Hackney Borough Council
HACKNEY RETAIL AND LEISURE STUDY

ROGER TYM & PARTNERS
Planners and Development Economists

Executive Summary
May 2005

ROGER TYM & PARTNERS

Fairfax House
15 Fulwood Place
London WC1V 6HU

t 020 7831 2711
f 020 7831 7653
e london@tymconsult.com
w www.tymconsult.com

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1 INTRODUCTION

1.1 The London Borough of Hackney (LB Hackney) commissioned Roger Tym & Partners in April 2004 to carry out a borough-wide Retail and Leisure Capacity Study (the study). The purpose of the study was to provide background information to inform the emerging Local Development Framework and to provide baseline information for the development of Area Action Plans and regeneration strategies for Dalston Kingsland and Hackney (Mare Street) town centres.

The Study Aims

1.2 The aims for the study, as stated in the LB Hackney brief, were as follows:

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

1.3 These aims were set in the context that whilst there had been significant changes in retailing beyond the borough over the previous decade, retail change within the borough had been relatively small. Some previously identified opportunity sites had still to be developed and it was perceived that there was or might be significant scope for new retail and leisure development in the borough. Such scope and the associated opportunities for inward investment could contribute significantly in terms of aiding regeneration and creating employment.

The Study Approach

1.4 The specified aims of the study required a number of baseline assessments to be undertaken. Three specific surveys were commissioned in May and June 2004, namely:

- A household survey – which comprised a telephone interview of 1,200 households in an agreed study area. This was divided in twelve zones – nine in LB Hackney, two in LB Islington and one on LB Tower Hamlets.
- A visitor survey – which conducted on-street with interviews in Mare Street (161 no.), Dalston Kingsland (152) and Stoke Newington (195).
- A healthcheck survey – undertook a detailed evaluation of Mare Street, Dalston Kingsland and Stoke Newington.

1.5 These surveys provided data on shopping and leisure patterns in the study area as a whole, on the vitality and viability of the borough's three town centres and on levels of visitor satisfaction with these centres. Cumulatively, the surveys provided a wide range of data for the modelling of retail need across the whole study area, the qualitative assessment of the current performance of each town centre, as well as the extent and potential of opportunity sites within the borough.

The Study Outputs

1.6 The study findings are presented by means of a main report plus three technical survey reports. The main report is free-standing, summarises the main findings of the survey work and makes specific draft policy recommendations. The technical reports cover each of the three main surveys – the household survey, the visitor survey and the healthcheck survey. Each of these technical reports includes details of the relevant survey methodology, the resultant technical data and analysis, and detailed appendices.

1.7 This executive summary seeks to draw out all key messages and recommendations and is structured as follows:

- Section 2 summarises the key findings of the **household survey**
- Section 3 summarises the key findings of the **visitor survey**
- Section 4 summarises the key findings of the **healthcheck survey**
- Section 5 suggests **opportunity sites** which could meet the need for additional floorspace
- Section 6 puts forward suggested planning **policy options**

2 HOUSEHOLD SURVEY – KEY FINDINGS

2.1 The Household Survey established the current shopping and leisure patterns in the Borough and in areas beyond that could be important in the context of the LB Hackney centres. To do this, a Study Area was defined which covered an area from which the LB Hackney centres were considered to be likely to draw the majority of their trade. The Study Area is defined below.

2.2 Nine of the zones (zones 1 to 9) are wholly within the LB Hackney, two are in LB Islington (zones 10 and 11) and the final zone (zone 12) is within LB Tower Hamlets.

2.3 The nine LB Hackney zones are:

- zone 1: covering Dalston and De Beauvoir wards (Dalston's local zone)
- zone 2: covering Hackney Central and Chatham wards (Hackney Mare Street's local zone)
- zone 3: covering Hoxton and Haggerston wards
- zone 4: covering Queensbridge and Victoria wards
- zone 5: covering King's Park and Wick wards
- zone 6: covering Hackney Downs and Leabridge wards
- zone 7: covering Springfield and Cazenove wards
- zone 8: covering New River, Lordship and Brownswood wards
- zone 9: covering Clissold and Stoke Newington Central wards

2.4 Unlike Dalston and Hackney Mare Street town centres, Stoke Newington is not located conveniently within one or two wards. Instead it straddles the boundary of zones 6, 7, 8 and 9.

2.5 The two LB Islington zones are:

- zone 10: covering Highbury West and Highbury East wards
- zone 11: covering Mildmay, Canonbury and St Peter's wards

2.6 The single LB Tower Hamlets zone is:

- zone 12: covering Weavers and Bethnal Green North wards

2.7 In the next section we present the key findings of the Household Survey.

Retail - Comparison goods

2.8 Comparison goods (or consumer durables) are retail goods such as clothes, shoes, homeware, jewellery, sportswear, games/toys, books, music, electricals and furniture. Households spend approximately 50% of their total comparison goods expenditure in their primary location.

2.9 Much of the shopping for these goods by residents in the study area is undertaken not in the borough itself but predominantly in the West End of London. The West End is the dominant centre for each of the twelve study area zones and, overall, accounts for almost 40% of all main comparison shopping trips from study area residents.

2.10 The performance of the borough's centres is weak. In terms of trips, Dalston draws 11% of all main shopping trips in the study area, Mare Street draws 9% and Stoke Newington draws just 2%. In terms of overall market share of comparison expenditure in the study area, the borough's centres perform at an even lower level with Dalston capturing 8%, Mare Street next with 4% and Stoke Newington accounting for 2.5%. Even in an inner London context, where catchments overlap and transport links to higher order centres are relatively good, these capture levels are surprisingly low.

2.11 The main comparison centre in the borough is Dalston. It attracts shoppers from the local zones of both Hackney Mare Street and Stoke Newington without losing significant trips to these centres from its local zone. Even so, all three LB Hackney centres generally have very localised catchments with little comparison draw from beyond the zones immediately surrounding the centre.

2.12 Turning to transport mode, most trips for comparison shopping are made by bus which accounts for almost half of all trips from the study area. However, the private car accounts for a sizable 16% of all trips. The localised nature of LB Hackney centres' catchment area is confirmed by the short journey lengths which in the case of Dalston and Mare Street are around 11 minutes. This compares to the 30 minutes average taken by shoppers accessing the West End.

2.13 Trips by tube and train comprise 10% and 4% respectively across all zones. But at the zonal level, these figures are significantly higher in places where such means of transport are more readily available. It is likely that the proposed East London Line Extension (ELLX) to Dalston, would increase the proportion of residents in Dalston's local zone and along the ELLX route which uses the tube for comparison goods shopping trips. However, it is unclear whether these trips would be to the same locations as visited at present, and thus simply divert from other modes, or if they will be new trips.

2.14 The primary reason for undertaking comparison shopping in the borough's centres that of close proximity to home, rather than the quality and range of the shops. Indeed, it is the (perceived) local lack of such attractiveness that creates the main reason for visiting rival destinations outside the borough. Price competitiveness is also very important for borough's shoppers. Dalston achieved the highest satisfaction score for comparison goods provision within the borough, but even here the centre only achieves an average score whilst the other two centres score below average.

Retail - Convenience goods

2.15 Convenience goods are food, drink, tobacco and non-durable household goods commonly used to clean and maintain the home. Convenience goods shopping patterns are much more localised than those for comparison goods. LB Hackney has two dominant foodstores – Tesco in Morning Lane, Mare Street and Sainsbury in the Kingsland Shopping Centre, Dalston. These two stores, centrally located in the borough, alone account for 35% of the study area's main convenience goods shopping trips. Both command around a 50% share of primary trips for convenience goods from their local zones and also draw well from the surrounding zones.

2.16 The Safeway store in Stoke Newington centre and the Tesco (Metro) store in Well Street also have a notable draw within their local zones. There is relatively high customer loyalty to the main store visited. Half of all households only use the one store and other households on average spend 60% of their total convenience goods expenditure in the primary location.

2.17 The borough's centres command an overall market share of 55% for convenience trade. If we examine just those nine study area zones which lie within LB Hackney, the market share of the borough's centres rises to 69%. . The three town centres all achieve strong retention rates from their local zones, but relatively little beyond this. But only 52% of the convenience expenditure from zone 8 (the wards of New River, Lordship and Brownswood) is retained within the borough. Households in this zone experience comparatively long journey times and the survey data may indicate a need for improved provision in this northern part of the Borough

2.18 Turning to transport mode, a surprising finding is the high proportion of residents (36% overall) that shops for convenience goods on foot. The proportion of car-borne shoppers is some 32% overall, a comparatively low proportion in the light of experience elsewhere. The only exception is the Sainsbury store on Green Lanes which has double (65%) the percentage of car-borne shoppers.

2.19 The travel times to convenience stores are low; two-thirds take less than ten minutes. This indicates a good distribution of provision. Close proximity to home is the overwhelming reason why shoppers visit convenience goods stores within the borough. The availability and ease of parking were not cited to any significant degree as reasons for visiting the stores. Each of the borough's town centres had above average satisfaction ratings for convenience shopping, particularly Dalston.

Leisure – Eat and drink

2.20 Some 60% of households have a trip out to eat and drink at more than once a month. Such leisure trips are the second most common type of shopping-related activity after convenience goods shopping.

2.21 Stoke Newington Church Street is the most popular location for eating and drinking destinations. It draws 15% of all study area residents, compared to 12% going to Angel and 11% going to the West End. The Stoke Newington draw is localised, however, with its draw declining with increasing proximity to other centres that provide rival eating and drinking facilities. The inference is that, given the choice, households prefer to eat and drink in the immediate locality rather than travelling longer distances.

2.22 Hackney Mare Street and Dalston each draw 7% of all the study area visits to eating and drinking facilities. This indicates considerable scope for improvement, especially in Mare Street.

2.23 The most common transport mode for such trips is by foot, which accounts for almost 40% of all trips for eating and drinking. The figure is even higher for the three town centres. Bus journeys account for 28% of all such trips and almost a quarter of residents use the car to access eating and drinking leisure facilities. Journey times to the borough's centres average around 10 minutes, which again compares to an average of half an hour to the West End.

2.24 In terms of overall satisfaction, Stoke Newington predictably scores the highest rating. Mare Street scores the lowest. Again, this seems to point to the prospects for improvements in Mare Street.

Leisure – Commercial activities

2.25 The term commercial leisure refers to activities such as visits to cinemas, theatres and sports centres. Across the study area, this activity is dominated by trips to the West End which account for 17% of all trips. This is less than the figure for comparison goods shopping trips to the West End. Angel is also an important centre for commercial leisure activity, accounting for 12% of all study area trips. In comparison, Dalston has a draw of only 7%, with Mare Street at 4% and Stoke Newington at 2%. These low figures for the borough's centres are partly the result of the survey findings that 36% of study area residents state that they never visit commercial leisure facilities for this type of activity. Nevertheless, the combined draw of these centres of only 13% appears to be surprisingly low.

2.26 Commercial leisure trips are made much less frequently than retail trips. The most common figure revealed in the survey was monthly. The dominant transport mode is by bus which accounts for 41% of all trips from the study area. However, a quarter of households use the car for commercial leisure trips. Journey lengths average around 10 minutes to the borough's centres and 30 minutes to the West End. Respondents considered Dalston to be average in terms of commercial leisure provision, but the two other borough centres are considered to rate between average and poor.

3 VISITOR SURVEY – KEY FINDINGS

Dalston

Visitor and Trip Characteristics

3.1 The key visitor characteristics of Dalston Kingsland are:

- It has the widest visitor draw of all the LB Hackney centres, but even here almost two-thirds of visitors are residents of Hackney.
- Over one-quarter of visitors come from elsewhere in London.
- Dalston is the LB Hackney centre which attracts the highest proportion of visitors from elsewhere in the UK and abroad.

3.2 Shopping is the main reason why people visit Dalston. Some 54% of visitors cite this as the main purpose of their visit, compared to some 40% of visitors to Mare Street and some 30% of visitors to Stoke Newington. Dalston is the main shopping destination in Hackney

3.3 The Ridley Road Market is a key attractor of visitors to Dalston, with almost a quarter citing this as their main reason for visiting. On the other hand, few visits to Dalston are made for food and drink uses or for leisure, which possibly reflects a relative lack of these facilities. This, together with limited outdoor seating and no public open space, perhaps explains the fact that the average visit length in Dalston is 1 hour 40 minutes, which is shorter than the time spent in other borough centres.

Spending Characteristics

3.4 Comparison goods purchases are almost twice as likely in Dalston as they are in Mare Street or Stoke Newington, reflecting Dalston's status as the major centre within Hackney. Compared to the borough's other centres, Dalston's visitors spend the highest amount on both convenience (£27) and comparison goods (£45) per visit. This is largely due to the greater number of high value comparison goods retailers in the centre, i.e. selling electrical goods.

3.5 In addition, spending on convenience goods in Ridley Road Market is high, with half of visitors spending over £20.

Transport & Accessibility

3.6 The majority of visitors to Dalston travel to the centre by bus or on foot. This pattern is reflected across all the Hackney centres, but lower proportions of visitors use these modes of transport to access Dalston.

3.7 Dalston has 6% of visitors who use the train, which is similar to the level for the other centres. This is disappointing given that the station is well-located within the centre. Visitors to Dalston make longer journeys than visitors to other centres. On average they spend 20 minutes on their journey time, but a significant proportion spend over 45 minutes. This reflects Dalston's wider catchment area than other centres.

Visitor Attitudes

3.8 Over 40% of visitors to Dalston consider it to be good or very good at meeting their needs for clothes and shoes. This is approximately twice the levels of satisfaction stated for Mare Street or Stoke Newington. But despite Dalston being the prime centre in the borough, almost 60% of visitors do not consider it to be their main centre for comparison goods shopping – the West End is the most popular destination for these goods.

3.9 Visitors to Dalston do not tend to use non-shopping facilities when visiting the centre. Of those that do use non-shopping facilities, bars, restaurants, and cafes are the most popular, used by 13% of visitors. 11% of visitors also intend to visit the cinema. The library is the only other significant non-shopping facility used by visitors, although it attracts less than half the proportion that visits that the library in Mare Street achieves – perhaps due to the fact that it is not prominently located.

Suggested Improvements

3.10 The visitor survey responses included the following suggested improvements for Dalston:

- A third of all visitors to Dalston suggested that no improvements were necessary, which indicates a level of satisfaction with the centre.
- Improving cleanliness was the highest response of those visitors who wanted changes made.
- 15% of visitors suggest that a better range of shops would improve the centre. This figure is lower than the proportions who suggested this improvement for either Mare Street or Stoke Newington, demonstrating that Dalston has the best range of shops in Hackney but that there is still the potential to improve.
- Dalston has the highest proportion of visitors who want improvements made to the level of car parking, almost twice the levels in the other centres. This is likely to be related to the higher proportion of visitors to Dalston who travel to the centre by car.
- Reducing crime was mentioned by few visitors, which is surprising as Dalston has the highest level of recorded crime in Hackney.

Hackney Mare Street

Visitor and Trip Characteristics

3.11 Almost three-quarters of visitors to Mare Street come from within LB Hackney, a comparable level to Stoke Newington. Mare Street attracts visitors from other London boroughs but none in the survey were from elsewhere in the UK or abroad.

3.12 Shopping is the dominant reason why people visit Mare Street. Other reasons included proximity to home (15% of respondents), education (8%) and leisure and recreation (8%). Very few visits to Mare Street are made for A3 food and drink uses. Visitors to Mare Street spend on average 2 hours in the centre, which is longer than in Dalston, probably because it is a more attractive centre with open space and outdoor seating.

Spending Characteristics

3.13 Almost half of all visitors to Mare Street do not intend to purchase any goods during their visit, which is the highest proportion of Hackney centres. More visitors intend to spend on convenience goods than comparison goods. Of the borough's three town centres, Mare Street is the centre where spending on comparison goods is least likely; 80% of visitors do not intend to purchase any comparison goods during their visit.

Transport & Accessibility

3.14 The majority of visitors to Mare Street travel to the centre by bus or on foot. Mare Street has the highest proportion (55%) that uses the bus to travel to the centre. A lower proportion of visitors walk to the centre but this mode of transport still represents almost a third of all visitors. The only other significant mode of transport is the train, but at 7% this is low given that two stations serve the centre. Of the three town centres, Mare Street has the lowest proportion (2%) of visitors who travel to the centre by private car, compared to 17% for Dalston and 8% for Stoke Newington.

Visitor Attitudes

3.15 Proximity to home is the main reason why visitors (60% of respondents) choose to visit Mare Street, but less than 20% consider the centre to be good or very good at meeting their needs for clothes and shoe shopping. In fact, almost three-quarters of visitors to Mare Street do not consider it to be their main centre for comparison goods shopping and only 10% consider it to be their second choice of centre for such goods.

3.16 Visiting the library is the main non-shopping activity undertaken by visitors. This is likely to be because it is a modern facility which is prominently located in the centre. A high proportion of visitors also intend to use the open space in the centre. Compared to the other centres, a lower proportion of visitors to Mare Street intend to also visit a restaurant, café or bar while in the centre. There are low levels of satisfaction with the indoor leisure facilities.

Suggested Improvements

3.17 The visitor survey responses included the following suggested improvements for Mare Street:

- Most visitors to Mare Street sought improvements to the range of shops in the centre. This helps to explains why visitors to the centre tend to shop elsewhere.
- More than a quarter of visitors overall wanted to see improvements made to the shopping environment, and the northern section was considered to be a particular problem. Visitors also wanted to see the amount of traffic reduced in the northern section.
- A high proportion of visitors wanted crime reduced in the centre, and this was particularly highlighted in the northern section of the centre.

Stoke Newington

Visitor and Trip Characteristics

3.18 A key visitor characteristic of Stoke Newington is that more than three-quarters of its visitors come from within LB Hackney. This is a comparable level to Mare Street but less than Dalston which attracts more visitors from outside Hackney. Stoke Newington attracts less visitors from the other London boroughs compared to Dalston or Mare Street.

3.19 Shopping is the main reason why people visit Stoke Newington, but the proportion of visitors citing this purpose for their visit (30%) is lower than the figures for Mare Street (38%) and much lower than for Dalston (54%). On the other hand, a significant number of visitors (10%) state that the bars, restaurants and cafes in Stoke Newington – and particularly in Church Street - are their main reason for visiting.

Spending Characteristics

3.20 As with the other centres, visitors to Stoke Newington are more likely to purchase convenience goods than comparison goods. But this is the centre where visitors spend the least, with approximately £15 spent on convenience goods and £24 on comparison goods. A high proportion of purchases are made in Church Street which houses specialist / niche retailers selling high value convenience and comparison goods.

Transport & Accessibility

3.21 The key transport and accessibility characteristics in Stoke Newington are:

- Stoke Newington has the highest proportion of visitors who travel to the centre on foot, with over half of all visitors doing so.

- A lower proportion of visitors take the bus, but this mode of transport still represents almost a third of all trips. This may relate to the one-way traffic system in operation through the centre which may discourage visitors travelling in a southbound direction.

Visitor Attitudes

3.22 More than 60% of visitors to Stoke Newington stated that their main reason for visiting the centre was proximity to home, which reflects the local nature of its catchment area. More than a quarter of visitors consider the centre to be good or very good at meeting their needs for clothes and shoe shopping. But more than 85% of visitors (a higher figure than for Dalston and Mare Street) do not consider the centre to be their main destination for comparison goods shopping. This reflects the limited supply of comparison goods floorspace and relative lack of multiple retailers here.

3.23 Visiting restaurants, cafes or bars is the main non-shopping activity undertaken by visitors to Stoke Newington. 60% of visitors to Church Street undertake a non-shopping activity, and half of those intend to visit a restaurant, cafe or bar while in the centre. These facilities are a characteristic of this centre and a key attraction. Not surprisingly, three quarters of all visitors were satisfied that the centre meets their needs for these facilities.

Suggested Improvements

3.24 The survey responses included the following suggested improvements for Stoke Newington:

- A quarter of all visitors to Stoke Newington wanted improvements made to the range of shops in the centre and almost one-fifth wished to see improvements to the shopping environment. Some 12% of respondents suggested the provision of a cinema or leisure facility.
- There were some noticeable differences between the responses made in the High Street and Church Street areas. In particular, reducing crime and improving cleanliness were identified as measures by those questioned in the High Street, but lower proportions requested these changes from Church Street. .
- Interestingly, while a high proportion of visitors wanted crime reduced in Stoke Newington, the crime statistics indicate that this centre has much lower levels of recorded crime than either Mare Street or Dalston.

4 HEALTHCHECK SURVEY – KEY FINDINGS

Dalston

4.1 Dalston Kingsland 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.

4.2 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.

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

4.4 There are eight opportunity sites identified in Dalston, several of which are adjacent to the core retail area. The latter could provide the opportunity to increase the amount of retail and leisure floorspace in the centre. Some of these sites are suitable for major multiple retailers.

Hackney Mare Street

4.5 Overall, Mare Street has the largest amount of total floorspace of the borough's centres, although a high proportion (45%) comprises non-retail uses. In terms of retail floorspace, Mare Street is second to Dalston but it contains the largest core shopping frontage area in the borough. It provides the most attractive shopping environment of the three Hackney centres.

4.6 Mare Street performs well as a centre in terms of rents and yields. It 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.

4.7 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.

4.8 There are four key development or opportunity sites, all of which are located centrally. Redevelopment of these sites would 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

4.9 Stoke Newington is the smallest of the borough's town centres. It has far fewer multiple retailers and a poorer range of shops. Local people generally have to visit other centres to meet all their shopping needs.

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

4.11 There is one retail development opportunity site in Stoke Newington. This comprises land at Wilmer Place which is partly used for car parking and suitable for retail or leisure uses.

4.12 The identified opportunity sites in all three of the borough's town centres are elaborated in the next section of this report.

5 OPPORTUNITY SITES

5.1 The healthcheck work and advice from the Council's officers led to the identification of 13 opportunity (i.e. potential redevelopment) sites in or close to the borough's three town centres. These comprise:

- Dalston : Town Centre North Site (Cantor Scheme)
- Dalston : Town Centre South Site (Chelverton Scheme)
- Dalston : East London Line Extension Site, Dalston Lane
- Dalston : Architectural Salvage Site, 25-27 Dalston Lane
- Dalston : Thames House, 20-23 Tyssen Passage, Hartwell Street
- Dalston : Kingsland Shopping Centre, Kingsland High Street
- Dalston : Blockbusters, 130 Kingsland High Street
- Dalston : Gillett Square
- Hackney : Former Gibbons Building, 5-19 Amhurst Road
- Hackney : Bus Garage, Bohemia Place
- Hackney : Former HSBC Bank, 354 Mare Street
- Hackney : 280 Mare Street
- Stoke Newington : Land at Wilmer Place

5.2 A combination of these sites can be used to meet the identified need for additional retail and leisure floorspace in the borough's town centres. The development potential of each site is reviewed in the main report general terms only. All of the sites have either been the subject of planning applications for retail and leisure uses, are identified in the Adopted UDP (1995), or are a derelict site recognised as being suitable for redevelopment.

Dalston

5.3 Eight opportunity sites are identified in Dalston. Most of these sites are within the town centre boundary and are identified in the Adopted UDP for town centre uses (not all retail). Almost all of the sites have been the subject of planning applications over the past decade. In the case of the Cantor and Chelverton schemes, the principle of retail and leisure development is broadly acceptable, but such uses need to be adequately provided for in these town centre locations.

5.4 Thus the market and the planning framework in Dalston both point towards new retail, leisure and other uses in the town centre, but little progress has been made over the last ten years. On the other hand, the East London Line Extension site (which adjoins the Chelverton scheme) offers the potential for redevelopment at a key location and implementation of the approval in 2003 to extend the Kingsland Centre would probably stimulate further regeneration.

Hackney Mare Street

5.5 Four opportunity sites are identified in Hackney, all of which are within the defined town centre boundary. The two largest sites are 5-19 Amhurst Road (the former Gibbons Building) and the bus garage in Bohemia Place. The former is part of the centre's core shopping frontage but is currently derelict. The bus depot is in operational use but, subject to relocation of this facility, would make an excellent location for town centre uses including retail and leisure.

5.6 Hackney's other two opportunity sites (354 and 280 Mare Street) are both vacant listed buildings. These factors, plus the fact that extensive restoration is needed in one case, restrict the ease with which beneficial re-use can be achieved, but both buildings have the potential to improve the centre's retail and leisure offer.

5.7 Other development opportunities which would improve the centre include:

- Creating an improved pedestrian link through the railway arches from Tesco in Morning Lane to the core shopping frontage on Mare Street.
- Enhancing the entrance to Hackney Central and creating or improving pedestrian links to Amhurst Road and Graham Road.

5.8 These two opportunities will not necessarily create new retail or leisure space but will contribute to the attractiveness of the centre. Their implementation would improve both pedestrian accessibility within the centre and access to secondary shopping areas, thus increasing their viability.

Stoke Newington

5.9 One opportunity site is identified in Stoke Newington, namely land at Wilmer Place. This site is within the town centre boundary and is the subject of a Council development brief which seeks to encourage a wide range of town centre commercial and community uses. Both retail and leisure uses are suitable, though development would be assisted if various owners (including the Council) cooperate in preparing a comprehensively designed scheme.

6 POLICY OPTIONS

6.1 The primary purpose of the retail and leisure study is to provide background information to inform the on-going preparation of the Local Development Framework, including Area Action Plans and regeneration strategies for Dalston Kingsland and Hackney (Mare Street) town centres. The study is based on a range of surveys and resultant analysis of:

- the modelling of the likely impact of future comparison goods retail development on the borough's town centres,
- the need for additional retail and leisure floorspace in these centres;
- the physical capacity of the borough's main centres to accommodate future growth.

6.2 The study then moves on to explore a range of planning policy options. The Council may wish to consider these as a means of progressing from background information towards mapping out the preferred future development of the borough's main centres. These policy options are based on, and supported by, the survey and analytical work undertaken in the study.

6.3 These policy options are divided into strategic policies (which cover the whole borough) and centre-specific policies for Dalston, Hackney Mare Street and Stoke Newington, together with proposals for Shacklewell, South Lower Clapton Road, and Brownswood.

Draft Strategic Policies

SP1: The Retail Hierarchy

6.4 The London Plan regards Dalston as a major centre and both Hackney Mare Street and Stoke Newington as district centres. It is thus proposed that the Council adopts the London Plan nomenclature for centres, but upgrades Mare Street to a major centre. This would produce the following format for centres in the borough:

- Major Centres - Dalston; Hackney Mare Street
- District Centres - Stoke Newington
- Local Centres - (others)

SP2: Additional Local Centre - Shacklewell

6.5 It is proposed that Shacklewell be identified as a local centre, and that it be added to the schedule of 11 local centres as set out in the adopted UDP. This is on the basis that Shacklewell meets the requirements of PPS6 (Annex A) for a local centre and has a range of shops, including a post office, which serves the needs of its local catchment.

SP3: Additional Local Centre - South Lower Clapton Road

6.6 South Lower Clapton Road is currently part of the defined Mare Street town centre. It is, however, physically separated from Mare Street and is quite different in terms of the type of retail activity present. It largely comprises independent convenience outlets and matches the definition of local centres as in PPS6 (Annex A). As such, it is proposed that South Lower Clapton Road be identified as a local centre.

SP4: Town Centre Boundary & Shopping Frontages

6.7 The adopted UDP dates back to 1995 and subsequent Government policy, especially PPS6 on town centre uses, has moved on. It is proposed that town centre boundaries are defined, with amendments in accordance with Policies D1 and MS1, as put forward below. It is also proposed that within the town centre boundary, separate primary and secondary shopping frontages are defined, which clearly indicates the preferred location for retail development.

SP5: Car Parking Provision

6.8 The analysis concludes that the borough's centres are comparatively well provided for in terms of car parking. Though access by bus is generally excellent, these town centres are less well served than most other Inner London Boroughs by the tube and overground rail. It is thus proposed that the current car parking provision (with the exception of the loss of parking associated with the environmental enhancements in Gillett Square) within the town centres are retained at current levels, at least until significant public transport (rail) improvements are implemented.

SP6: Town Centre Management Schemes and Business Improvement Districts

6.9 The study identifies the lack of cleanliness of the street environment in all three town centres as being a significant weakness; it points to the need for a more effective street cleansing regime to be put in place. However, the study findings do not, of themselves, provide an adequate evidence base to support the introduction of town centre managers for these centres. It is thus not proposed that emerging local development documents include any specific policies on TCM schemes or BIDs, but it is suggested that the Core Strategy or relevant Action Area Plans make reference to these potential tools in the form of supporting text.

SP7: Diversity of Uses

6.10 Maintaining or improving the diversity of uses in any centre is a legitimate planning objective. This requires polices to restrict changes of use and, it is proposed, to retain large retail units. As polices based on minimum A1 frontages can be difficult to defend, it is proposed that a policy be introduced with a presumption against a change of use from A1 to A2/A3/A4/A5 if floorspace exceeds a particular figure. It is also proposed to protect diversity by means of a policy presumption against the sub-division of large retail units which would create some non-A1 floorspace.

Suggested Draft Policies for Dalston

D1: Town Centre Boundary

6.11 It is proposed that the area south of Dalston Lane and east of Woodland Street be deleted from the defined Dalston town centre boundary. This area comprises poor quality shops with many vacant units and is remote from the main shopping area of the town centre. It would be more advantageous to encourage redevelopment of this area for residential or other uses that would generate more demand for town centre uses and help sustain such activity in the centre 'proper'.

D2: Shopping Frontages

6.12 The UDP includes only a small section of the Dalston frontages within the core frontage. It is proposed that the core frontages be extended to include the Kingsland Centre on the eastern side of Kingsland High Street, as well as the proposed eastern extension to this shopping centre. The remainder of the retail area would be defined as a secondary shopping frontage in accordance with Policy SP4, above.

D3: Retail & Leisure Allocations

6.13 It is proposed that the following sites are allocated for retail or leisure development in Dalston, depending on their planning status at the time of the Local Development Document: Town Centre North and South Sites, East London Line Extension Site, Architectural Salvage Site, Thames House and the Kingsland Shopping Centre. These sites are close to the ELLX and their (re)use for retail and leisure development would help Dalston to maximise the benefits of this scheme.

D4: Public Square Allocation

6.14 It is proposed that Gillett Square be allocated or protected as a public square, depending on its status at the time of LDD preparation. At present there are no areas of public open space in Dalston and this site has been identified as one of the Mayor's 100 public spaces project. The protection of Gillett Square will provide the opportunity for shoppers and visitors to escape from the busy streets which are dominated by traffic, thus encouraging people to spend more time in Dalston.

Suggested Draft Policies for Hackney Mare Street

MS1: Town Centre Boundary

6.15 It is proposed that the town centre boundary is reduced to exclude the South Lower Clapton Road area, which will become a Local Shopping Centre, as recommended by Policy SP3 above.

MS2: Shopping Frontages

6.16 The core shopping frontage, as currently defined, equates to the area of prime retail pitch and no change in is suggested. But it is proposed that the remainder of the retail area be defined as a secondary shopping frontage in accordance with Policy SP4 above.

MS3: Retail & Leisure Allocations

6.17 It is proposed that the following sites are allocated for retail or leisure development in Hackney Mare Street, depending on their planning status at the time of LDD preparation: former Gibbons Building, former HSBC Bank, 280 Mare Street and the bus garage. The latter is a large opportunity site and its mixed use redevelopment could be used to add to the number of large shop units (hopefully for national multiples) as well as bars and restaurants which are currently lacking in the centre.

MS4: Improved Pedestrian Routes

6.18 It is proposed that an improved and clearly legible pedestrian link be provided from the Tesco site to the core shopping frontage. This will require highway and environmental improvements – to be defined in the relevant part of the LDD. This would better link a key centre attractor and the rest of the centre. It is also proposed that, contingent upon exact design details, proposals to improve Hackney Central station should include improvements to pedestrian access to the town centre.

Suggested Draft Policies for Stoke Newington

SN1: Retail Function

6.19 Stoke Newington has two distinct elements – Church Street for independent convenience and clothes stores and restaurants/cafes (serving a relatively wide catchment), which is different to the High Street for day-to-day shopping needs (serving a very localised catchment). It serves a different market to the borough's other two town centres. It is proposed that policies be introduced to protect and enhance Stoke Newington's character and function as a district centre. In parallel, the appropriate LDD should include text in support of a focused marketing plan to be prepared by means of a BID.

SN2: Town Centre Boundary

6.20 It is proposed that the town centre boundary remains unchanged, primarily as there is only one development opportunity in the centre. It is also proposed that the western part of Church Street is retained as a separate local centre and that Shacklewell is defined as a new local centre.

SN3: Shopping Frontages

6.21 The core shopping frontage as defined in the Adopted UDP corresponds to the prime retail pitch where the highest rental levels are achieved. It is therefore proposed that the core shopping frontage in Stoke Newington High Street remains unchanged. The remainder of the retail area should be defined as a secondary shopping frontage in accordance with Policy SP4 as above.

SN4: Retail Allocations

6.22 It is proposed that Wilmer Place be allocated for retail and/or leisure development in accordance with the approved development brief.

Suggested Draft Policies for Brownswood

BW1: Foodstore Provision

6.23 Whilst most of the borough has a reasonable provision of convenience shops, the wards of New River, Lordship and Brownswood (study survey Zone 8) retain a low proportion of market share. Residents in these wards tend to travel elsewhere for convenience goods which may indicate a need for improved local provision. It is thus proposed that an appropriately located site is allocated within this area for convenience goods provision. The store should be of a scale to serve the local catchment area only, and not draw trade from other centres.