smooth pedestrian movement.

8.20 Between Bayley Street and Torrington Place the character of the buildings and general shopping environment improves and is more cohesive. This section of the frontage is characterised by furniture and homeware flagship stores which provide attractive and enticing shop frontages. The pavements are well maintained and although the pavements are smaller in width, footfall in this area is lower and therefore this is not of significant concern.

8.21 North of Torrington Place the quality of the build environment on Tottenham Court Road deteriorates again, with a mix of modern architectural 60s, 70s and 80s styles. The area has a lower level of footfall, and a greater mix of multiple and independent retailers offering a range in quality products. With less key retail attractors located in this area, footfall is noticeably lower. The pavements are poorly maintained and there is little evidence of investment in the public realm.

Accessibility

8.22 Tottenham Court Road is easily accessible by public transport. Tottenham Court Road underground station provides access to the Northern and Central lines, Goodge Street in the centre of Tottenham Court Road is on the Northern Line, and Warren Street in the north is on the Northern and Victoria Lines. Throughout the Central

London Frontage, the PTAL rating is considered to be 'excellent' (6b rating), reflecting the strength of accessibility throughout the centre.

8.23 At present the development of Crossrail blights connectivity around the St Giles part of the Central London Frontage; however, works will improve the accessibility of the centre over the medium to long term. The redevelopment of Tottenham Court Road station and the opening of a new Crossrail station will provide fast east-west connections across London, and will significantly increase the station's capacity. Crossrail is scheduled to be completed in 2018 and will increase the number of passengers using the station each day by 53,000 people (to total 200,000 people per day), increasing the area's accessibility.

8.24 Approximately 17 day bus routes run through along Tottenham Court Road. Tottenham Court Road is dominated by buses and other fast moving traffic. Whilst providing excellent accessibility, this also hinders pedestrian movement from one side of the street to the other, despite the provision of pedestrian crossings at points along the street. Traffic is particularly dominant around St Giles Circus, however we understand that Council have ambitions to implement a diagonal pedestrian crossing in this location to improve pedestrian permeability around Tottenham Court Road station.

8.25 Respondents to the household telephone survey that visit Tottenham Court Road most often usually walk to the centre (39%), whilst 26% travel by bus, 17% travel by London Underground and 3% by travel by car.

8.26 A higher proportion of respondents to the in-centre survey travelled to the centre by London Underground (46%), and a lower proportion travel by foot and by bus (19% and 18% respectively). 10% of respondents to the in-centre survey travelled to Tottenham Court Road by National Rail, indicating that they are visitors to the centre from outside central London.

Customer Views and Behaviour

8.27 The household telephone survey undertaken in January 2013 included various attitudinal questions about the frequency of visits to Tottenham Court Road, the reasons for visiting the centre and likes and dislikes about the centre. The key findings from the telephone and in-centre surveys are summarised below:

- Tottenham Court Road is the second most popular centre to visit in Camden (after Camden Town) with 16% of respondents to the household telephone survey stating that they visit the centre 'most often'. Of those who visit Tottenham Court Road most often, the highest proportions are drawn from zone 1 (43%), zone 9 (35%), zone 8 (28%) and zone 7 (20%).
- Of those respondents who stated they visit Tottenham Court Road most often it is evident that less people visit the centre on a daily basis in comparison to other centres in Camden (only 14%). Most people visit Tottenham Court Road less frequently; either once a month (18%) or 2-3 times a week (15%). These shopping patterns reflect the nature of the retail offer at Tottenham Court Road, focused on homewares and electricals which are generally purchased less frequently.
- Non-food shopping is main reason why people chose to visit Tottenham Court Road (74%). Only 39% of respondents use the centre for food shopping (39%), making Tottenham Court Road the least popular destination to undertake convenience shopping of the centres in the survey area. The results show relatively low proportions of respondents choosing to visit to undertake daytime eating (32%), evening eating (30%) and daytime leisure activities (28%).
- The majority of respondents to the household survey like visiting Tottenham Court Road because it provides a 'good range of chain/well known stores' (25%), a 'good range of independent stores' (22%), it is 'close to home' (15%), it is 'close to work' (8%) and because there is a 'good bus service/easily accessible' and there is a 'good choice of electrical shops' (both 5%).
- 47% of respondents who visit Tottenham Court Road most often dislike 'very little' about the centre. The main dislikes are that the centre is 'too busy' (18%), the 'traffic congestion' (14%) and that it is 'run down, unattractive and dirty' (5%).
- Overall, the majority of telephone survey respondents who visit Tottenham Court Road in the evenings perceived the centre to be safe or very safe. However, of those who stated that they visit the centre most often, 26% stated that they do not visit Tottenham Court Road during the evenings, reflecting the centres limited evening leisure offer.
- 64% of respondents stated that nothing would encourage them to visit more often in the daytime. The main suggestions to improve the centre in the daytime were the provision of 'more chain/well known stores' (4%), 'more independent shops', 'better public transport links', 'more food stores' and 'more department stores' (all at 3%).

- During the evening, 69% of respondents stated that nothing would encourage them to visit more often in the evenings. The key improvements suggested for the centre are ‘more restaurants’ (7%), ‘more security/better personal safety’, ‘more pubs/bars’ and ‘more nightclubs’ (2% each).

8.28 In addition an in-centre shopper survey of 99 people was undertaken in January 2013, which also included attitudinal questions about the provision of shopping and leisure facilities in Tottenham Court Road, and included responses from tourists from the UK and abroad. The in-centre survey was undertaken across the whole of the town centre on one day during the week and on a Saturday. The key findings of the in-centre survey are summarised below:

- 28% of respondents identified themselves as ‘local residents’, 26% as ‘tourist from the UK’, 22% as ‘workers’ and 18% as ‘tourist from overseas’. Analysis of the postal sectors provided by respondents to the in-centre survey indicates that 87% of respondents to the in-centre survey live outside the study area, of which 18% live overseas.
- When asked what the main purpose of their visit to Tottenham Court Road was, 23% stated ‘work/business’, 15% were ‘meeting friends/socialising’, 13% were visiting to undertake ‘non-food shopping’, 8% were going to the theatre and 7% were sight-seeing. Only 4% stated that the main purpose of their visit was to undertake food shopping.
- In terms of main food shopping, respondents to the in-centre survey, only relatively small proportions visit supermarkets on Tottenham Court Road, with Tesco Express and Marks and Spencer both drawing 7% of main food shopping trips. The results for top-up food shopping were also similar, with Tesco Express drawing the highest proportion of visitors (7%). This demonstrates that comparison retailing is dominant within this central London frontage.
- Length of visit to Tottenham Court Road is reasonably high. The majority of visitors to Tottenham Court Road intend to spend all day in the area (30%), while 20% of visitors intend to spend between two hours three hours in the area. The highest proportion of respondents visit Tottenham Court Road on a daily basis (21%), however it is also evident that shoppers visit the centre less frequently (15% visiting monthly, 8% visiting yearly and 11% visiting less often), which corroborates the findings of the household telephone survey.
- The main things that in-centre survey respondents liked about Tottenham Court Road were the ‘pleasant/attractive environment (22%). 20% of respondents like

the ‘good selection of non-food shops’, 19% like the ‘good accessibility/public transport’, 18% like the ‘good selection of food shops’, 15% like the ‘close proximity to tourist attractions’ and 14% liked the ‘good range of services’.

- The majority of respondents disliked ‘nothing in particular’ about Tottenham Court Road. However, 12% considered there is ‘too much traffic’, 8% think it is too crowded and 6% think it is too noisy.
- Respondents would be encouraged to visit Tottenham Court Road more often if there was ‘less traffic’ (7%), ‘more variety/greater range of goods’ (6%), and the provision of a ‘more family friendly environment’ and ‘create more open spaces’ (5% each).

8.29 Respondents to the in-centre survey were asked to rate the provision of shops and services in Tottenham Court Road. Taking a mean score of the rankings of shop and service provision (scores: very strong = 2, good = 1, average = -1 and weak = -2), it is evident that Tottenham Court Road is perceived to have high ratings for its daytime eating and drinking facilities (0.91), perceptions of safety (0.89), provision of chain shops (0.72) and overall environment (0.63). The centre has good ratings for its provision of night time eating and drinking facilities (0.58) and provision of independent retailers (0.48). The centre has reasonable ratings for local service provision (hairdressers, banks etc.) (0.21), and low rankings for the provision of high end/niche shops (0.03).

Proposals and Commitments

8.30 There are a number of future development sites within the Central London Frontage identified for redevelopment, reflecting the area’s designation as an Opportunity Area and the potential of the area following the implementation of Crossrail. The following sites are identified for future development in the adopted Camden Site Allocations DPD (September 2012) and draft Fitzrovia Area Action Plan (December 2012), or subject to pending planning applications or extant planning permissions:

8.31 **St Giles Circus** - is identified as a future Site Allocation to create a new world class public space, including a mix of retail, residential, office and leisure uses. A planning application (ref. 2012/6858/P) is currently being considered by the Council for the redevelopment of St Giles Circus to provide space for community events, exhibitions, product launches, live music, awards, conferences, fashion shows, with a gallery for LED advertising and information space, a hotel, 420 sqm A1/A3 flexible floorspace, 3,000 sqm A3 floorspace and 1,070 sqm A4 floorspace.

8.32 **6-17 Tottenham Court Road** - is allocated in the Fitzrovia AAP for redevelopment to intensify the existing retail and office uses on the site. It is envisaged that this site could be comprehensively redeveloped alongside the Central Cross site (below), to improve permeability to Hanway Place and increase densities to provide an additional 3,000 sqm of floorspace for retail, housing, office and community use by creating additional storeys to the building.

8.33 **Central Cross** (18-30 Tottenham Court Road) - is also identified for redevelopment in the Fitzrovia AAP, which the Council envisage could come forward comprehensively with the site above. The Council seek to retain retail, business and housing uses on this site. We note that there is a resolution to grant planning permission (subject to S106) on this site for the refurbishment, extension and repartition of the existing retail units on Tottenham Court Road to provide 218 sqm additional A1 floorspace and 1,280 sqm additional flexible A1/A3 floorspace (application ref. 2012/2232/P).

8.34 To provide an indication of the scale of retail development likely to come forward in the surrounding area over the plan period, although not strictly within the defined Tottenham Court Road Central London Frontage, the **Royal Mail Sorting Office** on New Oxford Street is allocated for redevelopment to include a mix of retail, office, hotel, commercial and residential uses. In addition, the land bound by **New Oxford Street, Museum Street and West Central Street** is identified for redevelopment to provide retail, office and residential uses.

8.35 Within the City of Westminster, planning permission has been granted for the redevelopment above Tottenham Court Road underground station, which will provide offices, retail and a new theatre/auditorium.

Summary

- Tottenham Court Road Central London Frontage is considered to be performing relatively strongly against a number of key health check indicators, and is focused towards the comparison goods market, historically being associated specialist furniture, electricals, book and music shops. However, these sectors are currently in decline reflecting a wider trend towards multichannel retailing. Therefore, over the plan period, there should be no complacency about the strength of the specialist comparison goods retailing on Tottenham Court Road and Charing Cross Road.

- Reflective of national trends, homeware, furniture and electronics retailers are increasingly looking for units with larger floorplates to accommodate large showroom type flagship stores, which are then supplemented by online sales. Retail units with large floorplates, which are suitable for modern retailers, should therefore continue to be accommodated throughout the centre to attract retailers to the area. This may require the reconfiguration and amalgamation of smaller units.
- Reflecting the centre's location within the West End and the significant proportion of workers in the area (including Mid Town), the nature of the wider retail offer is catered towards meeting needs of the shopper and workforce populations: convenience top up, sandwich shops, coffee shops and pharmaceuticals.
- At present, the St Giles area is blighted as a result of Crossrail construction; however, when the redevelopment works to Tottenham Court Road station are completed in 2018, this will present a significant opportunity for additional retail and service expansion. Retailers will seek to capture spend arising from the additional passengers using the station and increased footfall in the area.
- Results from the household telephone survey indicate that Tottenham Court Road is the second most popular centre to visit after Camden Town, and it is most popular for non-food shopping. However Tottenham Court Road attracts less frequent trips than other centres, reflecting the nature of the homeware and electrical retail offer, products which are generally purchased less often.
- The in-centre survey identified that 87% of respondents using the centre live outside the survey area. This includes 18 of people who identified that they were tourists from overseas, reflecting the international role of the centre.
- Respondents to the household and in-centre surveys stated they like the centre because of the good range of both chain and independent retailers and because the centre is easily accessible. The key dislikes about Tottenham Court Road were that the centre is too busy and there is too much traffic.
- Over the plan period we expect Tottenham Court Road, Charing Cross Road and Denmark Street to continue to perform specialist retailing functions; however, in light of market changes, there may need to be a more flexible approach towards allowing a range of town centre uses to come forward within these areas in order to maintain the strength of the centre. The possible introduction of two way traffic on Tottenham Court Road could also help to improve pedestrian safety and accessibility throughout the centre.

9. Holborn / High Holborn Central London Frontage

9.1 Holborn Central London Frontage largely operates as a town centre for workers in the Holborn area. Focused around Holborn underground station, the Central London Frontage is located to the east of Tottenham Court Road, along New Oxford Street. The centre borders with the City of London, the City of Westminster and the London Borough of Islington.

9.2 Holborn is allocated as a Growth Area in the Camden Core Strategy (2010) and the London Plan (2011), as suitable for large scale redevelopment or significant increase in jobs and homes based around transport interchanges where increased capacity is planned. According to Core Strategy Policy CS2 (Growth Areas), the mixed use redevelopment of a number of sites is expected to take place within Holborn.

9.3 The London Plan expects a minimum of 2,000 new jobs and 200 new homes to be provided in the area by 2031. The Council expects that these will be met through relatively small scale, private sector-led schemes, reflecting that the area's potential for intensification will largely arise from the redevelopment of existing properties to provide high density office developments.

Central London Frontage Boundary

9.4 The Camden Proposals Map defines Holborn's Central London Frontage as comprising the shopping streets of High Holborn/Holborn (from the junction of New Oxford Street to Holborn Circus) and Kingsway, south of High Holborn to Keeley Street. The overall Central London Frontage is not continuous; there are small gaps where offices and hotels without a shopping component have been excluded.

9.5 The Camden Planning Guidance CPG5 identifies High Holborn and Holborn as primary frontages, and identifies Kingsway frontages south of Gate Street as secondary frontages. The Council seeks to protect the retail function of Holborn's frontage and therefore planning permission will not be granted for development involving loss of retail uses which results in retail uses falling below 50% of the total units in each individual primary frontage.

9.6 Furthermore, planning permission will not be granted for development that results in more than 25% of shop units in each individual frontage being in food, drink and entertainment uses. The Council seek to allow flexibility, albeit limited, in the growth of these sectors. An exception is applied to Kingsway, south of Gate Street. This area is considered to be particularly suitable for the provision of a high level of food, drink and entertainment uses. Subject to an impact assessment, up to 40% food, drink and entertainment uses will be permitted along these frontages.

Diversity of Uses

9.7 Similarly to the previous retail study, there is no Experian Goad data available to identify the diversity of uses within the centre. We have, therefore, undertaken an audit of the centre as part of our site visit in January 2013. Our audit identified the composition of units in the Holborn Central London Frontage, set out below in Table 9.1.

Table 9.1: Holborn/High Holborn London Frontage Composition of Units

	Number of Units	% of Total	UK Average (%)	Variance
Convenience	10	7.04	8.02	-0.98
Comparison	31	21.83	33.03	-11.20
Service	91	64.08	46.56	17.52
Vacant	10	7.04	12.23	-5.19
Miscellaneous	0	0.00	0.16	-0.16
TOTAL	142	100	100	-

Source: UK average taken from Experian Goad (January 2012), number of units taken from GVA site visit

9.8 There are three main convenience stores in Holborn; the largest is Sainsbury's at Kingsway, located adjacent to Holborn station (c. 894 sqm net floorspace). Little Waitrose is located along High Holborn and comprises c. 566 sqm net floorspace and a smaller Sainsbury's Local is located at Mid City Place, to the east along High Holborn (c. 312 sqm net floorspace). In addition to these stores, there are a number of independent convenience goods stores predominately catered towards the needs of local workers. The total convenience goods floorspace in Holborn is c. 2,425 sqm net sales area.

9.9 There is currently a deficiency in terms of comparison goods floorspace and units in Holborn. Our audit, conducted in January 2013, found a total 4,511 sqm net comparison floorspace distributed across 31 units. This is approximately 12% below the national average. The comparison goods offer comprises 5 health and beauty/pharmaceutical shops i.e. Boots and Superdrug; 8 clothing shops, i.e. Dorothy Perkins, New Look, T M Lewin and Charles Tyrwhitt; 7 electrical shops i.e. Carphone Warehouse, Maplin and Ryness; and 3 card shops, i.e. Cards Galore and Scribbler Cards. It is evident that the majority of these stores cater for local office workers and the small residential community.

9.10 Holborn has an above average number of service units; 64% of all units within the centre are serving a retail, leisure or financial/business service. In particular, c. 44 % of all units within the centre are operating as leisure services; one third of these are Cafés. Retail service operators within the centre include dry cleaners, print and copy shops, opticians, a hair dresser and a travel agent. The financial service offer is dominated by banks and building societies.

Retailer Representation

9.11 Our audit identified 95 multiple retailers in Holborn Central London Frontage (72% of all operating retail and service units). This is the highest proportion of multiple retailers of the centres assessed in this study. A number of these units were operating as cafes, i.e. Eat, Starbucks, Café Nero, Costa Coffee and Prêt A Manger. Some of these operators occupy multiple units within Holborn i.e. Eat operates out of 5 units within Holborn. The majority of the Financial Service operators within Holborn are multiple retailers, such as Barclays, Britannia, Halifax, HSBC, Natwest and more. Some of these operators also occupy multiple units within the centre. The majority of units along High Holborn and approximately half of the units along Kingsway are occupied by multiple retailers.

9.12 There are 37 independent retailers within the centre, c. 28% of all operating retail and service units. Circa 62% of these units are leisure service operators, including public houses, restaurants, bars and cafés. Independent retailers are distributed throughout the centre, although a cluster of independent units is located along Little Turnstile.

9.13 The Focus database identified a strong level of operator demand comprising a total of 23 retailer requirements for retail and service units in Holborn, totalling between 84 and 3438 sqm floorspace in February 2013. As highlighted in Table 9.2 below, the majority of these requirements are for leisure service units, and include requirements from Taco Bell, Baguette Express, Roosters Piri Piri, Costa and Toni Guy,

Table 9.2: Published Requirements for Holborn/High Holborn

	No of Units	Min. Floorspace (sqm gross)	Max. Floorspace (sqm gross)
Comparison	6	23	372
Convenience	4	33	279
Leisure Services	13	28	2,787
TOTAL	**23**	**84**	**3,438**

Source: Co-Star Focus Database (February 2013)

Vacancies

9.14 The audit of Holborn Central London Frontage identified 10 vacant units. This vacancy rate is c. 5% below the national average and c. 1% below the Greater London regional average. This indicates that the area is performing well and relatively healthy in terms of retail offer. Most vacant units are distributed throughout the centre, although four vacant units are located within close proximity along Kingsway. These appeared to be under renovation at the time of visit. The low vacancy level reflects the high retail demand for units in the centre.

Environmental Quality

9.15 The quality of public realm varies throughout the Central London Frontage; the entire environment is distinctive and dominated by office development. Throughout the centre, there are many historical buildings which are segregated by modern developments. There are also few post war buildings with dilapidated facades within the centre. The centre appears disjointed in parts, as many large office entrances break up the continuity of shop frontages. The tall office buildings and busy main road form part of the mid town character of the centre. Some of the area and much of its immediate surroundings are designated as conservation areas.

9.16 The public realm of Kingsway is tree lined with wide pavements, facilitating the needs of local workers. Many pedestrian crossings are situated along the road; however, these roads become heavily congested.

9.17 High Holborn forms the main section of the centre and therefore has a high pedestrian flow throughout rush hour. The wide pavements and pedestrian crossings at the station cross roads help to facilitate pedestrian movement at these times however, further mitigation measures may be necessary.

Accessibility

9.18 Throughout the Central London Frontage, the PTAL rating is considered to be 'excellent' (6b rating), reflecting the strength of accessibility in the centre. There are Underground stations at Holborn and Chancery Lane, both of which are on the Central line. Holborn underground station is also on the Piccadilly Line.

9.19 Numerous day and night buses connect both High Holborn/Holborn and Kingsway to wider London zones. More than ten services run through High Holborn or Kingsway, of which many run throughout the night, supplemented by several night buses. The roads are dominated by buses and other fast moving traffic. Whilst providing excellent accessibility, this also hinders pedestrian movement from one side of street to the other, despite the provision of pedestrian crossings.

9.20 Respondents to the household telephone survey stated that they are most likely to walk (c. 51%) or travel by bus (c. 26%) into Holborn centre. A small percentage of visitors also cycle (c 9%) or travel by underground (c. 8%).

Customer Views and Behaviour

9.21 The household telephone survey, undertaken in January 2013, included various attitudinal questions about the frequency of visits to High Holborn/Holborn, the reasons for visiting the centre and likes and dislikes about the centre. The key findings from the survey are summarised below:

- Only 5% of telephone survey respondents visit Holborn more frequently.
- The majority of visitors visiting Holborn most often do so more than once a week (c. 70%). As stated previously, the majority of these visitors travel to the centre by foot or public transport, namely the bus.
- Visitors use Holborn for food (c. 55%) and non-food (59%) shopping as well as daytime and evening leisure activities. It is apparent that respondents link their trips into the centre for different activities i.e. food and non-food shopping.

Approximately 81% of respondents find Holborn a safe environment, although c. 17% respondents do not visit the centre during the evening.

- Respondents who regularly visit Holborn like the proximity of the centre to their home (c.42%) and workplace (c. 13%). Respondents also like the attractive environment within the centre (c. 11%), the range of independent operators (c. 7%) and multiple operators (c. 7%), as well as the accessibility of the centre (c. 4%).
- Respondents dislike very little about the centre; circa 66% of responses stated 'nothing/very little'. Other regular visitors dislike how busy the centre is (c. 14%) and the traffic congestion (c. 10%).

Proposals and Commitments

9.22 There are two future development sites within the Holborn Central London Frontage identified for redevelopment. The following sites are identified within the adopted Camden Site Allocations DPD (September 2012):

9.23 **12–42 Southampton Row & 1–4 Red Lion Square** – The 4,500 sqm development site is a future site allocation for a mixed use development comprising office, hotel or other commercial uses and a contribution to the supply of self-contained housing, including affordable housing and community uses. The site is currently being used for higher education and ancillary theatre uses. The site is surrounded by Southampton Row to the west, Drake Street/Red Lion Square to the east, Theobalds Road to the north and Fisher Street to the south.

9.24 **Land Bounded by 50-57 High Holborn, 18-25 Hand Court, 45-51 Bedford Row & Brownlow Street** – The 3,700 sqm development site is a future site allocation for the conversion and partial development to provide a mixed use scheme comprising offices, other commercial uses and a contribution to the supply of self-contained housing and community uses.

9.25 Additionally, the **Royal Mail Sorting Office** (21–31 New Oxford Street) is identified within the adopted Camden Site Allocations DPD. This site is adjacent to the Holborn Central London Frontage. It is allocated for a mixed use development comprising retail, office, hotel, other commercial uses and residential accommodation at upper levels. Proposals were refused for the erection of a part 4 and part 8 storeys mixed use development. This was refused due to the design, bulk and impact of the scheme, as well as loss of outlook and inadequate housing provision.

Summary

- Holborn Central London Frontage is predominantly a commercial area, with an extensive workforce population and a small residential community. Taking this into consideration, the centre is performing relatively well against a number of key health check indicators.
- Reflecting the location of the centre within Central London and the significant proportion of workers in the area, the nature of the retail offer is catered towards meeting needs of the shopper and workforce populations. Results from the household telephone survey indicate that respondents like Holborn because of its close proximity to work and/or home.
- There are a number of small/medium sized convenience units and a high proportion of service operators in Holborn. The service operators are predominantly leisure services, i.e. cafes. The centre has a significant deficiency in comparison retail units. This also reflects the lack of a specialist retail function in comparison to Tottenham Court Road's retail offer and the role of the West End.
- Holborn has a particularly low vacancy rate and high levels of retailer requirements which reflects the desirability of this central London location for multiple retailers to operate.
- Over the plan period we expect that Holborn Central London Frontage will continue to function as an office-led commercial area supported by day to day retail provision. It is evident from the Site Allocations DPD that mixed use developments comprising a mixture of residential, office and other commercial uses will continue to drive future development within this area.

Camden Town Centre and Retail Study 2013

Appendix 2 Convenience Goods Capacity Modelling

London Borough of Camden

Retail and Town Centre Study 2013

Convenience Goods Modelling

Table 1
Survey Area Population Forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
2013	36,944	63,059	77,392	42,931	41,048	48,689	94,046	85,197	37,527	**526,833**
2018	40,368	70,564	80,710	44,937	42,215	50,206	99,916	91,554	39,266	**559,736**
2023	41,286	72,406	82,440	44,798	42,960	51,575	105,385	96,418	40,292	**577,560**
2028	41,867	76,870	83,121	44,881	43,371	53,066	110,773	101,048	41,062	**596,059**
2031	41,932	76,884	83,411	44,917	43,595	53,703	113,664	103,747	41,556	**603,409**

Source: Experian Micromarketer, June 2013

	Postal Sectors
Zone 1	EC1N 2/6/7/8, EC4A 1, W1T 1/2/3/4/5/6/7, WC1A 1/2, WC1B 3/4/5, WC1E 6/7, WC1H 0/8/9, WC1N 1/2/3, WC1R 4/5, WC1V 6/7, WC1X 8, WC2A 2/3, WC2B 4/5/6/7, WC2H 8/9, WC2N 4
Zone 2	N1C 4, NW1 0/1/2/3/7/8/9, NW5 2/3
Zone 3	NW2 3, NW3 3/4/5/6, NW6 1/2/3/4
Zone 4	N6 6, NW3 1/2/7, NW5 1/4
Zone 5	NW2 4/5/6/7
Zone 6	NW1 4, NW8 0/6/7/8/9, W9 1
Zone 7	N19 3/4/5, N5 1, N7 0/6/7/8/9
Zone 8	EC1M 3/4/5/6, EC1R 0/1/3/4, EC1V 0/1/2/3/4/7/8, N1 0/1/2/7/8/9, WC1X 0/9
Zone 9	NW1 5/6, W1B 1/2/3/4/5, W1C 1/2, W1D 1/2/3/4/5/6/7, W1F 0/7/8/9, W1G 0/6/7/8/9, W1H 1,2,4,5,6,7, W1J 0/5/6/7/8/9, W1K 1/2/3/4/5/6/7, W1S 1/2/3/4, W1U 1/2/3/4/5/6/7/8, W1W 5/6/7/8, WC2H 0/7

London Borough of Camden
Retail and Town Centre Study 2013

Table 2
Per Capita Convenience Goods Expenditure (2011 Prices)

Growth in convenience goods spending per capita:

2011 - 2012	0.1% pa
2012 - 2013	-0.1% pa
2013 - 2018	0.5% pa
2018 - 2023	0.8% pa
2023 - 2028	0.8% pa
2028 - 2031	0.8% pa

den Lock Mark	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
2011	1,610	1,978	2,721	2,462	2,145	2,421	2,082	2,065	2,561
2013	1,610	1,978	2,721	2,462	2,145	2,421	2,082	2,065	2,561
2013 Minus SFT at 3%	**1,562**	**1,919**	**2,639**	**2,388**	**2,081**	**2,348**	**2,020**	**2,003**	**2,484**
2018	1,651	2,028	2,790	2,524	2,199	2,482	2,135	2,117	2,626
2018 Minus SFT at 4%	**1,585**	**1,947**	**2,678**	**2,423**	**2,111**	**2,383**	**2,049**	**2,032**	**2,521**
2023	1,718	2,110	2,903	2,627	2,289	2,583	2,221	2,203	2,732
2023 Minus SFT at 5%	**1,632**	**2,005**	**2,758**	**2,495**	**2,174**	**2,454**	**2,110**	**2,093**	**2,596**
2028	1,788	2,196	3,021	2,734	2,382	2,688	2,312	2,293	2,843
2028 Minus SFT at 5%	**1,698**	**2,086**	**2,870**	**2,597**	**2,262**	**2,554**	**2,196**	**2,178**	**2,701**
2031	**1,831**	**2,249**	**3,094**	**2,800**	**2,439**	**2,753**	**2,368**	**2,348**	**2,912**
2031 Minus SFT at 5%	**1,739**	**2,137**	**2,939**	**2,660**	**2,317**	**2,615**	**2,249**	**2,231**	**2,767**

Source: Experian Micromarketer, February 2013

Table 3
Total Survey Area Convenience Goods Expenditure (2011 Prices)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
2013	57,695	120,989	204,266	102,525	85,406	114,340	189,929	170,654	93,223	**1,139,028**
2018	63,968	137,376	216,151	108,891	89,124	119,633	204,747	186,079	98,975	**1,224,945**
2023	67,373	145,163	227,365	111,790	93,400	126,558	222,390	201,806	104,589	**1,300,434**
2028	71,098	160,377	238,560	116,549	98,126	135,510	243,262	220,093	110,920	**1,394,495**
2031	72,931	164,287	245,184	119,465	101,019	140,454	255,649	231,439	114,970	**1,445,397**

Source: Tables 1 and 2

London Borough of Camden
Retail and Town Centre Study 2013

Table 4
Convenience Goods Allocation 2013 - % Market Share

Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Centre / Store	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
CAMDEN TOWN									
Sainsbury's, Camden Road, CAMDEN TOWN	2.5%	42.5%	1.1%	12.8%	1.1%	2.1%	3.4%	0.8%	0.7%
Morrisons, Chalk Farm Road, CAMDEN TOWN	1.0%	14.4%	7.1%	15.9%	0.0%	3.9%	3.7%	2.7%	1.0%
Marks and Spencer, Camden High Street, CAMDEN TOWN	0.6%	4.9%	0.5%	2.9%	0.5%	4.3%	0.3%	0.0%	0.0%
Sainsbury's Local, Camden High Street / Chalk Farm Road, CAMDEN TOWN	0.0%	2.9%	0.0%	3.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Hawley Wharf / Camden Lock Market (Ref. 2012/4628/P)	3.0%	10.1%	0.0%	3.9%	0.3%	0.2%	0.5%	0.4%	1.4%
Total Camden Town In Centre	**7.0%**	**74.7%**	**8.7%**	**39.5%**	**1.8%**	**10.5%**	**7.9%**	**4.0%**	**3.1%**
KILBURN HIGH ROAD									
Sainsbury's, Kilburn High Road, KILBURN	0.0%	0.0%	5.1%	0.0%	21.3%	5.8%	0.0%	0.0%	0.0%
Marks and Spencer, Kilburn High Road, KILBURN	0.0%	0.0%	1.7%	0.0%	2.8%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Local, Kilburn High Road, KILBURN (LB Brent)	0.0%	0.0%	2.3%	0.0%	6.7%	1.4%	0.0%	0.0%	0.0%
Other Local Stores, KILBURN	0.0%	0.0%	1.1%	0.0%	3.6%	0.7%	0.0%	0.0%	0.0%
Total Kilburn High Road In Centre	**0.0%**	**0.0%**	**10.4%**	**0.0%**	**34.4%**	**7.9%**	**0.0%**	**0.0%**	**0.0%**
FINCHLEY ROAD / SWISS COTTAGE									
Waitrose, FINCHLEY ROAD / SWISS COTTAGE	0.0%	0.4%	30.0%	4.8%	8.2%	15.5%	0.0%	0.0%	0.0%
Sainsbury's, O2 Centre, FINCHLEY ROAD / SWISS COTTAGE	0.0%	0.5%	17.4%	3.1%	1.7%	14.0%	0.0%	0.0%	1.1%
Other Local Stores, FINCHLEY ROAD / SWISS COTTAGE	0.0%	0.0%	1.5%	0.7%	0.3%	3.9%	0.0%	0.0%	0.0%
Total Finchley Road / Swiss Cottage In Centre	**0.0%**	**0.9%**	**48.8%**	**8.5%**	**10.3%**	**33.4%**	**0.0%**	**0.0%**	**1.1%**
HAMPSTEAD									
Tesco Express, Heath Street, HAMPSTEAD	0.0%	0.0%	2.2%	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Local Stores, HAMPSTEAD	0.0%	0.0%	1.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Total Hampstead In Centre	**0.0%**	**0.0%**	**3.2%**	**4.2%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
KENTISH TOWN									
Sainsbury's Local, Kentish Town Road, KENTISH TOWN	0.4%	0.9%	0.0%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Kentish Town Road, KENTISH TOWN	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, Kentish Town Road (North and South), KENTISH TOWN	0.0%	1.1%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Local Stores, KENTISH TOWN	0.0%	10.2%	0.0%	5.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Total Kentish Town In Centre	**0.4%**	**13.2%**	**0.0%**	**10.1%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
WEST HAMPSTEAD									
Tesco Express, West End Land, WEST HAMPSTEAD	0.0%	0.0%	4.0%	0.3%	0.0%	0.3%	0.0%	0.0%	0.0%
Sainsbury's Local, West End Lane, WEST HAMPSTEAD	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Local Stores, WEST HAMPSTEAD	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total West Hampstead In Centre	**0.0%**	**0.0%**	**6.7%**	**0.3%**	**0.0%**	**0.3%**	**0.0%**	**0.0%**	**0.0%**
TOTTENHAM COURT ROAD									
Little Waitrose, TOTTENHAM COURT ROAD	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's Local (north), TOTTENHAM COURT ROAD	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.3%
Sainsbury's Central (south), TOTTENHAM COURT ROAD	2.1%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%
Other Local Stores, TOTTENHAM COURT ROAD	1.2%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	1.5%
Total Tottenham Court Road In Centre	**5.6%**	**0.5%**	**0.0%**	**1.6%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**3.9%**
HOLBORN									
Sainsbury's Local, Mid City Place, HOLBORN	3.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%
Sainsbury's Central, Kingsway, HOLBORN	3.4%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Little Waitrose, Weston House, High Holborn, HOLBORN	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Local Shops, HOLBORN	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total Holborn In Centre	**12.3%**	**0.5%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.2%**	**0.0%**
OTHER FOODSTORES IN CAMDEN BOROUGH									
Waitrose, The Brunswick, BLOOMSBURY (Neighbourhood Centre)	35.0%	1.7%	1.4%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%
Marks and Spencer, Pond Street, HAMPSTEAD HEATH (Edge of Centre)	0.0%	0.0%	2.2%	6.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Metro, GOODGE STREET (Neighbourhood Centre)	9.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%
Total Other Foodstores in Camden Borough	**44.7%**	**1.7%**	**3.6%**	**6.4%**	**0.0%**	**0.0%**	**0.0%**	**0.4%**	**3.3%**
TOTAL LONDON BOROUGH CAMDEN	**70.0%**	**91.4%**	**81.3%**	**70.7%**	**46.5%**	**52.1%**	**7.9%**	**4.7%**	**11.4%**
OUTSIDE LONDON BOROUGH OF CAMDEN									
Sainsbury's, Liverpool Road, ANGEL / ISLINGTON	4.6%	0.0%	0.0%	0.8%	0.0%	0.0%	4.6%	33.6%	0.0%
Tesco Metro, Bedford Street, COVENT GARDEN	6.5%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	5.5%
Morrisons, Hertslet Road, HOLLOWAY	1.0%	0.0%	0.0%	1.0%	0.0%	0.0%	22.4%	2.8%	0.0%
Waitrose, Holloway Road, HOLLOWAY	0.0%	0.4%	0.9%	7.2%	0.0%	0.0%	20.3%	4.1%	0.0%
Waitrose, Liverpool Road, ANGEL / ISLINGTON	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.4%	10.6%	0.0%
Waitrose, Marylebone High Street, MARYLEBONE	0.4%	0.0%	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	24.4%
Sainsbury's, High Road, Willesden Green, WILLESDON	0.0%	0.0%	0.9%	0.0%	14.3%	0.0%	0.0%	0.0%	0.0%
Waitrose, EDGWARE ROAD	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	12.4%
Total Outside London Borough of Camden	**12.5%**	**0.4%**	**1.8%**	**9.7%**	**14.9%**	**3.5%**	**47.7%**	**51.1%**	**42.3%**
Other	17.5%	8.2%	16.8%	19.6%	38.6%	44.4%	44.5%	44.2%	46.3%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: London Borough of Camden Telephone Survey, January 2013

London Borough of Camden
Retail and Town Centre Study 2013

2013 Baseline

Table 5
Convenience Goods Allocation 2013 - Spend (£) 2011 Prices

Zone Centre / Store	Zone 1 (£000)	Zone 2 (£000)	Zone 3 (£000)	Zone 4 (£000)	Zone 5 (£000)	Zone 6 (£000)	Zone 7 (£000)	Zone 8 (£000)	Zone 9 (£000)	Total (£000)
CAMDEN TOWN										
Sainsbury's, Camden Road, CAMDEN TOWN	1,426	51,413	2,304	13,156	913	2,400	6,449	1,440	615	**80,116**
Morrisons, Chalk Farm Road, CAMDEN TOWN	558	17,398	14,547	16,302	0	4,472	7,026	4,647	925	**65,875**
Marks and Spencer, Camden High Street, CAMDEN TOWN	326	5,877	946	3,008	394	4,878	483	0	0	**15,911**
Sainsbury's Local, Camden High Street / Chalk Farm Road, CAMDEN TOWN	0	3,466	0	3,949	0	0	0	0	0	**7,415**
Hawley Wharf / Camden Lock Market (Ref. 2012/4628/P)	1,743	12,217	0	4,042	248	254	966	739	1,349	**21,559**
Total Camden Town In Centre	**4,053**	**90,371**	**17,798**	**40,458**	**1,555**	**12,003**	**14,925**	**6,826**	**2,889**	**190,876**
KILBURN HIGH ROAD										
Sainsbury's, Kilburn High Road, KILBURN	0	0	10,503	0	18,231	6,648	0	0	0	**35,382**
Marks and Spencer, Killburn High Road, KILBURN	0	0	3,545	0	2,372	0	0	0	0	**5,917**
Sainsbury's Local, Kilburn High Road, KILBURN (LB Brent)	0	0	4,767	0	5,680	1,647	0	0	0	**12,093**
Other Local Stores, KILBURN	0	0	2,327	0	3,078	747	0	0	0	**6,152**
Total Kilburn High Road In Centre	**0**	**0**	**21,142**	**0**	**29,361**	**9,042**	**0**	**0**	**0**	**59,544**
FINCHLEY ROAD / SWISS COTTAGE										
Waitrose, FINCHLEY ROAD / SWISS COTTAGE	0	484	61,207	4,878	7,012	17,775	0	0	0	**91,356**
Sainsbury's, O2 Centre, FINCHLEY ROAD / SWISS COTTAGE	0	643	35,468	3,162	1,477	16,036	0	0	1,051	**57,837**
Other Local Stores, FINCHLEY ROAD / SWISS COTTAGE	0	0	3,016	709	293	4,402	0	0	0	**8,420**
Total Finchley Road / Swiss Cottage In Centre	**0**	**1,126**	**99,692**	**8,749**	**8,782**	**38,213**	**0**	**0**	**1,051**	**157,614**
HAMPSTEAD										
Tesco Express, Heath Street, HAMPSTEAD	0	0	4,483	2,832	0	0	0	0	0	**7,315**
Other Local Stores, HAMPSTEAD	0	0	1,958	1,514	0	0	0	0	0	**3,472**
Total Hampstead In Centre	**0**	**0**	**6,441**	**4,346**	**0**	**0**	**0**	**0**	**0**	**10,787**
KENTISH TOWN										
Sainsbury's Local, Kentish Town Road, KENTISH TOWN	210	1,123	0	3,108	**0**	**0**	**0**	**0**	**0**	**4,442**
Tesco Express, Kentish Town Road, KENTISH TOWN	0	1,192	0	0	0	0	0	0	0	**1,192**
Co-op, Kentish Town Road (North and South), KENTISH TOWN	0	1,272	0	1,199	0	0	0	0	0	**2,470**
Other Local Stores, KENTISH TOWN	0	12,363	0	6,042	0	0	0	0	0	**18,405**
Total Kentish Town In Centre	**210**	**15,951**	**0**	**10,349**	**0**	**0**	**0**	**0**	**0**	**26,509**
WEST HAMPSTEAD										
Tesco Express, West End Land, WEST HAMPSTEAD	0	0	8,204	288	0	338	0	0	0	**8,829**
Sainsbury's Local, West End Lane, WEST HAMPSTEAD	0	0	4,540	0	0	0	0	0	0	**4,540**
Other Local Stores, WEST HAMPSTEAD	0	0	946	0	0	0	0	0	0	**946**
Total West Hampstead In Centre	**0**	**0**	**13,689**	**288**	**0**	**338**	**0**	**0**	**0**	**14,315**
TOTTENHAM COURT ROAD										
Little Waitrose, TOTTENHAM COURT ROAD	1,373	0	0	0	0	0	0	0	0	**1,373**
Sainsbury's Local (north), TOTTENHAM COURT ROAD	0	0	0	1,196	0	0	0	0	246	**1,442**
Sainsbury's Central (south), TOTTENHAM COURT ROAD	1,189	548	0	0	0	0	0	0	1,976	**3,713**
Other Local Stores, TOTTENHAM COURT ROAD	691	0	0	493	0	0	0	0	1,379	**2,563**
Total Tottenham Court Road In Centre	**3,253**	**548**	**0**	**1,690**	**0**	**0**	**0**	**0**	**3,601**	**9,091**
HOLBORN										
Sainsbury's Local, Mid City Place, HOLBORN	2,245	0	0	0	0	0	0	413	0	**2,658**
Sainsbury's Central, Kingsway, HOLBORN	1,949	555	0	0	0	0	0	0	0	**2,504**
Little Waitrose, Weston House, High Holborn, HOLBORN	1,430	0	0	0	0	0	0	0	0	**1,430**
Other Local Shops, HOLBORN	1,472	0	0	0	0	0	0	0	0	**1,472**
Total Holborn In Centre	**7,097**	**555**	**0**	**0**	**0**	**0**	**0**	**413**	**0**	**8,065**
OTHER FOODSTORES IN CAMDEN BOROUGH										
Waitrose, The Brunswick, BLOOMSBURY (Neighbourhood Centre)	20,171	2,063	2,831	0	0	0	0	705	0	**25,770**
Marks and Spencer, Pond Street, HAMPSTEAD HEATH (Edge of Centre)	0	0	4,564	6,593	0	0	0	0	0	**11,157**
Tesco Metro, GOODGE STREET (Neighbourhood Centre)	5,608	0	0	0	0	0	0	0	3,054	**8,663**
Total Other Foodstores in Camden Borough	**25,780**	**2,063**	**7,395**	**6,593**	**0**	**0**	**0**	**705**	**3,054**	**45,589**
TOTAL LONDON BOROUGH CAMDEN	40,392	110,615	166,157	72,472	39,698	59,595	14,925	7,943	10,595	**522,392**
OUTSIDE LONDON BOROUGH OF CAMDEN										
Sainsbury's, Liverpool Road, ANGEL / ISLINGTON	2,658	0	0	829	0	0	8,656	57,269	0	**69,413**
Tesco Metro, Bedford Street, COVENT GARDEN	3,735	0	0	700	0	0	0	0	5,134	**9,569**
Morrisons, Hertslet Road, HOLLOWAY	584	0	0	988	0	0	42,551	4,824	0	**48,947**
Waitrose, Holloway Road, HOLLOWAY	0	484	1,885	7,408	0	0	38,541	7,011	0	**55,329**
Waitrose, Liverpool Road, ANGEL / ISLINGTON	0	0	0	0	524	0	818	18,105	0	**19,446**
Waitrose, Marylebone High Street, MARYLEBONE	245	0	0	0	0	2,585	0	0	22,731	**25,561**
Sainsbury's, High Road, Willesden Green, WILLESDON	0	0	1,885	0	12,226	0	0	0	0	**14,110**
Waitrose, EDGWARE ROAD	0	0	0	0	0	1,409	0	0	11,601	**13,010**
Total Outside London Borough of Camden	**7,222**	**484**	**3,769**	**9,925**	**12,750**	**3,994**	**90,566**	**87,209**	**39,466**	**255,385**
Other	10,081	9,890	34,340	20,129	32,959	50,750	84,439	75,501	43,162	**361,251**
TOTAL	57,695	120,989	204,266	102,525	85,406	114,340	189,929	170,654	93,223	1,139,028

Source: Tables 3 & 4

London Borough of Camden
Retail and Town Centre Study 2013

2018 Baseline

Table 6
Convenience Goods Allocation 2018 - Spend (£) 2011 Prices

Zone Centre / Store	Zone 1 (£000)	Zone 2 (£000)	Zone 3 (£000)	Zone 4 (£000)	Zone 5 (£000)	Zone 6 (£000)	Zone 7 (£000)	Zone 8 (£000)	Zone 9 (£000)	**Total (£000)**
CAMDEN TOWN										
Sainsbury's, Camden Road, CAMDEN TOWN	1,581	58,377	2,438	13,973	953	2,511	6,952	1,570	653	**89,008**
Morrisons, Chalk Farm Road, CAMDEN TOWN	619	19,754	15,394	17,315	0	4,679	7,575	5,067	982	**71,383**
Marks and Spencer, Camden High Street, CAMDEN TOWN	361	6,672	1,001	3,195	411	5,103	521	0	0	**17,265**
Hawley Wharf / Camden Lock Market (Ref. 2012/4628/P)	0	3,936	0	4,194	0	0	0	0	0	**8,130**
Hawley Wharf / Camden Lock Market (Ref. 2012/4628/P)	1,933	13,872	0	4,293	258	266	1,041	806	1,433	**23,902**
Total Camden Town In Centre	**4,493**	**102,611**	**18,833**	**42,970**	**1,622**	**12,558**	**16,089**	**7,443**	**3,067**	**209,688**
KILBURN HIGH ROAD										
Sainsbury's, Kilburn High Road, KILBURN	0	0	11,114	0	19,025	6,956	0	0	0	**37,095**
Marks and Spencer, Killburn High Road, KILBURN	0	0	3,751	0	2,475	0	0	0	0	**6,226**
Sainsbury's Local, Kilburn High Road, KILBURN (LB Brent)	0	0	5,044	0	5,927	1,723	0	0	0	**12,694**
Other Local Stores, KILBURN	0	0	2,462	0	3,212	781	0	0	0	**6,456**
Total Kilburn High Road In Centre	**0**	**0**	**22,372**	**0**	**30,639**	**9,460**	**0**	**0**	**0**	**62,471**
FINCHLEY ROAD / SWISS COTTAGE										
Waitrose, FINCHLEY ROAD / SWISS COTTAGE	0	549	64,768	5,181	7,317	18,598	0	0	0	**96,414**
Sainsbury's, O2 Centre, FINCHLEY ROAD / SWISS COTTAGE	0	730	37,532	3,358	1,542	16,778	0	0	1,116	**61,056**
Other Local Stores, FINCHLEY ROAD / SWISS COTTAGE	0	0	3,192	753	306	4,606	0	0	0	**8,857**
Total Finchley Road / Swiss Cottage In Centre	**0**	**1,279**	**105,492**	**9,292**	**9,164**	**39,982**	**0**	**0**	**1,116**	**166,326**
HAMPSTEAD										
Tesco Express, Heath Street, HAMPSTEAD	0	0	4,744	3,008	0	0	0	0	0	**7,752**
Other Local Stores, HAMPSTEAD	0	0	2,072	1,608	0	0	0	0	0	**3,680**
Total Hampstead In Centre	**0**	**0**	**6,816**	**4,616**	**0**	**0**	**0**	**0**	**0**	**11,432**
KENTISH TOWN										
Sainsbury's Local, Kentish Town Road, KENTISH TOWN	233	1,276	0	3,301	0	0	0	0	0	**4,810**
Tesco Express, Kentish Town Road, KENTISH TOWN	0	1,354	0	0	0	0	0	0	0	**1,354**
Co-op, Kentish Town Road (North and South), KENTISH TOWN	0	1,444	0	1,273	0	0	0	0	0	**2,717**
Other Local Stores, KENTISH TOWN	0	14,038	0	6,417	0	0	0	0	0	**20,455**
Total Kentish Town In Centre	**233**	**18,112**	**0**	**10,991**	**0**	**0**	**0**	**0**	**0**	**29,335**
WEST HAMPSTEAD										
Tesco Express, West End Land, WEST HAMPSTEAD	0	0	8,681	306	0	353	0	0	0	**9,340**
Sainsbury's Local, West End Lane, WEST HAMPSTEAD	0	0	4,804	0	0	0	0	0	0	**4,804**
Other Local Stores, WEST HAMPSTEAD	0	0	1,001	0	0	0	0	0	0	**1,001**
Total West Hampstead In Centre	**0**	**0**	**14,486**	**306**	**0**	**353**	**0**	**0**	**0**	**15,145**
TOTTENHAM COURT ROAD										
Little Waitrose, TOTTENHAM COURT ROAD	1,523	0	0	0	0	0	0	0	0	**1,523**
Sainsbury's Local (north), TOTTENHAM COURT ROAD	0	0	0	1,271	0	0	0	0	261	**1,532**
Sainsbury's Central (south), TOTTENHAM COURT ROAD	1,318	622	0	0	0	0	0	0	2,098	**4,038**
Other Local Stores, TOTTENHAM COURT ROAD	766	0	0	524	0	0	0	0	1,464	**2,754**
Total Tottenham Court Road In Centre	**3,606**	**622**	**0**	**1,795**	**0**	**0**	**0**	**0**	**3,823**	**9,846**
HOLBORN										
Sainsbury's Local, Mid City Place, HOLBORN	2,490	0	0	0	0	0	0	450	0	**2,940**
Sainsbury's Central, Kingsway, HOLBORN	2,161	631	0	0	0	0	0	0	0	**2,791**
Little Waitrose, Weston House, High Holborn, HOLBORN	1,586	0	0	0	0	0	0	0	0	**1,586**
Other Local Shops, HOLBORN	1,633	0	0	0	0	0	0	0	0	**1,633**
Total Holborn In Centre	**7,869**	**631**	**0**	**0**	**0**	**0**	**0**	**450**	**0**	**8,949**
OTHER FOODSTORES IN CAMDEN BOROUGH										
Waitrose, The Brunswick, BLOOMSBURY (Neighbourhood Centre)	22,365	2,342	2,995	0	0	0	0	769	0	**28,471**
Marks and Spencer, Pond Street, HAMPSTEAD HEATH (Edge of Centre)	0	0	4,830	7,002	0	0	0	0	0	**11,832**
Tesco Metro, GOODGE STREET (Neighbourhood Centre)	6,218	0	0	0	0	0	0	0	3,243	**9,461**
Total Other Foodstores in Camden Borough	**28,583**	**2,342**	**7,825**	**7,002**	**0**	**0**	**0**	**769**	**3,243**	**49,764**
TOTAL LONDON BOROUGH CAMDEN	**44,784**	**125,597**	**175,824**	**76,972**	**41,426**	**62,354**	**16,089**	**8,661**	**11,249**	**562,957**
OUTSIDE LONDON BOROUGH OF CAMDEN										
Sainsbury's, Liverpool Road, ANGEL / ISLINGTON	2,947	0	0	880	0	0	9,332	62,446	0	**75,606**
Tesco Metro, Bedford Street, COVENT GARDEN	4,141	0	0	743	0	0	0	0	5,451	**10,335**
Morrisons, Hertslet Road, HOLLOWAY	648	0	0	1,049	0	0	45,870	5,260	0	**52,827**
Waitrose, Holloway Road, HOLLOWAY	0	549	1,994	7,868	0	0	41,548	7,645	0	**59,605**
Waitrose, Liverpool Road, ANGEL / ISLINGTON	0	0	0	0	547	0	881	19,742	0	**21,169**
Waitrose, Marylebone High Street, MARYLEBONE	271	0	0	0	0	2,705	0	0	24,133	**27,110**
Sainsbury's, High Road, Willesden Green, WILLESDON	0	0	1,994	0	12,758	0	0	0	0	**14,752**
Waitrose, EDGWARE ROAD	0	0	0	0	0	1,474	0	0	12,317	**13,791**
Total Outside London Borough of Camden	**8,008**	**549**	**3,988**	**10,541**	**13,305**	**4,179**	**97,632**	**95,092**	**41,901**	**275,195**
Other	11,177	11,230	36,338	21,379	34,394	53,100	91,026	82,326	45,825	**386,794**
TOTAL	**63,968**	**137,376**	**216,151**	**108,891**	**89,124**	**119,633**	**204,747**	**186,079**	**98,975**	**1,224,945**

Source: Tables 3 & 4

London Borough of Camden
Retail and Town Centre Study 2013

2023 Baseline

Table 7
Convenience Goods Allocation 2023 - Spend (£) 2011 Prices

Zone Centre / Store	Zone 1 (£000)	Zone 2 (£000)	Zone 3 (£000)	Zone 4 (£000)	Zone 5 (£000)	Zone 6 (£000)	Zone 7 (£000)	Zone 8 (£000)	Zone 9 (£000)	**Total (£000)**
CAMDEN TOWN										
Sainsbury's, Camden Road, CAMDEN TOWN	1,665	61,686	2,565	14,345	999	2,656	7,551	1,702	690	**93,859**
Morrisons, Chalk Farm Road, CAMDEN TOWN	652	20,874	16,192	17,776	0	4,950	8,227	5,495	1,037	**75,203**
Marks and Spencer, Camden High Street, CAMDEN TOWN	381	7,051	1,053	3,280	431	5,399	566	0	0	**18,160**
Hawley Wharf / Camden Lock Market (Ref. 2012/4628/P)	0	4,159	0	4,306	0	0	0	0	0	**8,465**
Hawley Wharf / Camden Lock Market (Ref. 2012/4628/P)	2,035	14,658	0	4,408	271	281	1,131	874	1,514	**25,172**
Total Camden Town In Centre	**4,733**	**108,428**	**19,810**	**44,114**	**1,700**	**13,285**	**17,475**	**8,072**	**3,241**	**220,859**
KILBURN HIGH ROAD										
Sainsbury's, Kilburn High Road, KILBURN	0	0	11,691	0	19,938	7,358	0	0	0	**38,987**
Marks and Spencer, Killburn High Road, KILBURN	0	0	3,946	0	2,594	0	0	0	0	**6,540**
Sainsbury's Local, Kilburn High Road, KILBURN (LB Brent)	0	0	5,306	0	6,211	1,823	0	0	0	**13,340**
Other Local Stores, KILBURN	0	0	2,590	0	3,367	827	0	0	0	**6,783**
Total Kilburn High Road In Centre	**0**	**0**	**23,532**	**0**	**32,109**	**10,008**	**0**	**0**	**0**	**65,649**
FINCHLEY ROAD / SWISS COTTAGE										
Waitrose, FINCHLEY ROAD / SWISS COTTAGE	0	580	68,128	5,319	7,668	19,675	0	0	0	**101,370**
Sainsbury's, O2 Centre, FINCHLEY ROAD / SWISS COTTAGE	0	771	39,479	3,448	1,616	17,749	0	0	1,179	**64,242**
Other Local Stores, FINCHLEY ROAD / SWISS COTTAGE	0	0	3,357	773	321	4,873	0	0	0	**9,323**
Total Finchley Road / Swiss Cottage In Centre	**0**	**1,351**	**110,965**	**9,540**	**9,604**	**42,297**	**0**	**0**	**1,179**	**174,936**
HAMPSTEAD										
Tesco Express, Heath Street, HAMPSTEAD	0	0	4,990	3,088	0	0	0	0	0	**8,078**
Other Local Stores, HAMPSTEAD	0	0	2,179	1,651	0	0	0	0	0	**3,830**
Total Hampstead In Centre	**0**	**0**	**7,170**	**4,739**	**0**	**0**	**0**	**0**	**0**	**11,908**
KENTISH TOWN										
Sainsbury's Local, Kentish Town Road, KENTISH TOWN	245	1,348	0	3,389	0	0	0	0	0	**4,982**
Tesco Express, Kentish Town Road, KENTISH TOWN	0	1,431	0	0	0	0	0	0	0	**1,431**
Co-op, Kentish Town Road (North and South), KENTISH TOWN	0	1,526	0	1,307	0	0	0	0	0	**2,833**
Other Local Stores, KENTISH TOWN	0	14,834	0	6,588	0	0	0	0	0	**21,421**
Total Kentish Town In Centre	**245**	**19,138**	**0**	**11,284**	**0**	**0**	**0**	**0**	**0**	**30,667**
WEST HAMPSTEAD										
Tesco Express, West End Land, WEST HAMPSTEAD	0	0	9,131	314	0	374	0	0	0	**9,819**
Sainsbury's Local, West End Lane, WEST HAMPSTEAD	0	0	5,053	0	0	0	0	0	0	**5,053**
Other Local Stores, WEST HAMPSTEAD	0	0	1,053	0	0	0	0	0	0	**1,053**
Total West Hampstead In Centre	**0**	**0**	**15,238**	**314**	**0**	**374**	**0**	**0**	**0**	**15,925**
TOTTENHAM COURT ROAD										
Little Waitrose, TOTTENHAM COURT ROAD	1,604	0	0	0	0	0	0	0	0	**1,604**
Sainsbury's Local (north), TOTTENHAM COURT ROAD	0	0	0	1,304	0	0	0	0	276	**1,581**
Sainsbury's Central (south), TOTTENHAM COURT ROAD	1,388	658	0	0	0	0	0	0	2,217	**4,262**
Other Local Stores, TOTTENHAM COURT ROAD	807	0	0	538	0	0	0	0	1,547	**2,892**
Total Tottenham Court Road In Centre	**3,798**	**658**	**0**	**1,842**	**0**	**0**	**0**	**0**	**4,040**	**10,338**
HOLBORN										
Sainsbury's Local, Mid City Place, HOLBORN	2,622	0	0	0	0	0	0	488	0	**3,110**
Sainsbury's Central, Kingsway, HOLBORN	2,276	666	0	0	0	0	0	0	0	**2,942**
Little Waitrose, Weston House, High Holborn, HOLBORN	1,670	0	0	0	0	0	0	0	0	**1,670**
Other Local Shops, HOLBORN	1,719	0	0	0	0	0	0	0	0	**1,719**
Total Holborn In Centre	**8,288**	**666**	**0**	**0**	**0**	**0**	**0**	**488**	**0**	**9,442**
OTHER FOODSTORES IN CAMDEN BOROUGH										
Waitrose, The Brunswick, BLOOMSBURY (Neighbourhood Centre)	23,555	2,475	3,151	0	0	0	0	834	0	**30,014**
Marks and Spencer, Pond Street, HAMPSTEAD HEATH (Edge of Centre)	0	0	5,080	7,188	0	0	0	0	0	**12,269**
Tesco Metro, GOODGE STREET (Neighbourhood Centre)	6,549	0	0	0	0	0	0	0	3,427	**9,976**
Total Other Foodstores in Camden Borough	**30,104**	**2,475**	**8,231**	**7,188**	**0**	**0**	**0**	**834**	**3,427**	**52,259**
TOTAL LONDON BOROUGH CAMDEN	**47,167**	**132,717**	**184,946**	**79,021**	**43,413**	**65,964**	**17,475**	**9,393**	**11,887**	**591,984**
OUTSIDE LONDON BOROUGH OF CAMDEN										
Sainsbury's, Liverpool Road, ANGEL / ISLINGTON	3,104	0	0	904	0	0	10,136	67,724	0	**81,868**
Tesco Metro, Bedford Street, COVENT GARDEN	4,361	0	0	763	0	0	0	0	5,760	**10,884**
Morrisons, Hertslet Road, HOLLOWAY	682	0	0	1,077	0	0	49,823	5,704	0	**57,287**
Waitrose, Holloway Road, HOLLOWAY	0	580	2,098	8,078	0	0	45,129	8,291	0	**64,175**
Waitrose, Liverpool Road, ANGEL / ISLINGTON	0	0	0	0	573	0	957	21,410	0	**22,940**
Waitrose, Marylebone High Street, MARYLEBONE	286	0	0	0	0	2,861	0	0	25,502	**28,649**
Sainsbury's, High Road, Willesden Green, WILLESDON	0	0	2,098	0	13,370	0	0	0	0	**15,468**
Waitrose, EDGWARE ROAD	0	0	0	0	0	1,559	0	0	13,016	**14,575**
Total Outside London Borough of Camden	8,434	580	4,195	10,821	13,943	4,421	106,045	103,129	44,278	**295,846**
Other	11,772	11,866	38,223	21,948	36,044	56,174	98,870	89,283	48,424	**412,604**
TOTAL	**67,373**	**145,163**	**227,365**	**111,790**	**93,400**	**126,558**	**222,390**	**201,806**	**104,589**	**1,300,434**

Source: Tables 3 & 4

London Borough of Camden
Retail and Town Centre Study 2013

2028 Baseline

Table 8
Convenience Goods Allocation 2028 - Spend (£) 2011 Prices

Zone Centre / Store	Zone 1 (£000)	Zone 2 (£000)	Zone 3 (£000)	Zone 4 (£000)	Zone 5 (£000)	Zone 6 (£000)	Zone 7 (£000)	Zone 8 (£000)	Zone 9 (£000)	**Total** **(£000)**
CAMDEN TOWN										
Sainsbury's, Camden Road, CAMDEN TOWN	1,757	68,151	2,691	14,956	1,049	2,844	8,260	1,857	731	**102,296**
Morrisons, Chalk Farm Road, CAMDEN TOWN	688	23,061	16,990	18,532	0	5,300	8,999	5,993	1,100	**80,664**
Marks and Spencer, Camden High Street, CAMDEN TOWN	402	7,790	1,105	3,419	453	5,781	619	0	0	**19,568**
Hawley Wharf / Camden Lock Market (Ref. 2012/4628/P)	0	4,595	0	4,489	0	0	0	0	0	**9,084**
Hawley Wharf / Camden Lock Market (Ref. 2012/4628/P)	2,148	16,195	0	4,595	284	301	1,237	953	1,606	**27,319**
Total Camden Town In Centre	**4,994**	**119,792**	**20,786**	**45,992**	**1,786**	**14,225**	**19,115**	**8,803**	**3,437**	**238,931**
KILBURN HIGH ROAD										
Sainsbury's, Kilburn High Road, KILBURN	0	0	12,267	0	20,947	7,879	0	0	0	**41,092**
Marks and Spencer, Killburn High Road, KILBURN	0	0	4,140	0	2,725	0	0	0	0	**6,865**
Sainsbury's Local, Kilburn High Road, KILBURN (LB Brent)	0	0	5,567	0	6,525	1,952	0	0	0	**14,044**
Other Local Stores, KILBURN	0	0	2,717	0	3,537	885	0	0	0	**7,139**
Total Kilburn High Road In Centre	**0**	**0**	**24,691**	**0**	**33,734**	**10,716**	**0**	**0**	**0**	**69,141**
FINCHLEY ROAD / SWISS COTTAGE										
Waitrose, FINCHLEY ROAD / SWISS COTTAGE	0	641	71,483	5,545	8,056	21,067	0	0	0	**106,792**
Sainsbury's, O2 Centre, FINCHLEY ROAD / SWISS COTTAGE	0	852	41,423	3,594	1,697	19,005	0	0	1,251	**67,823**
Other Local Stores, FINCHLEY ROAD / SWISS COTTAGE	0	0	3,523	806	337	5,217	0	0	0	**9,883**
Total Finchley Road / Swiss Cottage In Centre	**0**	**1,493**	**116,429**	**9,946**	**10,090**	**45,289**	**0**	**0**	**1,251**	**184,497**
HAMPSTEAD										
Tesco Express, Heath Street, HAMPSTEAD	0	0	5,236	3,219	0	0	0	0	0	**8,455**
Other Local Stores, HAMPSTEAD	0	0	2,287	1,721	0	0	0	0	0	**4,008**
Total Hampstead In Centre	**0**	**0**	**7,523**	**4,940**	**0**	**0**	**0**	**0**	**0**	**12,463**
KENTISH TOWN										
Sainsbury's Local, Kentish Town Road, KENTISH TOWN	259	1,489	0	3,534	0	0	0	0	0	**5,281**
Tesco Express, Kentish Town Road, KENTISH TOWN	0	1,581	0	0	0	0	0	0	0	**1,581**
Co-op, Kentish Town Road (North and South), KENTISH TOWN	0	1,686	0	1,362	0	0	0	0	0	**3,048**
Other Local Stores, KENTISH TOWN	0	16,388	0	6,868	0	0	0	0	0	**23,257**
Total Kentish Town In Centre	**259**	**21,144**	**0**	**11,764**	**0**	**0**	**0**	**0**	**0**	**33,167**
WEST HAMPSTEAD										
Tesco Express, West End Land, WEST HAMPSTEAD	0	0	9,581	327	0	400	0	0	0	**10,308**
Sainsbury's Local, West End Lane, WEST HAMPSTEAD	0	0	5,302	0	0	0	0	0	0	**5,302**
Other Local Stores, WEST HAMPSTEAD	0	0	1,105	0	0	0	0	0	0	**1,105**
Total West Hampstead In Centre	**0**	**0**	**15,988**	**327**	**0**	**400**	**0**	**0**	**0**	**16,715**
TOTTENHAM COURT ROAD										
Little Waitrose, TOTTENHAM COURT ROAD	1,692	0	0	0	0	0	0	0	0	**1,692**
Sainsbury's Local (north), TOTTENHAM COURT ROAD	0	0	0	1,360	0	0	0	0	293	**1,653**
Sainsbury's Central (south), TOTTENHAM COURT ROAD	1,465	727	0	0	0	0	0	0	2,351	**4,542**
Other Local Stores, TOTTENHAM COURT ROAD	851	0	0	561	0	0	0	0	1,641	**3,053**
Total Tottenham Court Road In Centre	**4,008**	**727**	**0**	**1,921**	**0**	**0**	**0**	**0**	**4,284**	**10,940**
HOLBORN										
Sainsbury's Local, Mid City Place, HOLBORN	2,767	0	0	0	0	0	0	532	0	**3,299**
Sainsbury's Central, Kingsway, HOLBORN	2,402	736	0	0	0	0	0	0	0	**3,138**
Little Waitrose, Weston House, High Holborn, HOLBORN	1,763	0	0	0	0	0	0	0	0	**1,763**
Other Local Shops, HOLBORN	1,814	0	0	0	0	0	0	0	0	**1,814**
Total Holborn In Centre	**8,746**	**736**	**0**	**0**	**0**	**0**	**0**	**532**	**0**	**10,014**
OTHER FOODSTORES IN CAMDEN BOROUGH										
Waitrose, The Brunswick, BLOOMSBURY (Neighbourhood Centre)	24,857	2,735	3,306	0	0	0	0	909	0	**31,807**
Marks and Spencer, Pond Street, HAMPSTEAD HEATH (Edge of Centre)	0	0	5,330	7,494	0	0	0	0	0	**12,825**
Tesco Metro, GOODGE STREET (Neighbourhood Centre)	6,911	0	0	0	0	0	0	0	3,634	**10,545**
Total Other Foodstores in Camden Borough	**31,768**	**2,735**	**8,636**	**7,494**	**0**	**0**	**0**	**909**	**3,634**	**55,177**
TOTAL LONDON BOROUGH CAMDEN	**49,775**	**146,626**	**194,053**	**82,385**	**45,610**	**70,629**	**19,115**	**10,245**	**12,606**	**631,045**
OUTSIDE LONDON BOROUGH OF CAMDEN										
Sainsbury's, Liverpool Road, ANGEL / ISLINGTON	3,276	0	0	942	0	0	11,087	73,861	0	**89,166**
Tesco Metro, Bedford Street, COVENT GARDEN	4,603	0	0	795	0	0	0	0	6,108	**11,506**
Morrisons, Hertslet Road, HOLLOWAY	720	0	0	1,123	0	0	54,499	6,221	0	**62,563**
Waitrose, Holloway Road, HOLLOWAY	0	641	2,201	8,422	0	0	49,364	9,042	0	**69,670**
Waitrose, Liverpool Road, ANGEL / ISLINGTON	0	0	0	0	602	0	1,047	23,350	0	**24,999**
Waitrose, Marylebone High Street, MARYLEBONE	302	0	0	0	0	3,064	0	0	27,046	**30,411**
Sainsbury's, High Road, Willesden Green, WILLESDON	0	0	2,201	0	14,047	0	0	0	0	**16,248**
Waitrose, EDGWARE ROAD	0	0	0	0	0	1,670	0	0	13,804	**15,473**
Total Outside London Borough of Camden	**8,900**	**641**	**4,402**	**11,282**	**14,648**	**4,733**	**115,997**	**112,474**	**46,958**	**320,036**
Other	12,422	13,110	40,105	22,882	37,868	60,147	108,149	97,374	51,355	**443,413**
TOTAL	**71,098**	**160,377**	**238,560**	**116,549**	**98,126**	**135,510**	**243,262**	**220,093**	**110,920**	**1,394,495**

Source: Tables 3 & 4

London Borough of Camden
Retail and Town Centre Study 2013

2031 Baseline

Table 8
Convenience Goods Allocation 2031 - Spend (£) 2011 Prices

Zone Centre / Store	Zone 1 (£000)	Zone 2 (£000)	Zone 3 (£000)	Zone 4 (£000)	Zone 5 (£000)	Zone 6 (£000)	Zone 7 (£000)	Zone 8 (£000)	Zone 9 (£000)	Total (£000)
CAMDEN TOWN										
Sainsbury's, Camden Road, CAMDEN TOWN	1,802	69,813	2,766	15,330	1,080	2,948	8,681	1,952	758	**105,130**
Morrisons, Chalk Farm Road, CAMDEN TOWN	706	23,624	17,462	18,996	0	5,493	9,458	6,302	1,140	**83,180**
Marks and Spencer, Camden High Street, CAMDEN TOWN	412	7,980	1,136	3,505	466	5,992	650	0	0	**20,140**
Hawley Wharf / Camden Lock Market (Ref. 2012/4628/P)	0	4,707	0	4,601	0	0	0	0	0	**9,308**
Hawley Wharf / Camden Lock Market (Ref. 2012/4628/P)	2,203	16,590	0	4,710	293	312	1,300	1,003	1,664	**28,075**
Total Camden Town In Centre	**5,123**	**122,712**	**21,363**	**47,142**	**1,839**	**14,744**	**20,089**	**9,257**	**3,563**	**245,832**
KILBURN HIGH ROAD										
Sainsbury's, Kilburn High Road, KILBURN	0	0	12,607	0	21,564	8,166	0	0	0	**42,337**
Marks and Spencer, Kilburn High Road, KILBURN	0	0	4,255	0	2,805	0	0	0	0	**7,060**
Sainsbury's Local, Kilburn High Road, KILBURN (LB Brent)	0	0	5,722	0	6,718	2,023	0	0	0	**14,462**
Other Local Stores, KILBURN	0	0	2,793	0	3,641	917	0	0	0	**7,351**
Total Kilburn High Road In Centre	**0**	**0**	**25,377**	**0**	**34,728**	**11,107**	**0**	**0**	**0**	**71,212**
FINCHLEY ROAD / SWISS COTTAGE										
Waitrose, FINCHLEY ROAD / SWISS COTTAGE	0	657	73,468	5,684	8,293	21,835	0	0	0	**109,937**
Sainsbury's, O2 Centre, FINCHLEY ROAD / SWISS COTTAGE	0	873	42,573	3,684	1,747	19,698	0	0	1,297	**69,873**
Other Local Stores, FINCHLEY ROAD / SWISS COTTAGE	0	0	3,620	826	347	5,408	0	0	0	**10,201**
Total Finchley Road / Swiss Cottage In Centre	**0**	**1,530**	**119,662**	**10,195**	**10,388**	**46,941**	**0**	**0**	**1,297**	**190,011**
HAMPSTEAD										
Tesco Express, Heath Street, HAMPSTEAD	0	0	5,382	3,300	0	0	0	0	0	**8,681**
Other Local Stores, HAMPSTEAD	0	0	2,350	1,764	0	0	0	0	0	**4,114**
Total Hampstead In Centre	**0**	**0**	**7,732**	**5,064**	**0**	**0**	**0**	**0**	**0**	**12,796**
KENTISH TOWN										
Sainsbury's Local, Kentish Town Road, KENTISH TOWN	265	1,525	0	3,622	0	0	0	0	0	**5,413**
Tesco Express, Kentish Town Road, KENTISH TOWN	0	1,619	0	0	0	0	0	0	0	**1,619**
Co-op, Kentish Town Road (North and South), KENTISH TOWN	0	1,727	0	1,397	0	0	0	0	0	**3,124**
Other Local Stores, KENTISH TOWN	0	16,788	0	7,040	0	0	0	0	0	**23,828**
Total Kentish Town In Centre	**265**	**21,659**	**0**	**12,059**	**0**	**0**	**0**	**0**	**0**	**33,983**
WEST HAMPSTEAD										
Tesco Express, West End Land, WEST HAMPSTEAD	0	0	9,847	335	0	415	0	0	0	**10,597**
Sainsbury's Local, West End Lane, WEST HAMPSTEAD	0	0	5,449	0	0	0	0	0	0	**5,449**
Other Local Stores, WEST HAMPSTEAD	0	0	1,136	0	0	0	0	0	0	**1,136**
Total West Hampstead In Centre	**0**	**0**	**16,432**	**335**	**0**	**415**	**0**	**0**	**0**	**17,182**
TOTTENHAM COURT ROAD										
Little Waitrose, TOTTENHAM COURT ROAD	1,736	0	0	0	0	0	0	0	0	**1,736**
Sainsbury's Local (north), TOTTENHAM COURT ROAD	0	0	0	1,394	0	0	0	0	304	**1,698**
Sainsbury's Central (south), TOTTENHAM COURT ROAD	1,502	744	0	0	0	0	0	0	2,437	**4,684**
Other Local Stores, TOTTENHAM COURT ROAD	873	0	0	575	0	0	0	0	1,700	**3,149**
Total Tottenham Court Road In Centre	**4,112**	**744**	**0**	**1,969**	**0**	**0**	**0**	**0**	**4,441**	**11,266**
HOLBORN										
Sainsbury's Local, Mid City Place, HOLBORN	2,767	0	0	0	0	0	0	560	0	**3,327**
Sainsbury's Central, Kingsway, HOLBORN	2,402	754	0	0	0	0	0	0	0	**3,156**
Little Waitrose, Weston House, High Holborn, HOLBORN	1,763	0	0	0	0	0	0	0	0	**1,763**
Other Local Shops, HOLBORN	1,814	0	0	0	0	0	0	0	0	**1,814**
Total Holborn In Centre	**8,746**	**754**	**0**	**0**	**0**	**0**	**0**	**560**	**0**	**10,060**
OTHER FOODSTORES IN CAMDEN BOROUGH										
Waitrose, The Brunswick, BLOOMSBURY (Neighbourhood Centre)	25,498	2,735	3,398	0	0	0	0	956	0	**32,586**
Marks and Spencer, Pond Street, HAMPSTEAD HEATH (Edge of Centre)	0	0	5,478	7,682	0	0	0	0	0	**13,160**
Tesco Metro, GOODGE STREET (Neighbourhood Centre)	7,089	0	0	0	0	0	0	0	3,767	**10,856**
Total Other Foodstores in Camden Borough	**32,588**	**2,801**	**8,876**	**7,682**	**0**	**0**	**0**	**956**	**3,767**	**56,670**
TOTAL LONDON BOROUGH CAMDEN	**51,059**	**150,201**	**199,441**	**84,446**	**46,955**	**73,206**	**20,089**	**10,773**	**13,067**	**649,235**
OUTSIDE LONDON BOROUGH OF CAMDEN										
Sainsbury's, Liverpool Road, ANGEL / ISLINGTON	3,360	0	0	966	0	0	11,652	77,668	0	**93,646**
Tesco Metro, Bedford Street, COVENT GARDEN	4,721	0	0	815	0	0	0	0	6,331	**11,868**
Morrisons, Hertslet Road, HOLLOWAY	739	0	0	1,151	0	0	0	6,542	0	**8,432**
Waitrose, Holloway Road, HOLLOWAY	0	657	2,262	8,632	0	0	51,878	9,508	0	**72,937**
Waitrose, Liverpool Road, ANGEL / ISLINGTON	0	0	0	0	619	0	1,101	24,554	0	**26,274**
Waitrose, Marylebone High Street, MARYLEBONE	309	0	0	0	0	3,176	0	0	28,033	**31,518**
Sainsbury's, High Road, Willesden Green, WILLESDON	0	0	2,262	0	14,461	0	0	0	0	**16,723**
Waitrose, EDGWARE ROAD	0	0	0	0	0	1,731	0	0	14,308	**16,038**
Total Outside London Borough of Camden	**9,130**	**657**	**4,524**	**11,564**	**15,080**	**4,906**	**121,904**	**118,272**	**48,672**	**334,710**
Other	12,743	13,429	41,219	23,454	38,984	62,341	113,656	102,394	53,231	**461,452**
TOTAL	**72,931**	**164,287**	**245,184**	**119,465**	**101,019**	**140,454**	**255,649**	**231,439**	**114,970**	**1,445,397**

Source: Tables 3 & 4

London Borough of Camden
Retail and Town Centre Study 2013

Table 10
Existing Floorspace

	Total Net Flsp (Note A) (sqm)	Net Conv Ratio (Note B) (%)	Net Convenience (sqm)	Benchmark Sales (Note C) (£ per sqm net)	Benchmark Turnover 2013 (£000s)
CAMDEN TOWN					
Sainsbury's, Camden Road, CAMDEN TOWN	3,050	72%	2,196	13,000	28,551
Morrisons, Chalk Farm Road, CAMDEN TOWN	3,066	67%	2,054	13,000	26,702
Marks and Spencer, Camden High Street, CAMDEN TOWN	881	84%	740	13,000	9,616
Sainsbury's Local, Camden High Street / Chalk Farm Road, CAMDEN TOWN	491	83%	408	13,000	5,299
Hawley Wharf / Camden Lock Market (Ref. 2012/4628/P)	8,411	100%	8,411	6,500	54,672
Total Camden Town In Centre	**15,899**	**-**	**13,809**	**9,041**	**124,839**
KILBURN HIGH ROAD					
Sainsbury's, Kilburn High Road, KILBURN	1,337	77%	1,029	13,000	13,382
Marks and Spencer, Killburn High Road, KILBURN	771	53%	409	13,000	5,313
Sainsbury's Local, Kilburn High Road, KILBURN (LB Brent)	238	82%	195	13,000	2,535
Other Local Stores, KILBURN	4,562	100%	4,562	6,500	29,653
Total Kilburn High Road In Centre	**6,908**	**-**	**6,195**	**8,213**	**50,883**
FINCHLEY ROAD / SWISS COTTAGE					
Waitrose, FINCHLEY ROAD / SWISS COTTAGE	2,139	81%	1,732	13,000	22,518
Sainsbury's, O2 Centre, FINCHLEY ROAD / SWISS COTTAGE	4,227	56%	2,367	13,000	30,772
Other Local Stores, FINCHLEY ROAD / SWISS COTTAGE	2,819	100%	2,819	6,500	18,324
Total Finchley Road / Swiss Cottage In Centre	**9,185**	**-**	**6,918**	**10,351**	**71,615**
HAMPSTEAD					
Tesco Express, Heath Street, HAMPSTEAD	253	83%	210	13,000	2,731
Other Local Stores, HAMPSTEAD	906	100%	906	6,500	5,889
Total Hampstead In Centre	**1,159**	**-**	**1,116**	**7,723**	**8,620**
KENTISH TOWN					
Sainsbury's Local, Kentish Town Road, KENTISH TOWN	232	85%	197	13,000	2,563
Tesco Express, Kentish Town Road, KENTISH TOWN	185	79%	146	13,000	1,899
Co-op, Kentish Town Road (North and South), KENTISH TOWN	582	86%	500	6,500	3,252
Other Local Stores, KENTISH TOWN	2,383	100%	2,383	6,500	15,489
Total Kentish Town In Centre	**3,382**	**-**	**3,226**	**7,191**	**23,203**
WEST HAMPSTEAD					
Tesco Express, West End Land, WEST HAMPSTEAD	371	75%	278	13,000	3,612
Sainsbury's Local, West End Lane, WEST HAMPSTEAD	195	81%	158	13,000	2,053
Other Local Stores, WEST HAMPSTEAD	1,046	100%	1,046	6,500	6,799
Total West Hampstead In Centre	**1,612**	**-**	**1,482**	**8,412**	**12,465**
TOTTENHAM COURT ROAD					
Little Waitrose, TOTTENHAM COURT ROAD	306	86%	263	13,000	3,415
Sainsbury's Local (north), TOTTENHAM COURT ROAD	1,147	84%	963	13,000	12,523
Sainsbury's Central (south), TOTTENHAM COURT ROAD	816	79%	644	13,000	8,378
Other Local Stores, TOTTENHAM COURT ROAD	4,186	100%	4,186	6,500	27,209
Total Tottenham Court Road In Centre	**6,454**	**-**	**6,056**	**8,507**	**51,525**
HOLBORN					
Sainsbury's Local, Mid City Place, HOLBORN	312	77%	240	13,000	3,123
Sainsbury's Central, Kingsway, HOLBORN	894	88%	787	13,000	10,227
Little Waitrose, Weston House, High Holborn, HOLBORN	566	92%	521	13,000	6,771
Other Local Shops, HOLBORN	652	100%	652	6,500	4,238
Total Holborn In Centre	**2,424**	**-**	**2,200**	**11,073**	**24,359**
OTHER FOODSTORES IN CAMDEN BOROUGH					
Waitrose, The Brunswick, BLOOMSBURY (Neighbourhood Centre)	2,235	81%	1,810	13,000	23,534
Marks and Spencer, Pond Street, HAMPSTEAD HEATH (Edge of Centre)	692	79%	547	13,000	7,109
Tesco Metro, GOODGE STREET (Neighbourhood Centre)	411	85%	349	13,000	4,543
Total Other Foodstores in Camden Borough	**3,338**	**-**	**2,707**	**13,000**	**35,187**
TOTAL LONDON BOROUGH OF CAMDEN	**50,360**		**43,709**	**9,213**	**402,694**

Note A: Floorspace figures dervied from IGD / Experian Goad
Note B: Net Convenience ratio derived from Verdict Grocery Retailers 2010 / GVA assumptions
Note C: Benchmark turnover derived from GVA assumptions

London Borough of Camden
Retail and Town Centre Study 2013

Table 11
Convenience Floorspace Commitments

	Total Net Floorspace (sqm)	Net Conv Ratio (%)	Net Convenience (sqm)	Benchmark Sales Density (£ per sqm net)	Average Turnover 2013 (£000s)	Average Turnover 2018 (£000s)	Average Turnover 2023 (£000s)	Average Turnover 2028 (£000s)	Average Turnover 2031 (£000s)
Kings Cross Central (Phase 1)	1,185	100%	1,185	13,000	0	15,404	15,559	15,715	15,810
Kings Cross Central (Phase 2)	1,382	100%	1,382	13,000	0	0	17,965	18,145	18,254
Kings Cross Central (Phase 3)	1,382	100%	1,382	13,000	0	0	0	17,965	18,073
Morrisons, Chalk Farm Extension (Ref. 2009/0802/P)	1,156	100%	1,156	13,000	15,032	15,107	15,259	15,412	15,505
Hawley Wharf / Camden Lock Market (Ref. 2012/4628/P)	959	100%	959	6,500	6,234	6,265	6,328	6,391	6,430
Belsize Road / Abbey Road Housing Sites (Ref. 2012/0096/P)	407	100%	407	13,000	5,291	5,318	5,371	5,425	5,457
Total	**6,471**	**-**	**6,471**	**-**	**26,557**	**42,094**	**60,481**	**79,053**	**79,528**

Source: London Borough of Camden

London Borough of Camden
Retail and Town Centre Study 2013

Capacity Projections: Convenience Goods

Table 12
Future Shop Floorspace Capacity in London Borough of Camden (GLOBAL BASELINE)

	CONVENIENCE GOODS				
	2013	2018	2023	2028	2031
Catchment/Survey Area Residents Spending in **London Borough of Camden** (£000)	522,392	562,957	591,984	631,045	649,235
Existing Shop Floorspace (sqm net)	43,709	43,709	43,709	43,709	43,709
Sales per sqm net £	11,952	9,213	9,306	9,399	9,455
Hawley Wharf / Camden Lock Market (Ref. 2012/4628/P)	522,392	402,694	406,738	410,821	413,291
Sales from Committed Floorspace (£000)	-	42,094	60,481	79,053	79,528
Residual Spending to Support new shops (£000)	-	118,168	124,765	141,171	156,416
Sales per sqm net in new shops (£) Based on large store format	13,000	13,065	13,196	13,329	13,463
Capacity for new floorspace (sqm net)	**-**	**9,045**	**9,455**	**10,591**	**11,619**

Assumes growth in sales efficiency of 0.1% pa up to 2018 and 0.2% pa post 2018 as per Experian Retail Planner 10.

Note: The total sum of the capacity for new floorspace arising in Tables 13 - 20 will not total the global convenience goods capacity figure. This is as a result of committed developments at Kings Cross Central and Belsize Road/Abbey Road. These are are not located within any of the 8 centres assessed below, and therefore the deduction on claims of expenditure for these commitments has not been factored into the individual town centre capacity assessments, however they are included as a deduction in the global capacity forecasts.

London Borough of Camden
Retail and Town Centre Study 2013

Capacity Projections: Convenience Goods

Table 13
Future Convenience Shop Floorspace Capacity in Camden Town

	CONVENIENCE GOODS				
	2013	2018	2023	2028	2031
Catchment/Survey Area Residents Spending in **Camden Town** (£000)	190,876	209,688	220,859	238,931	245,832
Existing Shop Floorspace (sqm net)	13,809	13,809	13,809	13,809	13,809
Sales per sqm net £	13,823	9,041	9,132	9,223	9,279
Sales from Existing Floorspace (£000)	190,876	124,839	126,093	127,359	128,124
Sales from Committed Floorspace (£000)	-	21,372	21,587	21,803	21,934
Residual Spending to Support new shops (£000)	-	63,477	73,180	89,769	95,773
Sales per sqm net in new shops (£) Based on large store format	13,000	13,065	13,196	13,329	13,409
Capacity for new floorspace (sqm net)	**0**	**4,858**	**5,545**	**6,735**	**7,143**

Assumes growth in sales efficiency of 0.1% pa up to 2018 and 0.2% pa post 2018 as per Experian Retail Planner 10.

Table 14
Future Convenience Shop Floorspace Capacity in Kilburn High Road

	CONVENIENCE GOODS				
	2013	2018	2023	2028	2031
Catchment/Survey Area Residents Spending in **Kilburn High Road** (£000)	59,544	62,471	65,649	69,141	71,212
Existing Shop Floorspace (sqm net)	6,195	6,195	6,195	6,195	6,195
Sales per sqm net £	9,612	8,213	8,296	8,379	8,430
Sales from Existing Floorspace (£000)	59,544	50,883	51,393	51,909	52,221
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	-	11,589	14,256	17,231	18,990
Sales per sqm net in new shops (£) Based on large store format	13,000	13,065	13,196	13,329	13,409
Capacity for new floorspace (sqm net)	**0**	**887**	**1,080**	**1,293**	**1,416**

Assumes growth in sales efficiency of 0.1% pa up to 2018 and 0.2% pa post 2018 as per Experian Retail Planner 10.

London Borough of Camden
Retail and Town Centre Study 2013

Capacity Projections: Convenience Goods

Table 15
Future Convenience Shop Floorspace Capacity in Finchley Road / Swiss Cottage

	CONVENIENCE GOODS				
	2013	2018	2023	2028	2031
Catchment/Survey Area Residents Spending in **Swiss Cottage / Finchley Road** (£000)	157,614	166,326	174,936	184,497	190,011
Existing Shop Floorspace (sqm net)	6,918	6,918	6,918	6,918	6,918
Sales per sqm net £	22,782	10,351	10,455	10,560	10,624
Sales from Existing Floorspace (£000)	157,614	71,615	72,334	73,060	73,499
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	-	94,711	102,603	111,437	116,511
Sales per sqm net in new shops (£) Based on large store format	13,000	13,065	13,196	13,329	13,409
Capacity for new floorspace (sqm net)	**0**	**7,249**	**7,775**	**8,361**	**8,689**

Assumes growth in sales efficiency of 0.1% pa up to 2018 and 0.2% pa post 2018 as per Experian Retail Planner 10.

Table 16
Future Convenience Shop Floorspace Capacity in Hampstead

	CONVENIENCE GOODS				
	2013	2018	2023	2028	2031
Catchment/Survey Area Residents Spending in **Hampstead** (£000)	10,787	11,432	11,908	12,463	12,796
Existing Shop Floorspace (sqm net)	1,116	1,116	1,116	1,116	1,116
Sales per sqm net £	9,666	7,723	7,801	7,879	7,927
Sales from Existing Floorspace (£000)	10,787	8,620	8,706	8,793	8,846
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	-	2,812	3,202	3,670	3,949
Sales per sqm net in new shops (£) Based on large store format	13,000	13,065	13,196	13,329	13,409
Capacity for new floorspace (sqm net)	**0**	**215**	**243**	**275**	**295**

Assumes growth in sales efficiency of 0.1% pa up to 2018 and 0.2% pa post 2018 as per Experian Retail Planner 10.

London Borough of Camden
Retail and Town Centre Study 2013

Capacity Projections: Convenience Goods

Table 17
Future Convenience Shop Floorspace Capacity in Kentish Town

	CONVENIENCE GOODS				
	2013	2018	2023	2028	2031
Catchment/Survey Area Residents Spending in **Kentish Town** (£000)	26,509	29,335	30,667	33,167	33,983
Existing Shop Floorspace (sqm net)	3,226	3,226	3,226	3,226	3,226
Sales per sqm net £	8,216	7,191	7,264	7,337	7,381
Sales from Existing Floorspace (£000)	26,509	23,203	23,436	23,671	23,814
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	-	6,132	7,231	9,495	10,169
Sales per sqm net in new shops (£) Based on large store format	13,000	13,065	13,196	13,329	13,409
Capacity for new floorspace (sqm net)	**0**	**469**	**548**	**712**	**758**

Assumes growth in sales efficiency of 0.1% pa up to 2018 and 0.2% pa post 2018 as per Experian Retail Planner 10.

Table 18
Future Convenience Shop Floorspace Capacity in West Hampstead

	CONVENIENCE GOODS				
	2013	2018	2023	2028	2031
Catchment/Survey Area Residents Spending in **West Hampstead** (£000)	14,315	15,145	15,925	16,715	17,182
Existing Shop Floorspace (sqm net)	1,482	1,482	1,482	1,482	1,482
Sales per sqm net £	9,660	8,412	8,496	8,581	8,633
Sales from Existing Floorspace (£000)	14,315	12,465	12,590	12,716	12,793
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	-	2,680	3,335	3,999	4,389
Sales per sqm net in new shops (£) Based on large store format	13,000	13,065	13,196	13,329	13,409
Capacity for new floorspace (sqm net)	**0**	**205**	**253**	**300**	**327**

Assumes growth in sales efficiency of 0.1% pa up to 2018 and 0.2% pa post 2018 as per Experian Retail Planner 10.

London Borough of Camden
Retail and Town Centre Study 2013

Capacity Projections: Convenience Goods

Table 19
Future Convenience Shop Floorspace Capacity in Tottenham Court Road

	CONVENIENCE GOODS				
	2013	2018	2023	2028	2031
Catchment/Survey Area Residents Spending in **Tottenham Court Road** (£000)	9,091	9,846	10,338	10,940	11,266
Existing Shop Floorspace (sqm net)	6,056	6,056	6,056	6,056	6,056
Sales per sqm net £	1,501	8,507	8,593	8,679	8,731
Sales from Existing Floorspace (£000)	9,091	51,525	52,042	52,565	52,881
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	-	-41,679	-41,704	-41,625	-41,615
Sales per sqm net in new shops (£) Based on large store format	13,000	13,065	13,196	13,329	13,409
Capacity for new floorspace (sqm net)	**0**	**-3,190**	**-3,160**	**-3,123**	**-3,104**

Assumes growth in sales efficiency of 0.1% pa up to 2018 and 0.2% pa post 2018 as per Experian Retail Planner 10.

Table 20
Future Convenience Shop Floorspace Capacity in Holborn

	CONVENIENCE GOODS				
	2013	2018	2023	2028	2031
Catchment/Survey Area Residents Spending in **Holborn** (£000)	8,065	8,949	9,442	10,014	10,060
Existing Shop Floorspace (sqm net)	2,200	2,200	2,200	2,200	2,200
Sales per sqm net £	3,666	11,073	11,185	11,297	11,365
Sales from Existing Floorspace (£000)	8,065	24,359	24,604	24,851	25,000
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	-	-15,410	-15,162	-14,836	-14,940
Sales per sqm net in new shops (£) Based on large store format	13,000	13,065	13,196	13,329	13,409
Capacity for new floorspace (sqm net)	**0**	**-1,179**	**-1,149**	**-1,113**	**-1,114**

Assumes growth in sales efficiency of 0.1% pa up to 2018 and 0.2% pa post 2018 as per Experian Retail Planner 10.

Camden Town Centre and Retail Study 2013

Appendix 3 Comparison Goods Capacity Modelling

London Borough of Camden

Retail and Town Centre Study 2013

Comparison Goods Modelling

Table 1
Survey Area Population Forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
2013	36,944	63,059	77,392	42,931	41,048	48,689	94,046	85,197	37,527	**526,833**
2018	40,368	70,564	80,710	44,937	42,215	50,206	99,916	91,554	39,266	**559,736**
2023	41,286	72,406	82,440	44,798	42,960	51,575	105,385	96,418	40,292	**577,560**
2028	41,867	76,870	83,121	44,881	43,371	53,066	110,773	101,048	41,062	**596,059**
2031	41,932	76,884	83,411	44,917	43,595	53,703	113,664	103,747	41,556	**603,409**

Source: Experian Micromarketer, June 2013

	Postal Sectors
Zone 1	EC1N 2/6/7/8, EC4A 1, W1T 1/2/3/4/5/6/7, WC1A 1/2, WC1B 3/4/5, WC1E 6/7, WC1H 0/8/9, WC1N 1/2/3, WC1R 4/5, WC1V 6/7, WC1X 8, WC2A 2/3, WC2B 4/5/6/7, WC2H 8/9, WC2N 4
Zone 2	N1C 4, NW1 0/1/2/3/7/8/9, NW5 2/3
Zone 3	NW2 3, NW3 3/4/5/6, NW6 1/2/3/4
Zone 4	N6 6, NW3 1/2/7, NW5 1/4
Zone 5	NW2 4/5/6/7
Zone 6	NW1 4, NW8 0/6/7/8/9, W9 1
Zone 7	N19 3/4/5, N5 1, N7 0/6/7/8/9
Zone 8	EC1M 3/4/5/6, EC1R 0/1/3/4, EC1V 0/1/2/3/4/7/8, N1 0/1/2/7/8/9, WC1X 0/9
Zone 9	NW1 5/6, W1B 1/2/3/4/5, W1C 1/2, W1D 1/2/3/4/5/6/7, W1F 0/7/8/9, W1G 0/6/7/8/9, W1H 1,2,4,5,6,7, W1J 0/5/6/7/8/9, W1K 1/2/3/4/5/6/7, W1S 1/2/3/ W1U 1/2/3/4/5/6/7/8, W1W 5/6/7/8, WC2H 0/7

London Borough of Camden
Retail and Town Centre Study 2013

Comparison Goods Expenditure Forecasts

Table 2
Per Capita Comparison Goods Expenditure (2011 Prices)

Growth in comparison goods spending per capita:

2011 - 2012	1.4% pa
2012 - 2013	1.8% pa
2013 - 2018	2.8% pa
2018 - 2023	2.9% pa
2023 - 2028	2.9% pa
2028 - 2031	2.9% pa

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
2011	2,585	3,282	5,116	4,493	3,729	4,426	3,369	3,408	4,872
2013	2,668	3,388	5,281	4,638	3,849	4,569	3,478	3,518	5,029
2013 Minus SFT at 15%	**2,268**	**2,880**	**4,489**	**3,942**	**3,272**	**3,883**	**2,956**	**2,990**	**4,275**
2018	3,063	3,889	6,063	5,325	4,419	5,245	3,993	4,039	5,774
2018 Minus SFT at 18%	**2,512**	**3,189**	**4,972**	**4,366**	**3,624**	**4,301**	**3,274**	**3,312**	**4,734**
2023	3,534	4,487	6,995	6,143	5,098	6,051	4,606	4,659	6,661
2023 Minus SFT at 20%	**2,827**	**3,590**	**5,596**	**4,914**	**4,079**	**4,841**	**3,685**	**3,728**	**5,329**
2028	4,077	5,177	8,069	7,087	5,882	6,981	5,314	5,375	7,684
2028 Minus SFT at 20%	**3,262**	**4,141**	**6,455**	**5,669**	**4,705**	**5,585**	**4,251**	**4,300**	**6,148**
2031	4,442	5,640	8,792	7,721	6,408	7,606	5,790	5,857	8,373
2031 Minus SFT at 20%	**3,554**	**4,512**	**7,034**	**6,177**	**5,127**	**6,085**	**4,632**	**4,685**	**6,698**

Source: Experian Micromarketer, February 2013 and Experian Retail Planner 10.1, September 2012
Note: SFT deductions based on GVA assumption

Table 3
Total Survey Area Comparison Goods Expenditure (2011 Prices)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total
2013	83,793	181,589	347,401	169,244	134,304	189,081	278,001	254,758	160,419	**1,798,590**
2018	101,406	225,054	401,257	196,203	152,976	215,940	327,116	303,209	185,904	**2,109,065**
2023	116,730	259,915	461,303	220,147	175,216	249,671	388,327	359,398	214,706	**2,445,415**
2028	136,561	318,339	536,582	254,445	204,074	296,362	470,901	434,533	252,431	**2,904,229**
2031	149,021	346,909	586,672	277,452	223,496	326,777	526,460	486,090	278,344	**3,201,220**

Source: Tables 1 and 2

London Borough of Camden
Retail and Town Centre Study 2013

Comparison Goods Market Share

Table 4
Comparison Goods Allocation 2013 - % Market Share

Zone Centre / Store	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)	Zone 8 (%)	Zone 9 (%)
LONDON BOROUGH OF CAMDEN									
Camden Town	4.3%	28.0%	1.9%	10.8%	0.7%	1.8%	2.5%	1.3%	0.3%
Kilburn High Road	0.0%	0.8%	4.6%	0.3%	12.6%	7.9%	0.0%	0.0%	0.0%
Finchley Road / Swiss Cottage	0.2%	1.3%	9.7%	3.7%	1.5%	7.3%	0.1%	0.9%	0.7%
Hampstead	0.0%	0.6%	3.2%	7.0%	1.0%	0.3%	1.2%	0.0%	0.2%
Kentish Town	0.0%	4.5%	0.0%	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%
West Hampstead	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tottenham Court Road	6.6%	2.4%	0.8%	1.1%	1.9%	1.2%	2.7%	2.8%	5.4%
Holborn	2.9%	0.0%	0.0%	0.1%	0.0%	0.0%	0.1%	1.0%	0.0%
TOTAL LONDON BOROUGH CAMDEN	**14.0%**	**37.7%**	**21.9%**	**28.6%**	**17.7%**	**18.4%**	**6.7%**	**6.0%**	**6.6%**
CENTRES OUTSIDE LONDON BOROUGH OF CAMDEN									
West End (Oxford Street/Regent Street/Bond Street)	64.9%	47.1%	41.4%	39.4%	29.1%	63.3%	34.7%	41.5%	73.1%
Angel / Upper Street (Islington)	0.4%	0.5%	0.3%	0.4%	0.0%	0.0%	10.1%	23.8%	0.1%
Marylebone	0.9%	0.4%	0.0%	0.7%	0.0%	1.6%	0.0%	0.0%	10.3%
Nags Head / Holloway Road	1.1%	0.7%	0.0%	0.8%	0.0%	0.0%	17.9%	4.2%	0.1%
Brent Cross Shopping Centre (Hendon)	0.2%	3.0%	22.6%	14.3%	26.8%	3.9%	5.9%	1.8%	0.5%
Tottenham Hale Retail Park, Tottenham	0.3%	0.2%	0.0%	1.2%	0.0%	0.0%	3.7%	3.3%	0.0%
Staples Corner Retail Park	0.0%	0.7%	2.0%	1.6%	6.8%	1.5%	0.0%	0.0%	0.1%
TOTAL OUTSIDE LONDON BOROUGH CAMDEN	**67.9%**	**52.7%**	**66.4%**	**58.3%**	**62.7%**	**70.3%**	**72.4%**	**74.5%**	**84.2%**
Other	18.1%	9.6%	11.7%	13.1%	19.6%	11.3%	20.8%	19.5%	9.2%
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: London Borough of Camden Telephone Survey, January 2013

London Borough of Camden
Retail and Town Centre Study 2013

Table 5
Comparison Goods Allocation 2013 - Spend (£) 2011 Prices

Zone Centre / Store	Zone 1 (£000)	Zone 2 (£000)	Zone 3 (£000)	Zone 4 (£000)	Zone 5 (£000)	Zone 6 (£000)	Zone 7 (£000)	Zone 8 (£000)	Zone 9 (£000)	SUB TOTAL (Resident Spend) (£000)	INFLOW (Outside Survey Area) (£000)	TOTAL (£000)
LONDON BOROUGH OF CAMDEN												
Camden Town	3,586	50,817	6,682	18,196	936	3,444	7,039	3,295	402	94,397	98,250	**192,647**
Kilburn High Road	0	1,474	15,916	516	16,928	14,909	0	0	0	49,743	26,785	**76,528**
Finchley Road / Swiss Cottage	177	2,418	33,799	6,180	1,995	13,761	395	2,217	1,158	62,100	26,614	**88,714**
Hampstead	0	1,060	10,990	11,891	1,346	492	3,391	0	396	29,565	32,029	**61,594**
Kentish Town	0	8,201	0	9,690	0	0	0	0	0	17,891	1,988	**19,878**
West Hampstead	0	0	5,703	0	0	0	0	0	0	5,703	1,426	**7,129**
Tottenham Court Road	5,555	4,433	2,894	1,848	2,603	2,176	7,529	7,174	8,611	42,823	286,583	**329,405**
Holborn	2,442	0	0	89	0	0	355	2,596	0	5,482	36,687	**42,169**
TOTAL LONDON BOROUGH CAMDEN	11,760	68,402	75,984	48,411	23,808	34,781	18,708	15,283	10,566	307,703	510,361	**818,065**
CENTRES OUTSIDE LONDON BOROUGH OF CAMDEN												
West End (Oxford Street/Regent Street/Bond Street)	54,398	85,609	143,993	66,751	39,119	119,687	96,568	105,643	117,267	829,035	-	**829,035**
Angel / Upper Street (Islington)	363	910	1,152	628	0	0	28,114	60,677	157	92,001	-	**92,001**
Marylebone	762	810	0	1,120	0	3,094	0	0	16,546	22,332	-	**22,332**
Nags Head / Holloway Road	921	1,330	0	1,305	0	0	49,894	10,627	197	64,274	-	**64,274**
Brent Cross Shopping Centre (Hendon)	163	5,455	78,681	24,129	35,987	7,296	16,506	4,480	866	173,564	-	**173,564**
Tottenham Hale Retail Park, Tottenham	251	345	0	2,053	0	0	10,277	8,493	0	21,419	-	**21,419**
Staples Corner Retail Park	36	1,303	6,986	2,715	9,111	2,794	0	0	87	23,031	-	**23,031**
TOTAL OUTSIDE LONDON BOROUGH CAMDEN	56,894	95,761	230,812	98,700	84,217	132,871	201,359	189,920	135,120	1,225,656	-	**1,225,656**
Other	15,139	17,426	40,605	22,132	26,279	21,428	57,933	49,556	14,733	**265,231**	**-**	**265,231**
Total Spend	**83,793**	**181,589**	**347,401**	**169,244**	**134,304**	**189,081**	**278,001**	**254,758**	**160,419**	**1,798,590**		**2,308,951**

Source: Tables 3 & 4

Note: Proportion of inflow for Camden Town, Hampstead and Tottenham Court Road derived from results of in-centre surveys in 2013. Proportion of inflow to other centres is based on findings of the 2008 retail study and our own assumptions about benchmark turnovers.

London Borough of Camden
Retail and Town Centre Study 2013

Table 6
Comparison Goods Allocation 2018 - Spend (£) 2011 Prices

Zone / Centre / Store	Zone 1 (£000)	Zone 2 (£000)	Zone 3 (£000)	Zone 4 (£000)	Zone 5 (£000)	Zone 6 (£000)	Zone 7 (£000)	Zone 8 (£000)	Zone 9 (£000)	SUB TOTAL (Resident Spend) (£000)	INFLOW (Outside Survey Area) (£000)	TOTAL (£000)
LONDON BOROUGH OF CAMDEN												
Camden Town	4,340	62,981	7,718	21,095	1,066	3,934	8,282	3,922	465	113,802	118,447	**232,249**
Kilburn High Road	0	1,827	18,383	598	19,282	17,027	0	0	0	57,117	30,755	**87,872**
Finchley Road / Swiss Cottage	214	2,996	39,038	7,164	2,273	15,716	464	2,639	1,342	71,847	30,792	**102,639**
Hampstead	0	1,313	12,694	13,786	1,533	561	3,990	0	458	34,336	37,197	**71,533**
Kentish Town	0	10,164	0	11,233	0	0	0	0	0	21,397	2,377	**23,775**
West Hampstead	0	0	6,587	0	0	0	0	0	0	6,587	1,647	**8,234**
Tottenham Court Road	6,722	5,494	3,343	2,142	2,965	2,485	8,859	8,539	9,978	50,528	338,148	**388,676**
Holborn	2,955	0	0	103	0	0	417	3,090	0	6,566	43,941	**50,507**
TOTAL LONDON BOROUGH CAMDEN	14,232	84,774	87,764	56,122	27,118	39,722	22,013	18,189	12,245	362,180	603,304	**965,484**
CENTRES OUTSIDE LONDON BOROUGH OF CAMDEN												
West End (Oxford Street/Regent Street/Bond Street)	65,832	106,101	166,316	77,384	44,557	136,689	113,628	125,735	135,896	972,138	-	**972,138**
Angel / Upper Street (Islington)	439	1,128	1,331	728	0	0	33,081	72,217	182	109,106	-	**109,106**
Marylebone	922	1,004	0	1,298	0	3,534	0	0	19,175	25,932	-	**25,932**
Nags Head / Holloway Road	1,115	1,649	0	1,513	0	0	58,709	12,647	228	75,861	-	**75,861**
Brent Cross Shopping Centre (Hendon)	197	6,760	90,879	27,973	40,991	8,332	19,422	5,332	1,004	200,891	-	**200,891**
Tottenham Hale Retail Park, Tottenham	304	427	0	2,380	0	0	12,093	10,108	0	25,312	-	**25,312**
Staples Corner Retail Park	43	1,615	8,069	3,148	10,377	3,191	0	0	100	26,543	-	**26,543**
TOTAL OUTSIDE LONDON BOROUGH CAMDEN	68,853	118,683	266,594	114,423	95,925	151,746	236,934	226,039	156,586	1,435,783	-	**1,435,783**
Other	18,321	21,597	46,900	25,658	29,933	24,472	68,169	58,980	17,073	311,102	**-**	**311,102**
Total Spend	**101,406**	**225,054**	**401,257**	**196,203**	**152,976**	**215,940**	**327,116**	**303,209**	**185,904**	2,109,065		**2,712,369**

Source: Tables 3 & 4

London Borough of Camden
Retail and Town Centre Study 2013

Table 7
Comparison Goods Allocation 2023 - Spend (£) 2011 Prices

Zone Centre / Store	Zone 1 (£000)	Zone 2 (£000)	Zone 3 (£000)	Zone 4 (£000)	Zone 5 (£000)	Zone 6 (£000)	Zone 7 (£000)	Zone 8 (£000)	Zone 9 (£000)	SUB TOTAL (Resident Spend) (£000)	INFLOW (Outside Survey Area) (£000)	TOTAL (£000)
LONDON BOROUGH OF CAMDEN												
Camden Town	4,996	72,736	8,873	23,669	1,221	4,548	9,832	4,648	537	131,061	136,410	**267,471**
Kilburn High Road	0	2,109	21,134	672	22,085	19,686	0	0	0	65,687	35,370	**101,056**
Finchley Road / Swiss Cottage	247	3,460	44,880	8,038	2,603	18,171	551	3,128	1,550	82,629	35,413	**118,042**
Hampstead	0	1,517	14,594	15,468	1,755	649	4,737	0	529	39,249	42,520	**81,769**
Kentish Town	0	11,738	0	12,604	0	0	0	0	0	24,342	2,705	**27,047**
West Hampstead	0	0	7,573	0	0	0	0	0	0	7,573	1,893	**9,467**
Tottenham Court Road	7,738	6,345	3,843	2,404	3,396	2,873	10,517	10,121	11,524	58,762	393,252	**452,013**
Holborn	3,402	0	0	116	0	0	495	3,662	0	7,676	51,369	**59,045**
TOTAL LONDON BOROUGH CAMDEN	16,382	97,906	100,897	62,971	31,061	45,927	26,133	21,560	14,142	416,979	698,931	**1,115,910**
CENTRES OUTSIDE LONDON BOROUGH OF CAMDEN												
West End (Oxford Street/Regent Street/Bond Street)	75,781	122,536	191,204	86,827	51,035	158,041	134,891	149,035	156,951	1,126,300	-	**1,126,300**
Angel / Upper Street (Islington)	506	1,302	1,530	816	0	0	39,272	85,600	210	129,236	-	**129,236**
Marylebone	1,061	1,159	0	1,456	0	4,085	0	0	22,146	29,908	-	**29,908**
Nags Head / Holloway Road	1,284	1,904	0	1,697	0	0	69,695	14,991	264	89,835	-	**89,835**
Brent Cross Shopping Centre (Hendon)	227	7,807	104,479	31,387	46,950	9,634	23,056	6,320	1,160	231,020	-	**231,020**
Tottenham Hale Retail Park, Tottenham	350	493	0	2,670	0	0	14,356	11,981	0	29,851	-	**29,851**
Staples Corner Retail Park	50	1,865	9,276	3,532	11,886	3,689	0	0	116	30,414	-	**30,414**
TOTAL OUTSIDE LONDON BOROUGH CAMDEN	79,258	137,067	306,488	128,387	109,871	175,450	281,270	267,928	180,846	1,666,564	-	**1,666,564**
Other	21,090	24,943	53,918	28,789	34,285	28,295	80,925	69,910	19,718	361,871	**-**	**361,871**
Total Spend	**116,730**	**259,915**	**461,303**	**220,147**	**175,216**	**249,671**	**388,327**	**359,398**	**214,706**	2,445,415		**3,144,346**

Source: Tables 3 & 4

London Borough of Camden
Retail and Town Centre Study 2013

Table 8
Comparison Goods Allocation 2028 - Spend (£) 2011 Prices

Zone / Centre / Store	Zone 1 (£000)	Zone 2 (£000)	Zone 3 (£000)	Zone 4 (£000)	Zone 5 (£000)	Zone 6 (£000)	Zone 7 (£000)	Zone 8 (£000)	Zone 9 (£000)	SUB TOTAL (Resident Spend) (£000)	INFLOW (Outside Survey Area) (£000)	TOTAL (£000)
LONDON BOROUGH OF CAMDEN												
Camden Town	5,844	89,086	10,321	27,357	1,422	5,399	11,922	5,620	632	157,603	164,036	**321,640**
Kilburn High Road	0	2,584	24,583	776	25,722	23,368	0	0	0	77,033	41,479	**118,512**
Finchley Road / Swiss Cottage	289	4,238	52,204	9,290	3,032	21,569	669	3,782	1,823	96,896	41,527	**138,422**
Hampstead	0	1,858	16,975	17,878	2,044	771	5,744	0	623	45,892	49,717	**95,609**
Kentish Town	0	14,377	0	14,568	0	0	0	0	0	28,944	3,216	**32,161**
West Hampstead	0	0	8,809	0	0	0	0	0	0	8,809	2,202	**11,011**
Tottenham Court Road	9,052	7,771	4,470	2,778	3,956	3,410	12,754	12,237	13,549	69,978	468,315	**538,293**
Holborn	3,980	0	0	134	0	0	601	4,428	0	9,143	61,187	**70,330**
TOTAL LONDON BOROUGH CAMDEN	19,166	119,913	117,363	72,782	36,176	54,516	31,690	26,067	16,626	494,299	831,679	**1,325,978**
CENTRES OUTSIDE LONDON BOROUGH OF CAMDEN												
West End (Oxford Street/Regent Street/Bond Street)	88,655	150,079	222,406	100,355	59,440	187,596	163,574	180,192	184,527	1,336,825	-	**1,336,825**
Angel / Upper Street (Islington)	592	1,595	1,779	944	0	0	47,623	103,495	247	156,275	-	**156,275**
Marylebone	1,241	1,420	0	1,683	0	4,849	0	0	26,037	35,231	-	**35,231**
Nags Head / Holloway Road	1,502	2,332	0	1,962	0	0	84,515	18,125	310	108,746	-	**108,746**
Brent Cross Shopping Centre (Hendon)	265	9,562	121,528	36,276	54,682	11,436	27,959	7,642	1,363	270,715	-	**270,715**
Tottenham Hale Retail Park, Tottenham	409	604	0	3,086	0	0	17,409	14,486	0	35,994	-	**35,994**
Staples Corner Retail Park	58	2,284	10,790	4,082	13,844	4,379	0	0	136	35,574	-	**35,574**
TOTAL OUTSIDE LONDON BOROUGH CAMDEN	92,723	167,877	356,503	148,389	127,966	208,260	341,079	323,940	212,621	1,979,359	-	**1,979,359**
Other	24,672	30,549	62,716	33,275	39,931	33,586	98,132	84,525	23,183	430,570	**-**	**430,570**
Total Spend	**136,561**	**318,339**	**536,582**	**254,445**	**204,074**	**296,362**	**470,901**	**434,533**	**252,431**	2,904,229		**3,735,907**

Source: Tables 3 & 4

London Borough of Camden
Retail and Town Centre Study 2013

Table 9
Comparison Goods Allocation 2031 - Spend (£) 2011 Prices

Zone Centre / Store	Zone 1 (£000)	Zone 2 (£000)	Zone 3 (£000)	Zone 4 (£000)	Zone 5 (£000)	Zone 6 (£000)	Zone 7 (£000)	Zone 8 (£000)	Zone 9 (£000)	SUB TOTAL (Resident Spend) (£000)	INFLOW (Outside Survey Area) (£000)	TOTAL (£000)
LONDON BOROUGH OF CAMDEN												
Camden Town	6,378	97,081	11,284	29,831	1,557	5,953	13,329	6,287	697	172,397	179,433	**351,830**
Kilburn High Road	0	2,815	26,878	846	28,170	25,766	0	0	0	84,476	45,487	**129,963**
Finchley Road / Swiss Cottage	315	4,619	57,077	10,131	3,321	23,782	747	4,231	2,010	106,232	45,528	**151,761**
Hampstead	0	2,024	18,560	19,494	2,239	850	6,422	0	686	50,275	54,465	**104,741**
Kentish Town	0	15,667	0	15,885	0	0	0	0	0	31,552	3,506	**35,058**
West Hampstead	0	0	9,631	0	0	0	0	0	0	9,631	2,408	**12,039**
Tottenham Court Road	9,878	8,469	4,887	3,030	4,332	3,760	14,258	13,689	14,940	77,244	516,940	**594,184**
Holborn	4,343	0	0	146	0	0	672	4,953	0	10,114	67,689	**77,803**
TOTAL LONDON BOROUGH CAMDEN	20,914	130,675	128,318	79,363	39,620	60,111	35,428	29,160	18,333	541,922	915,456	**1,457,378**
CENTRES OUTSIDE LONDON BOROUGH OF CAMDEN												
West End (Oxford Street/Regent Street/Bond Street)	96,744	163,548	243,167	109,429	65,097	206,848	182,873	201,572	203,470	1,472,750	-	**1,472,750**
Angel / Upper Street (Islington)	646	1,738	1,945	1,029	0	0	53,241	115,775	273	174,647	-	**174,647**
Marylebone	1,355	1,547	0	1,836	0	5,347	0	0	28,710	38,794	-	**38,794**
Nags Head / Holloway Road	1,639	2,541	0	2,139	0	0	94,486	20,276	342	121,423	-	**121,423**
Brent Cross Shopping Centre (Hendon)	290	10,420	132,873	39,557	59,887	12,609	31,258	8,548	1,503	296,945	-	**296,945**
Tottenham Hale Retail Park, Tottenham	447	659	0	3,365	0	0	19,463	16,204	0	40,138	-	**40,138**
Staples Corner Retail Park	64	2,489	11,797	4,451	15,161	4,829	0	0	150	38,942	-	**38,942**
TOTAL OUTSIDE LONDON BOROUGH CAMDEN	101,183	182,943	389,782	161,806	140,145	229,633	381,321	362,375	234,448	2,183,638	-	**2,183,638**
Other	26,924	33,291	68,571	36,283	43,731	37,033	109,710	94,554	25,563	475,660	**-**	**475,660**
Total Spend	**149,021**	**346,909**	**586,672**	**277,452**	**223,496**	**326,777**	**526,460**	**486,090**	**278,344**	3,201,220		**4,116,676**

Source: Tables 3 & 4

London Borough of Camden
Retail and Town Centre Study 2013

Table 10: Existing Comparison Goods Floorspace (In-Centre)

	Net Floorspace (sqm)
Camden Town	19,434
Kilburn High Road	13,352
Finchley Road / Swiss Cottage	11,559
Hampstead	5,490
Kentish Town	3,682
West Hampstead	2,032
Tottenham Court Road	15,413
Holborn	4,735
TOTAL LONDON BOROUGH CAMDEN	**75,696**

Source: Experian Goad / IGD

Note: Includes comparison goods floorspace from main foodstores

London Borough of Camden
Retail and Town Centre Study 2013

Table 11: Comparison Goods Commitments

	Net Comparison Floorspace (sqm)	Benchmark Sales Density (£/sqm net) (Note C)	Average Turnover 2013 (£000)	Average Turnover Derived from Study Area 2018 (£000)	Average Turnover Derived from Outside Study Area 2018 (£000)	TOTAL AVERAGE TURNOVER 2018 (£000)	Average Turnover Derived from Study Area 2023 (£000)	Average Turnover Derived from Outside Study Area 2023 (£000)	TOTAL AVERAGE TURNOVER 2023 (£000)	Average Turnover Derived from Study Area 2028 (£000)	Average Turnover Derived from Outside Study Area 2028 (£000)	TOTAL AVERAGE TURNOVER 2028 (£000)	Average Turnover Derived from Study Area 2031 (£000)	Average Turnover Derived from Outside Study Area 2031 (£000)	TOTAL AVERAGE TURNOVER 2031 (£000)
Kings Cross Central (Phase 1) OUT OF CENTRE (Note A)	7,013	6,000	0	28,011	18,674	**46,686**	28,211	23,082	**51,293**	28,039	28,039	**56,078**	29,581	29,581	**59,161**
Kings Cross Central (Phase 2) OUT OF CENTRE (Note A)	8,181	6,000	0	0	0	**0**	26,997	22,089	**49,086**	26,833	26,833	**53,666**	28,308	28,308	**56,616**
Kings Cross Central (Phase 3) OUT OF CENTRE (Note A)	8,181	6,000	0	0	0	**0**	0	0	**0**	24,543	24,543	**49,086**	25,892	25,892	**51,785**
Hawley Wharf / Camden Lock Village (Ref. 2012/4628/P) CAMDEN TOWN (Note B)	4,430	6,000	26,580	14,450	15,040	**29,491**	15,876	16,524	**32,401**	17,358	18,066	**35,424**	18,312	19,059	**37,371**
Central Cross/1 Stephen Street, Tottenham Court Road (Ref. 2012/2232/P) TOTTENHAM COURT ROAD	1,498	7,000	10,486	11,634	0	**11,634**	12,782	0	**12,782**	13,975	0	**13,975**	14,743	0	**14,743**
187-199 West End Lane, West Hampstead (Ref. 2011/6129/P) WEST HAMPSTEAD	704	6,000	4,224	4,687	0	**4,687**	5,149	0	**5,149**	5,629	0	**5,629**	5,939	0	**5,939**
The Lighthouse Block, 283-297 Pentonville Road (Ref. 2008/5358/P) OUT OF CENTRE	573	6,000	3,440	3,816	0	**3,816**	4,193	0	**4,193**	4,584	0	**4,584**	4,836	0	**4,836**
Unit 2, The O2 Centre, Swiss Cottage / Finchley Road (Ref. 2009/4698/P) SWISS COTTAGE / FINCHLEY ROAD	563	6,000	3,378	3,748	0	**3,748**	4,118	0	**4,118**	4,502	0	**4,502**	4,749	0	**4,749**
Total	**31,143**	**-**	**48,108**	66,347	33,714	**100,061**	97,327	61,695	**159,021**	125,463	97,481	**222,944**	132,361	102,840	**235,201**

Source: London Borough of Camden

Note A: Average turnover for Kings Cross Central incorporates turnover arising from within and outside the survey area. We have assumed that 60% of the scheme turnover will be drawn from within the study area in 2018, decreasing to 55% in 2023, and 50% in 2028 and 2031.

Note B: Average turnover for Hawley Wharf incorporates turnover arising from within inside and outside the survey area. Using results from the in-centre survey we have assumed that Camden Town acheives an inflow of 51% of spend from outside the survey area.

Note C: Assume benchmark sales densities of £7,000 per sqm net in Central London Frontages and a sales density of £6,000 per sqm net in town centre / Growth Area locations

London Borough of Camden
Retail and Town Centre Study 2013

Capacity Projections: Comparison Goods

Table 12
Future Shop Floorspace Capacity in London Borough of Camden (GLOBAL BASELINE)

	COMPARISON GOODS				
	2013	2018	2023	2028	2031
Total Available Expenditure (£000)	1,798,590	2,109,065	2,445,415	2,904,229	3,201,220
Market Share from Survey Area	17	17	17	17	17
Survey Area Residents Spending (£000)	307,703	362,180	416,979	494,299	541,922
Inflow to Centres from Beyond Survey Area (£000)	510,361	603,304	698,931	831,679	915,456
Total London Borough of Camden Comparison Goods Turnover With INFLOW (£000)	**818,065**	**965,484**	**1,115,910**	**1,325,978**	**1,457,378**
Existing Retail Floorspace (sqm net)	75,696	75,696	75,696	75,696	75,696
Sales per sqm net (£)	10,807	11,991	13,174	14,403	15,195
Sales from Existing Floorspace (£000)	818,065	907,646	997,212	1,090,250	1,150,190
Sales from Commitments (£000)	0	66,347	97,327	125,463	132,361
Residual Spending to support new floorspace (£000)	0	-8,509	21,372	110,264	174,828
Sales per sqm net in new shops (£)	6,000	6,657	7,314	7,996	8,436
Capacity for new floorspace (sqm net)	**0**	**-1,278**	**2,922**	**13,789**	**20,724**

Note: Assumes growth in sales efficiency: 2.1% pa 2013-2018, 1.9% pa 2018-2023 and 1.8% pa 2023-2028

Note: Inflow has been dervied for each centre from the 2013 in-centre survey results and GVA assumptions

Note: Sales from commitments includes proportion of turnover derived from within survey area only

Note: The total sum of the capacity for new floorspace arising in Tables 13 - 20 will not total the global comparison goods capacity figure. This is as a result of committed developments at Kings Cross Central and The Lighthouse Block. These are are not located within any of the 8 centres assessed below, and therefore the deduction on claims of expenditure for these commitments has not been factored into the individual town centre capacity assessments, however they are included as a deduction in the global capacity forecasts.

London Borough of Camden
Retail and Town Centre Study 2013

Capacity Projections: Comparison Goods

Table 13
Future Shop Floorspace Capacity in Camden Town

	COMPARISON GOODS 2013	2018	2023	2028	2031
Total Available Expenditure (£000)	1,798,590	2,109,065	2,445,415	2,904,229	3,201,220
Market Share from Survey Area	5	5	5	5	5
Survey Area Residents Spending (£000)	94,397	113,802	131,061	157,603	172,397
Inflow to Camden Town from Beyond Survey Area (£000)	98,250	118,447	136,410	164,036	179,433
Total Camden Town Comparison Goods Turnover With INFLOW (£000)	**192,647**	**232,249**	**267,471**	**321,640**	**351,830**
Existing Retail Floorspace (sqm net)	19,434	19,434	19,434	19,434	19,434
Sales per sqm net (£)	9,913	10,999	12,084	13,211	13,938
Sales from Existing Floorspace (£000)	192,647	213,742	234,834	256,744	270,859
Sales from Commitments (£000)	0	14,450	15,876	17,358	18,312
Residual Spending to support new floorspace (£000)	0	4,056	16,761	47,538	62,659
Sales per sqm net in new shops (£)	6,000	6,657	7,314	7,996	8,436
Capacity for new floorspace (sqm net)	**0**	**609**	**2,292**	**5,945**	**7,428**

Note: Assumes growth in sales efficiency: 2.1% pa 2013-2018, 1.9% pa 2018-2023 and 1.8% pa 2023-2028
Note: Inflow has been dervied for Camden Town from the 2013 in-centre survey results

Table 14
Future Shop Floorspace Capacity in Kilburn High Road

	COMPARISON GOODS 2013	2018	2023	2028	2031
Total Available Expenditure (£000)	1,798,590	2,109,065	2,445,415	2,904,229	3,201,220
Market Share from Survey Area	3	3	3	3	3
Survey Area Residents Spending (£000)	49,743	57,117	65,687	77,033	84,476
Inflow to Kilburn High Road from Beyond Survey Area (£000)	26,785	30,755	35,370	41,479	45,487
Total Kilburn High Road Comparison Goods Turnover With INFLOW (£000)	**76,528**	**87,872**	**101,056**	**118,512**	**129,963**
Existing Retail Floorspace (sqm net)	13,352	13,352	13,352	13,352	13,352
Sales per sqm net (£)	5,732	6,359	6,987	7,639	8,059
Sales from Existing Floorspace (£000)	76,528	84,908	93,286	101,990	107,597
Sales from Commitments (£000)	0	0	0	0	0
Residual Spending to support new floorspace (£000)	0	2,964	7,770	16,522	22,366
Sales per sqm net in new shops (£)	6,000	6,657	7,314	7,996	8,436
Capacity for new floorspace (sqm net)	**0**	**445**	**1,062**	**2,066**	**2,651**

Note: Assumes growth in sales efficiency: 2.1% pa 2013-2018, 1.9% pa 2018-2023 and 1.8% pa 2023-2028
Note: Inflow has been dervied for Kilburn High Road based on GVA turnover assumptions

London Borough of Camden
Retail and Town Centre Study 2013

Capacity Projections: Comparison Goods

Table 15
Future Shop Floorspace Capacity in Finchley Road / Swiss Cottage

	COMPARISON GOODS				
	2013	2018	2023	2028	2031
Total Available Expenditure (£000)	1,798,590	2,109,065	2,445,415	2,904,229	3,201,220
Market Share from Survey Area	3	3	3	3	3
Survey Area Residents Spending (£000)	62,100	71,847	82,629	96,896	106,232
Inflow to Swiss Cottage from Beyond Survey Area (£000)	26,614	30,792	35,413	41,527	45,528
Total Swiss Cottage Comparison Goods Turnover With INFLOW (£000)	**88,714**	**102,639**	**118,042**	**138,422**	**151,761**
Existing Retail Floorspace (sqm net)	11,559	11,559	11,559	11,559	11,559
Sales per sqm net (£)	7,675	8,515	9,356	10,228	10,791
Sales from Existing Floorspace (£000)	88,714	98,428	108,141	118,231	124,731
Sales from Commitments (£000)	0	3,748	4,118	4,502	4,749
Residual Spending to support new floorspace (£000)	0	463	5,783	15,690	22,280
Sales per sqm net in new shops (£)	6,000	6,657	7,314	7,996	8,436
Capacity for new floorspace (sqm net)	**0**	**70**	**791**	**1,962**	**2,641**

Note: Assumes growth in sales efficiency: 2.1% pa 2013-2018, 1.9% pa 2018-2023 and 1.8% pa 2023-2028
Note: Inflow has been dervied for Swiss Cottage based on GVA turnover assumptions

Table 16
Future Shop Floorspace Capacity in Hampstead

	COMPARISON GOODS				
	2013	2018	2023	2028	2031
Total Available Expenditure (£000)	1,798,590	2,109,065	2,445,415	2,904,229	3,201,220
Market Share from Survey Area	2	2	2	2	2
Survey Area Residents Spending (£000)	29,565	34,336	39,249	45,892	50,275
Inflow to Hampstead from Beyond Survey Area (£000)	32,029	37,197	42,520	49,717	54,465
Total Hampstead Comparison Goods Turnover With INFLOW (£000)	**61,594**	**71,533**	**81,769**	**95,609**	**104,741**
Existing Retail Floorspace (sqm net)	5,490	5,490	5,490	5,490	5,490
Sales per sqm net (£)	11,219	12,448	13,676	14,952	15,774
Sales from Existing Floorspace (£000)	61,594	68,339	75,083	82,088	86,601
Sales from Commitments (£000)	0	0	0	0	0
Residual Spending to support new floorspace (£000)	0	3,194	6,687	13,521	18,140
Sales per sqm net in new shops (£)	6,000	6,657	7,314	7,996	8,436
Capacity for new floorspace (sqm net)	**0**	**480**	**914**	**1,691**	**2,150**

Note: Assumes growth in sales efficiency: 2.1% pa 2013-2018, 1.9% pa 2018-2023 and 1.8% pa 2023-2028
Note: Inflow has been dervied for Hampstead from the 2013 in-centre survey results

London Borough of Camden
Retail and Town Centre Study 2013

Capacity Projections: Comparison Goods

Table 17
Future Shop Floorspace Capacity in Kentish Town

	COMPARISON GOODS				
	2013	2018	2023	2028	2031
Total Available Expenditure (£000)	1,798,590	2,109,065	2,445,415	2,904,229	3,201,220
Market Share from Survey Area	1	1	1	1	1
Survey Area Residents Spending (£000)	17,891	21,397	24,342	28,944	31,552
Inflow to Kentish Town from Beyond Survey Area (£000)	1,988	2,377	2,705	3,216	3,506
Total Kentish Town Comparison Goods Turnover With INFLOW (£000)	**19,878**	**23,775**	**27,047**	**32,161**	**35,058**
Existing Retail Floorspace (sqm net)	3,682	3,682	3,682	3,682	3,682
Sales per sqm net (£)	5,399	5,990	6,581	7,195	7,591
Sales from Existing Floorspace (£000)	19,878	22,055	24,232	26,492	27,949
Sales from Commitments (£000)	0	0	0	0	0
Residual Spending to support new floorspace (£000)	0	1,719	2,815	5,668	7,109
Sales per sqm net in new shops (£)	6,000	6,657	7,314	7,996	8,436
Capacity for new floorspace (sqm net)	**0**	**258**	**385**	**709**	**843**

Note: Assumes growth in sales efficiency: 2.1% pa 2013-2018, 1.9% pa 2018-2023 and 1.8% pa 2023-2028
Note: Inflow has been dervied for Kentish Town based on GVA turnover assumptions

Table 18
Future Shop Floorspace Capacity in West Hampstead

	COMPARISON GOODS				
	2013	2018	2023	2028	2031
Total Available Expenditure (£000)	1,798,590	2,109,065	2,445,415	2,904,229	3,201,220
Market Share from Survey Area	0	0	0	0	0
Survey Area Residents Spending (£000)	5,703	6,587	7,573	8,809	9,631
Inflow to West Hampstead from Beyond Survey Area (£000)	1,426	1,647	1,893	2,202	2,408
Total West Hampstead Comparison Goods Turnover With INFLOW (£000)	**7,129**	**8,234**	**9,467**	**11,011**	**12,039**
Existing Retail Floorspace (sqm net)	2,032	2,032	2,032	2,032	2,032
Sales per sqm net (£)	3,509	3,893	4,277	4,676	4,934
Sales from Existing Floorspace (£000)	7,129	7,910	8,690	9,501	10,023
Sales from Commitments (£000)	0	4,687	5,149	5,629	5,939
Residual Spending to support new floorspace (£000)	0	-4,362	-4,373	-4,119	-3,923
Sales per sqm net in new shops (£)	6,000	6,657	7,314	7,996	8,436
Capacity for new floorspace (sqm net)	**0**	**-655**	**-598**	**-515**	**-465**

Note: Assumes growth in sales efficiency: 2.1% pa 2013-2018, 1.9% pa 2018-2023 and 1.8% pa 2023-2028
Note: Inflow has been dervied for West Hampstead based on GVA turnover assumptions

London Borough of Camden
Retail and Town Centre Study 2013

Capacity Projections: Comparison Goods

Table 19
Future Shop Floorspace Capacity in Tottenham Court Road

	COMPARISON GOODS 2013	2018	2023	2028	2031
Total Available Expenditure (£000)	1,798,590	2,109,065	2,445,415	2,904,229	3,201,220
Market Share from Survey Area	2	2	2	2	2
Survey Area Residents Spending (£000)	42,823	50,528	58,762	69,978	77,244
Inflow to Tottenham Court Road from Beyond Survey Area (£000)	286,583	338,148	393,252	468,315	516,940
Total Tottenham Court Road Comparison Goods Turnover With INFLOW (£000)	**329,405**	**388,676**	**452,013**	**538,293**	**594,184**
Existing Retail Floorspace (sqm net)	15,413	15,413	15,413	15,413	15,413
Sales per sqm net (£)	21,372	23,713	26,053	28,483	30,049
Sales from Existing Floorspace (£000)	329,405	365,476	401,541	439,005	463,140
Sales from Commitments (£000)	0	11,634	12,782	13,975	14,743
Residual Spending to support new floorspace (£000)	0	11,565	37,690	85,313	116,300
Sales per sqm net in new shops (£)	7,000	7,767	8,533	9,329	9,842
Capacity for new floorspace (sqm net)	**0**	**1,489**	**4,417**	**9,145**	**11,817**

Note: Assumes growth in sales efficiency: 2.1% pa 2013-2018, 1.9% pa 2018-2023 and 1.8% pa 2023-2028
Note: Inflow has been dervied for Tottenham Court Road based on results of in-centre survey and GVA turnover assumptions

Table 20
Future Shop Floorspace Capacity in Holborn

	COMPARISON GOODS 2013	2018	2023	2028	2031
Total Available Expenditure (£000)	1,798,590	2,109,065	2,445,415	2,904,229	3,201,220
Market Share from Survey Area	0	0	0	0	0
Survey Area Residents Spending (£000)	5,482	6,566	7,676	9,143	10,114
Inflow to Holborn from Beyond Survey Area (£000)	36,687	43,941	51,369	61,187	67,689
Total Holborn Comparison Goods Turnover With INFLOW (£000)	**42,169**	**50,507**	**59,045**	**70,330**	**77,803**
Existing Retail Floorspace (sqm net)	4,735	4,735	4,735	4,735	4,735
Sales per sqm net (£)	8,905	9,880	10,855	11,868	12,521
Sales from Existing Floorspace (£000)	42,169	46,787	51,404	56,200	59,290
Sales from Commitments (£000)	0	0	0	0	0
Residual Spending to support new floorspace (£000)	0	3,720	7,641	14,130	18,513
Sales per sqm net in new shops (£)	7,000	7,767	8,533	9,329	9,842
Capacity for new floorspace (sqm net)	**0**	**479**	**895**	**1,515**	**1,881**

Note: Assumes growth in sales efficiency: 2.1% pa 2013-2018, 1.9% pa 2018-2023 and 1.8% pa 2023-2028
Note: Inflow has been dervied for Holborn based on GVA turnover assumptions

Camden Town Centre and Retail Study 2013

Appendix 4
Analysis of Performance of Existing Centres

1. Analysis of Performance of Existing Centres

1.1 In this appendix we set out a detailed analysis of the current performance of each of the town centres and central London frontages for convenience and comparison goods retailing. We review the current shopping patterns identified in the household telephone survey to assess the performance of existing convenience and comparison goods floorspace, and identify the capacity for additional floorspace arising.

1.2 Our analysis of existing convenience goods floorspace compares the turnovers of the Borough's foodstores (foodstores which achieve the highest market share across the survey area) against benchmark company average turnovers to understand how well the stores are performing. For comparison goods there are no standard benchmark sales densities for town centres and therefore our analysis of performance is based on our health checks of the centres, understanding of retailing in the area, and our extensive experience elsewhere.

1.3 Further explanation in relation to the benchmark sales densities used in this Study can be found in paragraph 6.19-6.21 of the main report.

2. Convenience Goods Performance

Camden Town

Convenience Goods Shopping Patterns

2.1 We have estimated the trade draw of Camden Town for convenience goods (Appendix 2, Table 4). This breaks down the trade drawn from in centre stores in Camden Town (Sainsbury's, Morrisons, Marks and Spencer, Sainsbury's Local (Camden High Street and Chalk Farm Road)), and other smaller and independent convenience stores (including bakers, butchers, newsagents, green grocers, delicatessens, health food stores and off licences), and trade drawn from other small convenience stores (including Lidl and Co-op).

2.2 Camden Town is located within zone 2, and it is evident that the foodstores in the centre draw a 75% convenience goods market share within this zone. This is a high level of trade retention within this zone. Table 4 (Appendix 2) and Plan 4a illustrates that foodstore provision in Camden also has a significant influence on shopping patterns in the surrounding zones 4 and 6 (with market shares of 40% and 11% respectively). In addition foodstores in Camden also have a more limited influence in shopping patterns within zones 3, 7 and 1 (market shares of 9%, 8% and 7% respectively). This indicates that foodstores in Camden Town have a strong level of influence on shopping patterns within and beyond the Borough.

2.3 It is evident that within the survey area the Sainsbury's Camden Road has the strongest influence on shopping patterns, drawing a market share of 43% from within zone 2. Sainsbury's also draws high market shares from zone 4 (13%). In total, we estimate that the store has a total convenience goods turnover of approximately £80.1m (Appendix 2, Table 5). Based on an estimated floorspace of 2,196 sqm net convenience floorspace, this equates to a sales density of circa £36,479 per sqm net. Compared to an average sales density for main foodstores of £13,000 sqm net, this analysis indicates that the store is currently trading extremely strongly at above company average levels.

2.4 In addition, the Morrisons Chalk Farm Road also has a strong influence on shopping patterns, drawing a market share of 14% from within zone 2. However, Morrisons draws its highest market shares from within zone 4 (16%), and the store also draws trade from zone 3 (7%). We estimate that the store has a total convenience goods turnover of approximately £65.9m. Based on an estimated convenience goods floorspace of 2,054 sqm net, this equates to a sales density of circa £32,071 per sqm net. Against average sales densities for major foodstores of £13,000 per sqm net, which indicates that this store is also currently trading at extremely strongly at above company average levels.

2.5 The turnover of Marks and Spencer's foodhall is £15.9m. Using a convenience goods floorspace estimate of 740 sqm net, this indicates that the store has a sales density of £21,510 per sqm net. Comparing this to a benchmark sales density of £13,000 per sqm net, this indicates that the store is performing very strongly at above company average levels.

2.6 Combining the market shares for the two Sainsbury's Local stores in Camden Town, it is evident that these stores have a turnover of £7.4m. Using a total convenience floorspace for the two stores of 408 sqm net, this indicates that the stores have a sales density of £18,192 per sqm net. Comparing this against a benchmark average sales density of £13,000 per sqm net indicates that the Sainsbury's Local stores are also trading at above company average levels.

2.7 'Other' convenience stores and independent food retailers in Camden draw a market share of 10% in zone 2, 4% in zone 4 and 3% in zone 1. These foodstores principally cater for 'top-up' food shopping. We forecast that these stores achieve a turnover of approximately £21.6m, equating to an average turnover of £2,563 per sqm net.

2.8 It is well-recognised that household surveys by nature underestimate the amount of expenditure attributed to smaller stores, because respondents will usually provide a response based on larger, more high profile stores, and because people tend to use a variety of destinations for their top-up food shopping. Paragraph B34 of the Government 'Practice Guide on Need, Impact and the Sequential Approach' explains that this often results in a lower turnover for smaller stores.

2.9 For the purposes of this study, we have assumed that retail floorspace for 'other' convenience goods is likely to trade at a sales density of £6,500 per sqm net. This is a relatively low sales density, in contrast to the main foodstores (£13,000 per sqm net), which we consider is appropriate because the stores which fall within this category are small scale independent convenience stores, discount retailers and markets which are likely to have much lower sales densities than mainstream foodstore operators. We consider that 'other' convenience stores in Camden Town are likely to be drawing a reasonable level of turnover.

2.10 Overall, we estimate that the total convenience goods turnover of Camden Town is currently £190.9m, approximately 17% of total available expenditure in the survey area. Based upon a total net sales floorspace of approximately 13,809 sqm net, Camden Town currently has an average convenience goods sales density of £13,823 per sqm net. This is in line with the benchmark average sales densities for the main foodstores in Camden and indicates that convenience stores in the town, particularly large supermarkets, are currently performing very strongly.

2.11 The telephone survey does not pick up tourist or business users who may undertake lunchtime shopping trips to the town centre foodstores. Accordingly the trade not identified within the raw data of the telephone survey will boost the estimated turnover figures identified above. These factors may increase spending in foodstores in Camden Town, thereby contributing to the need for additional convenience retail floorspace.

Convenience Goods Capacity: Camden Town

2.12 We have examined the capacity for additional convenience goods floorspace in Camden up to 2031, incorporating interim years of 2018, 2023 and 2028. In order to ensure our capacity forecasts are as up to date and robust as possible, we take account of new convenience goods developments already coming forward as a result of existing planning permissions. We have factored in to our assessment the commitment for the extension to the Morrisons supermarket and the local produce market at Hawley Wharf.

2.13 We estimate there will be surplus convenience goods spend to support further convenience goods floorspace in Camden Town between 2018 and 2031. Our projections are summarised in Appendix 2, Table 13, and indicate that by 2018 there will be £63.5m residual expenditure to support convenience goods floorspace, which is forecast to grow to £73.2m by 2023, to £89.8m by 2028, and to £95.8m by 2031. When converting this residual expenditure into floorspace we have assumed that mainstream foodstore operators would aim to achieve an average sales density of £13,000 per sqm net. If smaller operators, discount food retailers or market provision came forward, the amount of capacity would be greater as they achieve lower sales densities.

2.14 Using a sales density of £13,000 per sqm net, and assuming constant market shares, there is capacity for an additional 4,858 sqm net by 2018, rising to 5,545 sqm net by 2023, increasing to 6,735 sqm net up to 2028, and up to 7,143 sqm net by 2031 within Camden Town.

2.15 The available expenditure to support additional convenience goods floorspace in Camden Town does not take into account the commitment at Kings Cross Central, which is likely to draw some expenditure arising within Camden Town. Accordingly, the capacity figures identified in paragraph 2.14 above should be considered as an upper limit because it is likely that some of the capacity arising will be drawn to support the committed development at Kings Cross Central, thereby reducing capacity in Camden Town.

2.16 The capacity arising is largely as a consequence of the significant overtrading of the Sainsbury's and Morrisons foodstores, which are collectively overtrading by around £90.7m. These foodstores are the second and third largest stores in the Borough (after Sainsbury's Swiss Cottage) and both provide car parking, therefore it is not surprising that these foodstores are performing strongly and drawing trade from other zones in the study area. Over the plan period we would expect that if the Morrisons and Hawley Wharf developments are implemented this will enhance the convenience goods offer in the town, but will not absorb all of the capacity arising in the town to support additional convenience goods floorspace.

Kilburn High Road

Convenience Goods Shopping Patterns

2.17 We have estimated the trade draw of Kilburn High Road for convenience goods (Appendix 2, Table 4). This breaks down the trade drawn from in centre stores in Kilburn High Road (Sainsbury's, Marks and Spencer and Sainsbury's Local), and other smaller and independent convenience stores (including Tesco Express and Iceland, as well as a bakers, three butchers, convenience stores, a fishmongers, two greengrocers, two health food stores and off licences).

2.18 Kilburn High Road falls within zones 3 and 5 and it is evident from our analysis that the town centre convenience goods trade draw is strongest within these zones (zone 5 has a 34% market share and zone 3 has a 10% market share). In addition Kilburn High Road has a market share of 8% within zone 6 (Plan 4b).

2.19 It is evident that the Sainsbury's has the strongest influence within zone 5 (21%), and draws a more limited market share from zone 6 (6%) and zone 3 (5%). In total, we estimate that the stores have a total convenience goods turnover of c. £35.4m (Appendix 2, Table 5). This equates to a sales density of approximately £34,373 per sqm net. Compared to a benchmark sales density of £13,000 per sqm, this analysis demonstrates that the town centre store is currently trading at well above average levels.

2.20 The Marks and Spencer's foodhall draws a 3% market share from zone 5 and 2% market share from zone 3. We estimate that the store has a total convenience goods turnover of approximately £5.9m (Appendix 2, Table 5). This equates to a sales density of £14,478 per sqm net, which is above the benchmark average sales densities (£13,000 per sqm net).

2.21 The Sainsbury's Local in the north of the centre draws a higher market share, drawing 7% from zone 5, 2% from zone 3 and 1% from zone 6. Although technically this foodstore falls within the jurisdiction of the London Borough of Brent, we have included the foodstore within our capacity analysis because both halves of the Kilburn High Road contribute to the overall performance of the town centre. We estimate that the store has a total convenience goods turnover of approximately £12.1m (Appendix 2, Table 5). Based on a total convenience floorspace of 195 sqm net, this equates to a sales density of £62,011 per sqm net. This is extremely high in comparison to benchmark average sales densities (£13,000 per sqm net). The store is the only mainstream food retailer in the north of the town centre, thereby serving a wide catchment area. The very high sales density is a result of the relatively strong market shares for the store and the small level of convenience goods floorspace.

2.22 Trade to 'other' local stores draws lower market shares from the study area, and we estimate that these stores achieve a turnover of around £6.2m. This equates to an average turnover of £1,349 per sqm net (Appendix 2, Table 5). We consider that this is a low level of turnover for local town centre convenience goods shop, although the actual turnover of the stores may be higher after taking account of their top-up food shopping roles, which may have been underestimated by respondents to the household survey.

2.23 Overall, we estimate that the total convenience goods turnover of Kilburn High Road is currently £59.5m. Within Kilburn's core catchment areas, the town centre foodstores account for approximately 34% of total available convenience goods expenditure within zone 5, and 10% of total expenditure within zone 3. Based on a total net sales floorspace of 6,195 sqm net, Kilburn High Road currently has an average convenience goods sales density of £9,611 per sqm net. This is above our estimate of company average sales densities for town centre foodstores set out in Appendix 2, Table 10 (£8,213 per sqm net), and indicates that Kilburn is performing a strong convenience role.

Convenience Goods Capacity: Kilburn High Road

2.24 We have examined the capacity for additional convenience goods floorspace in Kilburn High Road up to 2031, incorporating interim years of 2018, 2023 2028 and 2031. We are not aware of any significant extant planning consents for additional convenience goods floorspace in Kilburn and therefore no committed developments have been included within our capacity projections.

2.25 We estimate there will be surplus convenience goods spend to support further convenience goods floorspace in Kilburn High Road between 2018 and 2031. Our projections are summarised in Appendix 2, Table 14, and indicate that by 2018 there will be £11.6m residual expenditure to support convenience goods floorspace, which is forecast to grow to £14.3m by 2023, up to £17.2m by 2028, and up to £19,0m up to 2031. When converting this residual expenditure into floorspace we have assumed that mainstream foodstore operators would aim to achieve an average sales density of £13,000 per sqm net. If smaller operators or discount food retailers come forward over the plan period, the amount of capacity would be greater as they would achieve a lower sales density.

2.26 Using a sales density of £13,000 per sqm net, and assuming constant market shares, there is capacity for an additional 887 sqm net convenience goods floorspace by 2018, rising to 1,080 sqm net by 2023, increasing to 1,293 sqm net by 2028, up to 1,416 sqm net to 2031. This capacity is largely a result of the level of overtrading of existing mainstream convenience goods stores, in particular the two Sainsbury's stores.

2.27 The available expenditure to support additional convenience goods floorspace in Kilburn High Road does not take into account the commitment at Kings Cross Central or Belsize Road Car Park, which may be likely to draw some expenditure arising within Kilburn High Road. Accordingly, the capacity figures identified in paragraph 2.46 above should be considered as an upper limit because it is likely that an element of the capacity arising will be drawn to support the committed developments at Kings

Cross Central and Belsize Road Car Park, thereby reducing capacity in Kilburn High Road.

2.28 Over the plan period, Kilburn should seek to maintain its strong market share from zones 5 and 3, and improve its range and offer of convenience goods, which should benefit from the opening of Aldi earlier this year.

Finchley Road/Swiss Cottage

Convenience Goods Shopping Patterns

2.29 We have estimated the trade draw of Finchley Road/Swiss Cottage for convenience goods (Appendix 2, Table 4). This breaks down the trade drawn from in centre stores in Finchley Road/Swiss Cottage (Waitrose and Sainsbury's), and 'other' town centre stores (incorporating smaller and independent convenience stores as well as Iceland, delicatessens and greengrocers).

2.30 Our analysis demonstrates that Finchley Road/Swiss Cottage has a strong trade draw within the west of the Borough. Finchley Road/Swiss Cottage draws half the convenience goods market share within zone 3 (49%), a third within zone 6 (33%), and a more limited market share in zone 5 (10%) and zone 4 (9%) (Appendix 2, Table 4 and Plan 4c).

2.31 Within zone 3, Waitrose Finchley Road was found to be the strongest performing foodstore, with a market share of 30% within this zone, 16% within zone 6, 8% within zone 5 and 5% in zone 4. In total we estimate that Waitrose has a total convenience goods turnover of £91.4m (Appendix 2, Table 5). Based on a total convenience floorspace of 1,732 sqm net, this equates to a high sales density of £52,740 per sqm net. Compared to a benchmark average sales density of £13,000 per sqm net, this indicates that the store is performing extremely strongly and trading well above company average levels. The store has high market shares from a number of zones, demonstrating the good accessibility of the foodstore off the A41 and Plan 3a illustrates that the store is one of the largest in the west of the Borough.

2.32 The Sainsbury's foodstore within the O2 Centre is also attracting a strong market share, drawing 17% from zone 3, 14% from zone 6, 3% from zone 4 and 2% from zone 5. Our analysis suggests that based on total convenience goods floorspace of 2,367 sqm net, the store is trading at a sales density of £24,434 per sqm net. Compared to a benchmark average sales density of £13,000 per sqm net, this indicates that the Sainsbury's store is also trading well at above company average levels.

2.33 Trade draw to other smaller and independent convenience goods retailers in Finchley Road/Swiss Cottage is significantly lower than the other main foodstores in the town, drawing 4% from zone 6, 2% from zone 3, a nominal market shares from zones 4 and 5. Collectively the 'other' town centre stores achieve a turnover of approximately £8.4m, equating to an average turnover of £2,987 per sqm net, which is low compared to benchmark levels.

2.34 We estimate that the total convenience goods turnover of Finchley Road/Swiss Cottage is currently £157.6m. Based on a total net sales floorspace of approximately 6,918 sqm net, Finchley Road/Swiss Cottage currently has an average convenience goods sales density of £22,782 per sqm net. This indicates that Finchley Road/Swiss Cottage is performing very strongly at above the level it should be trading at based on benchmark average levels (£10,351 per sqm net, Appendix 2, Table 10).

Convenience Goods Capacity: Finchley Road/Swiss Cottage

2.35 We have examined the capacity for additional convenience goods floorspace in Finchley Road/Swiss Cottage up to 2031, incorporating interim years of 2018, 2023 and 2031. We are not aware of any significant extant planning permissions for additional convenience goods floorspace over the plan period and therefore no committed developments have been included within the capacity forecasts for Finchley Road/Swiss Cottage.

2.36 We estimate that there will be a large surplus of convenience goods expenditure to support further convenience goods floorspace in Finchley Road/Swiss Cottage between 2018 and 2031. Our projections are summarised in Appendix 2, Table 15, which indicates that by 2018 there will be £94.7m residual spend to support convenience goods floorspace by 2018, rising to £102.6m in 2023, increasing to £111.4m by 2028, and to £116.5m up to 2031.

2.37 Using a benchmark sales density of £13,000 per sqm net, and assuming constant market shares, there is capacity for 7,249 sqm net of convenience goods floorspace by 2018, rising to 7,775 sqm net in 2023, increasing to 8,361 sqm net by 2028, up to 8,689 sqm net up to 2031. If smaller operators or discount retailers came forward, the amount of capacity would be greater as they achieve lower sales densities.

2.38 The available expenditure to support additional convenience goods floorspace in Finchley Road/Swiss Cottage does not take into account the commitment at Kings Cross Central, which may be likely to draw some expenditure arising within Finchley Road/Swiss Cottage. Accordingly, the capacity figures identified in paragraph 2.57 above should be considered as an upper limit because it is likely that some of the capacity arising will be drawn to support the committed developments at Kings Cross Central, thereby reducing capacity in Finchley Road/Swiss Cottage.

2.39 The capacity arising is largely as a consequence of the significant overtrading within the Waitrose and Sainsbury's supermarkets. We anticipate that over the plan period convenience goods capacity arising in the town centre may be reduced if more sustainable shopping patterns are encouraged and trade clawed back to centres which currently draw lower market shares, such as the neighbouring centres of Hampstead and West Hampstead.

Hampstead

Convenience Goods Shopping Patterns

2.40 We have estimated the trade draw of Hampstead for convenience goods (Appendix 2, Table 4). This breaks down the trade drawn from the only in centre supermarket in Hampstead (Tesco Express Heath Street), and other smaller and independent convenience stores (including three bakers, a butchers, a convenience store, a greengrocers, a delicatessen, two markets, two off licences and a cobblers).

2.41 Hampstead is located within zone 4, adjoining the boundary with zone 3. The Tesco Express and local stores draw a 4% convenience goods market share in zone 4 and a 3% share from zone 3. This is a very low level of trade retention within these zones. Hampstead draws no other market share from any of the survey zones, illustrating a very localised catchment and a low level of trade retention.

2.42 Appendix 2, Table 4 sets out that the Marks and Spencer's on Pond Street in Hampstead Heath (also located within zone 4, but not within Hampstead town centre) draws approximately 6% market share from within zone 4. However, it is evident that market share is leaking from zone 4 to zone 2, where Camden Town draws a high market share (40%), and Kentish Town draws a 10% market share (Plans 4a and 4e). The raw survey data indicates that zone 4 has the highest proportion of households who normally choose to undertake their food shopping online (20% of shoppers).

2.43 Tesco Express itself only draws a 3% market share from zone 4 and 2% market share from zone 3, and principally caters for top-up food shopping. We estimate that the turnover of the Tesco Express Heath Street is £7.3m (Appendix 2, Table 5). Based on an estimated 210 sqm net convenience goods floorspace, this equates to a sales density of circa £34,827 per sqm net. Compared to a benchmark sales density of £13,000 per sqm net, this analysis indicates that the store is currently trading extremely strongly at above company average levels. These findings demonstrate that despite the lack of market share and as a result of the restricted size of the foodstore and the lack of competing foodstores, Tesco Express is currently overtrading.

2.44 Other convenience stores and independent food retailers in Hampstead draw a market share of 2% in zone 4 and 1% in zone 3. These foodstores principally cater for 'top-up' food shopping. We forecast that these stores achieve a turnover of approximately £3.5m, equating to an average turnover of £3,832 per sqm net, which is a relatively good level of turnover for local town centre shops.

2.45 Overall, we estimate that the total convenience goods turnover of Hampstead is currently £10.8m, approximately 1% of total available expenditure in the survey area. Based upon a total net sales floorspace of approximately 1,116 sqm net, Hampstead currently has an average convenience goods sales density of £9,666 per sqm net. Despite the Tesco Express performing very strongly, the overall performance of Hampstead is considered to be slightly below the benchmark average sales densities for main foodstores in Hampstead. This reflects the poor provision of main foodstores within this zone.

2.46 The telephone survey does not pick up tourist or business users who may undertake lunchtime shopping trips to these foodstores. Accordingly the trade not identified within the raw data of the telephone survey will boost the estimated turnover figures identified above. These factors are likely to increase spending in foodstores in Hampstead.

Convenience Goods Capacity: Hampstead

2.47 We have examined the capacity for additional convenience goods floorspace in Hampstead up to 2031, incorporating interim years of 2018, 2023 and 2028. We have not identified any extant planning applications for significant additional convenience goods floorspace coming forward over the plan period in Hampstead.

2.48 We estimate that there will be a small surplus convenience goods expenditure to support further convenience goods floorspace in Hampstead between 2018 and 2028. Our projections are summarised in Appendix 2, Table 16, which indicates that by 2018 there will be £2.8m residual expenditure to support convenience goods floorspace, which is forecast to grow to £3.2m in 2023, increased to £3.7m by 2028, and up to £3.9m by 2031. When converting this residual expenditure into floorspace we have assumed that mainstream foodstore operators would aim to achieve an average sales density of £13,000 per sqm net. If smaller operators, specialist or discount food retailers came forward, the amount of capacity would be greater as they achieve a lower sales density.

2.49 Using a sales density of £13,000 per sqm net, assuming constant market shares, there is capacity for 215 sqm net by 2018, rising to 243 sqm net by 2023, 275 sqm net by 2028 and 295 sqm net up to 2031. If Hampstead was able to increase its market share and claw back convenience goods expenditure currently lost to larger centres such as Camden and Swiss Cottage, this may encourage more sustainable shopping patterns within this area of the Borough.

Kentish Town

Convenience Goods Shopping Patterns

2.50 We have estimated the trade draw of Kentish Town for convenience goods (Appendix 2, Table 4), breaking down the trade drawn from in centre stores in Kentish Town (Sainsbury's, Tesco Express and Co-op stores (north and south of Kentish Town Road)), and other smaller and independent convenience stores (including Iceland, as well as a bakery, health food shop, fishmonger, delicatessen, green grocers, convenience stores and off licences).

2.51 Kentish Town is located within zone 2, and it is evident that the foodstores in the centre draw a 13% convenience goods market share within this zone. This is a reasonable level of trade retention within this zone considering the size of the centre and the proximity of Camden Town (also within zone 2). Table 4 (Appendix 2) and Plan 4e illustrates that foodstore provision in Kentish Town also has an influence on shopping patterns in the surrounding zone 4 (10% market share) and a limited influence on shopping patterns within zones 1 (0.4%). This indicates that foodstores in Kentish Town have a relatively localised catchment and a reasonable level of trade retention within the Borough.

2.52 It is evident that within the survey area, local stores in Kentish Town have the strongest influence on shopping patterns, drawing a market share of 10% from within zone 2 and 6% from zone 4. In total, we estimate that local stores have a total convenience goods turnover of £18.4 (Appendix 2, Table 5). Based on the provision of 2,383 sqm net in local stores, this equates to an average turnover of £7,724 per sqm net which is a high level of turnover of local convenience stores (against a benchmark of £6,500 per sqm net).

2.53 It is evident that within the survey area the Sainsbury's Local Kentish Town Road is the supermarket with the strongest influence of shopping patterns, however, the store only draws a market share of 3% from zone 4, 1% from zone 2 and 0.4% from zone 1. In total, we estimate that the store has a total convenience goods turnover of approximately £4.4m (Appendix 2, Table 5). Based on an estimated floorspace of 197 sqm net convenience floorspace, this equates to a sales density of circa £22,526 per sqm net. Compared to a benchmark sales density of £13,000 sqm net, this analysis indicates that the store is currently trading very strongly at above company average levels.

2.54 Combining the market shares for the two Co-op stores on Kentish Town Road, it is evident that these stores have a turnover of £2.5m. Using a total convenience floorspace for the two stores of 500 sqm net, this indicates that the stores have a sales density of £4,936 per sqm net. Comparing this to a benchmark sales density of £6,500 per sqm net indicates that the Co-op stores are trading at below company average levels. During our site visit in January 2013, it was evident that the Co-op in the south of the centre at 217 Kentish Town Road was very quiet (potentially as a result of its close proximity to Tesco Metro), and these findings corroborate that the store is underperforming.

2.55 Tesco Express draws a market share of 1% in zone 2 and principally caters for top up food shopping. We forecast that the store achieves a turnover of approximately £1.2m. Based on a total convenience goods floorspace of 146 sqm net, this indicates that the store has a sales density of £8,164 per sqm net. Compared to a benchmark sales density for main foodstores (£13,000 per sqm net), this indicates that the store is currently performing at below company average levels.

2.56 Overall, we estimate that the total convenience goods turnover of Kentish Town is currently £26.5m, approximately 2% of total available expenditure in the survey area. Based upon a total net sales floorspace of approximately 3,226 sqm net, Kentish Town currently has an average convenience goods sales density of £8,216 per sqm net. This is higher than our estimate of benchmark sales densities for the main foodstores in Kentish Town (£7,191 per sqm net, Appendix 2, Table 10) and indicates that convenience stores in the town, particularly the local convenience stores, are currently performing very strongly.

Convenience Goods Capacity: Kentish Town

2.57 We have examined the capacity for additional convenience goods floorspace in Kentish Town up to 2031, incorporating interim years of 2018, 2023 and 2028. Following a review of extant planning consents for additional convenience goods floorspace, we are not aware of any significant convenience goods commitments coming forward in the town centre.

2.58 We estimate that there will be surplus convenience goods expenditure to support further convenience goods floorspace in Kentish Town between 2018 and 2031. Our projections are summarised in Appendix 2, Table 17, which indicates that by 2018 there will be £6.1m residual expenditure to support convenience goods floorspace, which is forecast to grow to £7.2m by 2023, increasing to £9.5m by 2028, and again to £10.2m by 2031.

2.59 Assuming that mainstream foodstore operators would generally seek to achieve an average sales density of £13,000 per sqm net, and assuming constant market shares, there is capacity for an additional 469 sqm net of convenience goods floorspace by 2018, growing to 548 sqm net by 2023, rising to 712 sqm net by 2028, to up to 758 sqm net up to 2031. If smaller retailers or discount food retailers came forward, the amount of capacity would be greater as they would achieve lower sales densities.West Hampstead

Convenience Goods Shopping Patterns

2.60 We have estimated the trade draw of West Hampstead for convenience goods (Appendix 2, Table 4). This breaks down the trade drawn from in centre stores including Tesco Express and Sainsbury's Local on West End Lane, as well as 'other' town centre foodstores including independent bakeries, delicatessens and greengrocers, convenience stores and off licenses.

2.61 It is evident from our analysis that the town centre convenience goods trade draw in West Hampstead has a low and self-contained market share. As we would expect West Hampstead draws its highest convenience goods trade draw within zone 3 (7%), a nominal market share in zones 4 and 6 (0.3%) and no market share within the remaining survey zones. West Hampstead's low market share is illustrated in Plan 4f.

2.62 The Tesco Express on West End Lane has the strongest influence on shopping patterns in West Hampstead, drawing 4% of trade from zone 3, and 0.3% from zones 4 and 6. In total, we estimate that the store has a total convenience goods turnover of c. £8.8m (Appendix 2, Table 5). Based on a total convenience goods floorspace of 278 sqm net, this equates to a sales density of approximately £31,774 per sqm net. Compared to a benchmark sales density of £13,000 per sqm net, this analysis indicates that the town centre store is currently trading very well at above company average levels.

2.63 Trade draw to the Sainsbury's Local was identified to be lower than the Tesco store, with a market share of only 2% within zone 3. We estimate that the Sainsbury's store has a total convenience goods turnover of approximately £4.5m (Appendix 2, Table 5). Based on a total convenience goods floorspace of 158 sqm net, we estimate that the store has a sales density of £28,741 per sqm net, which is also well above benchmark average levels (£13,000 per sqm net).

2.64 Trade draw to the 'other' town centre foodstores is very low, drawing a market share of just 0.5% in zone 3. We estimate that these stores achieve a turnover of around £0.9m, equating to an average turnover of just £904 per sqm net. We consider that this is a very low level of turnover for local town centre convenience goods shops. We anticipate that the actual turnover of these stores may be higher after taking account of their top-up food shopping roles, which may have been understated in the telephone survey, and also factoring in additional spend in these stores from people who work in West Hampstead. However, due to the very small market shares, these stores are likely to be undertrading.

2.65 Overall we estimate that the total convenience goods turnover of West Hampstead is currently £14.3m. The majority of spend (£13.7m) is drawn from West Hampstead's core zone (zone 3). Based on a total convenience goods sales floorspace of 1,482 sqm net, West Hampstead currently has an average sales density of £9,660 per sqm net. This is above our estimate of the company average sales densities for the town centre foodstores (£8,412 per sqm net). This indicates that despite the 'other' local convenience stores drawing a limited amount of trade, the very strong performance of the Tesco and Sainsbury's stores means that the centre is performing well overall.

Convenience Goods Capacity: West Hampstead

2.66 We have examined the capacity for additional convenience goods floorspace in West Hampstead up to 2031, incorporating interim years of 2018, 2023 and 2028. There are no significant extant planning consents for additional convenience goods retail floorspace and therefore no committed developments have been included within our capacity projections for West Hampstead.

2.67 We estimate that there will be a small surplus of convenience goods expenditure to support further convenience goods floorspace in West Hampstead between 2018 and 2031. Our projections are summarised in Appendix 2, Table 18, which indicates that by 2018 there will be £2.7m residual expenditure to support convenience goods floorspace, which is forecast to grow to £3.3m by 2023, increasing to £4.0m by 2028, increasing to £4.3m by 2031. When converting this residual spend to floorspace we have assumed that mainstream foodstore operators would aim to achieve an average sales density of £13,000 per sqm net. If smaller operators and discount food retailers came forward, the amount of capacity would be greater as they achieve a lower sales density.

2.68 Using the £13,000 per sqm net sales density, and assuming constant market shares, there is capacity arising for 205 sqm net additional convenience goods floorspace by 2018, rising to 253 sqm net by 2023, increasing to 300 sqm net by 2028, to a total of 327 sqm net up to 2031.

2.69 Whilst there are two supermarkets in West Hampstead these are currently overtrading primarily as a result of these foodstores being of a very small scale. Other convenience goods stores are of an even smaller scale and as a result drawing very low market shares. Over the plan period there is scope for West Hampstead to claw back convenience goods spend which is currently being drawn to higher order centres such as Swiss Cottage and Kilburn, in order to promote more local and sustainable shopping patterns.

Tottenham Court Road

Convenience Goods Shopping Patterns

2.70 We have estimated the trade draw of Tottenham Court Road central London frontage for convenience goods (Appendix 2, Table 4). This breaks down the trade drawn from in centre stores on Tottenham Court Road; in particular Little Waitrose, Sainsbury's Local and Sainsbury's Central supermarkets. 'Other' town centre foodstores include smaller foodstores (including Marks and Spencer and Tesco Express), as well as independent convenience goods retailers (including newsagents, confectioners, bakers and a health food shop).

2.71 Our analysis demonstrates that Tottenham Court Road town centre has a relatively contained trade draw. Tottenham Court Road is located in Zone 1 of the survey area, and as we would expect, the centre draws its highest convenience goods trade draw from this zone (6%). As illustrated in Appendix 2, Table 4 and Plan 4g, beyond zone 1 the centre has a more limited influence on shopping patterns, drawing a 4% market share from zone 9, 2% from zone 4 and 1% from zone 2.

2.72 The in-centre survey results for Tottenham Court Road have identified that the centre has a very strong level of inflow from visitors and shoppers which reside outside the survey area (87% of respondents to the in-centre survey). We have factored in levels of inflow in to our comparison goods capacity assessment, however we have not calculated levels of inflow to Tottenham Court Road for convenience goods because convenience shopping patterns tend to be more localised. However we recognise that foodstores on Tottenham Court Road will also perform a strong top-up food shopping role for tourists and workers who visit the centre, which is likely to result in additional convenience goods expenditure available to support these stores.

2.73 Within zone 1, the 'Little Waitrose' was found to be the strongest performing foodstore, with a market share of 2.4% from this zone. In total, we estimate that the Little Waitrose has a total convenience goods turnover of around £1.4m (Appendix 2, Table 5). Based on a convenience goods floorspace of 263 sqm net, equates to a sales density of £5,226 per sqm net. Compared to a benchmark sales density of £13,000 per sqm net, this analysis indicates that based on the household telephone survey the store is currently under performing, trading at below company average levels. However, in practice we anticipate that the turnover of the store is likely to be higher than estimated in our capacity analysis as a result of the inflow of spend from the local worker and visitor populations who are not resident within the survey area.

2.74 The Sainsbury's Central supermarket in the south of Tottenham Court Road draws the second highest market share from zone 1 and also draws some trade from zone 9 (both 2% market shares). Our analysis suggests that the store has a total convenience goods floorspace of 644 sqm net, this equates to a sales density of £5,761 per sqm net. Compared to benchmark sales density of £13,000 per sqm net, this analysis indicates that the Sainsbury's Central is also underperforming. However this does not take in to account the additional convenience goods spend likely to be drawn to this store from local workers and tourists residing outside the survey area.

2.75 Appendix 2, Table 5 shows that the larger Sainsbury's Local store in the north of Tottenham Court Road (963 sqm net) is currently achieving a turnover of £1.4m from the survey area, which equates to a sales density of £1,497 per sqm net. Similarly to the other main foodstores in Tottenham Court Road, this Sainsbury's Local is also trading at well below benchmark average levels (£13,000 per sqm net). However, it is likely that the store has a higher turnover when factoring in additional spend drawn from outside the telephone survey area, including local worker and tourist spend. Therefore this low level of turnover from the survey area does not necessarily mean that the store is underperforming, which is corroborated by the findings of our site visit which confirmed that the store appeared to be busy and trading well.

2.76 Trade drawn to the other smaller and independent convenience goods retailers in Tottenham Court Road is strongest in zones 1 and 9. Collectively the 'other' town centre stores achieve a turnover of approximately £2.6m. Based on a floorspace of 4,186 sqm net, this equates to a sales density of £612 per sqm net which is a very low sales density in comparison to the benchmark sales density for local foodstores in London (which we assume is around £6,500 per sqm net).

Convenience Goods Capacity Projections: Tottenham Court Road

2.77 We have examined capacity for additional convenience goods floorspace in the Tottenham Court Road central London frontage up to 2031, incorporating interim years of 2018, 2023 and 2028. We are not aware of any significant extant planning consents for additional convenience goods floorspace in Tottenham Court Road over the plan period and therefore no commitments have been factored into our capacity forecasts for the centre.

2.78 Appendix 2, Table 19 states illustrates that based on the results of the household telephone survey, there is no residual expenditure to support further convenience goods floorspace in Tottenham Court Road between 2018 and 2031. Therefore there is no capacity arising for convenience goods floorspace in Tottenham Court Road over the plan period.

2.79 The negative capacity arising in Tottenham Court Road is primarily as a result of the undertrading arising within the main foodstores in the centre. However the capacity forecasts do not factor in the level of inflow supporting these foodstores from local workers and tourists which reside outside the telephone survey area. In practice, we consider that existing stores in Tottenham Court Road have higher turnovers and therefore it is likely that there is additional convenience goods expenditure to support foodstore provision within Tottenham Court Road.

Holborn / High Holborn

Convenience Goods Shopping Patterns

2.80 We have estimated the trade draw of Holborn central London frontage for convenience goods (Appendix 2, Table 4). This breaks down the trade drawn from in centre stores in Holborn (Sainsbury's Local Mid City Place, Sainsbury's Local Kingsway and Waitrose) as well as 'other' foodstores including smaller stores and independent retailers.

2.81 It is evident that within zone 1, Holborn has a reasonable level of trade retention, drawing a 12% market share (Appendix 2, Table 4 and Plan 4h). The centre has a much weaker influence on shopping patterns outside this zone, drawing market shares of 0.5% in zone 2 and 0.2% in zone 8. This indicates that in terms of resident spend, the foodstores in Holborn have a localised catchment. However, this does not take in to account the additional spend arising as a result of the large workforce population who work in the Holborn area and who are likely to undertake some day to day top up food shopping during the week.

2.82 Within the survey area, the Sainsbury's Local at Mid City Place has the highest influence on shopping patterns in zone 1, drawing a market share of 4%. We estimate that the store has a total convenience goods turnover of approximately £2.7m (Appendix 2, Table 5). Based on an estimated convenience goods floorspace of 240 sqm net, this equates to an estimated floorspace of £11,066 per sqm net.

Compared to benchmark average sales density of £13,000 per sqm net, this analysis indicates that the store is currently trading slightly below company average levels.

2.83 The other Sainsbury's Local store on Kingsway draws a slightly lower market share of 3% from zone 1. We estimate that the store has a total convenience goods turnover of approximately £2.5m. Based on an estimated convenience floorspace of 787 sqm net, this equates to a sales density of £3,138 per sqm net. This indicates that the store is performing less strongly than the other Sainsbury's Local at Mid City Place and below company average levels.

2.84 The Little Waitrose store at Weston House draws a 2.5% market share from zone 1, which equates to an estimated store turnover of £1.4m. Based on an estimated convenience goods floorspace of 521 sqm net, this equates to a sales density of £2,746 per sqm net, which indicates that Little Waitrose is currently underperforming against benchmark levels (£13,000 per sqm net). However, this does not take in to consideration the additional spend from the local workforce population which will also support sales at this store.

2.85 Other convenience stores and independent food retailers in Holborn draw a market share of 2.6% from within zone 1. These foodstores principally cater for top-up food shopping. We forecast that these stores achieve a turnover of approximately £1.5m, equating to an average turnover of £2,258 per sqm net, which is below our estimate of the average turnover for local town centre shops in London (£6,500 per sqm net).

2.86 We estimate that the total convenience goods turnover of Holborn is currently £8.1m. Based upon a total convenience goods sales floorspace of approximately 2,220 sqm net, Holborn currently has an average convenience goods sales density of £3,666 per sqm net. This is below our estimate of company average sales densities for the main foodstores and local stores, indicating that the foodstores in Holborn are not performing a strong convenience goods role for the local resident population. We also anticipate that additional convenience goods expenditure will be available from the local workforce population of Midtown, who are likely to use these foodstores for the purchase of food during the working week and therefore supporting the in-store sales. During site visits of the study area all of the supermarkets appeared to be busy and trading well, and it is likely that these stores benefit from high levels of pedestrian footfall throughout the day.

Convenience Goods Capacity Projections: Holborn

2.87 We have examined the capacity arising for additional convenience goods floorspace in Holborn up to 2031, incorporating interim years of 2018, 2023 and 2031. We are not aware of any significant extant planning consents for additional convenience goods floorspace in Holborn and therefore no committed developments have been included within the capacity forecasts.

2.88 We estimate that there will be a no surplus expenditure to support additional convenience goods retailing in Holborn over the plan period. Our projections are summarised in Appendix 2, Table 20, and indicate that by 2018 there will be no surplus expenditure to support additional convenience goods floorspace in Holborn.

2.89 The negative capacity arising in Holborn is primarily as a result of the undertrading arising within the main foodstores in the centre. However the capacity forecasts do not factor in the level of inflow supporting these foodstores from local workers and tourists which reside outside the telephone survey area. In practice, we consider that existing stores in Holborn have higher turnovers and therefore it is likely that there is additional convenience goods expenditure to support foodstore provision within Holborn.

3. Comparison Goods Performance

Camden Town

Comparison Goods Shopping Patterns

3.1 We have estimated the trade draw of Camden Town for comparison goods (Appendix 3, Table 4). The table indicates that the catchment area of Camden Town is strongest within zone 2 (28%), however the centre also draws trade from zone 4 (11%) and zone 1 (4%), and smaller levels of trade from the other survey zones. On the basis of current market shares, Camden Town centre retains approximately 5.2% of comparison goods spend from within the survey area. This is the highest level of retention of all the centres in the Borough, and demonstrates the popularity of the competing West End as a comparison goods shopping destination (which draws 48% of spend derived from the survey area).

3.2 Results from the Camden Town in-centre survey identified that 51% of respondents live outside the telephone survey area. This corresponds to the findings from the 2008 retail study which assumed that Camden Town had a 50% inflow. Accordingly we have assumed that Camden Town derives 49% of its trade from within the survey area (which equates to £94.4m), whilst an additional £98.3m is derived from outside the survey area. Overall we estimate that Camden Town has a turnover of £192.6m.

3.3 Based on the total turnover for Camden Town and an existing comparison goods floorspace of 19,434 sqm net, we estimate that the town centre has a sales density of around £9,913 per sqm net. Based on our experience elsewhere, we consider that Camden Town is performing very strongly in terms of comparison goods sales densities, and this is consistent with our review of the town centre.

Comparison Goods Capacity: Camden Town

3.4 On the basis of Camden Town maintaining its existing market shares from within and outside the survey area, we estimate there is capacity arising in Camden Town to support additional comparison goods floorspace.

3.5 In assessing capacity for comparison goods we have factored in existing commitments for the redevelopment of Camden Lock Village Market at Hawley Wharf, which will provide an additional 4,430 sqm net of market retail floorspace. The development at Hawley Wharf will be dependent on expenditure arising from within the survey area as well as inflow from outside the survey area, which result in further expenditure to support this proposal.

3.6 Based on our assessment it is evident from Appendix 3, Table 13, that based on constant market shares and a sales density of £6,000 per sqm net for new floorspace, there will be residual capacity to support further comparison goods floorspace in Camden Town. There is theoretical capacity to support an additional 609 sqm net by 2018, rising to 2,292 sqm net by 2023, to 5,945 sqm net up to 2028, increasing to 7,428 sqm net up to 2031.

3.7 The available expenditure to support additional comparison goods floorspace in Camden Town does not take into account the commitment at Kings Cross Central, which is likely to draw some expenditure arising within Camden Town. Accordingly, the capacity figures identified in paragraph 3.6 above should be considered as an upper limit because it is likely that some of the capacity arising will be drawn to support the committed development at Kings Cross Central, thereby reducing capacity in Camden Town.

Kilburn High Road

Comparison Goods Shopping Patterns

3.8 Appendix 3, Table 4 indicates that the catchment area of Kilburn High Road is strong, achieving a market share of 13% from within zone 5 and 5% from within zone 3 (within which the centre is located half within each zone). The centre also has a strong market share of 8% from zone 6 which is located to the south of the centre, and minimal market shares of 0.8% from zone 2 and 0.3% from zone 4. We estimate that Kilburn High Road retains approximately 2.8% of comparison goods spend from within the survey area. Although this figure is low, it is the third highest level of retention of centres in the Borough, and also reflects the strong draw of the West End over shopping patterns.

3.9 No in-centre survey was undertaken within Kilburn High Road, therefore based on current turnover and the findings of previous survey work we have assumed that the centre has an inflow of 35% from outside the survey area. This is appropriate considering the lack of significant change in the centre since the previous survey was undertaken. The results indicate that the turnover of the centre has decreased slightly. We assume that Kilburn High Road derives 65% of its trade from within the survey area (which equates to £49.7m), whilst an additional £26.8m is derived from outside the survey area. Overall we estimate that Kilburn High Road has a turnover of £76.5m.

3.10 Based on the total turnover for Kilburn High Road and an existing comparison goods floorspace of 13,352 sqm net, we estimate that the town centre has a sales density of around £5,732 per sqm net. This is a similar sales density than identified in the previous retail study. Based on our experience elsewhere, we consider that Kilburn High Road is reasonably performing well in terms of comparison goods sales densities, and this is consistent with our review of the town centre.

Comparison Goods Capacity: Kilburn High Road

3.11 On the basis of Kilburn High Road maintaining its existing market shares from both within the survey area and outside, we estimate that there is residual expenditure to support to support additional comparison goods floorspace up to 2031 on the basis of growth in population and expenditure.

3.12 In assessing capacity for comparison goods we are not aware of any comparison goods commitments coming forward over 500 sqm over the plan period. Based on our assessment it is evident from Appendix 3, Table 14, and on the assumption that new comparison floorspace trades at a sales density of £6,000 per sqm net, that there is residual expenditure to support 445 sqm net up to 2018, increasing to capacity to support 1,062 sqm net up to 2023, rising to 2,066 sqm net up to 2028 and increasing to 2,651 sqm net up to 2031.

3.13 The available expenditure to support additional comparison goods floorspace in Kilburn High Road does not take into account the commitment at Kings Cross Central, which may draw some expenditure arising within Kilburn High Road. Accordingly, the capacity figures identified in paragraph 3.22 above should be considered as an upper limit because it is likely that some of the capacity arising will be drawn to support the committed developments at Kings Cross Central, thereby reducing capacity in Kilburn High Road.

Finchley Road/Swiss Cottage

Comparison Goods Shopping Patterns

3.14 Table 4, Appendix 3 indicates that the catchment area of Finchley Road/Swiss Cottage is relatively wide, drawing a proportion of market share from each survey zone. Trade draw is strongest within zone 3 (10%) in which the centre is located. Swiss Cottage also achieves a trade draw of 7% from within zone 6, 4% from zone 4, 2% from zone 5 and 1% from zone 2. The centre draws less than 1% from the remaining survey zones. Overall Finchley Road/Swiss Cottage town centre retains approximately 3.5% of comparison goods spend from within the survey area, which is the second highest level of retention for any of the Borough's centres after Camden Town. Whilst this is a relatively low figure, this reflects the strong influence that the West End has over shopping patterns and the lower order role of Swiss Cottage / Finchley Road.

3.15 No in-centre survey was undertaken within Finchley Road/Swiss Cottage, therefore based on the findings of previous survey work we have assumed that the centre has an inflow of 30% from outside the survey area. The results indicate that Swiss Cottage is achieving a higher overall turnover than estimated in the previous retail study. Assuming that Finchley Road/Swiss Cottage derives 70% of its trade from within the survey area (which equates to £62.1m), whilst an additional £26.6m is derived from outside the survey area. Overall we estimate that Finchley Road/Swiss Cottage has a total turnover of £88.7m.

3.16 Based on the total turnover for Finchley Road/Swiss Cottage and an existing comparison goods floorspace of 11,559 sqm net, we estimate that the town centre has a sales density of around £7,675 per sqm net. This is a slightly lower level of comparison goods floorspace, and therefore we have estimated that the sales density for Finchley Road/Swiss Cottage is slightly higher than estimated previously in the 2008 retail study. Based on our experience elsewhere, we consider that Finchley Road/Swiss Cottage is performing very strongly in terms of comparison goods sales densities, and this is consistent with our review of the town centre.

Comparison Goods Capacity: Finchley Road/Swiss Cottage

3.17 On the basis of Finchley Road/Swiss Cottage maintaining its existing market shares from both within the survey area and outside, we estimate that there is residual expenditure arising within the centre to support additional comparison goods floorspace up to 2031, on the basis of growth in population and expenditure.

3.18 In assessing capacity for comparison goods we have factored in the commitment at the O2 Centre for part change of use of the Virgin Active gym to Class A1 use (which will provide an additional 563 sqm net comparison goods floorspace. Based on our assessment it is evident from Appendix 3, Table 15, that there is residual expenditure to support further comparison goods floorspace in Finchley Road/Swiss Cottage. Based on new comparison goods floorspace achieving a sales density of £6,000 per sqm net, there is theoretical capacity to support an additional 70 sqm net up to 2018, increasing to 791 sqm net by 2023, rising to 1,962 sqm net up to 2028, increasing to 2,641 sqm net up to 2031.

3.19 The available expenditure to support additional comparison goods floorspace in Finchley Road/Swiss Cottage does not take into account the commitment at Kings Cross Central, which may draw some expenditure arising within Finchley Road/Swiss Cottage. Accordingly, the capacity figures identified in paragraph 3.28 above should be considered as an upper limit because it is likely that some of the capacity arising will be drawn to support the committed developments at Kings Cross Central, thereby reducing capacity in Finchley Road/Swiss Cottage.

Hampstead

Comparison Goods Shopping Patterns

3.20 Appendix 3, Table 4 identifies the trade draw of Hampstead town centre for comparison goods from the telephone survey area. It is evident that the comparison goods catchment area for Hampstead is more localised that Camden Town, and is focused primarily within its own zone (zone 4, 7%) and the neighbouring zone 3 (3%). The town centre also draws some limited market share from zones 2, 5, 6, 7 and 9. Based on expenditure derived from the survey area alone, Hampstead currently retains 1.6% of comparison goods expenditure.

3.21 The Hampstead in-centre survey identified that 48% of respondents live outside the telephone survey area. This is a higher level of inflow compared to the assumptions used in the previous 2008 retail study (15%). However we have based our assumptions on the most up to date survey results, and this provides a similar level of turnover for

Hampstead as the previous study and therefore we consider this to be an appropriate level of inflow.

3.22 We therefore assume that Hampstead derives 48% of its trade from within the survey area (which equates to £29.6m), whilst an additional £32m is derived from outside the survey area. Overall we estimate that Hampstead has a total turnover of £61.6m. Based on the total turnover for Hampstead and an existing comparison goods floorspace of 5,490 sqm net, we estimate that the town centre has a sales density of around £11,219 per sqm net. This is the highest sales density achieved in the centres in the Borough, and reflects the high end luxury offer in the town. Based on our experience elsewhere, we consider that Hampstead is performing very strongly in terms of comparison goods sales densities, and this is consistent with our review of the town centre.

Comparison Goods Capacity: Hampstead

3.23 On the basis of Hampstead maintaining its existing market shares from both within the survey area and outside, we estimate that there is residual expenditure arising in Hampstead to support additional comparison goods floorspace over the plan period by virtue of growth in population and expenditure.

3.24 In assessing capacity for comparison goods we are not aware of any comparison goods commitments coming forward over 500 sqm over the plan period. Based on our assessment, which assumes that new comparison goods floorspace will trade at £6,000 per sqm net, it is evident from Appendix 3, Table 16 that in the short term there will be residual expenditure to support 480 sqm net additional comparison goods floorspace up to 2018. Theoretical capacity to support an additional floorspace increases to 914 sqm net by 2023, rising to 1,691 sqm net up to 2028, and up to 2,150 sqm net up to 2031.

Kentish Town

Comparison Goods Shopping Patterns

3.25 Table 4, Appendix 3 indicates that the catchment area of Kentish Town is strongest within zone 4 (6%) which is to the north of zone 2 in which the town centre is located. Kentish Town achieves a trade draw of 5% from within zone 2, in which Camden Town is also located. The town centre draws no market share from the other survey zones, therefore the town has a relatively limited catchment area. Kentish Town retains approximately 1% of comparison goods spend from within the survey area. This is a low figure but reflects the key influence that the West End has over shopping patterns.

3.26 No in-centre survey was undertaken within Kentish Town, therefore based on the findings of previous survey work we have assumed that Kentish Town has an inflow of 10% from outside the survey area. We consider this level of inflow is appropriate considering the lack of significant change in the centre since the previous survey work. This is the lowest level of inflow for all the centres in the Borough, and the results indicate that Kentish Town is achieving a slightly lower turnover than the previous study. Assuming that Kentish Town derives 90% of its trade from within the survey area (which equates to £17.9m), whilst an additional £2m is derived from outside the survey area, we estimate that Kentish Town has a turnover of £19.9m.

3.27 Based on the total turnover for Kentish Town and an existing comparison goods floorspace of 3,682 sqm net, we estimate that the town centre has a strong sales density of around £5,399 per sqm net. This is in line with the sales density identified for the Kentish Town in the previous retail study, and based on our experience elsewhere, we consider that Kentish Town is performing reasonably well in terms of comparison goods sales densities, and this is consistent with our review of the town centre.

Comparison Goods Capacity: Kentish Town

3.28 On the basis of Kentish Town maintaining its existing market shares from both within the survey area and outside, we estimate that there is no capacity arising in Kentish Town to support additional comparison goods floorspace up to 2018, however there is capacity arising after this period on the basis of growth in population and expenditure.

3.29 In assessing capacity for comparison goods we are not aware of any comparison goods commitments coming forward over 500 sqm over the plan period. Based on our assessment it is evident from Appendix 3, Table 17, that in the short term there is residual capacity to support 258 sqm net additional floorspace up to 2018 (on the basis of new comparison floorspace trading at £6,000 per sqm net). After this period there will be residual expenditure to support further comparison goods floorspace in Kentish Town, with theoretical capacity to support up to 385 sqm net by 2023, rising to 709 sqm net up to 2028, up to a total of 843 sqm net up to 2031.

West Hampstead

Comparison Goods Shopping Patterns

3.30 Appendix 3, Table 4 indicates that the catchment area of West Hampstead is very localised, drawing a market share of only 1.6% within zone 3 in which it is located. The town centre draws no market share from the other survey zones. West Hampstead centre retains approximately 0.3% of comparison goods spend from within the survey area. This is the lowest level of trade retention within the survey area and reflects the small size of the centre and also the strong draw of the West End and Brent Cross shopping centre on zone 3.

3.31 No in-centre survey was undertaken within West Hampstead, therefore based on the findings of previous survey work we have assumed that West Hampstead has an inflow of 20% from outside the survey area. Assuming that West Hampstead derives 80% of its trade from within the survey area (which equates to £5.7m), whilst an additional £1.4m is derived from outside the survey area. Overall we estimate that West Hampstead has a turnover of £7.1m.

3.32 Based on the total turnover for West Hampstead and an existing comparison goods floorspace of 2,032 sqm net, we estimate that the town centre has a sales density of around £3,509 per sqm net. This is in line with the previous estimates of floorspace, but is a slightly lower sales density identified for the West Hampstead in the previous study. Based on the performance of other centres in the Borough, and our experience elsewhere, we consider that West Hampstead is not performing as well as other centres in terms of comparison goods sales densities. The centre is not performing as adequately as we would expect for a centre of this size in the Borough, however this may be as a result of quick links from the centre to the West End (Bond Street is five stops on the Jubilee Line) as well as the existing limited comparison shopping offer in the centre, which is also confirmed by our qualitative assessment West Hampstead.

Comparison Goods Capacity: West Hampstead

3.33 On the basis of West Hampstead maintaining its existing market shares from both within the survey area and outside, we estimate that there is no residual expenditure arising in West Hampstead to support additional comparison goods floorspace over the plan period.

3.34 In assessing capacity for comparison goods we have included the commitment to deliver 704 sqm net floorspace at 187-199 West End Lane, which have assumed will come forward for comparison goods retail. Based on our assessment it is evident from Appendix 3, Table 18, that taking account of committed developments there will be no capacity to support further comparison goods floorspace in West Hampstead, although this should not prohibit future retail schemes coming forward in the town centre.

Tottenham Court Road Central London Frontage

Comparison Goods Shopping Patterns

3.35 We have estimated the trade draw of Tottenham Court Road for comparison goods (Appendix 3, Table 4). The table indicates that the catchment area of Tottenham Court Road is reasonably dispersed through the study area, and is strongest within zone 1 (7%), within which it is located. The central London frontage also draws trade from zone 9 (5%), zones 7 and 8 (3%), zones 2 and 5 (2%) and zone 3, 4 and 6 (1%). On the basis of current market shares, Tottenham Court Road retains approximately 2.4% of comparison goods spend from within the survey area. Whilst this is a low level of trade retention, in the context of the other centres in the survey area this is a reasonable level of retention. Within zone 1 65% of respondents undertake their comparison goods shopping in the West End, which illustrates the dominance of Oxford Street, Bond Street and Regent Street for comparison goods shopping.

3.36 Results from the 2013 Tottenham Court Road in-centre survey identified that 87% of respondents live outside the telephone survey area. The Tottenham Court Road central London frontage was not assessed as part of the previous 2008 retail study and therefore there is no benchmark for inflow levels to the centre. This level of inflow is very high however based on our professional experience elsewhere in London we consider that the results from the in-centre survey accurately reflects the role of Tottenham Court Road plays as an employment area and a key tourist destination. We have therefore assumed that Tottenham Court Road has an inflow of 87%. Accordingly we have assumed that Tottenham Court Road derives 13% of its trade from within the survey area (which equates to £42.8m), whilst an additional £286.6m is derived from outside the survey area. Overall we estimate that Tottenham Court Road has a turnover of £329.4m.

3.37 Based on the total turnover for Tottenham Court Road and an existing comparison goods floorspace of 15,413 sqm net, we estimate that the central London frontage has a very high sales density of around £21,372 per sqm net. Based on our experience elsewhere, we consider that the Tottenham Court Road central London frontage is performing very strongly in terms of comparison goods sales densities, and this is consistent with its role as a central London frontage, and our qualitative review of the centre. This high sales density also reflects the retail offer of Tottenham Court Road which is focused on quality furniture and electronic goods, which are expensive items which are generally purchased less frequently, resulting in higher spend per shopping trip.

Comparison Goods Capacity: Tottenham Court Road

3.38 On the basis of Tottenham Court Road maintaining its existing market shares from both within the survey area and outside, we estimate that there is capacity arising in the central London frontage to support additional comparison goods floorspace, on the basis of growth in population and expenditure.

3.39 In assessing capacity for comparison goods we have factored in existing commitments for the redevelopment at Central Cross 1 Stephen Street, which will provide an additional 1,498 sqm net of retail floorspace, which we have assumed will come forward from comparison goods. Based on our assessment it is evident from Appendix 3, Table 19, that there will be residual expenditure to support further comparison goods floorspace in Tottenham Court Road, assuming that new comparison goods floorspace trades at a sales density of £7,000 per sqm net. There is theoretical capacity to support an additional 1,489 sqm net by 2018, rising to 4,417 sqm net by 2023, increasing to 9,145 sqm net up to 2028, increasing to 11,817 sqm net up to 2031.

3.40 The available expenditure to support additional comparison goods floorspace in Tottenham Court Road does not take into account the commitment at Kings Cross Central, which may draw some expenditure arising within Tottenham Court Road. Accordingly, the capacity figures identified in paragraph 3.39 above should be considered as an upper limit because it is likely that some of the capacity arising will be drawn to support the committed developments at Kings Cross Central, thereby reducing capacity in Tottenham Court Road. In addition to this, in light of the significant redevelopment opportunities coming forward in the Tottenham Court

Road area, there may be scope to increase Tottenham Court Road's market share over the plan period if the centre continues to expand its retail offer.

Holborn Central London Frontage

Comparison Goods Shopping Patterns

3.41 Table 4, Appendix 3 show that the household telephone survey results indicate that the catchment area of Holborn is limited. The strongest market share is within zone 1 (3%) within which Holborn is located. Holborn also draws a 1% market share from zone 8 and less than 1% from zone 4 and 7. The central London frontage draws no market share from the other survey zones, therefore the town has a relatively limited catchment area in terms of resident spend. Holborn retains approximately 0.3% of comparison goods spend from within the survey area. This is a low figure however it reflects the key influence that the West End has over shopping patterns and the role that Holborn serves meeting needs of the local workforce population and tourists who live outside the survey area.

3.42 No in-centre survey was undertaken within Holborn and the previous retail study did not assess inflow to Holborn central London frontage. Therefore on the basis of the in-centre results from Tottenham Court Road central London frontage which performs a similar retail role, and on our own assumptions and professional experience elsewhere, we have assumed that Holborn has also has an inflow of 87% from outside the survey area. As such, Holborn and Tottenham Court Road achieve the highest levels of inflow for all the centres in the Borough. Assuming that Holborn derives 13% of its trade from within the survey area (which equates to £5.5m), whilst an additional £36.7m is derived from outside the survey area. Overall we estimate that Holborn has a turnover of £42.2m.

3.43 Based on the total turnover for Holborn and an existing comparison goods floorspace of 4,735 sqm net, we estimate that the central London frontage has a sales density of around £8,905 per sqm net. This is a high sales density, however it is lower than the sales density for Tottenham Court Road. This is in line with the findings of our qualitative assessment which identified that Holborn is performing a day to day comparison shopping role based around essential comparison goods bought by workforce and tourist populations, rather than Tottenham Court Road which performs a more specialist furniture and electronics goods role. Overall we consider Holborn is performing well in terms of comparison goods sales densities.

Comparison Goods Capacity: Holborn

3.44 On the basis of Holborn maintaining its existing market shares from both within the survey area and outside, and assuming that new comparison goods floorspace trades at a sales density of £7,000 per sqm net, we estimate that there is residual expenditure arising in Holborn to support additional comparison goods floorspace up to 2031 on the basis of growth in population and expenditure.

3.45 In assessing capacity for comparison goods we are not aware of any comparison goods commitments coming forward over 500 sqm over the plan period. Based on our assessment it is evident from Appendix 3, Table 20 that in the short term there is residual expenditure to support 479 sqm net additional floorspace up to 2018. There is also theoretical capacity to support an additional 895 sqm net by 2023, rising to 1,515 sqm net up to 2028, increasing to 1,881 sqm net up to 2031.

3.46 The available expenditure to support additional comparison goods floorspace in Holborn does not take into account the commitment at Kings Cross Central, which may draw some expenditure arising within Holborn. Accordingly, the capacity figures identified in paragraph 3.45 above should be considered as an upper limit because it is likely that some of the capacity arising will be drawn to support the committed developments at Kings Cross Central, thereby reducing capacity in Holborn.