London Borough of Hackney

HACKNEY RETAIL AND LEISURE STUDY – HEALTHCHECK SURVEY

ROGER TYM & PARTNERS
Planners and Development Economists

Final Report
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Introduction

1.1 The London Borough of Hackney (LB Hackney) commissioned Roger Tym & Partners (RTP) in April 2004 to carry out a Borough-wide Retail and Leisure Capacity Study to provide background information to inform the forthcoming preparation of the Local Development Framework (which will replace the existing UDP), and to provide baseline information for the development of Area Action Plans and regeneration strategies for Dalston Kingsland and Hackney (Mare Street) town centres.

1.2 The Study comprises four separate reports, as follows:

- Main Report;
- Visitor Survey Report;
- Household Survey Report; and
- Healthcheck Report (this document)

The Study Aims

1.3 LB Hackney's brief comprises five discrete aims for the study as a whole:

1. To assess the future retail and leisure needs of the Borough and to advise on the most appropriate means of accommodating any identified need;
2. To consider Hackney's current and potential retail position in the retail and town centre network in the East London Sub-region;
3. To assess Hackney's competitive retail advantage and to develop overall strategies for promoting and improving both the retail offer and the vitality and vitality of the town centres;
4. To assess the likely impact of developments proposed outside the Borough (in particular at Stratford) on the Borough's town centres; and
5. To advise on the appropriate car parking levels for any proposed new retail and leisure development, and location and management strategy.

1.4 This Healthcheck Report deals primarily with Aims 1, 2 and 3 above. It assesses the vitality and viability of the three main shopping centres in the Borough by using the key town centre health indicators identified in PPG6. These are:

- Diversity of uses;
- Retailer representation and intention to change representation;
- Shopping rents;
- Proportion of vacant street level property;
- Commercial yields on non-domestic property;
- Pedestrian flows;
- Accessibility;
- Customer views and behaviour;
- Perception of safety and occurrence of crime; and
- State of the town centre environmental quality.

1.5 For the purposes of this report we have divided the indicators into two broad categories: market indicators; and qualitative indicators.

1.6 This Visitor Survey Report informs Chapter 3 and Chapter 6 of the Main Report.

Methodology

1.7 Below we provide a short summary description of each indicator, and an indication of the data sources we have used to gather the information.

Market Indicators

Retail Rents

1.8 Retail rents give an indication of the strength of the market and the demand for floorspace. It is standard practise in commercial property agency to value shop rents in terms of “Zone A” prices. The Zone A relates to the first six metres back from the front of the shop, this being the most valuable floorspace. Value decreases with distance from the front of the shop.

1.9 It is our usual practice to use a published source to obtain rental data. We obtained “Zone A” rental data from the Colliers CRE 2003 “In-Town Retail Rents Map” for the Hackney Centres, where available, and other centres in the sub- region with a comparable role in the London retail hierarchy.

1.10 Colliers CRE undertake an annual assessment of the open market “Zone A” rents in 544 shopping locations in the UK and Republic of Ireland. The Colliers CRE quoted rental values for each location relate to a hypothetical shop unit of optimum size and configuration in the prime pitch. However, Colliers CRE has only published rental data for Dalston and Stoke Newington since 2001, and does not publish any data for Mare Street. As long term and consistent published data is not readily available for the Hackney centres, which is itself an indication of their limited importance in the region, we only use the Colliers CRE data for rental comparisons with other centres in the sub-region.

1.11 To supplement the Colliers CRE rental data and to obtain a view on the spread of rental levels within each centre, we have sourced data from a number of commercial property agents active in the area. In each case we have discussed rental values across the centre with a number of agents and taken a consensus view on values. We present rental data for all the centres in **Table 1** and **Table 3** of **Appendix 1.**

Yields

1.12 Yields are the market’s assessment of investment risk, and in the context of healthcheck assessments give an indication of the attractiveness of a centre to investors. Yields are the ratio of rent to capital value, and are usually calculated as a result of a retail property transaction, and expressed as a percentage. Broadly speaking the lower the yield the more attraction to investors, as this will reflect the expectation of future rental growth. The converse is also true, the higher the yield the lower the expectation of rental growth, the greater the risk and this is reflected in low capital values. Investors are on the whole less inclined to commit funds to high yielding property, although the year’s purchase (i.e. the period in which the actual investment will be recouped) will be shorter than low risk low yielding property.

1.13 We have obtained yield data for the Hackney centres, where available, and other centres in the sub- region with a comparable role in the London retail hierarchy from the latest available Valuation Office Agency (VOA) January 2004 “Property Market Report”. The VOA monitors prime retail yields in 550 shopping centres throughout England, and is based on the yield of a modern standard sized shop unit in the highest rented position in the town centre.

1.14 However, the VOA does not publish yield data for Stoke Newington. In this instance we obtained the view of commercial property agents active in the area.

1.15 The yield data is presented for all the centres in **Table 2** and **Table 4** of **Appendix 1.**

Retailer Requirements

1.16 Retailer demand provides an indication of how attractive a centre is to traders that are currently not represented. Retail demand can be assessed by location, by type of trader and by floorspace requirement. We used the Estates Gazette Interactive database (EGi) to establish retailer requirements, which provides a regularly updated guide to the property requirements of leading retail and leisure chains in the UK and Ireland. Our search of the database was conducted in June 2004.

1.17 The database does not include retailer requirements for small independent operators. However, we obtained the views of local commercial property agents to establish the level and type of demand for units from the independent retail sector.

1.18 From the EGi database we have obtained data for the current demand for in-town A1 "convenience", A1 "comparison", A2, A3 and D2 space for the Hackney centres and also other London major and district centres by way of comparison. This data is presented for all the centres in **Appendix 2.**

Diversity of Uses

1.19 The quantum and quality of the different uses within a centre gives an indication of the role of the centre and the attraction to shoppers.

1.20 We have calculated the amount and proportion of ground floor floorspace in the different use class categories within each centre. The use class categories included are: A1 convenience goods, A1 comparison goods, A2, A3, D2, sui generis, vacant and other. The 'other' category comprises of all other uses identified in the survey work such as residential and other accommodation, offices, and health (e.g. Class C1, C3, B1 and D1). The land use surveys were carried out by RTP in April 2004 based on OS digital mapping supplied by LB Hackney. This data provides the most accurate assessment of the amount of floorspace in the centres and is presented in tabular form in the diversity of use section for each centre.

1.21 The boundary of each centre is based on the UDP defined town centres. However, for some centres the UDP defined boundary does not accurately reflect the units within retail and leisure uses. We assumed that such units, while outside the defined town centre boundaries were still associated with that centre. In such circumstances we have incorporated the floorspace data for those units within the overall centre total.

1.22 To allow for comparison with centres elsewhere we have obtained data from Experian GOAD that gives the quantum and proportion of floorspace by retail category and benchmark the Hackney centres against floorspace averages for the London and Great Britain, as we have for vacancy. The GOAD categories are: comparison goods, convenience goods, service goods and miscellaneous. GOAD is the only consistent dataset that can be used to compare Hackney's centre against benchmarks. GOAD data is presented for all the centres in **Table 1, Table 2** and **Table 3** of **Appendix 3.**

1.23 We do not rely on the GOAD data to provide accurate floorspace figures for each centre, because the GOAD data are notoriously inaccurate for two principle reasons, (i) the exclusion from the figures of trading area on floors other than ground, and (ii) basing the area calculation on the property boundary rather than the building area (ie the boundary will include areas external to the building such as yards and parking areas).

Vacancy Rates

1.24 Vacant property reduces the attraction of a centre and, depending on the quantum and location, can indicate demand-side failure. We have calculated the amount and proportion of vacant ground floor floorspace through the land use surveys, carried out by RTP in April 2004 based on OS digital mapping supplied by LB Hackney. The vacancy data is presented in tabular form in the diversity of use section for each centre.

Qualitative Indicators

Pedestrian Flows

1.25 The most straightforward measurement of the vitality of a shopping street / shopping centre is to record the number of pedestrians using a centre's streets during normal shopping hours. Such a measurement provides a good indication of the vitality of the streets comprising the centre, the centre as a whole, and also changes across the day. Pedestrian flow, or footfall as it is more commonly referred to, is a vital consideration for retailers when evaluating different locations. The relationship between footfall and location is simple; the heavier the footfall the higher the prospect of sales the better the pitch.

1.26 Accordingly footfall surveys were undertaken in the Hackney centres on Friday 7th and Saturday 8th May 2004. In each centre, surveys sampled footfall at five locations across the centre chosen to represent a range of pitches including the busiest, but also including some other key strategic locations. The locations were chosen in association with the client and are shown on the Maps 1, 2 and 3 of Appendix 7.

1.27 The surveys involved a team of enumerators counting the total number of pedestrians passing along the street (counted across the full street width, building to building line) at each location. All the surveys were carried out simultaneously so as to maintain comparability. A five minutes/hour footfall sample was taken through-out the core shopping day (10.00 – 16.00). The sample fraction (1/12th) is relatively high for such surveys and is therefore considered to provide very reliable data.

1.28 Weather conditions in each centre on all the days surveyed were dry. The relative proportions of shoppers in each of the centres will be, as far as possible, shielded from the impact of weather due to the fact that the surveys were carried out simultaneously.

1.29 The data and maps identifying the count points for each centre are presented in **Map 1, Map 2** and **Map 3** of **Appendix 7.**

Accessibility

1.30 Accessibility issues concern the ease and convenience of access to the centre by a choice of means of transport, and ease of movement on foot within the centre.

1.31 In terms of the "to" we consider the location of the centre in terms of the public transport network and also the road network in respect of the private car and bicycle. We also consider the arrival points, those being stations, bus stops, off-street parking, on-street parking and cycle racks. We are naturally aware that a proportion of visitors in most centres will arrive on foot, but because of the dispersed nature of this form of travel we do not make reference to it here.

1.32 The "accessibility within" assessment considers the ease of movement of pedestrians within the centre, and makes reference to roadway crossing facilities, the quality of the pavements and the barriers to ease of movement.

1.33 We have based our assessment on qualitative information gathered through our own centre surveys, conducted during April 2004.

Safety and Crime

1.34 Crime, and more particularly the perception of crime, can be damaging to an area and its future prospects. Visitors think twice about making a trip to a centre if it is regularly linked with incidents of crime. Crime can therefore play a major negative role in changing shopping habits.

1.35 To establish the crime levels in each centre we used statistics from the Metropolitan Crime Report Information System (CRIS), obtained by the Community Safety Team (LB Hackney). The crime data for each centre relates to the UDP defined town centre boundaries. Separate data is provided for crime against the person and crime on property. The data is presented for the five years from April 1999 to March 2004 within the crime and safety section for each centre.

Customer Views and Behaviour

1.36 The views and shopping habits of the catchment population are important indicators that permit the assessment of the degree of satisfaction with the centre, and specifically with the range and quality of the shopping provision and non-shopping services and facilities.

1.37 The Household and Visitors' Surveys, undertaken as part of this study, are used to assess the views and behaviour of shoppers in each centre. The surveys identify the strengths and weaknesses of each centre in general and point to gaps in the shopping/leisure provision.

Environmental Quality

1.38 The quality of the environment is a major determining factor that influences where shopping trips are undertaken. Shopping is increasingly seen as a leisure experience and so the overall quality of the buildings, the public open spaces and the general amenity of a centre is vital in maintaining a centre's attractiveness to shoppers. A poor quality building in a prominent location will blight in the same way that an attractive building frontage will bring a positive effect.

1.39 We have based our assessment on qualitative information gathered through our own centre surveys, conducted in April 2004.

Development Opportunities

1.40 The presence of vacant or under-used sites and buildings within a centre are a key factor which influence visitor perceptions of a centre. Large and prominently located sites that remain vacant for extended periods can undermine confidence in a centre, as investors and landowners, for whatever reason, are unwilling or unable to redevelop sites. The redevelopment of vacant sites or buildings for retail or leisure use can be used to increase the diversity of uses and attractiveness of a centre.

1.41 As part of our centre surveys, undertaken in April 2004, we identified any large vacant and derelict sites and buildings located within each town centre, which could potentially be used for new retail and leisure uses. Our meetings with local commercial property agents and LB Hackney's Property & Valuation Department also highlighted other potential vacant sites.

1.42 Having identified potential opportunity sites, we obtained committee reports and development briefs, where available, to establish the planning status of each. The development opportunities for each centre are presented in the last section of the healthcheck for each centre.

1.43 The potential suitability of each site for retail and leisure use is assessed in Chapter 6 of the Main Report.

2 KEY FINDINGS

Dalston Kingsland

2.1 This is the largest of Hackney's centres in terms of the amount of retail floorspace, and is the best performing retail centre in Hackney. It has the highest rents but comparable yields to the other centres.

2.2 The centre has a strong core area which is the busiest pedestrian location in Hackney. A key attraction of the centre is Ridley Road market.

2.3 The centre suffers from high levels of crime and a poor shopping environment, which are likely to undermine any efforts to make the centre attractive to shoppers and major multiple retailers.

2.4 There are many key development sites in Dalston, which are adjacent to the core retail area and provide the opportunity to increase the amount of retail and leisure floorspace in the centre, and provide large retail units suitable for major multiple retailers.

Hackney Mare Street

2.5 Overall, Mare Street has the largest amount of total floorspace of Hackney's centres, but a high proportion (45%) is within non-retail uses. For example, the Town Hall, Central Library, and leisure uses will contribute to the total floorspace within the centre.

2.6 This is the second largest of Hackney's town centres in terms of total retail floorspace, but contains the largest Core Shopping Frontage area. It provides the most attractive shopping environment of the three Hackney centres.

2.7 Mare Street performs well as a centre in terms of rents and yields, and which provides some larger retail units attractive to major multiple retailers. Marks & Spencer, who are considered to be a key attraction for a town centre, are located in Mare Street.

2.8 The lack of bars and restaurants is both a weakness and an opportunity as the evening economy is improving and such uses would be complementary to the civic and D2 facilities already established in the centre. There are currently some prominent vacant buildings which could be re-used to accommodate such uses.

2.9 The key development sites are located at the main entrance to the centre, which provide an opportunity to make the centre more attractive and welcoming for visitors. There are also opportunities to re-connect part of the centre by improving or creating pedestrian links within it.

Stoke Newington

2.10 Stoke Newington is the smallest of Hackneys town centres, and it has far fewer multiple retailers and a poorer range of shops. Local people will have to visit other centres to meet all their shopping needs.

2.11 Stoke Newington, and Church Street in particular, is characterised by independent and niche retailers, restaurants and café uses, and there is strong demand from retailers for units located in the prime retail pitches.

2.12 There is one retail development opportunity site in Stoke Newington.

3 DALSTON KINGSLAND

Overview

3.1 Dalston Kingsland is the second largest of Hackney's town centres, only marginally smaller than Mare Street. However, Dalston is the centre with the largest amount of retail floorspace, and is the dominant centre in Hackney. It is classified in the London Plan as a Major centre, the only one in Hackney, and our floorspace survey indicates that it provides approximately 49,500sqm gross of floorspace, of which 40,200sqm (equivalent to 82%) is currently used for retailing[1] purposes. The centre, as currently defined in the adopted UDP (1995) covers all of Kingsland High Street, a distance from north to south of approximately 750m, and also includes a section of Dalston Lane. The centre is shown in **Map 1, Appendix 7**. The key retail attractions in the centres are the Ridley Road Market and the 9,000sqm Kingsland Shopping Centre, both located centrally within the centre.

3.2 Immediately to the south, is the defined Kingsland Road local shopping centre. To the north is the Shacklewell area, which also contains some shops and services, but is not currently defined as a retail centre.

3.3 A new underground station at Dalston Junction is planned within the centre as part of the proposed East London Line Extension (ELLX). There is a number of development opportunity sites associated with this proposal, which is likely to result in larger retail units being provided adjacent to the core retail area. In particular, such units are likely to attract multiple high street retailers to Dalston, improving its overall attraction.

Market Indicators

Retail Rents

3.4 The different retail pitches in Dalston are shown on **Map 1, Appendix 7.** The prime retail pitch is located within Kingsland Shopping Centre and on Kingsland High Street immediately adjacent to the shopping centre. The best retail property in this pitch currently achieves Zone A rents of between £650/sqm and £750/sqm according to local commercial property agents, with the higher levels achieved close to MK One and Peacocks on Kingsland High Street, and within Kingsland Shopping Centre close to Burtons and Dorothy Perkins.

3.5 According to Colliers CRE 2003 data Dalston Kingsland achieved the highest rental levels of Hackney's centres, at approximately £800/sqm. Although as with all Colliers CRE data this assessment is based upon an optimum retail unit in the prime pitch. The rental levels for Dalston have risen from £650/sqm in 2001, the first year that rental data for Dalston and the other Hackney centres was published.

3.6 While Dalston has the highest rental levels of Hackney's centres, a more informative yardstick is to compare prime Zone A rents in the centre with other major centres in north and north east London. We set out the most recent Colliers CRE rental data in **Appendix 1 Table 1**. The data indicates that prime 2003 rents in Dalston, at approximately £800/sqm was the same as Nags Head (Holloway), and higher than East Ham at £700/sqm. However, rental levels were substantially below other Major centres such as Camden, Islington (Angel) and Stratford (approximately £1,950/sqm, £1,400/sqm and £1,023/sqm respectively). Wood Green, a Metropolitan Centre, achieved a Zone A rental level of approximately £1,300/sqm.

3.7 The secondary retail pitch is located in the remainder of Kingsland High Street, north of Winchester Place and south of Boleyn Road. The best retail property in this pitch

[1] Retail in classes A1, A2 and A3

achieves rents of between £275/sqm and £325/sqm. Marks & Spencer previously occupied a unit at 3-13 Kingsland High Street, but left Dalston in the 1980's. As part of the 1992 RTP study, Marks & Spencer were asked if they were likely to return to Dalston, but at that time expressed no desire to do so. Local agents consider that these units and others further south are too large and therefore expensive for the smaller independent retailers who currently constitute most of the retailer demand for representation in the secondary retail pitch.

3.8 Outside the primary and secondary retail pitches rental levels drop dramatically. Retail units in Dalston Lane, where development opportunities exist, currently achieve rents of between only £100/sqm and £150/sqm.

Yields

3.9 Valuation Office Agency's 2004 published data, shown in **Appendix 1 Table 2,** indicates that yields in Dalston Kingsland have improved considerably over the past decade from 12% in 1994 to 8.75% in 2003. Local agents confirm that yields are indeed between 8 and 9%, which is a similar level to yields in Hackney Mare Street and Stoke Newington. Compared to the other Major centres identified in **Table 2** yields in Dalston Kingsland has hardened the most (by 3.25%), albeit from the weakest investment yield a decade ago. Nevertheless yields in Dalston are still higher than Stratford (at 8%), but are now equivalent to the Angel and better than Walthamstow (at 9%). The significant improvement in yields is almost certainly down to the prospect of major improvements in trading that the transport infrastructure proposals will herald.

Retailer Requirements

3.10 **Appendix 2** sets out the Estates Gazette Interactive published retailer requirements data for all the Hackney town centres. This indicates that there are seven national multiples (chainstore) retailers with space requirements in Dalston Kingsland, which is low by general standards, and only half that for Hackney Mare Street. The requirements in Dalston are mostly from A1 comparison retailers, including Bonmarche, Phones4U and O2. The multiples almost without exception seek space within or immediately adjacent to the primary retail area. However, suitable opportunities have been few and far between for the multiples for a few years now as vacancy rates continue to be virtually zero, which suggests that new modern space in the right location would be attractive to retailers. Although the low level of multiple interest suggests that new space would need to attract a mix of local independents trading up as well as the multiples.

3.11 In **Table 1** below we compare requirements in Dalston with that for other major centres. Dalston has far fewer national multiple retailers seeking space than other nearby centres of Wood Green[2], Walthamstow, Stratford and Islington.

Table 1: Retailer Requirements for Other Major Centres

MAJOR CENTRES	A3	A1 Comparison	A1 Convenience	D2	TOTAL
Camden Town	2	17	2	0	21
East Ham	2	3	2	0	7
Nags Head (Holloway)	2	8	1	0	11
Islington (Angel)	17	39	5	1	62
Stratford	4	20	2	0	26
Walthamstow	4	15	1	0	20
Wood Green	4	16	3	0	23
Dalston	**1**	**6**	**0**	**0**	**7**

Source : Estates Gazette Interactive (June 2004)

[2] Wood Green is a defined Metropolitan Centre in the London Plan (February 2004)

3.12 Dalston, along with East Ham, has the lowest level of retailer demand when compared with other major centres. There are a number of factors which are contributing to this comparatively low level of demand. Dalston suffers from a poor image amongst retailers and commercial property agents. This stems from a perception of a high level of crime, coupled with the poor street environment, all of which will undermine the centre's attraction as a place to shop, and as a place to invest. In addition, according to local business organisations the centre does lack available shop units with large floorplates required by multiple retailers, and this significantly reduces Dalston's ability to compete with other major centres in north London. The development opportunities in the centre could address the latter factor by providing appropriately sized and appropriately located units attractive to multiple retailers.

3.13 While above we have described multiple retailer requirements, commercial agents indicate that there is good demand for representation from local independent retailers. In contrast to multiple retailers, smaller independent retailers generally seek much smaller retail units in centres that attract the right type of clientele for their business. For example, niche retailers which sell high value goods such as jewellery or china, and appeal to upmarket customers are more likely to be attracted to Hoxton, Broadway Market or Stoke Newington town centres rather than Dalston, and indeed this is borne out in the analysis of the mix of uses in Dalston below. However, independent retailers who cannot afford the rents in these centres, provide lower value routine purchase goods, benefiting from a busy location with high footfall are more likely to seek space in Dalston. Local commercial agents indicate that Dalston's multi-ethnicity continues to attract independent traders serving in particular the Turkish and Afro Caribbean communities.

Diversity of Uses

i) Floorspace Survey

3.14 In **Table 2** below, we present the aggregate totals for the number of outlets and the total floorspace totals by Use Class Order for Dalston Kingsland. The table shows that Dalston Kingsland is the second largest of Hackney's centres. It has approximately 49,500sqm of floorspace, of which 40,200sqm (82%) is in retail use. This is the Hackney centre with the largest amount of retail floorspace. The centre supports 417 retail units, which includes 180 stalls in Ridley Road Market. Excluding the market there are 237 retail shop units, which is slightly more than Stoke Newington (with 233 retail units). However, Stoke Newington has far less overall retail floorspace, demonstrating that Dalston Kingsland contains much larger retail units, although as identified above the units in Dalston do not meet modern retailer size requirements.

3.15 The defined Core Shopping Frontage is very small, and only contains approximately 5,100sqm of floorspace within only 20 units. It is not surprising that all of this space is used for retail purposes, and vacancy is zero. Surprisingly, the indoor section of the Kingsland Shopping Centre is not within the defined core shopping frontage area.

3.16 The lack of vacant units within the core shopping area, and large units in particular means that Dalston is unable to attract national multiple retailers to locate in the centre. The lack of available units explains, in part, why there are fewer national multiple retailers seeking to locate in Dalston. As mentioned above, the provision of new modern retail space, which is well-located, would attract retailers to Dalston

3.17 The stalls within Ridley Road Market have not been included in floorspace calculations, but the market contains approximately 180 pitches, with stalls specialising in world foods, clothing, household goods and toiletries. We have estimated that Ridley Road Market accounts for a total of 3,000sqm[3], which is split 70% convenience and

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[3] The estimated area of Ridley Road Market is derived by assuming that the retail floorspace comprises the stalls and their circulation space, and equals the approximate length of the street occupied by stalls multiplied by its width.

30% comparison. We have used these estimates to calculate the proportion of expenditure that the market contributes to the total spending within Dalston town centre.

3.18 Dalston Kingsland has a low proportion of D2 leisure uses, representing only 3% of floorspace (1,393sqm). The main D2 activities are Rio Cinema and Kings Gym. This is a much lower proportion than Hackney Mare Street, which has 14% of its floorspace used for D2 activities. This is very surprising as Dalston Kingsland is the dominant centre in Hackney. However, proposed leisure developments at opportunity sites in the centre are likely to address this situation, adding to the leisure attraction.

Table 2: Diversity of Uses in Dalston Kingsland

	OUTLETS	FLOORSPACE	
CORE AREA		SQM	%
A1 Comparison	15	3,777	8
A2	1	96	0.2
A3	4	1,215	2
CORE TOTAL RETAIL	20	5,088	10
CORE TOTAL	20	5,088	10
RIDLEY ROAD MARKET			
A1 Comparison	54	900	2
A1 Convenience	126	2,100	4
TOTAL	180	3,000	6
NON-CORE AREA			
A1 Comparison	131	16,937	34
A1 Convenience	30	8,077	16
A2	23	3,295	7
A3	33	3,811	8
Sui Generis	3	215	0.4
D2	6	1,393	3
Vacant	30	3,934	8
Other	25	3,530	7
NON-CORE RETAIL	217	32,121	65
NON-CORE TOTAL	281	41,192	84
TOTAL RETAIL	417	40,208	82
CENTRE TOTAL	481	49,279	100

Source: RTP Unit Survey (April 2004) using OS Area Data

ii) Benchmark Comparison

3.19 Having identified above the floorspace totals in Dalston Kingsland, we now move on to compare the amount of floorspace in different uses in the centre with two benchmarks, the average mix of uses for all London centres and the GB average using data sourced from Experian. **Appendix 3 Table 1** shows that Dalston Kingsland has marginally more convenience goods floorspace than the London and GB averages, but much less comparison goods floorspace (44%) compared to 47% (London) and 53% (UK). This represents a similar but less extreme pattern and diversity of uses to that for the other Hackney centres.

3.20 Dalston Kingsland has 18% of its floorspace devoted to convenience goods floorspace, compared with the London average of 17%. The centre is particularly well served by butchers and bakers. In terms of groceries and frozen foods, Dalston Kingsland has an average amount of floorspace when compared to the benchmarks (Sainsbury's and Iceland, within Kingsland Shopping Centre will contribute to the provision). However, there is an under-provision of greengrocers and fishmongers.

3.21 Analysis of the comparison goods floorspace provision shows that the centre has 43% of floorspace devoted to comparison goods, whereas the UK average is 53%. The under-provision is most noticeable in books and stationers, gifts, department and catalogue showrooms, and sports. However, the centre is particularly well provided for in terms of footwear floorspace.

3.22 Analysis of the service use floorspace provision shows that Dalston Kingsland is well provided for, with 23% compared to the GB average of 20%, but is marginally underprovided for when compared with the London average, which is 27%. The centre is well served by hairdressing, beauty and health uses in particular.

Vacancy Rates

3.23 **Table 2** above shows that there are a total of 30 vacant units in Dalston Kingsland, comprising approximately 3,900sqm, representing 8% of the total. This is the second highest proportion of vacant units of all Hackney's centres only marginally below Stoke Newington at 8.4%, but all of the vacant units are located beyond the primary retail frontages.

3.24 Although Dalston's core frontages are fully occupied, unlike both Hackney Mare Street and Stoke Newington's core frontages, a reason for this could be that Dalston Kingsland's core area is much smaller and more tightly defined than the other centres - covering only 20 retail units.

3.25 The vacant units are mostly located in Dalston Lane, at both the eastern and western ends. In the western part, adjacent to the proposed ELLX station, where retail and leisure development opportunities exist. At the eastern end, the vacant retail property is in a much more peripheral location compared to the core retail pitch. There is a tendency for linear centres such as Dalston to have much weaker retailing pitches at the margins due to the remoteness from the core retail area.

Qualitative Indicators

Accessibility to Dalston Kingsland

i) By Public Transport

3.26 Dalston Kingsland has good accessibility by public transport, with the A10 being a major bus route into and out of Central London with many stops along the high road. There are 10 bus routes which serve Dalston, and 3 of these routes operate a night bus service. These routes serve locations both east and west including Hackney Central, and north and south including Stoke Newington. Dalston is also well served by buses travelling to the West End, and there are bus connections serving Wood Green town centre, which is both a benefit and a disadvantage because it makes both these locations accessible for residents in the Borough.

3.27 Dalston Kingsland railway station (North London Line) is well located in the heart of the primary shopping area, and provides good east-west rail links to the centre linking up with Highbury and Islington to the west and Hackney Central to the east. Our observations indicate that a large number of rail users utilise Dalston Kingsland station for shopping purposes.

3.28 The completion of the East London Line Extension and the opening of the Dalston Lane station will connect Dalston to the underground network, providing new and important north-south links.

By Private Transport

3.29 Dalston Kingsland is not very accessible by private transport due principally to the fact that the high road is routinely heavily congested, there is a perception of undersupply of car parking and little opportunity for car borne shoppers to stop and park for a limited period of time given that the High Road is a red route and Dalston town centre is covered by a Controlled Parking Zone, which restricts on-street parking to residents and businesses.

3.30 In total Dalston provides 570 off-street car parking spaces for all visitors including those working in the centre as well as shoppers. The principal car park is the Kingsland Shopping Centre car park, with approximately 390 spaces, which is conveniently located for access to the prime shopping area. There is also an off-street car park at Bentley Road (109 spaces) and a smaller facility at Gillett Square (74 spaces), although the Council have aspirations to remove the Gillett Square facility, and create a much needed new public space surrounded by various uses including residential, office and leisure.

3.31 We have gathered data on off-street car parking numbers and total retail floorspace in the benchmark centres to assist our assessment of whether Dalston is over or undersupplied with car parking. The data and the car park to floorspace ratios for Dalston and the other centres are presented at **Table 3** below.

Table 3 – Car Parking Dalston and Benchmark Centres

Major Centres	Off Street Car Parking	Total Retail Size (sqm)	Parking Ratio/sqm
Camden Town	669	105,010	157
East Ham	216	53,660	248
Nags Head (Holloway)	n/a	56,800	n/a
Islington (Angel)	n/a	38,360	n/a
Stratford	n/a	62,510	n/a
Walthamstow	2,000	85,950	43
Wood Green	2,500	108,830	44
Dalston	**573**	**40,718**	**71**

Source: RTP using ODPM Floorspace Data (2000)

3.32 The table indicates that Dalston has a good level of provision (1 space to every 71 sqm of retail floorspace), although the Visitor Survey indicates that Dalston is the centre where the highest proportion of visitors suggested that more car parking would improve the centre. Only Walthamstow (1:43) and Wood Green (1:44) have a higher ratio (1:43), which is likely to reflect their outer London location. In addition, Wood Green is a purpose built 1970's shopping centre where the car was deliberately well-provided for in the design.

Accessibility within Dalston Kingsland

3.33 We have previously noted that Dalston is a linear centre that has town centre activities on either side of the High Road throughout its length. The High Road is a very heavily trafficked route, which is a negative aspect from the perspective of the quality of the shopping environment, but because the traffic speeds are generally slow and there are a number of signalled pedestrian crossing points in the heart of the centre pedestrian movement is not inhibited as much as in some other London linear centres. The provision of a crossing point adjacent to the station, the bus stops close by and the main car park to the rear of the covered centre means that the main arrival points and the principal retail attractions (the covered centre, the prime area on the High Road and the market) are all highly accessible.

3.34 Generally the pavements in Kingsland High Street are fairly narrow, which because the pavements and roadway are also busy inhibit pedestrian movement within the centre. Ridley Road Market is a considerable attraction, and the area regularly gets very busy and congested. This is naturally a major plus point for the traders and possibly indicates that opportunities exist for expansion.

3.35 In contrast, Kingsland Shopping Centre provides a much more pleasant pedestrian environment, with easy movement between shops. It is a covered shopping centre, which is considered to be becoming more successful in attracting pedestrians, particularly now that Sainsbury's are located at the eastern end of the centre. The 1992 RTP study commented on how the shopping centre was not that successful at attracting shoppers to Dalston. At that time the centre had 8 vacant units, and a Leo's foodstore was the main convenience anchor store for the Shopping Centre, while Sainsbury's were located outside the centre on Kingsland High Street.

Footfall

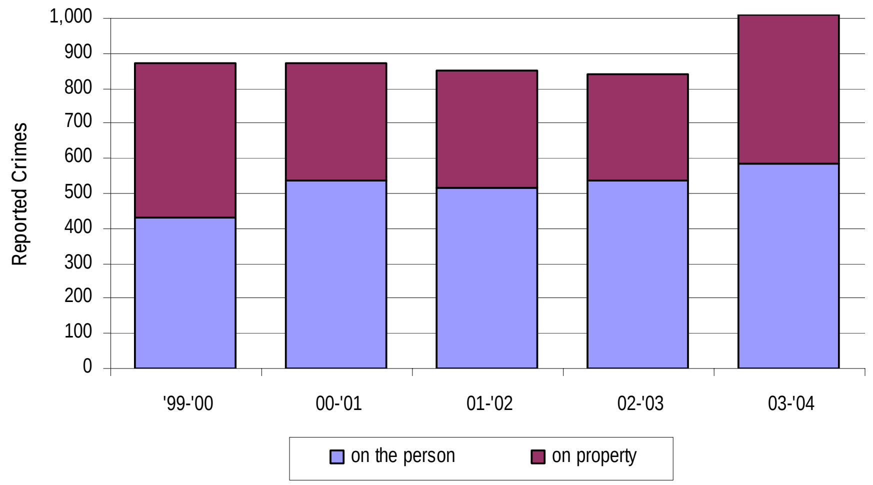
3.36 As part of this study we undertook a footfall survey, which was sampled at five locations within Dalston, shown on **Map 1, Appendix 7**. We present the resulting footfall data in table and chart format at **Appendix 4, Table 1** and **Appendix 5, Figure 1.** The survey demonstrates:

- Overall Dalston has the highest footfall counts of Hackney's town centres, particularly on Fridays, but are only marginally higher than the footfall counts in the prime retail areas of Hackney Mare Street on Saturdays. The centre exhibits the traditional pattern of higher footfall on Saturdays than on the weekday.
- The busiest location in Dalston Kingsland is at the entrance to Ridley Road Market (location 3), with recorded footfall of 12,600 on Friday, rising to almost 22,000 on Saturday. This location is much the busiest in the whole of Hackney and reinforces the importance of the market as a key attraction for visitors to the centre.
- The second busiest location is outside Peacocks on Kingsland High Street (point 2) with 11,700 pedestrians on Friday and 17,300 on Saturday. Of all the Hackney locations only Mare Street on a Saturday achieves comparable footfall to this location.
- Beyond the two prime locations (points 2 and 3) footfall is much lower elsewhere in Dalston. On Friday, Ridley Road Market has almost two and a half times more pedestrians than Dalston Lane (point 4), and on Saturday this area has over four times more pedestrians than the southern part of Kingsland Road (point 5).

Safety and Crime

3.37 Crime statistics for all Hackney's centres are presented in **Appendix 6** and in **Chart 1** overleaf. Crime Statistics for the five year period from April 1999 to March 2004 indicate that Dalston Kingsland has the highest overall level of crime allegations of Hackney's town centres, in both crime categories. In total there were over 1,000 crimes in the year 2003/04, of which 586 were against the person, and 422 were on property. This is an increase of 36% and a reduction of 5% compared to five years earlier respectively. Crime against the person is clearly the key concern in Dalston, as even more than crime on property this is likely to deter shoppers from visiting the centre.

Chart 1 – Dalston Crime Statistics – 1999/00 to 2003/04



Source: Metropolitan Crime Report Information System (CRIS) data provided by Community Safety Team (LB Hackney)

3.38 According to the Hackney Crime & Disorder Audit (1999/2001) Hackney has amongst the highest levels of street robbery in the Metropolitan area. Reducing crime in Dalston is an issue that must be tackled if the centre is to be attractive to shoppers and multiple retailers and to allow it to improve. The centre already has the benefit of CCTV cameras, and there are a number of initiatives to tackle crime e.g. Safer Streets, Hackney Bus Initiative, Dalston Partnership Policing Project, but whilst the trend over the past five years was for a reduction in crime on property it has been consistently upwards in respect of crime on the person. Added to which the 03/04 figures are sharply upward in both respects. This is a matter of concern.

3.39 Interestingly, despite the higher crime figures, the Visitor Survey results show that reducing crime was proposed as an improvement for a much lower proportion of visitors to Dalston compared to both Mare Street and Stoke Newington. This suggests that this issue does not deter existing visitors to the centre. However, crime and the perception of crime will further discourage those potential visitors, who instead choose to shop in other centres.

Environmental Quality

i) Streets & Open Spaces

3.40 In our view Dalston has a poor street environment, which undermines the attractiveness of the centre as a retailing and shopping destination. This is primarily due to the juxtaposition of a heavily congested road and shoppers on generally narrow pavements with little or no planting to soften an otherwise inhospitable street scene. That said the covered shopping centre provides a traffic free shopping environment and the Ridley Road Market also offers pedestrians an opportunity to escape from the traffic dominated environment. We have previously referred to proposals to create a new area of public open space at Gillett Square, which if approved will be located away from the prime shopping area and the busy main road. When developed, this site will provide an attractive space for all visitors to the centre including shoppers, as well as new cultural attractions for Dalston.

ii) Building Frontages

3.41 Unlike Hackney Mare Street and Stoke Newington, the prime shopping area of Dalston Kingsland is not contained within a Conservation Area, and in addition, there are few listed buildings and generally few buildings of architectural merit. As a result the centre is the least visually attractive of the three, and in our view the shop fronts are less colourful, less well maintained and less interesting than the other Hackney centres and indeed centres generally elsewhere.

iii) Street Furniture & Cleanliness

3.42 The centre is noticeably devoid of seating areas. However, this is a consequence of the lack of public open space, and that which is available (within Kingsland Shopping Centre) being regularly heavily used. Again the Gillett Square proposals provide the opportunity to provide areas for relaxation, and if well integrated with the retailing area would be undoubtedly popular with shoppers.

3.43 Dalston has a problem with street cleanliness compared to centres elsewhere. The Visitor Survey confirms this view, with street cleanliness being the improvement requested by the highest proportion of visitors. A considerably higher proportion of Dalston's visitors suggested tackling cleanliness to improve the centre, compared to the other Hackney centres. Ridley Road Street market and the other market stalls located around this area have a major impact upon the cleanliness of the centre. This is particularly noticeable around the northern access to Kingsland Shopping Centre from the market, but permeates throughout the centre and is a significant detractor for retailers and shoppers.

Development Opportunities

3.44 There are a number of opportunity sites and existing proposals in Dalston Kingsland which provide the opportunity to increase retail and leisure provision in the centre. Most of these encouragingly are located adjacent to the Core Shopping Frontage, and some are associated with, and adjacent to, the proposed East London Line Extension. The potential opportunity sites are as follows:

Table 4 – Dalston Kingsland Development Opportunity Sites

Site	Proposal
Dalston Town Centre North Site “Cantor Scheme” Dalston Lane / Ashwin Street	A planning application was submitted for the redevelopment of this site, comprising 3,725sqm retail, 3,265sqm office, 550 residential, 170 car parking spaces. The application was refused because inadequate provision was made for employment generating floorspace, and there was not enough retail uses proposed for this town centre site. RTP’s 1992 study recognised this site as having redevelopment / retail potential, and considered the site to be the next logical phase of development in Dalston. It envisaged a scheme that provided links to Kingsland Shopping Centre and created strong north-south pedestrian flows.
Dalston Town Centre South Site “Chelverton Scheme” Dalston Lane	A planning application has been approved on this site for mixed use development comprising residential, 2,200sqm leisure, 1,100sqm retail, commercial / training floorspace, and 117 parking spaces. RTP’s 1992 study recognised this site as providing a potential extension to Dalston’s retail core.
East London Line Extension Site Dalston Lane	A planned extension to the underground rail network, providing tube links into Dalston, which also includes a bus interchange. The extension is expected to be operational by 2010. Retail uses could also be part of redevelopment. The 1992 RTP study considered that in the long term a deck could be constructed over the railway line to provide a much larger commercial development scheme.
Architectural Salvage Site 27 Dalston Lane	A planning application has been approved for gym, business and residential use.
Thames House Hartwell Street	A planning application has been submitted for flats, live/work units, 2,987sqm retail, gym and 39 car parking spaces.
Kingsland Shopping Centre	A planning application has been approved to provide an extension to the existing shopping centre. The proposal comprises a 2 storey extension over existing car park to provide 3,800sqm retail, but leading to the loss of 42 car parking spaces. RTP’s 1992 study recognised that the existing pedestrian routes in Dalston run east–west only, and the existing shopping centre turns its back on areas to the south. It recommended increasing permeability by opening a north-south pedestrian route linking Ridley Road Market to Ashwin Street. The committee report on the application allowed for a future bridge over the railway line to Ridley Road Market, which will link northern and southern areas, and also provide improved pedestrian links to Dalston Lane.
Blockbusters 130 Kingsland High Street	An application has been approved for retail uses on the ground floor with residential use above. The current building is single storey and is set back from the street. The proposed building will reintroduce a street frontage and provide a more visible retail unit.
Ridley Road Market	There has been a proposal to provide improved market storage facilities and toilets at the market.
Gillett Square, Gillett Street	A planning application has been submitted for a public square and cultural, leisure and retail buildings. The site is currently occupied by a Council owned car-park.

4 HACKNEY MARE STREET

Overview

4.1 Hackney Mare Street is the largest of Hackney's town centres in terms of total floorspace, providing a total of approximately 51,300sqm gross of floorspace, of which only 28,300sqm (55%) is in retail use. This represents a much lower proportion of retail space than the two other centres. In comparison, 82% of floorspace in Dalston is used for retail uses, and 76% of Stoke Newington's floorspace is used for these purposes. This is a result of the higher proportion of leisure uses, and also that Mare Street is the civic and administrative centre of Hackney. The centre, as currently defined in the adopted UDP (1995), covers the northern part of Mare Street, and extends to a distance of approximately 1,100m from south of the Town Hall to Clapton Park United Reform Church on Lower Clapton Road, and includes adjacent sections of Morning Lane, Graham Road and Amhurst Road. The extent of the centre is shown on **Map 2, Appendix 7**.

4.2 The North London Line railway crosses Hackney Mare Street, at the junction of Amhurst Road, which effectively splits the centre into two distinct parts. To the north is the core retail area containing the main retail attractors Marks & Spencer, Primark, and Boots. To the south the key retail interest is provided by Tesco, the centre's main supermarket and off-street car parking provision, and Woolworths. The southern zone is also the administrative and leisure area, where the Town Hall, Library and the Hackney Empire are located.

4.3 There are two retail development opportunity site, at the former Gibbons building on Amhurst Road, and at the Bus Garage on Bohemia Place. In addition, there are a number of vacant buildings in prominent locations which could be re-used for retail purposes.

Market Indicators

Retail Rents

4.4 The different retail pitches in Mare Street are shown on **Map 2, Appendix 7.** The prime retail pitch is located on Narrow Way, to the north of the railway line, where restricted vehicular access arrangements exist. This is the pitch where the key anchor stores Marks & Spencer, Primark and Boots are located. This area is generally a pleasant shopping environment with attractive shopfronts. According to local commercial property agents, the best retail property in this pitch currently achieve Zone A rents of between £475/sqm and £550/sqm, with the higher levels achieved close to Marks & Spencer and Primark. As an example, 376 Mare Street in the middle of the prime retail pitch, currently occupied by Holland & Barrett, recently achieved a Zone A rent of £500/sqm. Hackney Mare Street achieves similar prime pitch Zone A retail rents to Stoke Newington at £550/sqm, but is significantly lower than Dalston Kingsland at £750/sqm.

4.5 Colliers CRE do not publish rental data for Mare Street, which is perhaps a reflection of its limited importance in the region. However, whilst not directly comparable, data presented in **Appendix 1 Table 3,** shows Colliers CRE data for other London district against local commercial property agents views on rental levels for prime property in Mare Street. The comparison demonstrates that prime retail property in Hackney Mare Street are performing very much in line with other London centres at the same level in the shopping hierarchy. Without doubt the strength of the key attractors in the prime pitch is a major reason for the satisfactory performance of the centre in prime rental terms.

4.6 The main secondary retail pitch is located on Mare Street, to the south of the railway line, where Woolworths and JD Sports occupy units. The Hackney Empire marks the end of the secondary retail area. This pitch is an area interspersed with civic, office, community and leisure uses. This creates dead street frontages which are inactive during the day. The retail provision in the secondary location is less attractive than that on Narrow Street, and the heavy flow of traffic makes the shopping environment much less attractive. The best retail property in this pitch achieves Zone A rents of between £325/sqm and £375/sqm. For example, 322 Mare Street (occupied by Bronx, a clothing retailer) recently achieved a rent of £350/sqm. Local agents consider that it is the close proximity of car parking at Tesco, which provides free parking, attracts retailers and shoppers to this area of Mare Street.

4.7 Outside the narrowly defined primary and secondary retail pitches, rental levels drop dramatically reflecting less interest from both retailers and shoppers to visit the more marginal locations. The Paragon centre, located to the south of the Town Hall on Mare Street, is removed from the prime and secondary retail core areas. It provides a mix of civic, library, office and A3 uses, but the proposed A3 uses are currently largely unoccupied and we understand that there has been limited interest in the leisure / gym unit. It was hoped that the opening of the Wetherspoons pub at 286 Mare Street would boost the rental levels and attraction of this area, but thus far the regenerative effect has not occurred. Rental levels fall further to approximately £100/sqm in Graham Road and Morning Lane.

4.8 The best property in Lower Clapton Road will achieve retail rents of £200/sqm. This area mostly contains independent traders retailing either convenience or routine comparison goods, and effectively fulfils the role of a separate local centre rather than forming a part of Hackney Mare Street. There is also a clear physical boundary between the shops on Lower Clapton Road and the town centre. The 1992 RTP study considered that this area did not function as part of the town centre. This remains the case, and as such, the current boundary and retail status of this area should be reviewed to reflect its local centre role.

Yields

4.9 Published data, shown in **Appendix 1 Table 4**, indicates that yields in Hackney Mare Street have fallen during the last 10 years, from 12% in 1994 to 9% in 2004. Local agents confirm that yields are between an optimistic 8% and 9%, which is a similar level for yields in Stoke Newington and Dalston Kingsland and the benchmark centres. Hackney Mare Street has shown a decrease of 3% in a 10 year period. This is a substantial change in comparison to other comparable London centres most of which have remained either fairly static, or in the case of Palmers Green and Golders Green have experienced a softening of yields.

4.10 Local agents point to a tendency of owner occupation in Hackney Mare Street, and that the yield level achieved is dependent upon the potential to make use of upper floors for other activity. If residential use is possible, which is generally the case, then the property is a more attractive investment proposition as the building will generate two income streams.

Retailer Requirements

4.11 The published retailer requirements data, set out in **Appendix 2,** indicates that there are 16 national multiples with space requirements in Hackney Mare Street., which is the highest of all three Hackney town centres. The requirements are mostly from A1 comparison retailers, such as Argos, Bonmarche, Cardfair, and O2. These traders fall into three categories - clothing, cards and stationery and mobile telephone retailers. There are also requirements from three A3 retailers - Burger King and Flaming Nora both restaurant operators and Subway a sandwich shop. Argos, for example, is seeking a unit of between 900sqm and 1500sqm, which is equivalent in size to the

Marks & Spencer and Woolworth units on Mare Street. At present there are currently few vacancies in the primary and secondary retail pitches of Mare Street and nothing of the scale sought by Argos.

4.12 Interestingly, a third of respondents to the Visitor Survey suggested that Mare Street would be improved if a better range of shops were provided. This proportion was the highest of all the Hackney centres, and demonstrates why visitors currently prefer to shop in other centres. The above points clearly demonstrate that there are space requirements for multiple retailers to locate in Mare Street, and a demand from visitors for better shops. The development opportunity sites, identified below, could be used to meet the needs of both retailers and visitors, and may attract those who currently shop elsewhere to visit Mare Street.

4.13 **Table 5** below compares the level of retailer requirements for other district centres and indicates that Hackney Mare Street compares favourably with most other district centres, with only Ruislip having appreciably more. This indicates that multiple retailers are prepared to consider locating in Hackney Mare Street just as much as most other district centres.

Table 5 – Retailer Requirements – Hackney Mare Street, Stoke Newington and selected district centres

DISTRICT CENTRES	A3	A1 Comparison	A1 Convenience	D2	TOTAL
Acton	5	8	3	0	16
Balham	8	11	0	0	19
Golders Green	2	8	0	0	10
Palmers Green	0	7	1	0	8
Ruislip	6	14	2	0	22
Stoke Newington	**2**	**2**	**1**	**0**	**5**
Hackney Mare Street	**3**	**10**	**1**	**0**	**16**

Source : Estates Gazette Interactive (June 2004)

4.14 While demand exists from multiple retailers for space in Mare Street, there are a limited number of large retail units which could accommodate them. In addition, major multiple retailers will only want to locate within or immediately adjacent to the Core Shopping Frontage area.

Diversity of Uses

i) Floorspace Survey

4.15 In **Table 6** below, we present the aggregate totals for the number of outlets and the total floorspace totals by Use Class Order for Hackney Mare Street. The table shows that Mare Street is the largest of Hackney's centres with approximately 51,300sqm gross floorspace. Of the total floorspace only 28,300sqm (55%) is in retail use, which represents a much lower absolute floorspace and proportion than both Dalston and Stoke Newington (82% and 76% respectively). The reason for the low proportion of retail space is the much higher proportion of buildings in Mare Street devoted to leisure, community, civic and administrative uses. For example, the Town Hall and Main Library are located within the centre, as are the Hackney Empire and Ocean.

Table 6: Diversity of Uses in Hackney Mare Street

	OUTLETS	FLOORSPACE	
CORE SHOPPING FRONTAGE		SQM	%
A1 Comparison	24	3,840	7
A1 Convenience	6	1,613	3
A2	3	246	0.5
A3	4	872	2
Sui Generis	0	0	0
D2	2	244	0.5
Vacant	2	244	0.5
Other	1	464	1
CORE TOTAL RETAIL	**37**	**6,572**	**13**
CORE TOTAL	**42**	**7,495**	**15**
NON-CORE SHOPPING FRONTAGE			
A1 Comparison	71	9,852	19
A1 Convenience	25	6,276	12
A2	17	1,958	4
A3	38	3,665	7
ASG	4	132	0.3
D2	7	7,418	14
Vacant	22	2,485	5
Other	28	12,007	23
NON-CORE RETAIL	**151**	**21,751**	42
NON-CORE TOTAL	**212**	**43,792**	85
TOTAL RETAIL	**188**	**28,323**	**55**
CENTRE TOTAL	**254**	**51,287**	**100**

Source: RTP Unit Survey (April 2004) using OS Area Data

4.16 The defined Core Shopping Frontage in Mare Street has almost 7,500sqm of floorspace contained in a total of 42 units, all but 900sqm (5 units) of which are in retail use. The defined core area is over twice the size the Core Shopping Frontages in Dalston Kingsland and Stoke Newington. Unlike Dalston Kingsland there are some vacant units within the core shopping frontage area, and there is also a vacant site - at the former Gibbons building on Amhurst Road, which was destroyed by fire in 2003.

4.17 The centre is well served by A3 uses, although these are mostly food takeaways and cafes, and the centre has a distinct lack of bars and restaurants.

4.18 Hackney Mare Street has the highest proportion of D2 leisure uses of all Hackney's centres, representing 14% of floorspace (7,418sqm). There are a total of nine D2 operators in the centre, the Hackney Empire and Ocean being the principal ones, but there is a also a gym on Lower Clapton Road and a social club in Valette Street. In comparison, Dalston Kingsland has only 3% and Stoke Newington 5% of floorspace in D2 leisure use.

4.19 The town centre floorspace survey includes units in Lower Clapton Road, which are considered to function more as a local centre rather than part of the main town centre. The centre boundary definition is an issue that we explore in the policy issues section of the main report.

ii) Benchmark Comparison

4.20 Having identified the floorspace totals in the assessment above, we now move on to compare the amount of floorspace in different uses in the centre with two benchmarks, the London and GB averages. We do this through floorspace data sourced from Experian. It should be noted that the areas surveyed by Experian are not identical to the UDP defined town centre areas, so the floorspace and unit data will differ from our assessment above. However, the Experian data is useful because it provides a consistent dataset by which Hackney's centres can be compared against benchmarks.

4.21 The data presented at **Appendix 3 Table 2** shows that overall Mare Street has significantly more convenience goods floorspace than the London and GB averages, which is a similar situation to the other Hackney centres. However, the picture differs slightly when we look at the benchmarks for comparison goods and service used floorspace. Mare Street has a higher proportion of comparison goods floorspace compared to the London average, but lower than the UK average. As a consequence, service uses floorspace displays the opposite characteristics, where service use floorspace in Mare Street is lower than the London average, but marginally higher than the UK average.

4.22 A quarter of the floorspace in Hackney Mare Street is devoted to convenience goods retailing, compared with a London average of 17%. The centre is well served by bakers, groceries, and confectioners, tobacconist and newsagents (CTN). The 3,300sqm gross Tesco store on Morning Lane is the principal convenience goods store in the town centre, although separated from the primary shopping area. The Marks & Spencer store located in the primary shopping frontage on Narrow Street primarily sells convenience goods (approximately 70% convenience goods). In addition to these stores there is a Somerfield store and a number of smaller independent grocers in the centre, all of which in aggregate represents a good level of convenience goods provision in the centre.

4.23 Compared to the GB benchmarks Hackney Mare Street is marginally under-provided for in terms of comparison goods floorspace, but compared to the London average it is slightly better. The centre has 49% of floorspace devoted to comparison floorspace, whereas the UK average is 53%. The scale of under-provision varies within the aggregate category, and is particularly noticeable in the women's, girls and children's clothing sector, electrical goods, and gifts, china and glass. However, Mare Street is well served by footwear and general clothing retailers. Interestingly it is the women's clothing and mobile phone retailers who are registering interest in gaining representation in Mare Street as discussed above.

4.24 Analysis of the service use retail floorspace provision shows that the amount of floorspace in Hackney Mare Street is very much in line with the benchmark averages of circa 20%. The centre is well served by A3 food and drink uses, in particular fast-food takeaways which dominate the A3 provision, and by hairdressing, beauty and health uses.

Vacancy Rates

4.25 As shown in **Table 6** above, there is approximately 2,700sqm of vacant space in Hackney Mare Street, which represents 5.5% of total floorspace, and is contained within 24 units. The proportion of vacant floorspace is lower than both Stoke Newington (8.4%) and Dalston Kingsland (8%). Very little of the vacant floorspace is located within the core shopping frontage.

4.26 However, 354 Mare Street (former HSBC Bank) is currently vacant. This attractive listed building occupies a prominent location within the Core Shopping Frontage, which could make a contribution to the uses in Mare Street, adding to its vitality and attraction as a retail and leisure area.

4.27 The vast bulk of the vacant space is located within the marginal retail areas of Graham Road, which contains poorer quality shop units, and in Lower Clapton Road, which functions more as a local centre.

Qualitative Indicators

Accessibility to Hackney Mare Street

i) By Public Transport

4.28 As with all of Hackney's centres, Mare Street has good accessibility by public transport, and is particularly well served by buses. There are 14 bus routes which serve Hackney Central, and 7 of these routes operate a night bus service. These routes serve locations both east and west including Dalston Kingsland, and north and south including Stoke Newington. Hackney Central is well served by buses travelling to West End, and they also provide connections to other town centres including Stratford, Leyton, and Walthamstow.

4.29 Bus stops are located in key locations within the centre – outside the Town Hall, at the northern end of Mare Street on Lower Clapton Road, at the southern end of Mare Street, and outside Tesco on Morning Lane. As such, visiting the key attractions within the centre by bus is very convenient.

4.30 Options to exclude buses completely from the northern section of Mare Street have previously been investigated. While there were environmental benefits associated with this, these were considered to be outweighed by the dis-benefits to buses and passengers having to re-route around the centre, with resultant increased journey times. In addition, there are no plans to relocate the bus depot from the centre, so buses would still need to enter key parts of the centre. However, in our view Narrow Way would benefit hugely as a shopping destination from the removal of the buses.

4.31 Hackney Central railway station (North London Line) is located within the centre, and provides good east-west rail links. However, the station does not currently provide an attractive arrival point for visitors to the centre, and there is considerable room for improvement. There may also be opportunities to create a further station access point onto Graham Road and improved access to Amhurst Road, which will be examined through an Area Action Plan for the centre. A new entrance onto Graham Road would be likely to create redevelopment opportunities and be the catalyst for significant improvements in the attractiveness of this area, potentially leading to the transformation of this marginal retail area. Hackney Downs station, which provides the north-south rail links to the centre, is not so conveniently located for accessing the centre. In particular the pedestrian linkages are not obvious and are poorly signed, and are unlikely to be well used by visitors. A study is currently being undertaken which seeks to establish ways to improve the pedestrian links between the two stations, which offers the prospect of improvements in the future.

ii) By Private Transport

4.32 Mare Street is not easily accessed by private transport due to the fact that the main roads tend to be very busy and congested for most of the day, and the only car park of any size is at the Tesco store off Morning Lane. Mare Street (A107) is a major north-south route, and with most traffic diverted around the Narrow Way section, the adjoining roads tend to be even busier.

4.33 Hackney Mare Street provides a total of 305 off-street car parking spaces. The main car park for visitors is, as mentioned above, provided at the Tesco store, which has 280 spaces. The only other off-street facility is on Amhurst Road, but this only provides 25 spaces.

4.34 In terms of on-street parking, the centre is covered by a Controlled Parking Zone, which restricts the opportunities for on-street parking by shoppers.

4.35 **Table 7** shows the comparison of off-street car parking levels with other district centres. Hackney Mare Street provides an average level of car parking when compared to other district centres.

Table 7 – Car parking Provision – Hackney Mare Street , Stoke Newington and other District Centres

District Centres	Off Street Car Parking	Total Retail Size (sqm)	Parking Ratio/sqm
Acton	370	33,910	92
Balham	262	28,700	110
Golders Green	n/a	24,970	n/a
Palmers Green	200	24,390	122
Ruislip	409	19,600	48
Hackney Mare Street	**305**	**33,336**	**109**
Stoke Newington	**284**	**31,756**	**112**

Source: RTP using ODPM Floorspace Data (2000)

4.36 The table indicates that compared to other District centres in London Hackney Mare Street is reasonably well provided for in terms of aggregate numbers of spaces. Results from the Visitor Survey confirm this view, with a low proportion of respondees suggesting increases to car parking levels as an improvement to the centre. Although, this may, in part be due to the fact that a high proportion of visitors to the centre travel either by bus, or walk. Stoke Newington is slightly less well-served by off-street parking spaces (1:112) than Mare Street. It is only Acton (1:92) and Ruislip (1:48), which are better provided for in terms of aggregate number of spaces, both of which are Outer London centres.

4.37 The lack of dedicated parking for shoppers visiting the comparison goods facilities may deter some potential visitors, but the spaces at Tesco are likely to encourage linked shopping trips due to the close proximity between the Tesco store and the town centre. However, while increased provision of car parking spaces would no doubt appeal to retailers and shoppers, more cars would only increase pressure on already congested roads, and doesn't make sense for a centre well served by public transport.

Accessibility within Hackney Mare Street

4.38 The prime shopping area, Narrow Way, benefits from restricted vehicular access (buses and delivery vehicles only are permitted and only in a north to south direction). The restrictions and narrowing of the carriageway have been in place since the 1980's. This has made significant improvements in the pedestrian environment chiefly through the expanded pavement widths and the improved safety resulting from traffic moving only in one direction. However, at busy times of the day the street can be dominated by buses, particularly towards the southern end where the bus stop is located. The benefits to the shopping environment would be significant were the buses to be re-routed. Nevertheless compared to shopping environments elsewhere, the Narrow Way shopper is able to move around the shopping area with a high degree of freedom and in reasonable safety.

4.39 The southern section of Mare Street (south of the railway bridge), also has wide pavements, but pedestrian movement within this area is severely restricted because Mare Street is four lanes wide at this point and is heavily trafficked, and for safety reasons requires the presence of pedestrian safety barriers. As such pedestrians have to use the main pedestrian crossing points to gain access to shops on opposites sides of the road.

4.40 A key accessibility issue is the current pedestrian link to Tesco, on the south side of the railway line. The 1992 RTP study identified the potential to redevelop the site, but raised the problem of creating linkages to the prime retail area as the key concern. The study recommended that developing pedestrian links through the railway arches would be the best way of improving accessibility. However, the Tesco scheme did not incorporate the recommendations, and the pedestrian links between Tesco and the Core Retail Frontages remain very poor and unattractive.

Footfall

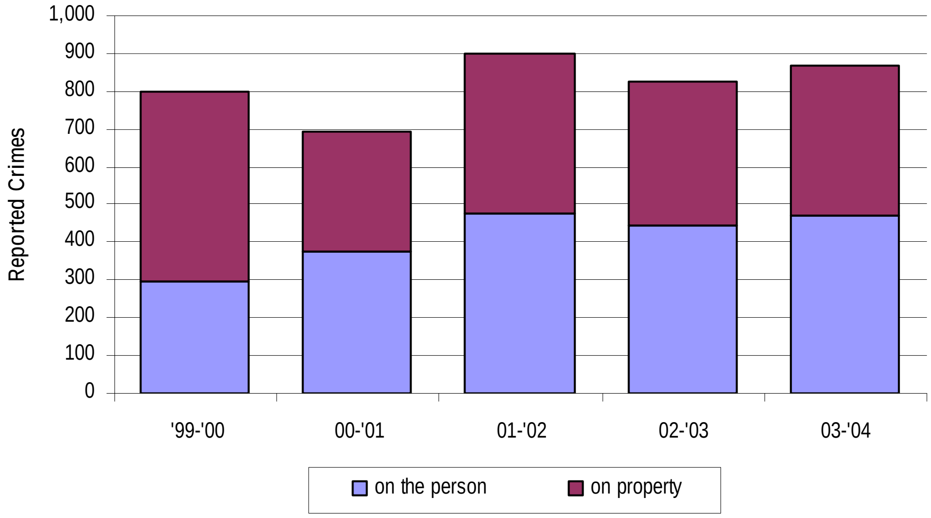
4.41 Footfall was sampled at five locations within the centre. The location of the footfall counts are shown in **Map 2, Appendix 7**. The footfall table and chart for Hackney Mare Street are set out at **Appendix 4 Table 2** and **Appendix 5 Figure 2.** Compared to the other centres surveyed, the following points are noted:

- In general, Hackney Mare Street has lower footfall counts than Dalston Kingsland, but higher counts than Stoke Newington. This is particularly evident on the Friday, but the Saturday results indicate that the primary locations on Mare Street achieve only slightly lower footfall counts compared to those recorded in Dalston.
- The location with the highest recorded footfall in Hackney Mare Street is outside Primark, in the southern part of the street (count point 3), which achieved 7,500 on the Friday and 19,000 on the Saturday.
- As is the general pattern for most shopping centres that function as shopping destinations, footfall is higher in the centre on Saturday compared to the weekday (the Friday). The average footfall for the centre on the Saturday is 165% higher than on the Friday, which compares with the equivalent figure for Dalston being 47%. The pitch outside Woolworths to the south of the railway bridge (point 4), the variance between Friday and Saturday is over three and a half times (from 4,800 to 16,900).
- Footfall counts drop considerably in the peripheral retail locations in the centre (points 1 and 5), and on a Friday are much lower than peripheral locations in the two other centres.
- Lower Clapton Road has the lowest footfall of all Hackney's centres on a Friday, with only 2,600 pedestrians passing the location. However, as with the rest of the centre, footfall is significantly higher on Saturday. The lower footfall count in this location is consistent with the lack of a strong retail attraction, the presence of independent retailers selling convenience goods and services, and the primarily local centre function.

Safety and Crime

4.42 Crime statistics for all Hackney's centres are set out in **Appendix 6** and we the data is shown in **Chart 2** below. The statistics indicate that overall Hackney Mare Street has less of a problem with crime than Dalston Kingsland, but considerably higher figures than Stoke Newington. In 2004 there were a total of 850 crime allegations, with 471 against the person and 397 on property. That the incidence of crime against the person are higher than those against property, and in respect of which the trend is upwards, is a similar characteristic to the other Hackney centres.

Chart 2 – Hackney Mare Street Crime Statistics – 1999/00 to 2003/04



Source: Metropolitan Crime Report Information System (CRIS) data provided by Community Safety Team (LB Hackney)

4.43 There has been a steady year-on-year increase in crime against the person over the five year period (totalling a 59% rise overall), compared to a corresponding overall reduction of 21% in respect of crime against property. This crime profile has emerged while CCTV cameras and other crime tackling initiatives have been in operation.

4.44 The Visitors Survey results show that more than a quarter of all visitors to Mare Street suggested crime reduction would improve the centre, and this issue was particularly mentioned by those visiting the northern part of the centre, including Narrow Way. Not surprisingly, a high proportion of visitors suggested increased policing would improve the centre.

4.45 The impact of what are comparatively high crime rates will be to discourage use of the leisure facilities in the centre particularly in the evening, and the ability to attract additional uses in the future, and is likely to explain why there has been limited interest in opening restaurants or finding an operator for the gym within the library building. In any event, Mare Street will compete with other locations for visitors in the evening, in particular Stoke Newington for restaurants and also Hoxton and Broadway Market, all of which are likely to be safer centres to visit.

Environmental Quality

4.46 To encourage multiple retailers to locate in Mare Street, there should be a focus on enhancing the attractiveness of the core shopping frontage, and improving the environment of the remainder of the centre, in particular the entry points from Hackney Central station.

i) Streets & Open Spaces

4.47 Mare Street north of the railway line is dominated by St John's Church and St John's Gardens, and Clapton Square. These areas of informal open space provide visitors with ample opportunities to take a break while shopping. This is an open and green part of the centre, which provides an attractive backdrop to the overall architectural quality and urban form of Narrow Way and some notable buildings of architectural merit, and provides a visually appealing and pleasant shopping environment. Hackney Mare Street has a distinct advantage over the other two Hackney centres, and indeed many centres elsewhere in London, because of the provision of significant public open space at the heart of the centre.

4.48 In the area to the south of the railway line, Town Hall Square is a large public open space provides some seating opportunities for visitors. However, the square is towards the southern boundary of the town centre and is not readily accessible from the primary retail pitch.

ii) Building Frontages

4.49 Hackney Mare Street is included within three separate conservation areas - Clapton Square, Town Hall Square, and Mare Street. The designations reflect the fact that there are many visually attractive buildings some in visually prominent positions. In our view there is no question that the quality of buildings and the building frontages, particularly in the core shopping area, are much better than in Dalston and Stoke Newington, except for Stoke Newington Church Street.

4.50 The curved building line in the northern part of Mare Street, combined with the general uniformity of most of the buildings, generates an interesting and attractive environment. The shop fronts are generally attractive and well maintained. Within the last couple of years, new entrants such as Mish Mash at 419 Mare Street have contributed positively to the quality of the shop fronts, to the benefit of the centre more generally.

4.51 The key building which detracts from the townscape quality of the core shopping frontage because of its poor condition and prominent location, is the currently vacant 354 Mare Street (former HSBC Bank). This building represents a weakness and an opportunity, and should be used to create a landmark retail facility within the area. The building and its setting lends itself to bar / restaurant use, which are the key activities that Hackney Mare Street both currently lacks and has perhaps the greatest opportunity to support.

4.52 The southern part of Mare Street is dominated by Hackney Town Hall, the Hackney Empire, and the Old Central Hall and Library (now Ocean). The new library is a modern building, which attracts people to this part of Mare Street, but not for shopping. The key building which detracts from the townscape quality is the currently vacant 280 Mare Street, which is opposite the Town Hall. Again this building appears to offer much scope for A3 bar / restaurant uses.

iii) Street Furniture & Cleanliness

4.53 As referred to above the Town Square provides seating, but at a location divorced from the primary shopping area. Within the core shopping area seating is provided within the Church Gardens. The shopping environment benefits from generally well maintained and clean streets, with no obvious problem areas. The results from the Visitor Survey confirm that visitors to the centre agree with our view, with very few respondents suggesting that the cleanliness of Mare Street needs to be tackled to improve it.

Development Opportunities

4.54 There are two retail development opportunity sites within the Core Shopping Frontage area of Hackney Mare Street. There are also two currently vacant buildings which could be redeveloped and re-used for retail purposes. The remainder of the identified sites in **Table 8** below are opportunities for general improvements to the centre rather than opportunities to expand the shopping area.

Table 8 – Hackney Mare Street Development Opportunity Sites

Site	Proposal
Former Gibbons Building Amhurst Road	A vacant site with no detailed proposals for redevelopment. There is an opportunity to provide retail uses on the ground floor, and preferably larger units to attract multiple retailers. A retail frontage should be provided on Amhurst Road, because at present the unit occupied by Marks & Spencer is a blank frontage in this location. The redevelopment of this site also provides an opportunity to improve the appearance of the entrance to the centre from Hackney Central station.
Bus Garage, Bohemia Place	The site is use as a Bus Garage with forecourt bus parking areas, with no current plans to relocate this use. The site is allocated in the adopted 1995 UDP (Site Ref. No. 288), along with land to the south of the railway line, now redeveloped and occupied by Tesco. The UDP identified site as suitable for office and retail, if the bus garage is no longer required for operational use. It is well-located to the primary shopping area. The potential redevelopment of this site will be examined as part of an Area Action Plan for the town centre.
Former HSBC Bank 354 Mare Street	This building is currently vacant. It is a listed building in prominent location on Mare Street, and is adjacent to Hackney's only Grade 1 listed building (the Old Tower of former Church of St Augustine). There is an opportunity to convert the building to a bar / restaurant – providing that there is the demand from occupiers, and issues of crime in centre can be overcome. Mare Street currently lacks bar and restaurant uses to attract visitors, particularly in the evening.
280 Mare Street	This building is currently vacant and was also vacant at the time of RTP's 1992 study. It is a locally listed building, in a strategically important location, opposite the Town Hall, adjacent to Ocean and diagonally opposite Hackney Empire. The building is owned by the London Development Agency. A draft brief prepared to guide future development considers office, retail or leisure activities as the most suitable uses. However, the building has no rear servicing, which may limit its appeal to potential occupiers.
Pedestrian Links Tesco site to Core Shopping Frontage	The 1992 RTP study suggested creating pedestrian links through railway arches from the Tesco site to the core shopping area. The current pedestrian links are unattractive and unclear. The implementation of this work would enhance the links to this key centre attractor.
Hackney Central Station	Improvements to the railway station and its surroundings could provide a better and more attractive pedestrian link and visitor entrance to Amhurst Road and Graham Road.

5 STOKE NEWINGTON

Overview

5.1 Stoke Newington is Hackney's smallest centre in terms of size with over 36,700sqm of floorspace, of which almost 27,900sqm (76%) is in retail use. The centre, as currently defined in the adopted UDP (1995), covers Stoke Newington High Street, the southern part of Stamford Hill and includes the eastern part of Church Street. It extends to a distance of 1,200m from Stoke Newington Police Station in the south to Stamford Hill in the north. The extent of the centre is shown in **Map 3, Appendix 7.**

5.2 Beyond the eastern part of Church Street the remainder to the west is defined as a Local Centre. The Shacklewell area, to the south of Stoke Newington and north of Dalston, also contains a large number of retail units, but this area is not currently defined as a retail centre.

5.3 Stoke Newington town centre contains four distinct retail areas: the prime shopping area on Stoke Newington High Street where Woolworths and the high street banks are located; the eastern end of Church Street which is characterised by restaurants, cafes and upmarket independent retailers; Stoke Newington Road which is characterised by Turkish shops and facilities; and Stamford Hill where Safeway is located but is also characterised by shops which cater in the main for the surrounding Orthodox Jewish community and are essentially an extension to the shops provided within the Stamford Hill local centre located further to the north.

5.4 There is one retail / leisure / commercial development opportunity in Stoke Newington at Wilmer Place.

Market Indicators

Retail Rents

5.5 The different retail pitches in Stoke Newington are shown on **Map 3, Appendix 7.** The prime retail pitch is located south of Stoke Newington High Street / Church Street junction where the only key anchor store, Woolworths, is located. The best retail property in this pitch currently achieves Zone A rents of £550/sqm. However, according to local commercial property agents, the eastern part of Church Street is also an attractive pitch attracting upmarket independent retailers, and rents between £475/sqm and £550/sqm are achieved for the best property. Prime rents are well below those in Dalston, but similar to Hackney Mare Street.

5.6 We compare prime rentals in Stoke Newington with other district centres in London through published data set out in **Appendix 1 Table 3**, which indicates that the centre prime rents according to Colliers CRE in 2003 was approximately £430/sqm. This level is broadly similar to Zone A rents in the other district centres.

5.7 Location is all important for retailers. Our discussions with commercial agents confirm that at the present time the type of traders seeking space on Church Street will not consider units round the corner on Stoke Newington High Street. This demonstrates a high degree of sensitivity to location. The two streets, Church Street and the High Street provide a very contrasting retail offer. Church Street with its range of independent boutiques and restaurants in a shopping environment much less traffic-dominated, provides a conducive shopping and leisure time offer, very different to the "routine" and value-driven retail offer on the heavily trafficked High Street. It is rare to experience such a juxtaposition of shopping environments.

5.8 Beyond the prime areas on the High Street and Church Street rents, the secondary retail pitch is located north of Garnham Street to the south of Belfast Road (Stoke Newington Station), and south of Brooke Road to north of Dynevor Road. The best retail property in this pitch achieves rents of between £275/sqm and £375/sqm. The units are a mixture of value-led multiple retailers, such as Shoefayre, betting offices such as Ladbrokes, and independent and specialist convenience stores such as Konoc Delicatessen, but also including butchers, bakers, and fishmongers.

5.9 The multi-ethnic composition of Stoke Newington has encouraged the peripheral areas to develop particular ethnic retail specialisms. As such, the demand for retail property remains high, and the rental levels do not decrease as sharply as peripheral retail areas in the other Hackney centres. In the areas outside the primary and secondary area, the best property achieves rents of between £225/sqm and £275/sqm. It is in these locations where the ethnic hairdressers, restaurants, and bakers are to be found, e.g. Bagel House (No.2 Stoke Newington High Street), Karizma Kuafor Hairdressers (No.49). At the very margins rents fall to as low as £100/sqm.

Yields

5.10 There is no published data on yields for Stoke Newington and in common with the other Hackney centres, local agents indicate a tendency towards owner occupation. As such there is little investment activity in the centre. However, the general view is that yields are likely to be between 8% and 9%, which are comparable to yields in Hackney Mare Street and Dalston Kingsland and generally similar to those in other district centres. This data is shown in **Appendix 1 Table 4**.

5.11 The high value of residential property in Stoke Newington, and particularly in and around Church Street, means that the yield level achieved from property is driven by the opportunities for residential development on upper floors.

Retailer Requirements

5.12 Published retailer requirements data, as set out in **Appendix 2,** indicates that there are just five national multiples with space requirements within Stoke Newington. The A1 comparison requirements are from card and stationery retailers – Card Warehouse and Cardfair. Iceland is the only A1 convenience retailer with a requirement and the A3 demand is from McDonalds and Strada a restaurant operator.

5.13 The multiple retailer requirements for Stoke Newington are the lowest of the Hackney centres. The low demand stems generally from the perception that the centre has low quality retailing attracting low spend shoppers, and the average unit size in Stoke Newington (143sqm) is lower than Dalston. It is also the case that retailers consider that Stoke Newington and Dalston town centres have overlapping catchment areas. Therefore if traders express an interest in the catchment they tend to plump for the bigger centre – Dalston.

5.14 We understand from our discussions with local agents that there is a good level of demand from independent convenience and comparison goods operators, but this is largely restricted to space in Church Street. Units on Church Street are routinely contested by up to half a dozen interested parties. Local agents have indicated that they also experience demand from independent coffee shops seeking to locate in this street.

5.15 **Table 9,** below, sets out the level of retailer requirements for Stoke Newington, Hackney Mare Street and other district centres. This indicates that Stoke Newington attracts the lowest multiple retailer interest of all the district centres, reflecting the proximity of Dalston and also the fact that the centre commands strong attraction from upmarket independent traders.

Table 9 – Retailer Requirements – Hackney Mare Street, Stoke Newington and selected district centres

DISTRICT CENTRES	A3	A1 Comparison	A1 Convenience	D2	TOTAL
Acton	5	8	3	0	16
Balham	8	11	0	0	19
Golders Green	2	8	0	0	10
Palmers Green	0	7	1	0	8
Ruislip	6	14	2	0	22
Stoke Newington	**2**	**2**	**1**	**0**	**5**
Hackney Mare Street	**3**	**10**	**1**	**0**	**16**

Source : Estates Gazette Interactive (June 2004)

Diversity of Uses

i) Floorspace Survey

5.16 We present the aggregate totals for the number of outlets and the total floorspace by use class group for Stoke Newington in **Table 10** below. This indicates that with over 36,700sqm of floorspace Stoke Newington is the smallest of Hackney's centres, by approximately 12,500sqm. The centre supports 27,900sqm of retail floorspace, contained within 233 retail units. The units, with an average size of 120 sqm, are much smaller than the average for Dalston (195sqm).

Table 10: Diversity of Uses in Stoke Newington

	OUTLETS	FLOORSPACE	
CORE SHOPPING FRONTAGE		SQM	%
A1 Comparison	11	2,390	7
A1 Convenience	6	1,135	3
A2	3	580	2
A3	6	781	2
Sui Generis	0	0	0
D2	1	212	1
Vacant	2	134	0.4
CORE TOTAL RETAIL	26	4,886	13
CORE TOTAL	29	5,232	14
NON-CORE SHOPPING FRONTAGE			
A1 Comparison	91	8,540	23
A1 Convenience	42	7,557	21
A2	17	1,710	5
A3	57	5,182	14
Sui Generis	3	176	0.5
D2	15	1,643	4
Vacant	31	2,892	8
Other	22	3,794	10
NON-CORE RETAIL	207	22,990	63
NON-CORE TOTAL	278	31,495	86
TOTAL RETAIL	233	27,875	76
CENTRE TOTAL	307	36,727	100

Source: RTP Unit Survey (April 2004) using OS Area Data

5.17 The defined Core Shopping Frontage area of Stoke Newington is the second smallest of Hackney's centres, with only 5,232sqm of floorspace accommodated in just 29 outlets. The majority of the defined frontage is used for retail purposes, but despite its small size vacancy stands at two units.

5.18 Stoke Newington is very well served by A3 uses, with 63 units in total. These uses account for 16% of the total floorspace in the centre. The A3 uses are mostly bars, cafes and restaurants, which are a characteristic of the centre. In comparison, Dalston has 10% and Mare Street has 9% of their respective floorspace in A3 uses, despite being much larger centres.

5.19 Another notable characteristic of Stoke Newington is the high number of D2 uses, with 15 in total. However, the majority of these units are small social clubs serving the local Turkish community.

ii) Benchmark Comparison

5.20 Having identified above the floorspace totals in Stoke Newington, we now move on to compare the amount and proportion of floorspace in different uses in the centre with two benchmarks, the London and GB averages using data sourced from Experian. It should be noted that the areas surveyed by Experian are not identical to the UDP defined town centres area, so the floorspace and unit data differ from our survey data. However, the Experian data provides a consistent (but not wholly accurate) base that enables comparison between the centres and benchmark data.

5.21 The data presented at **Appendix 3 Table 3** shows that Stoke Newington has considerably more convenience goods floorspace than the London and GB averages, and as a consequence has far less comparison goods floorspace. In terms of the provision of service goods use floorspace, Stoke Newington is only just below the benchmark levels.

5.22 The proportion of convenience goods floorspace in the centre is 29%, which is considerably higher than the London and UK benchmarks, which both average 17%. In particular, Stoke Newington is very well served by bakers, grocers and off licences. Safeway on Stamford Hill is the main convenience goods anchor store although it is located on the northern periphery of the centre. There are also a large number of independent grocery stores and ethnic butchers and bakers which will also raise the convenience provision.

5.23 Analysis of the comparison goods floorspace shows that Stoke Newington has much less floorspace provision (37%) devoted to such goods when compared with the benchmarks (47%). The under-provision is noticeable in all sectors except furniture carpets and textiles and household goods, but this is likely to be because of the large furniture retailers at the edge of the centre on Stamford Hill. The low proportion of comparison goods floorspace will also be a consequence of the high level of convenience goods floorspace.

5.24 Stoke Newington supports similar levels of service provision compared with the benchmarks, and the centre is particularly well served by hairdresser, beauty and health uses. Interestingly, Stoke Newington has an almost identical level of floorspace (12%) devoted to restaurants, cafes and fast food outlets, when compared to the benchmarks. However, when we compare the number of A3 outlets with the benchmarks it is apparent that Stoke Newington has a much higher proportion (20%) compared with the benchmarks (12%). Therefore, Stoke Newington has a greater number of smaller A3 units, which confirms the perception of the area as one dominated by places to eat and drink.

Vacancy Rates

5.25 There is currently approximately 3,000sqm of vacant floorspace in Stoke Newington, representing 8.4% of total floorspace, which is marginally higher than Dalston (at 8%). The vacant space is housed in 33 units, compared to 30.units in Dalston. However, in Dalston the vacant floorspace is much greater. This demonstrates that the vacant units, like the retail stock generally, are much smaller in Stoke Newington. Small retail units are generally unappealing to the multiple retailers, but are more likely to interest the independents.

5.26 While the vacancy rates in the centre overall are fairly low, there are two large vacant units at 181 and 183-187 Stoke Newington High Street (240sqm and 550sqm respectively). These units have been vacant for a number of months and have failed to attract retailer interest. They are currently being marketed for A3/D2 uses.

5.27 The majority of vacant units are located in the more marginal retail areas, and are commonly less than 70sqm in size. The demand for off-pitch small units is very low and will only come from independent traders.

Qualitative Indicators

Accessibility to Stoke Newington

i) By Public Transport

5.28 As with all of Hackney's centres, Stoke Newington is highly accessible by public transport. There are 10 bus routes which serve Stoke Newington, four of which operate a night bus services. These routes mostly serve locations in a north and south direction, and will also serve Dalston Kingsland which is further to the south on the A10. Stoke Newington is well served by buses travelling to Central London, and also provides connections to other shopping centres including Wood Green, Walthamstow and Nag's Head.

5.29 Bus stops are located in many locations along Stoke Newington High Street, Church Street and Stamford Hill. However, traffic on Stoke Newington High Street is in a one-way direction (north), and as a result bus stops are located on the western side of the street only. Visitors travelling to Stoke Newington by bus from the north are diverted around the centre along adjacent side roads and not through the core shopping area. The result of this situation is that shoppers travelling from the north will have to alight from the bus in the secondary shopping areas and walk to the core retail areas, increasing their journey time. This could be a factor in discouraging shoppers from visiting the centre. Furthermore, the bus routes along Church Street, which operate in both directions, provide a regular and direct link to Angel.

5.30 Stoke Newington railway station (North London Line) provides north-south rail links, but is located on the edge of the town centre, well away from the prime retail areas.

ii) By Private Transport

5.31 Accessing Stoke Newington by private transport is not easy due to the traffic congestion on the A10, which is a principal radial route into and out of Central London, and the peripheral location of the centre's main car park (the 250 space Safeway car park). However, the Wilmer Place off-street car park provides 34 parking spaces, which are conveniently located for the prime shopping area and Church Street shops/restaurants.

5.32 **Table 11**, below, compares the parking to floorspace ratio for a selection of district centres, and demonstrates that the ratio in Stoke Newington is 1:112sqm, which is comparable to the other district centres.

Table 11 – Car parking Provision – Hackney Mare Street , Stoke Newington and other District Centres

District Centres	Off Street Car Parking	Total Retail Size (sqm)	Parking Ratio/sqm
Acton	370	33,910	92
Balham	262	28,700	110
Golders Green	n/a	24,970	n/a
Palmers Green	200	24,390	122
Ruislip	409	19,600	48
Hackney Mare Street	**305**	**33,336**	**109**
Stoke Newington	**284**	**31,756**	**112**

Source: RTP using ODPM Floorspace Data (2000)

5.33 Controlled Parking Zones are in operation on Stoke Newington Church Street and Stoke Newington High Street south of Rectory Road.

Accessibility within Stoke Newington

5.34 Stoke Newington High Street and Church Street both have comparatively narrow pavements, which reduces the buffer between road traffic and pedestrians. Especially in the case of the High Street, this makes for a less relaxing shopping environment. However, where on-street parking is permitted this helps reinforce the buffer reducing the impact of the traffic on the shopping experience. At certain busy times of the day the narrowness of the pavements can lead to pedestrians choosing to step out on to the roadway to continue unimpeded on their journey.

5.35 As with other Hackney centres, the dominance of traffic within Stoke Newington inhibits pedestrian movements across the busy main roads, and east - west movement is severely impeded.

5.36 The more peripheral retail locations benefit from wider pavements, as for example to the north in Stamford Hill and the southern part of Stoke Newington High Street. The pedestrian environment in such locations is more pleasant, however, the shops in these locations do not have the same level of attraction as the shops in the centre.

Footfall

5.37 Footfall was sampled at five locations within the centre, which are shown in **Map 3, Appendix 7**. The footfall table and chart for Stoke Newington are set out at **Appendix 4 Table 3** and **Appendix 5 Figure 3.** Compared to the other centres surveyed, the following points are noted:

- Stoke Newington has consistently the lowest footfall of all three Hackney centres, and overall is only half as busy as Dalston.
- The busiest location in Stoke Newington is outside the Woolworths store on Stoke Newington High Street (location point 4), where almost 9,600 pedestrians passed on Friday and 8,700 on Saturday. This location was twice as busy as the next busiest location in the centre (location 3).
- Church Street being characterised by restaurants, bars and café uses, is likely to be much busier at lunchtimes and in the evenings, and the Saturday lunchtime figure for the Church Street location does indicate that this is the case (refer to **Appendix 4 Table 3 Location 3**).
- All the other locations tend to attract similarly low numbers of pedestrians averaging around 4,500 on Friday and 3,500 on Saturday.
- Stoke Newington displays the reverse of the normal trend, where Friday is busier than Saturday. The busiest location, outside Woolworths, falls by approximately 900, from 9,600 on Friday to 8,700 on Saturday. The reason for this is likely to be because Stoke Newington and Stamford Hill are Orthodox Jewish areas, and as a

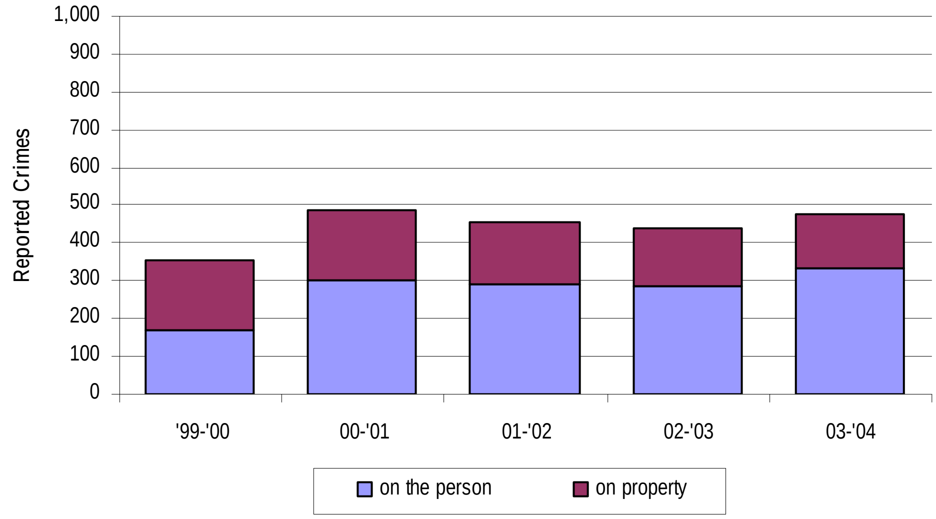
result some shops are closed and people will not visit shops on the Sabbath. In addition, other locations have a greater attraction for a main weekend shopping trip compared to the very limited offer in Stoke Newington.

Safety and Crime

5.38 Crime statistics for all Hackney's centres are set out in **Appendix 6** and in the data for Stoke Newington is shown in **Chart 3** below. Crime statistics for the five year period April 1999 to March 2004 indicate that Stoke Newington has the lowest level of crime of the Hackney town centres. Interestingly, a significant proportion of respondents to the Visitor Survey highlighted crime reduction as an issue to be tackled to improve the centre.

5.39 In 2004, there were a total of 478 crime allegations, which is approximately half the total recorded in Dalston and Hackney Mare Street.

Chart 3 – Stoke Newington Crime Statistics – 1999/00 to 2003/04



Source: Metropolitan Crime Report Information System (CRIS) data provided by Community Safety Team (LB Hackney)

5.40 Crime against the person saw a dramatic rise in the year to 00/01, but has stabilised in the period since. The trend over the last four years seems to be fairly static and possibly downward in respect of crime against property. Given the importance of the evening economy on Church Street it is imperative that efforts are directed at reducing the comparatively low levels of crime or at worst levels are maintained.

Environmental Quality

i) Streets & Open Spaces

5.41 There are no public open spaces in Stoke Newington, and the centre does lack a focal point. Clissold Park to the west of Church Street provides a nearby area of open space, but this is several hundred yards from the primary retail area.

ii) Building Frontages

5.42 The primary shopping area of Stoke Newington and all of Church Street are contained within the Stoke Newington Conservation Area, which recognises the attraction of the buildings, and indeed there is a uniformity to the building frontages that provides an attractive rhythm.

5.43 The traders on Church Street in particular provide very attractive and interesting shop fronts, and the bars and restaurants make fro an active and attractive street frontage. Fresh & Wild at 30-42 Church Street provides a particularly new, modern and interesting shop front. Dervish Café (15 Church Street) and Bar Lorca (175 Stoke Newington High Street) also provide interesting and active frontages. However, the two large vacant units at 181 and 183-187 Stoke Newington High Street detract from the street scene and are in a prominent location adjacent to the core shopping frontage.

iii) Street Furniture & Cleanliness

5.44 The shopping environment benefits from generally well maintained and clean streets. This is likely to be because the independent and niche retailers, and cafes and restaurants in particular, recognise that in order to attract customers the pavements outside their units will need to be clean and welcoming.

Development Opportunities

5.45 There is one development opportunity site in Stoke Newington. The details are provided in **Table 12**, below.

Table 12 – Stoke Newington Development Opportunity Sites

Site	Proposal
Land at Wilmer Place	The site is predominantly used as a public car park, but is surrounded by retail, office, community and residential uses. A development brief has been prepared to guide future development which allows for the reuse of the site for retail, community and cultural uses, and retaining a smaller car park.

APPENDIX 1

RENTS AND YIELDS DATA

Appendix 1 Table 1: Major Centres Prime Zone A Retail Rents

Major Centre	Year 2003
Camden	£1,938 / sqm
East Ham	£700 / sqm
Nags Head (Holloway)	£807 / sqm
Islington (Angel	£1,399 / sqm
Stratford	£1,023 / sqm
Walthamstow	£969 / sqm
Wood Green (1)	£1,292 / sqm
Dalston	**£807 / sqm**

Source: Colliers CRE In Town Retail Rents 2003
(1) Wood Green is a Metropolitan Centre

Appendix 1 Table 2: Major Centre Yields

		Year	
Major Centre	**1994**	**1997**	**2003**
Camden	8.00%	6.00%	7.00%
East Ham	9.50%	10.00%	8.00%
Nags Head (Holloway)	8.00%	8.00%	8.00%
Islington (Angel)	11.00%	8.50%	8.75%
Stratford	10.00%	8.00%	8.00%
Walthamstow	8.00%	9.00%	9.00%
Wood Green	8.00%	7.50%	7.00%
Dalston	**12.00%**	**9.50%**	**8.75%**

Source : Valuation Office Property Market Report (2004)

Appendix 1 Table 3: District Centre Prime Zone A Retail Rents

	Year 2003
Acton	£484 / sqm
Balham	£753 / sqm
Golders Green	£484 / sqm
Palmers Green	£431 / sqm
Ruislip	£484 / sqm
Stoke Newington	**£431** / sqm
Hackney Mare Street (1)	**£475 / sqm**

Source: Colliers CRE In Town Retail Rents 2003

Appendix 1 Table 4: District Centre Yields

District Centre	**1994**	**Year 1997**	**2003**
Acton	11.00%	10.00%	9.00%
Balham	8.50%	9.00%	8.50%
Golders Green	8.50%	8.50%	9.00%
Palmers Green	9.50%	9.50%	10.00%
Ruislip	9.00%	10.00%	9.00%
Stoke Newington (1)	**n/a**	**n/a**	**9.00%**
Hackney Mare Street	**12.00%**	**11.00%**	**9.00%**

Source : Valuation Office Property Market Report (2004)

(1) Estimate from Local Commercial Property Agents (Zone A rents)

APPENDIX 2

RETAILER REQUIREMENTS

Appendix 2 : Retailer Requirements

DALSTON

Company Name	**Retail Activity**	**Type**	**Sales area of required units**
Retail (A1) - General Retail			
bonmarché	Clothing	Shopping Centre, In town	232m2 (2,497 ft2) - 279m2 (3,003 ft2)
Card Warehouse	Cards & Stationery	Shopping Centre, In town	93m2 (1,001 ft2) - 232m2 (2,497 ft2)
Cardfair	Cards & Stationery	In town, Shopping Centre	93m2 (1,001 ft2) - 232m2 (2,497 ft2)
O2	Electrical & Computer Goods	In town, Shopping Centre	93m2 (1,001 ft2)
Phones 4U	Electrical & Computer Goods	Shopping Centre, In town	74m2 (797 ft2) - 139m2 (1,496 ft2)
Sensations	Cards & Stationery	In town, Shopping Centre	79m2 (850 ft2) - 163m2 (1,755 ft2)
Retail (A3) - Food & Drink/Restaurants			
Basilico Pizza	Restaurants Bars & Cafes	In town	70m2 (753 ft2) - 111m2 (1,195 ft2)

HACKNEY MARE STREET

Retail (A1) - General Retail			
99p Stores	Department Store & Variety Store	In town, Shopping Centre	372m2 (4,004 ft2) - 557m2 (5,996 ft2)
Argos	Department Store & Variety Store	In town, Edge of town	929m2 (10,000 ft2) - 1,486m2 (15,995 ft2)
Atlantic Clothing	Clothing	In town	186m2 (2,002 ft2) - 650m2 (6,997 ft2)
Blue Inc	Clothing	In town	139m2 (1,496 ft2) - 279m2 (3,003 ft2)
bonmarché	Clothing	Shopping Centre, In town	232m2 (2,497 ft2) - 279m2 (3,003 ft2)
Card Warehouse	Cards & Stationery	Shopping Centre, In town	93m2 (1,001 ft2) - 232m2 (2,497 ft2)
Cardfair	Cards & Stationery	In town, Shopping Centre	93m2 (1,001 ft2) - 232m2 (2,497 ft2)
Dreams	Household Goods	Out of town, Edge of town	279m2 (3,003 ft2) - 929m2 (10,000 ft2)
Nicolas	Drink & CTN	In town	46m2 (495 ft2) - 111m2 (1,195 ft2)
O2	Electrical & Computer Goods	In town, Shopping Centre	93m2 (1,001 ft2)
Phones 4U	Electrical & Computer Goods	Shopping Centre, In town	74m2 (797 ft2) - 139m2 (1,496 ft2)
Sensations	Cards & Stationery	In town, Shopping Centre	79m2 (850 ft2) - 163m2 (1,755 ft2)
Shoe Zone	Clothing	In town, Edge of town	93m2 (1,001 ft2) - 232m2 (2,497 ft2)
Retail (A3) - Food & Drink/Restaurants			
Subway	Restaurants Bars & Cafes	In town	37m2 (398 ft2) - 111m2 (1,195 ft2)
Flaming Nora	Restaurants Bars & Cafes	In town	74m2 (797 ft2) - 111m2 (1,195 ft2)
Burger King	Restaurants Bars & Cafes	In town	0.40hectares (0.99 acres)

STOKE NEWINGTON

Retail (A1) - General Retail			
Card Warehouse	Cards & Stationery	Shopping Centre, In town	93m2 (1,001 ft2) - 232m2 (2,497 ft2)
Cardfair	Cards & Stationery	In town, Shopping Centre	93m2 (1,001 ft2) - 232m2 (2,497 ft2)
Iceland	Supermarket	In town	279m2 (3,003 ft2) - 790m2 (8,504 ft2)
Retail (A3) - Food & Drink/Restaurants			
McDonald's	Restaurants Bars & Cafes	Edge of town, Out of town	0.10 hectares (0.25 acres)
Strada	Restaurants Bars & Cafes	In town	167m2 (1,798 ft2) - 325m2 (3,498 ft2)

Source: Estates Gazette Interactive (June 2004)

APPENDIX 3

GOAD TOWN CENTRE SUMMARY DATA

Appendix 3 Table 1: Goad Centre Summary Report for Dalston - Kingsland High Road

Base: Greater London & UK

Centre Selection: All Outlets
Survey Date: 18/07/2003

		Floorspace						Outlets					
		Dalston Kingsland		**Greater London**		**UK**		**Dalston Kingsland**		**Greater London**		**UK**	
	Type	**Floorspace sq ft**	**Dalston Kingsland %**	**Greater London %**	**Index**	**UK %**	**Index**	**Outlets**	**Dalston Kingsland %**	**Greater London %**	**Index**	**UK %**	**Index**
Convenience													
G1A	Bakers	7,400	1.20	0.80	151	1.05	115	7	1.96	1.35	145	1.98	99
G1B	Butchers	11,400	1.85	0.51	366	0.48	390	5	1.40	0.80	175	0.85	165
G1C	Greengrocers & Fishmongers	1,600	0.26	1.42	18	1.63	16	2	0.56	0.69	81	0.79	71
G1D	Groceries & Frozen Foods	72,900	11.85	11.39	104	11.80	100	21	5.87	3.64	161	2.74	214
G1E	Off Licences & Home Brew	5,600	0.91	0.70	129	0.48	190	4	1.12	1.04	108	0.73	154
G1F	CTN & Convenience	12,100	1.97	2.00	98	1.28	153	9	2.51	3.45	73	2.19	115
	Total	**111,000**	**18.05**	**16.81**	**107**	**16.72**	**108**	**48**	**13.41**	**10.95**	**122**	**9.27**	**145**
Comparison													
G2A	Footwear & Repairs	21,200	3.45	1.53	225	1.63	212	17	4.75	2.27	209	2.30	207
G2B	Mens & Boys Wear	10,000	1.63	1.26	130	1.12	145	8	2.23	1.57	142	1.43	156
G2C	Womens, Girls & Childrens	25,400	4.13	3.94	105	4.60	90	19	5.31	4.95	107	5.59	95
G2D	Mixed & General Clothing	28,100	4.57	4.16	110	4.70	97	10	2.79	2.86	98	3.31	84
G2E	Furniture, Carpets & Textiles	43,500	7.07	4.54	156	5.27	134	16	4.47	4.14	108	4.64	96
G2F	Books, Arts & Crafts, Stationers & Copying	12,300	2.00	3.71	54	3.59	56	8	2.23	4.19	53	4.51	50
G2G	Electrical, Home Ent, Telephones & Video	26,300	4.28	4.10	104	4.09	105	20	5.59	5.05	111	5.16	108
G2H	DIY, Hardware & Household Goods	40,600	6.60	4.39	150	5.04	131	14	3.91	2.93	133	3.06	128
G2I	Gifts, China, Glass & Leather Goods	3,800	0.62	0.90	69	1.02	60	2	0.56	1.54	36	1.93	29
G2J	Cars, Motor Cycles & Accessories	11,500	1.87	2.56	73	2.38	79	6	1.68	1.63	103	1.44	116
G2K	Chemists, Toiletries & Opticians	18,200	2.96	3.64	81	3.95	75	12	3.35	3.67	91	3.75	89
G2L	Variety, Department & Catalogue Showrooms	5,200	0.85	7.35	12	9.04	9	1	0.28	0.71	39	1.11	25
G2M	Florists & Gardens	3,400	0.55	0.44	126	0.49	113	3	0.84	0.89	95	1.09	77
G2N	Sports, Toys, Cycles & Hobbies	6,800	1.11	1.87	59	2.65	42	5	1.40	1.72	81	2.71	52
G2O	Jewellers, Clocks & Repairs	5,400	0.88	1.01	87	1.02	86	5	1.40	2.04	69	2.27	61
G2P	Charity, Pets & Other Comparison	7,100	1.15	1.76	66	2.45	47	5	1.40	2.33	60	3.77	37
	Total	**268,800**	**43.70**	**47.15**	**93**	**53.03**	**82**	**151**	**42.18**	**42.49**	**99**	**48.08**	**88**
Service													
G3A	Restaurants, Cafes, Fast Food & Take Away	65,800	10.70	12.59	85	8.09	132	50	13.97	18.19	77	12.66	110
G3B	Hairdressing, Beauty & Health	34,200	5.56	4.37	127	2.95	189	32	8.94	6.52	137	6.16	145
G3C	Launderettes & Dry Cleaners	6,500	1.06	0.99	107	0.48	218	7	1.96	1.94	101	1.04	189
G3D	Travel Agents	3,200	0.52	1.15	45	1.15	45	3	0.84	1.67	50	1.91	44
G3E	Banks & Financial Services	23,900	3.89	5.35	73	5.19	75	14	3.91	4.12	95	4.68	83
G3F	Building Societies	1,600	0.26	0.38	69	0.58	45	1	0.28	0.40	69	0.70	40
G3G	Estate Agents & Auctioneers	11,100	1.80	2.42	75	2.01	90	8	2.23	3.72	60	3.44	65
	Total	**146,300**	**23.78**	**27.24**	**87**	**20.44**	**116**	**115**	**32.12**	**36.56**	**88**	**30.59**	**105**
Miscellaneous													
G4A	Employment, Careers, Pos & Info	3,800	0.62	1.73	36	1.83	34	2	0.56	1.49	37	1.49	38
G4B	Vacant	85,200	13.85	7.06	196	7.98	173	42	11.73	8.50	138	10.57	111
	Total	**89,000**	**14.47**	**8.79**	**165**	**9.82**	**147**	**44**	**12.29**	**9.99**	**123**	**12.06**	**102**

Centre Total **615,100 Floorspace in Square Feet** **358 Outlets**

Appendix 3 Table 2: Goad Centre Summary Report for Hackney - Mare Street

Base: Greater London & UK

Centre Selection: All Outlets

Survey Date: 18/07/2003

		Floorspace						Outlets					
		Hackney Mare Street		Greater London		UK							
	Type	Floorspace sq ft	Hackney Mare Street %	Greater London %	Index	UK %	Index	Outlets	Hackney Mare Street %	Greater London %	Index	UK %	Index
Convenience													
G1A	Bakers	3,700	1.28	0.80	160	1.05	122	2	1.14	1.35	85	1.98	58
G1B	Butchers	800	0.28	0.51	55	0.48	58	1	0.57	0.80	72	0.85	67
G1C	Greengrocers & Fishmongers	1,700	0.59	1.42	41	1.63	36	2	1.14	0.69	167	0.79	145
G1D	Groceries & Frozen Foods	53,000	18.31	11.39	161	11.80	155	12	6.86	3.64	188	2.74	250
G1E	Off Licences & Home Brew	1,100	0.38	0.70	54	0.48	79	1	0.57	1.04	55	0.73	79
G1F	CTN & Convenience	9,300	3.21	2.00	161	1.28	251	9	5.14	3.45	149	2.19	235
	Total	**69,600**	**24.04**	**16.81**	**143**	**16.72**	**144**	**27**	**15.43**	**10.95**	**141**	**9.27**	**166**
Comparison													
G2A	Footwear & Repairs	7,100	2.45	1.53	160	1.63	151	5	2.86	2.27	126	2.30	124
G2B	Mens & Boys Wear	4,600	1.59	1.26	127	1.12	141	4	2.29	1.57	146	1.43	160
G2C	Womens, Girls & Childrens	8,900	3.07	3.94	78	4.60	67	7	4.00	4.95	81	5.59	72
G2D	Mixed & General Clothing	17,600	6.08	4.16	146	4.70	129	5	2.86	2.86	100	3.31	86
G2E	Furniture, Carpets & Textiles	18,100	6.25	4.54	138	5.27	119	6	3.43	4.14	83	4.64	74
G2F	Books, Arts & Crafts, Stationers & Copying	3,300	1.14	3.71	31	3.59	32	3	1.71	4.19	41	4.51	38
G2G	Electrical, Home Ent, Telephones & Video	6,100	2.11	4.10	51	4.09	52	6	3.43	5.05	68	5.16	66
G2H	DIY, Hardware & Household Goods	13,300	4.59	4.39	105	5.04	91	9	5.14	2.93	175	3.06	168
G2I	Gifts, China, Glass & Leather Goods	0	0.00	0.90	0	1.02	0	0	0.00	1.54	0	1.93	0
G2J	Cars, Motor Cycles & Accessories	4,100	1.42	2.56	55	2.38	60	4	2.29	1.63	140	1.44	159
G2K	Chemists, Toiletries & Opticians	11,600	4.01	3.64	110	3.95	102	7	4.00	3.67	109	3.75	107
G2L	Variety, Department & Catalogue Showrooms	29,000	10.02	7.35	136	9.04	111	2	1.14	0.71	161	1.11	103
G2M	Florists & Gardens	1,200	0.41	0.44	94	0.49	85	2	1.14	0.89	129	1.09	105
G2N	Sports, Toys, Cycles & Hobbies	7,400	2.56	1.87	136	2.65	97	3	1.71	1.72	100	2.71	63
G2O	Jewellers, Clocks & Repairs	1,700	0.59	1.01	58	1.02	57	2	1.14	2.04	56	2.27	50
G2P	Charity, Pets & Other Comparison	9,700	3.35	1.76	190	2.45	137	9	5.14	2.33	221	3.77	136
	Total	**143,700**	**49.64**	**47.15**	**105**	**53.03**	**94**	**74**	**42.29**	**42.49**	**100**	**48.08**	**88**
Service													
G3A	Restaurants, Cafes, Fast Food & Take Away	27,900	9.64	12.59	77	8.09	119	26	14.86	18.19	82	12.66	117
G3B	Hairdressing, Beauty & Health	12,300	4.25	4.37	97	2.95	144	15	8.57	6.52	131	6.16	139
G3C	Launderettes & Dry Cleaners	2,600	0.90	0.99	91	0.48	186	3	1.71	1.94	88	1.04	165
G3D	Travel Agents	0	0.00	1.15	0	1.15	0	0	0.00	1.67	0	1.91	0
G3E	Banks & Financial Services	12,300	4.25	5.35	79	5.19	82	5	2.86	4.12	69	4.68	61
G3F	Building Societies	1,800	0.62	0.38	164	0.58	108	1	0.57	0.40	142	0.70	82
G3G	Estate Agents & Auctioneers	4,000	1.38	2.42	57	2.01	69	4	2.29	3.72	61	3.44	66
	Total	**60,900**	**21.04**	**27.24**	**77**	**20.44**	**103**	**54**	**30.86**	**36.56**	**84**	**30.59**	**101**
Miscellaneous													
G3A	Employment, Careers, Pos & Info	2,100	0.73	1.73	42	1.83	40	2	1.14	1.49	76	1.49	77
G34B	Vacant	13,200	4.56	7.06	65	7.98	57	18	10.29	8.50	121	10.57	97
	Total	**15,300**	**5.28**	**8.79**	**60**	**9.82**	**54**	**20**	**11.43**	**9.99**	**114**	**12.06**	**95**
	Centre Total	**289,500**	**Floorspace in Square Feet**					**175**	**Outlets**				

Appendix 3 Table 3: Goad Centre Summary Report for Stoke Newington

Base: Greater London & UK
Centre Selection: All Outlets
Survey Date: 18/07/2003

		Floorspace						Outlets					
		Stoke Newington		**Greater London**		**UK %**		**Stoke Newington**		**Greater London**		**UK %**	
	Type	**Floorspace sq ft**	**Stoke Newington %**	**Greater London %**	**Index**	**UK %**	**Index**	**Outlets**	**Stoke Newington %**	**Greater London %**	**Index**	**UK %**	**Index**
Convenience													
G1A	Bakers	9,200	2.41	0.80	302	1.05	230	8	3.42	1.35	254	1.98	173
G1B	Butchers	1,900	0.50	0.51	98	0.48	105	2	0.85	0.80	107	0.85	101
G1C	Greengrocers & Fishmongers	5,500	1.44	1.42	102	1.63	88	4	1.71	0.69	249	0.79	217
G1D	Groceries & Frozen Foods	78,000	20.45	11.39	180	11.80	173	18	7.69	3.64	211	2.74	280
G1E	Off Licences & Home Brew	4,200	1.10	0.70	156	0.48	230	4	1.71	1.04	165	0.73	236
G1F	CTN & Convenience	10,500	2.75	2.00	138	1.28	215	10	4.27	3.45	124	2.19	195
	Total	**109,300**	**28.65**	**16.81**	**170**	**16.72**	**171**	**46**	**19.66**	**10.95**	**179**	**9.27**	**212**
Comparison													
G2A	Footwear & Repairs	3,700	0.97	1.53	63	1.63	60	4	1.71	2.27	75	2.30	74
G2B	Mens & Boys Wear	2,100	0.55	1.26	44	1.12	49	2	0.85	1.57	54	1.43	60
G2C	Womens, Girls & Childrens	3,200	0.84	3.94	21	4.60	18	4	1.71	4.95	35	5.59	31
G2D	Mixed & General Clothing	4,400	1.15	4.16	28	4.70	25	1	0.43	2.86	15	3.31	13
G2E	Furniture, Carpets & Textiles	33,300	8.73	4.54	192	5.27	166	13	5.56	4.14	134	4.64	120
G2F	Books, Arts & Crafts, Stationers &	7,300	1.91	3.71	52	3.59	53	5	2.14	4.19	51	4.51	47
G2G	Electrical, Home Ent, Telephones	9,700	2.54	4.10	62	4.09	62	13	5.56	5.05	110	5.16	108
G2H	DIY, Hardware & Household Goo	27,400	7.18	4.39	164	5.04	142	11	4.70	2.93	160	3.06	154
G2I	Gifts, China, Glass & Leather Go	0	0.00	0.90	0	1.02	0	0	0.00	1.54	0	1.93	0
G2J	Cars, Motor Cycles & Accessorie	29,000	7.60	2.56	297	2.38	320	6	2.56	1.63	157	1.44	178
G2K	Chemists, Toiletries & Opticians	5,400	1.42	3.64	39	3.95	36	5	2.14	3.67	58	3.75	57
G2L	Variety, Department & Catalogue	7,500	1.97	7.35	27	9.04	22	1	0.43	0.71	60	1.11	38
G2M	Florists & Gardens	0	0.00	0.44	0	0.49	0	0	0.00	0.89	0	1.09	0
G2N	Sports, Toys, Cycles & Hobbies	1,500	0.39	1.87	21	2.65	15	2	0.85	1.72	50	2.71	32
G2O	Jewellers, Clocks & Repairs	2,500	0.66	1.01	65	1.02	64	2	0.85	2.04	42	2.27	38
G2P	Charity, Pets & Other Compariso	5,000	1.31	1.76	74	2.45	54	4	1.71	2.33	73	3.77	45
	Total	**142,000**	**37.22**	**47.15**	**79**	**53.03**	**70**	**73**	**31.20**	**42.49**	**73**	**48.08**	**65**
Service													
G3A	Restaurants, Cafes, Fast Food &	48,900	12.82	12.59	102	8.09	158	48	20.51	18.19	113	12.66	162
G3B	Hairdressing, Beauty & Health	22,800	5.98	4.37	137	2.95	203	21	8.97	6.52	138	6.16	146
G3C	Launderettes & Dry Cleaners	3,900	1.02	0.99	104	0.48	211	4	1.71	1.94	88	1.04	165
G3D	Travel Agents	0	0.00	1.15	0	1.15	0	0	0.00	1.67	0	1.91	0
G3E	Banks & Financial Services	12,500	3.28	5.35	61	5.19	63	5	2.14	4.12	52	4.68	46
G3F	Building Societies	0	0.00	0.38	0	0.58	0	0	0.00	0.40	0	0.70	0
G3G	Estate Agents & Auctioneers	8,000	2.10	2.42	87	2.01	105	6	2.56	3.72	69	3.44	75
	Total	**96,100**	**25.19**	**27.24**	**92**	**20.44**	**123**	**84**	**35.90**	**36.56**	**98**	**30.59**	**117**
Miscellaneous													
G4A	Employment, Careers, Pos & Info	3,600	0.94	1.73	54	1.83	52	2	0.85	1.49	57	1.49	57
G4B	Vacant	30,500	7.99	7.06	113	7.98	100	29	12.39	8.50	146	10.57	117
	Total	**34,100**	**8.94**	**8.79**	**102**	**9.82**	**91**	**31**	**13.25**	**9.99**	**133**	**12.06**	**110**

Centre Total **381,500 Floorspace in Square Feet** **234 Outlets**

APPENDIX 4

FOOTFALL TABLES

APPENDIX 4: Footfall Tables

Table 1: Dalston Kingsland

	Friday					Saturday				
	1. Blockbuster Video - Kingsland High Street	2. Peacocks - Kingsland High Street	3. Ridley Road Market	4. Dalston Lane	5. Scooter Den - Kingsland Road	1. Blockbuster Video - Kingsland High Street	2. Peacocks - Kingsland High Street	3. Ridley Road Market	4. Dalston Lane	5. Scooter Den - Kingsland Road
10.00 -11.00	468	1548	2280	396	168	576	1836	3408	336	384
11.00 -12.00	1308	2580	2280	876	744	2868	2484	2760	432	408
12.00 -13.00	1320	2316	2688	1128	2184	2892	3444	3984	1464	1212
13.00 -14.00	1956	2808	3132	1524	852	2688	3756	4212	2184	1044
14.00 -15.00	1932	1260	2076	1308	996	2796	3852	4104	1104	1236
15.00 -16.00	1320	1236	180	156	948	1476	1884	3504	1224	1128
Totals	8304	11748	12636	5388	5892	13296	17256	21972	6744	5412
Average	1384	1958	2106	898	982	2216	2876	3662	1124	902

Table 2: Hackney Mare Street

	Friday					Saturday				
	1. Castles Estate Agent - Lower Clapton Road	2. William Hill - Mare Street	3. Primark - Mare Street	4. Woolworths - Mare Street	5. Hackney Library - Mare Street	1. Castles Estate Agent - Lower Clapton Road	2. William Hill - Mare Street	3. Primark - Mare Street	4. Woolworths - Mare Street	5. Hackney Library - Mare Street
10.00 -11.00	204	768	492	684	1044	312	1716	2100	1476	1032
11.00 -12.00	420	1164	1404	744	372	1788	2388	3060	1728	828
12.00 -13.00	540	1332	1272	792	504	1464	2388	3240	2508	1416
13.00 -14.00	432	1224	1692	1056	720	1956	2328	2388	4020	1440
14.00 -15.00	348	1332	1020	540	408	1236	2616	3804	4008	1740
15.00 -16.00	696	1440	1512	1020	456	1728	3996	4104	3192	1824
Totals	2640	7260	7392	4836	3504	8484	15432	18696	16932	8280
Average	440	1210	1232	806	584	1414	2572	3116	2822	1380

Table 3: Stoke Newington

	Friday					Saturday				
	1. Safeway - Stamford Hill	2. Millenium Café - Stoke Newington High Street	3. Oakwood Estate Agents - Church Street	4. Woolworths - Stoke Newington High Street	5. White Hart PH - Stoke Newington High Street	1. Safeway - Stamford Hill	2. Millenium Café - Stoke Newington High Street	3. Oakwood Estate Agents - Church Street	4. Woolworths - Stoke Newington High Street	5. White Hart PH - Stoke Newington High Street
10.00 -11.00	276	420	240	288	360	264	540	732	1068	432
11.00 -12.00	876	804	1116	1032	948	780	780	852	1128	660
12.00 -13.00	768	636	696	1488	948	816	708	648	1740	720
13.00 -14.00	900	996	900	1692	780	636	744	1128	1884	948
14.00 -15.00	696	888	696	2064	792	576	516	792	1488	492
15.00 -16.00	948	1344	1308	3000	624	516	540	1068	1392	636
Totals	4464	5088	4956	9564	4452	3588	3828	5220	8700	3888
Average	744	848	826	1594	742	598	638	870	1450	648

APPENDIX 5

FOOTFALL CHARTS

APPENDIX 5: Footfall - Charts

Figure 1: Dalston Kingsland

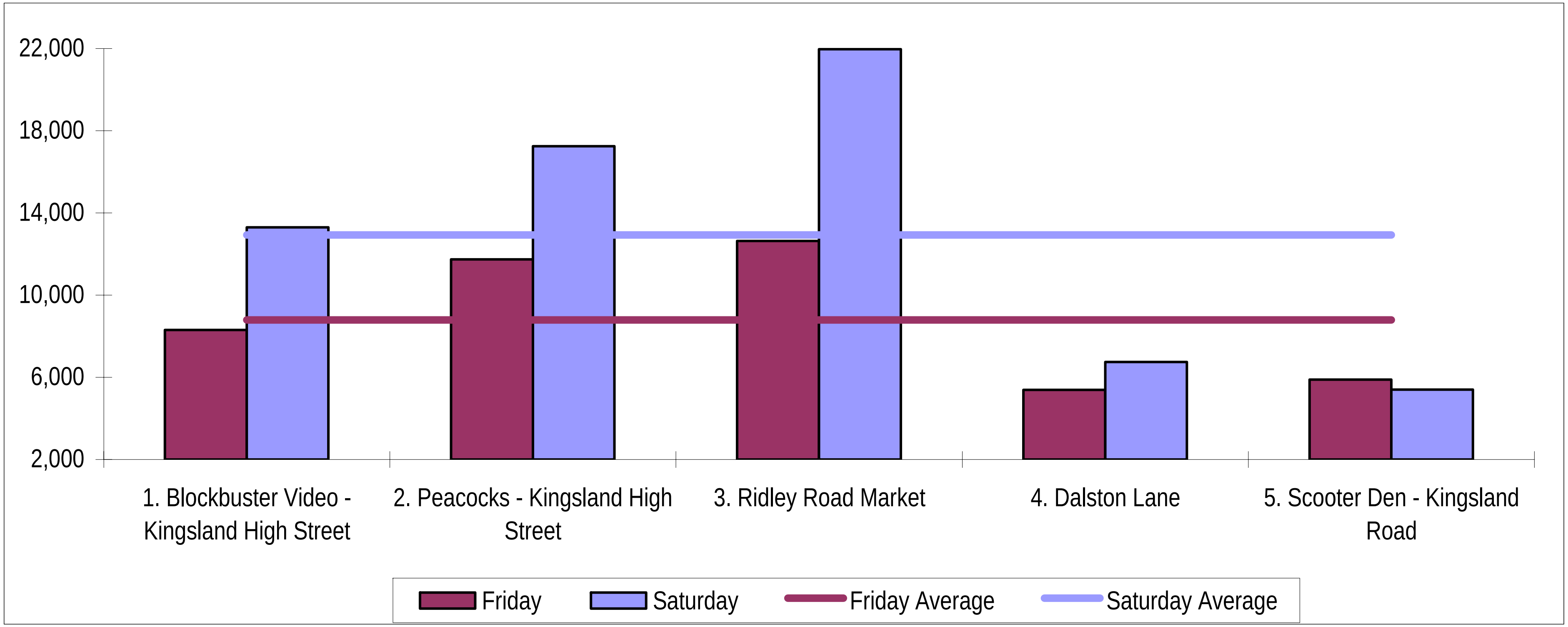


Figure 2: Hackney Mare Street

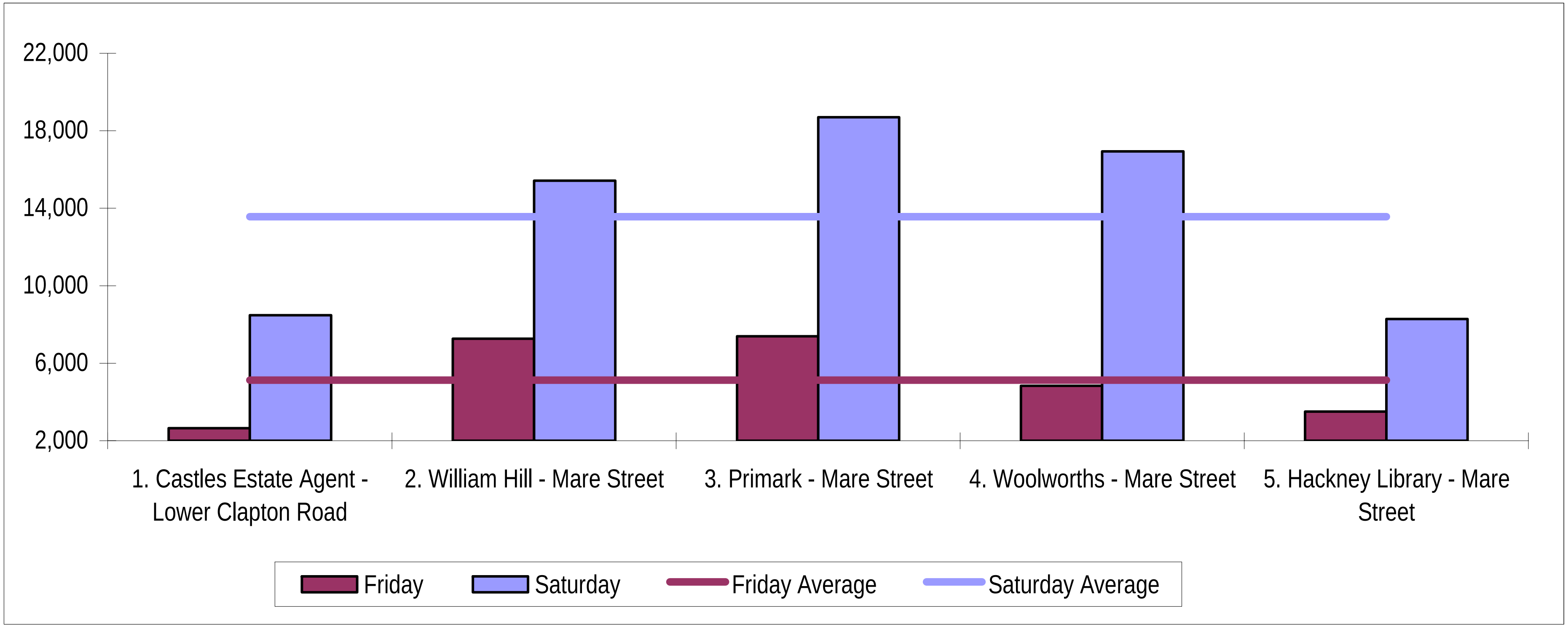
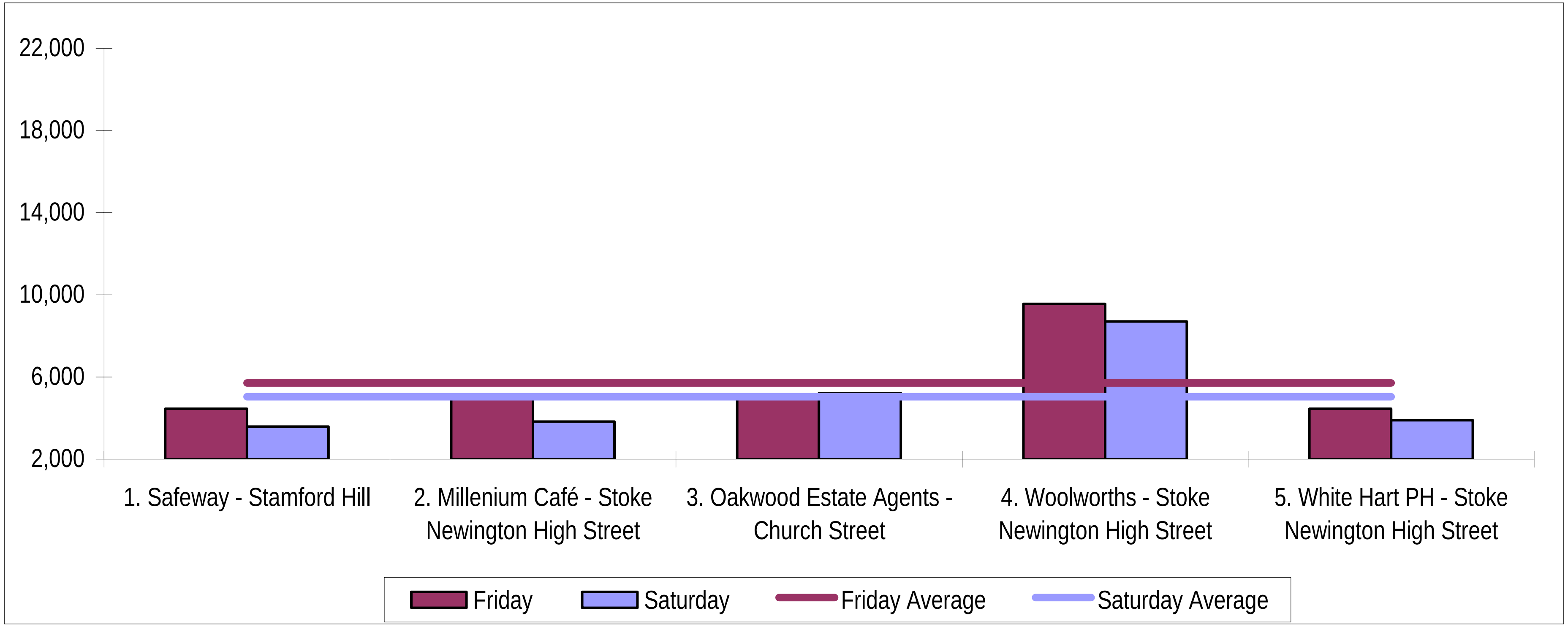


Figure 3: Stoke Newington



APPENDIX 6

CRIME DATA

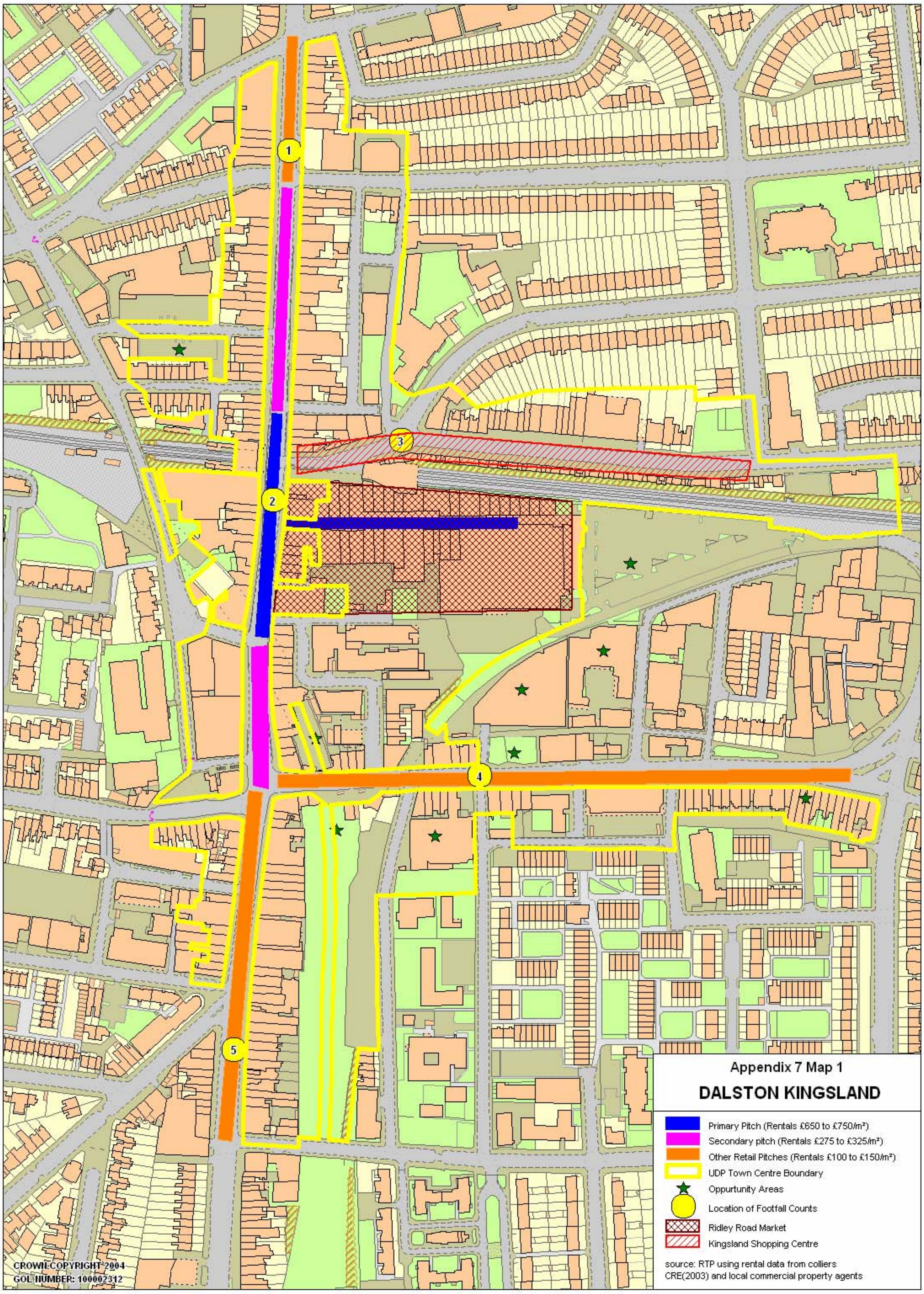
APPENDIX 6

	Crime Category	'99-'00	00-'01	01-'02	02-'03	03-'04	Five Year Change (absolute)	Five Year Change (percentage)
Dalston Kingsland	on the person	430	537	517	536	586	156	36
	on property	445	334	336	305	422	-23	-5
	Grand total	**875**	**871**	**853**	**841**	**1,008**	**133**	**15**
Hackney Mare Street	on the person	297	376	478	447	471	174	59
	on property	501	316	423	377	397	-104	-21
	Grand total	**798**	**692**	**901**	**824**	**868**	**70**	**9**
Stoke Newington	on the person	169	301	291	285	331	162	96
	on property	185	185	162	154	147	-38	-21
	Grand total	**354**	**486**	**453**	**439**	**478**	**124**	**35**

Source: Metropolitan Crime Report Information System (CRIS) data provided by Community Safety Team (LB Hackney)

APPENDIX 7

TOWN CENTRE MAPS


1
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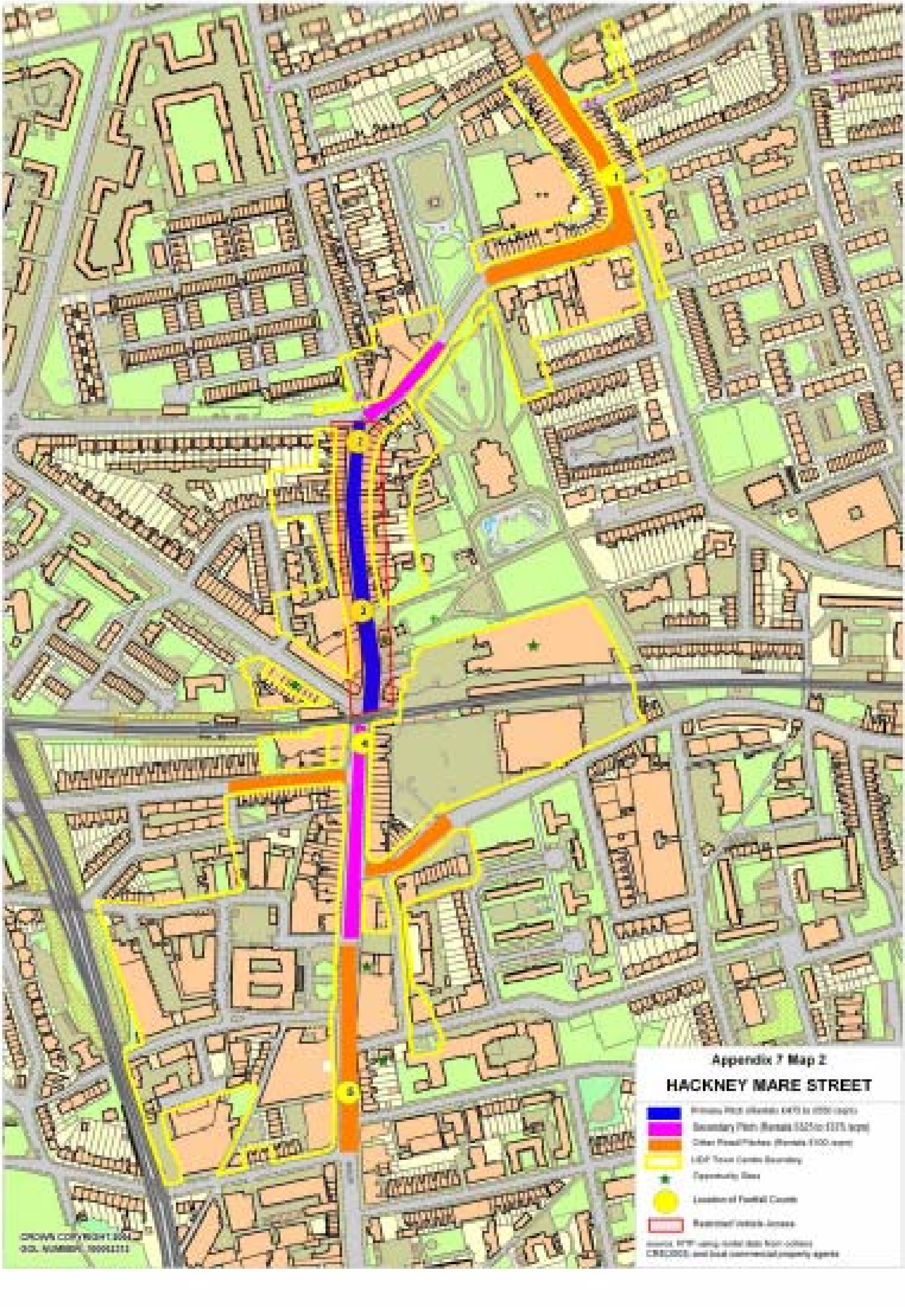
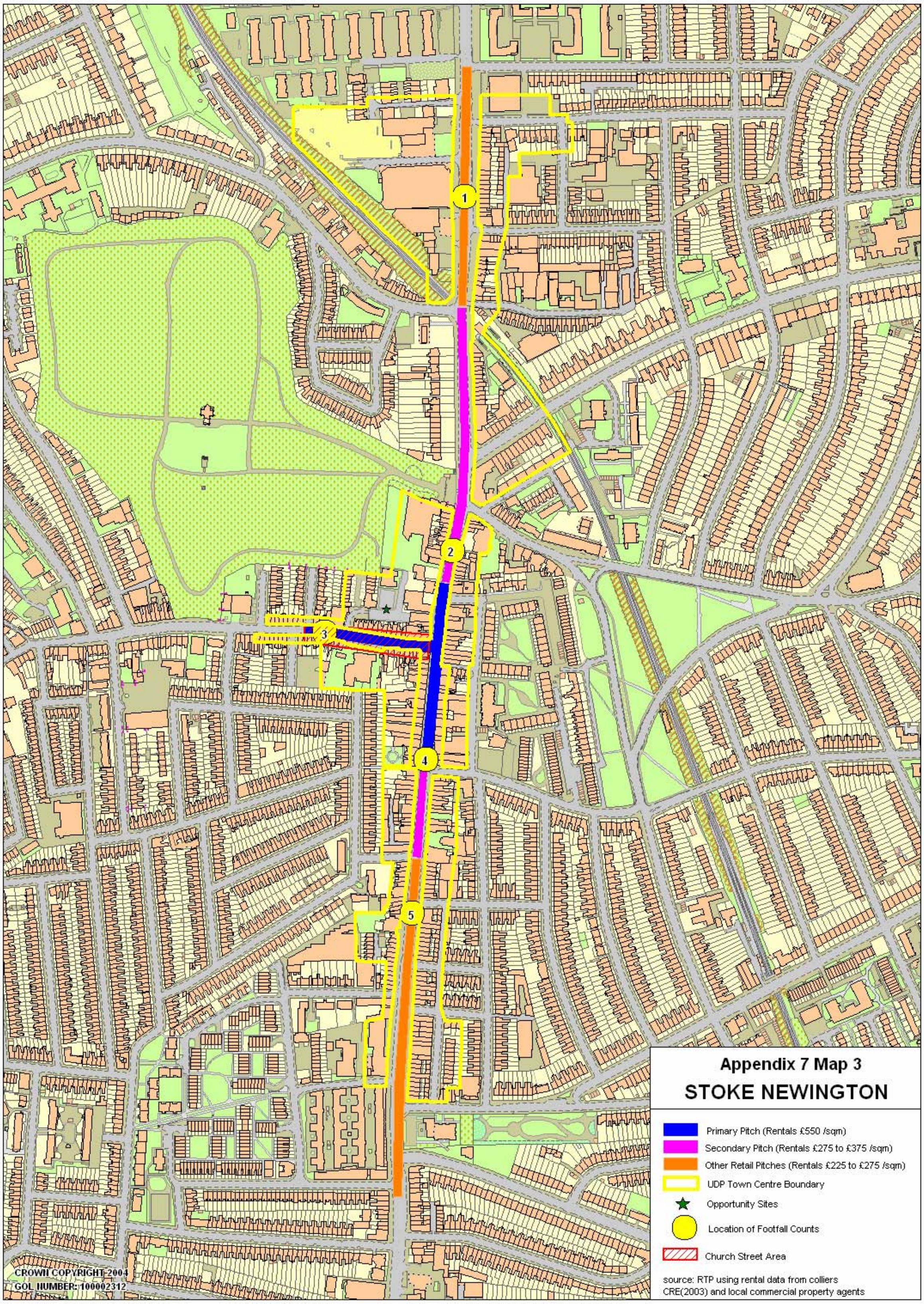
Appendix 7 Map 1
DALSTON KINGSLAND
Primary Pitch (Rentals £650 to £750/m²)
Secondary pitch (Rentals £275 to £325/m²)
Other Retail Pitches (Rentals £100 to £150/m²)
UDP Town Centre Boundary
Oppurtunity Areas
Location of Footfall Counts
Ridley Road Market
Kingsland Shopping Centre
source: RTP using rental data from colliers
CRE(2003) and local commercial property agents
CROWN COPYRIGHT 2004
GOL NUMBER: 100002312


Appendix 7 Map 2
HACKNEY MARE STREET
Location of Footfall Counts



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Appendix 7 Map 3
STOKE NEWINGTON
Primary Pitch (Rentals £550 /sqm)
Secondary Pitch (Rentals £275 to £375 /sqm)
Other Retail Pitches (Rentals £225 to £275 /sqm)
UDP Town Centre Boundary
Opportunity Sites
Location of Footfall Counts
Church Street Area
source: RTP using rental data from colliers CRE(2003) and local commercial property agents
CROWN COPYRIGHT 2004
GOL NUMBER: 100002312