

**The
Fitzrovia
Partnership**
Business Improvement Districts

**FITZROVIA
SUSTAINABILITY
OUR STRATEGY
FOR ACTION**

APPENDIX A:

Baseline Analysis of Fitzrovia

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Baseline Analysis of Fitzrovia

Local context

Located across Camden and Westminster in central London, Fitzrovia is a vibrant and diverse neighbourhood which brings together workers, residents, visitors, students, hospital staff and patients.

The Fitzrovia Partnership (TFP) spans two local authorities: London Borough of Camden and Westminster City Council (shown at Figure 1, below).

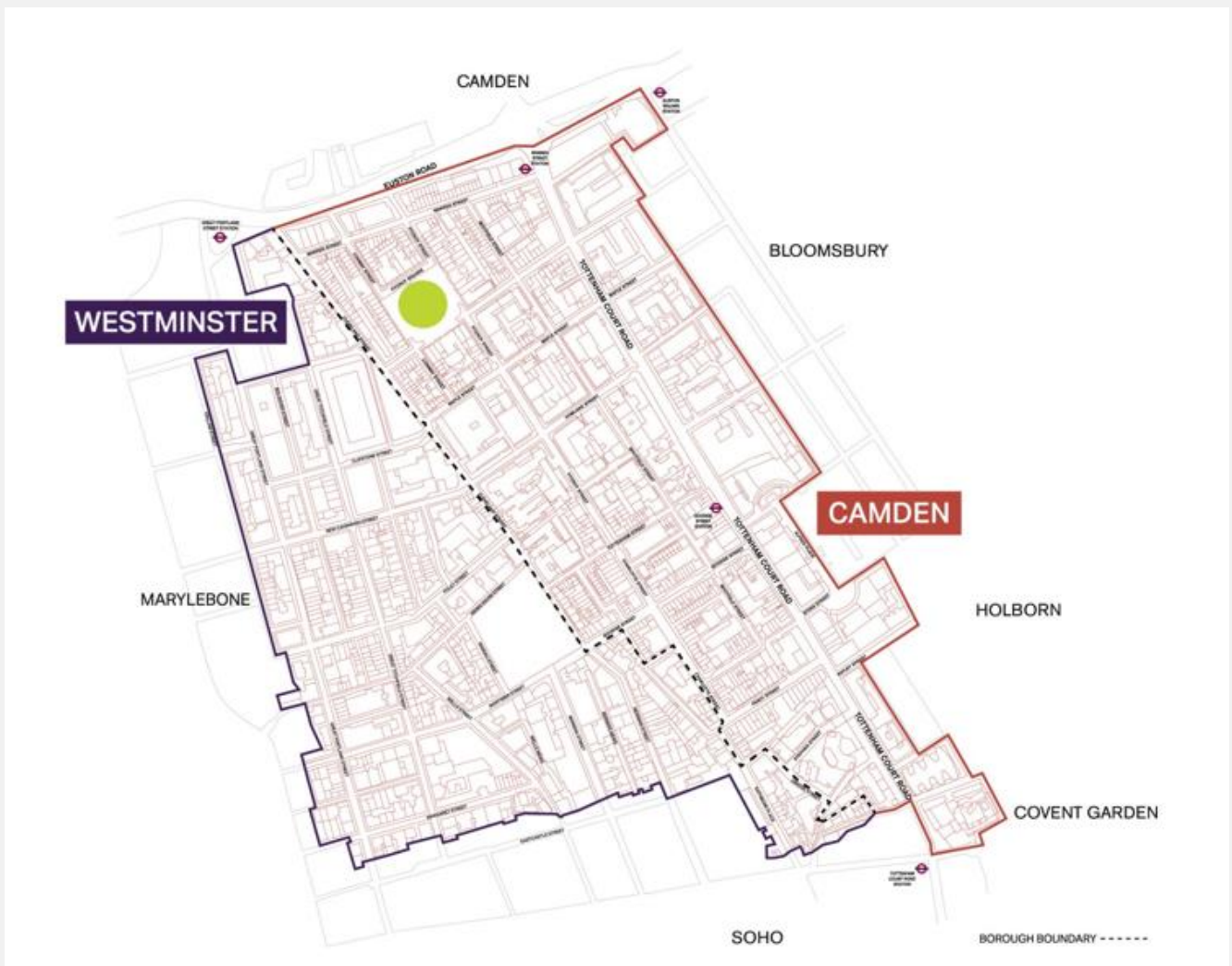


Figure 1: Fitzrovia footprint

The following sections provide a snapshot of the current economic, environmental and social challenges and opportunities in Fitzrovia

Fitzrovia's economy

Fitzrovia's economy is characterised by a diverse mix of sectors including architecture, hospitality, retail, universities, healthcare and financial services. The map at Figure 2, below, indicates the diverse mix of ground-floor uses in Fitzrovia.



Figure 2: Land use in Fitzrovia

Daytime population

Fitzrovia is served by five Underground stations: Tottenham Court Road, Goodge Street, Warren Street, Great Portland Street and Euston Square. There are 72 million arrivals a year, which is equivalent to approximately 200,000 people a day, many of whom visit Fitzrovia.

The current working patterns of office workers create fluctuations in footfall and local spending. Tuesdays, Wednesdays and Thursdays appear to be the busiest days, while Fridays and Mondays are comparatively quiet. Observations indicate that Fitzrovia at the weekends also has decreased visitor footfall.

Business sectors

The Fitzrovia Partnership's membership primarily consists of office-based businesses, but with more retail in the west and approximately equal proportions of food and beverage businesses in both the Camden and Westminster sides of The Fitzrovia Partnership's footprint (see charts at Figure 3, below). It is recommended that further analysis of the office sector is undertaken to understand the scale and number of businesses in different office-based sectors (i.e. finance, architecture, etc).

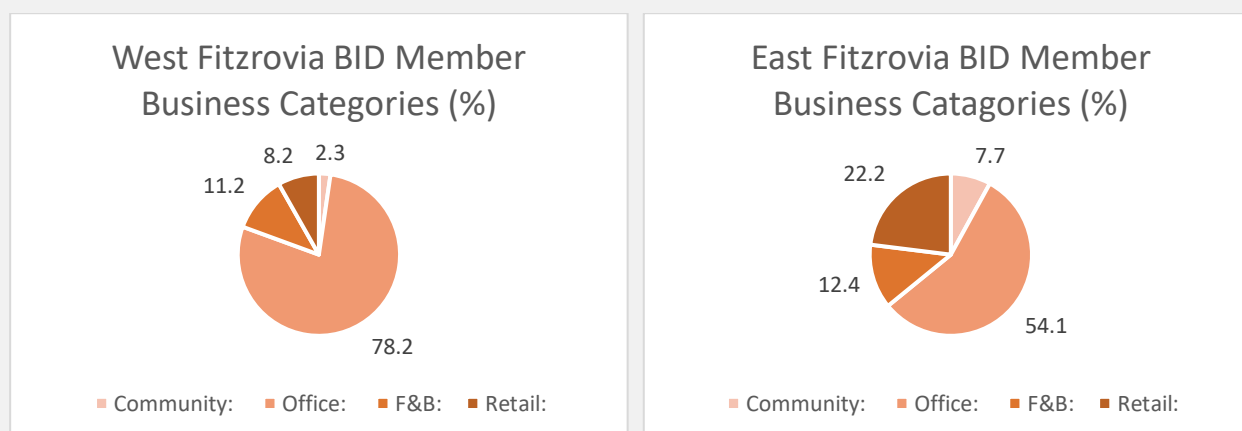


Figure 3: BID member business categories

Vacancy rates

To understand the Fitzrovia area's economic performance, a ground floor vacancy rate analysis of four main streets in Fitzrovia (Charlotte Street, Tottenham Court Road, Great Portland Street and Great Titchfield Street) was conducted to determine whether each commercial unit is either vacant or occupied.

	Number of vacant properties	Vacancy Rate
Great Portland Street	30	20.3%
Charlotte Street	14	17.3%
Tottenham Court Road	19	12.3%
Great Titchfield Street	7	7.5%

Figure 4: Commercial vacancy rates

The data is a representative sample of streets across Fitzrovia and an indicator of economic performance. The full set of data can be seen in a separate document which can also be used as the baseline for measuring future economic performance.

Great Portland Street has the highest ground-floor vacancy rate with 20% of buildings appearing to be vacant. Vacant commercial units and heavy flows of traffic on large parts of Great Portland Street creates a poor experience for pedestrians. It is noted that some units may be let but not occupied and others could be undergoing refurbishment.

Great Portland Street seems to be representative of a trend affecting primary commercial roads with a mix of retail and office space in central London, such as Strand, Kingsway and Fleet Street, in which visitors and workers seem to prefer the quieter adjacent areas with less traffic (such as Covent Garden near Strand).

Tottenham Court Road also had a comparatively high vacancy rate at 12% percent. The visual impact of vacant units is significant on Tottenham Court Road because of their size.

TfL commissioned research which indicates that the Elizabeth line has resulted in a 15% job growth in the areas surrounding Tottenham Court Road station. Tottenham Court Road however seems yet to fully capitalise from the Elizabeth line and the recent investment in its public realm.

Charlotte Street as a food and beverage street is performing relatively well, most notably at lunchtime and in the early evening. Charlotte Street has several vacant units, particularly towards its northern end. The overall ground floor vacancy rate on Charlotte Street is 17%.

Great Titchfield Street has vacant ground-floor units throughout the street. The overall ground floor vacancy rate is around 7%. It has a higher proportion of residential property than surrounding streets.

These findings indicate that the Fitzrovia economy could perform better, which is further validated by recent research from Colliers London Office Snapshot Report (2024 report) which shows that Fitzrovia has the highest office vacancy rate of any district in central London.

The ground floor vacancy rates on some of the key streets in Fitzrovia-Westminster could be due to their lack of coherent identity and offer, the rise of better-designed and curated places nearby, lower numbers of daytime office workers (particularly on Mondays and Fridays), online retail and night-time safety issues.

Summary

Overall, the Fitzrovia economy is likely to be resilient due to its diversity of sectors, including hospitality, health, education and notable clusters of architectural and media firms, which offer both the advantages of agglomeration and an interdependent economic ecosystem.

However, Fitzrovia does appear to be at a crossroads: It could be overtaken by rival neighbourhoods which have improved their offers and curated experiences for daytime populations; and that are better at attracting investment, occupiers and footfall. A coherent place vision, strategy and action plan is needed for Fitzrovia and its key commercial streets.

Fitzrovia's environment

Air quality

Although air quality has improved steadily since 2010 due to changes in vehicle engine standards, better regulation of emissions from home wood- and coal-burning, and large-scale interventions like the London Ultra Low Emission Zone (ULEZ), the Fitzrovia area still has levels of pollution that could affect the health of people, in particular its residents and workers who might have prolonged exposure to poor air quality.

The two maps below show the air quality predictions (of PM_{2.5} and NO₂) for Fitzrovia in 2025. Fitzrovia's air quality is generally poor, with higher levels of pollution on the main corridors, specifically Marylebone Road / Euston Road and Mortimer Street / Goodge Street.

The A501, which includes Euston Road, has the highest NO₂ concentration of any road in London, with annual emissions amounting to 75 µg/m³.

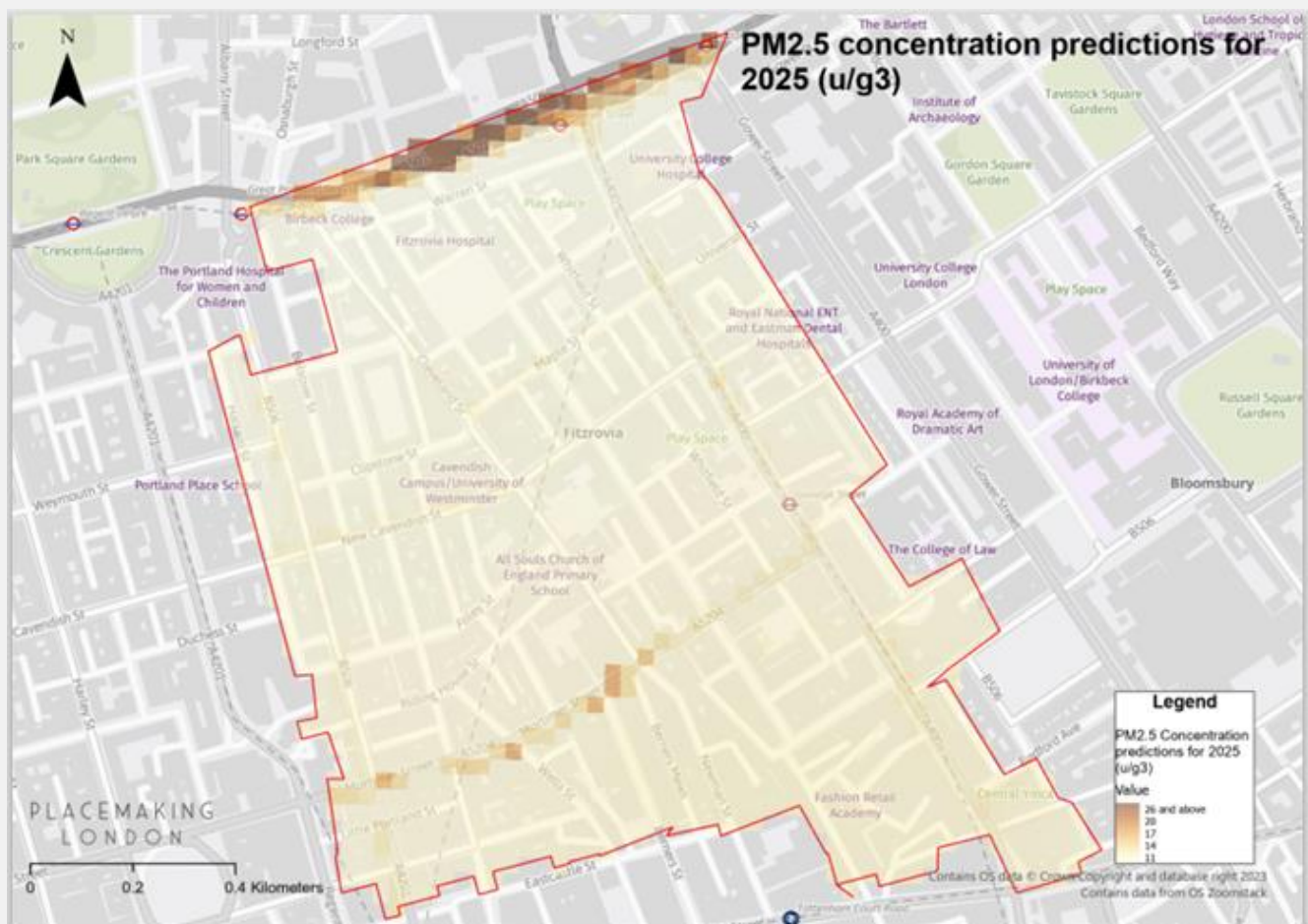


Figure 5: PM_{2.5} concentration prediction for 2025

The graph on the next page shows that the largest contributors of NO₂ in Camden and Westminster are the commercial and industrial sectors, followed by road traffic.

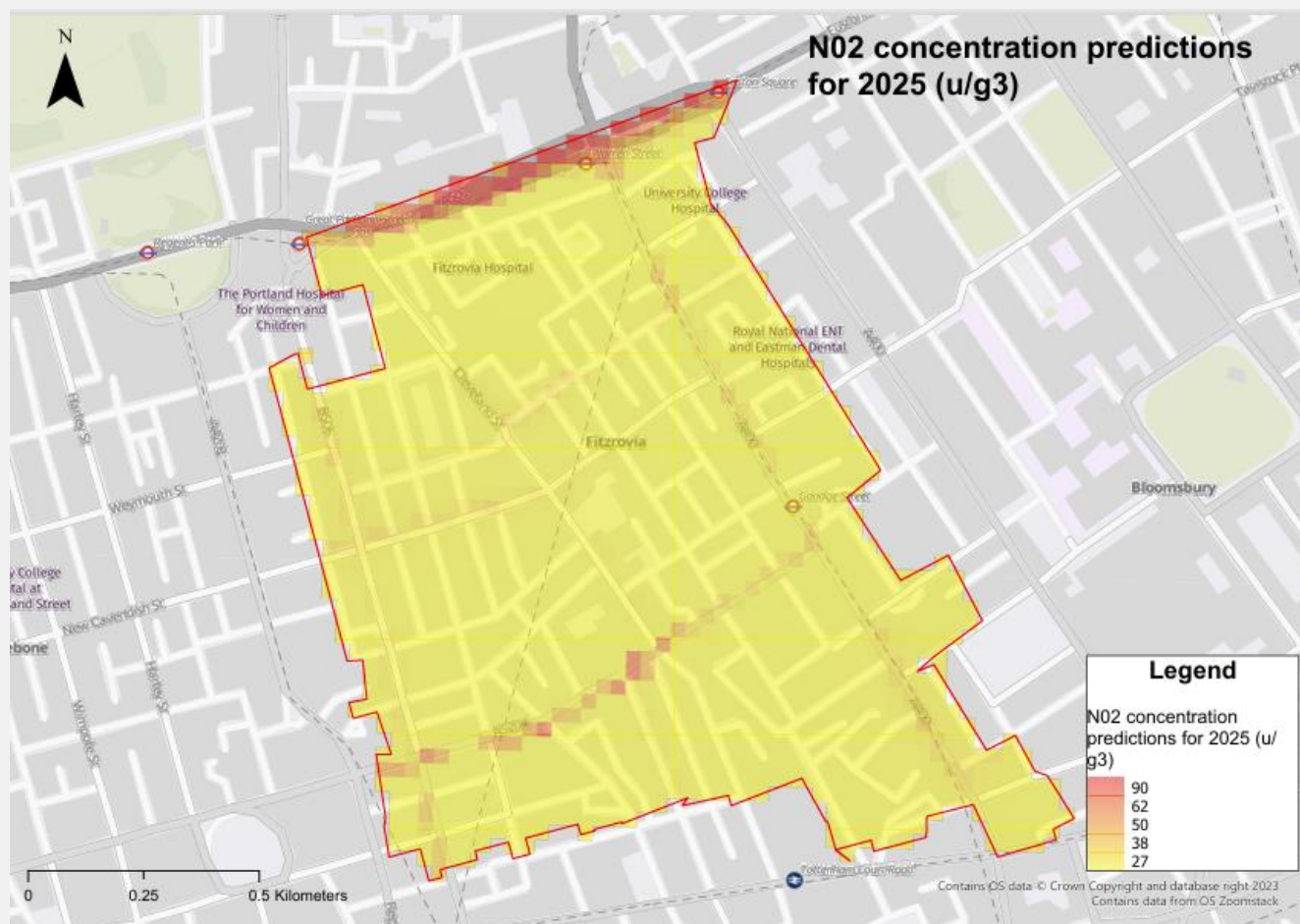


Figure 6: NO₂ concentration predictions for 2025

	Camden (% of NO ₂)	Westminster (% of NO ₂)	Camden (tonnes of NO ₂ per year)	Westminster (tonnes of NO ₂ per year)
Commercial and industry	56	59	608.4	916.0
<i>Construction (included in Commercial and industry)</i>	9.4	7.3	101.6	96
Domestic	4.7	3.4	51	64.8
Road Transport	31	33	334.6	956.0
Other	8.3	4.6	89.6	115.2
Total			1083.8	2052.0

Figure 7: Sources of NO₂ in 2019

Biodiversity and tree canopy

Fitzrovia is designated as an area deficient in open space (as set out in the Westminster City Council City Plan Partial Review March 2024, which can be found [here](#)).

While Camden is among the top ten areas for tree canopy cover in the country, the local picture is different in Fitzrovia. There are many streets with no trees or greenery at all. The map at Figure 8, below, illustrates this stark contrast between some streets having generous tree canopies and others with little or none. This is particularly evident towards the south of Fitzrovia from Mortimer Street to Margaret Street. Increasing biodiversity, greenery and creating tree-lined corridors would contribute to making Fitzrovia more climate resilient and potentially a more attractive place to visit and spend time in.

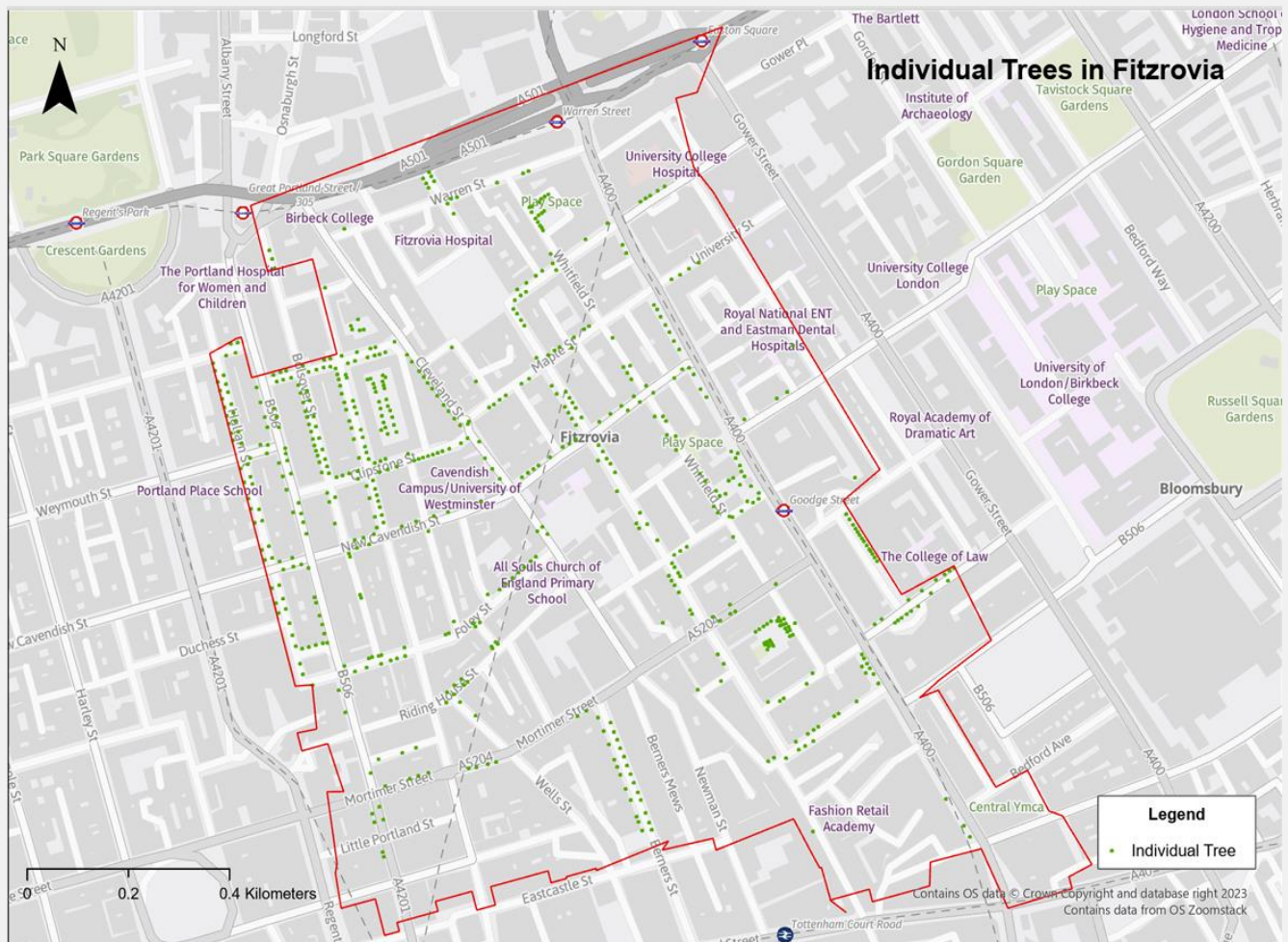


Figure 8: Location of trees in Fitzrovia

Flood risk

While the overall flood risk is isolated to specific areas of Fitzrovia (see Figure 9, below), future incidence of more extreme weather events makes localised flooding more likely, with a potentially detrimental impact on the local community and economy.

The risk of flooding, measured as a one-in-thirty chance for any given year, could be an issue in some locations in Fitzrovia. The flood risk map at Figure 6 illustrates areas with a high risk of surface water flooding, with narrow streets and courtyards especially vulnerable.

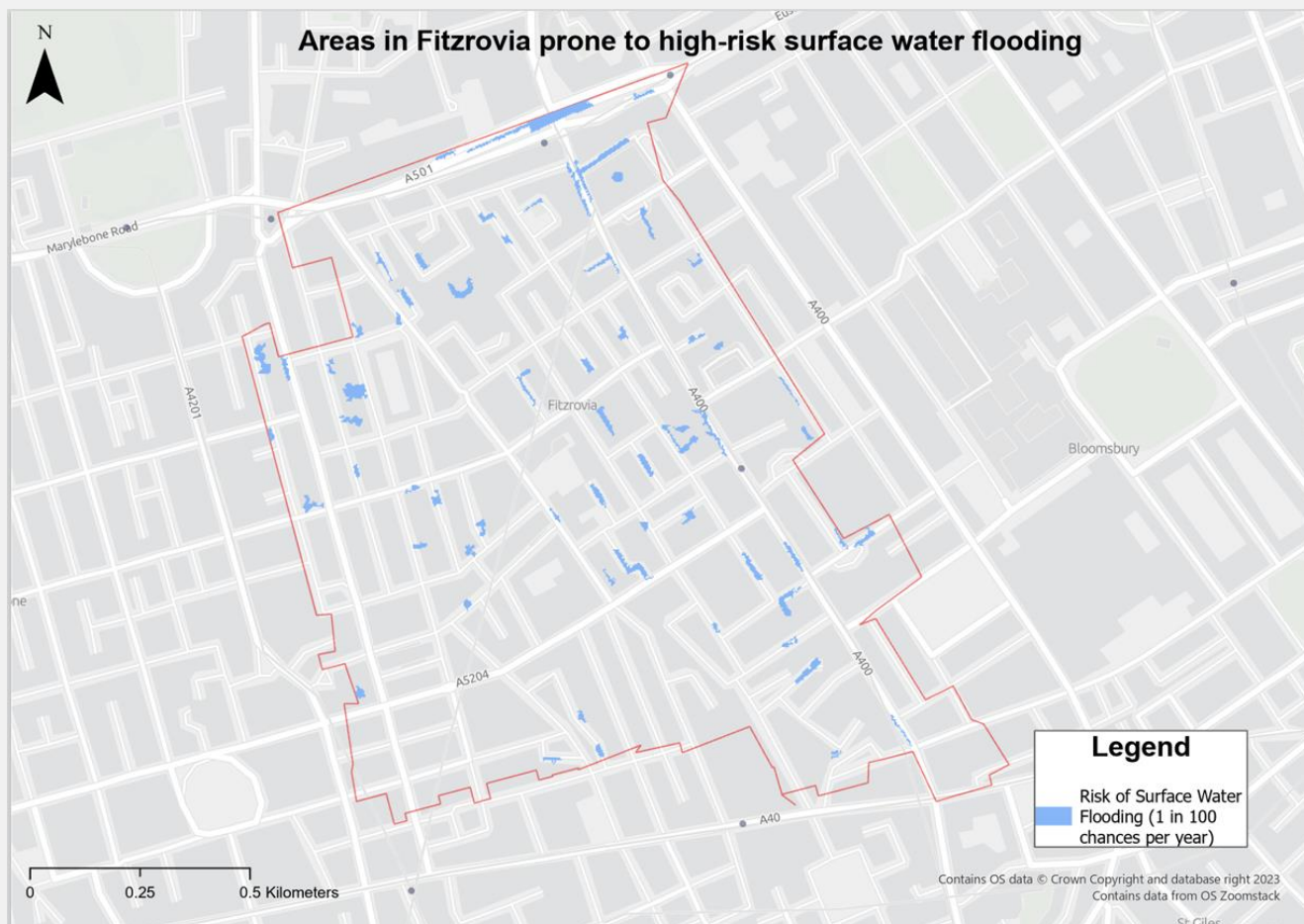


Figure 9: Areas of flood risk in Fitzrovia

Waste and recycling

The Mayor of London's target for recycling is 65% of all waste by 2030. Household recycling data is not available for Fitzrovia, but the likely levels in Fitzrovia can be estimated from the percentages for the two boroughs, shown in Figure 7, below:

	Camden	Westminster	London
Household recycling levels (Veolia)	28%	21%	33%

Figure 10: Household recycling levels

Overall, both boroughs are underperforming in terms of their levels of household recycling compared to the London average.

Business recycling in The Fitzrovia Partnership's Preferred Supplier Scheme is reported to have achieved a rate of 66.5% over the last 12 months (the waste collection provider is First Mile). It is recommended to further validate this self-reported recycling level as well as the recycling rates reported by the two preferred suppliers (Veolia and Biffa).

Transport and connectivity

Due to its central London location, Fitzrovia has excellent transport links, including five Underground stations and numerous bus routes, giving Fitzrovia the highest possible accessibility score of 6b (calculated by TfL, with an explanation of the methodology [here](#)). The Camden side of Fitzrovia is well served with dedicated and often segregated cycle routes, while there are limited cycling facilities in the Westminster side of Fitzrovia.

Buildings energy performance

Analysis of Energy Performance Certificates (EPCs) of non-domestic buildings in Fitzrovia was carried out for this project. This shows that less than half the district's floorplate is on target to meet the 2027 Minimum Energy Efficiency Standard (MEES) of C or better and more than three quarter's of Fitzrovia's floorplate is below the 2030 target of B or better.

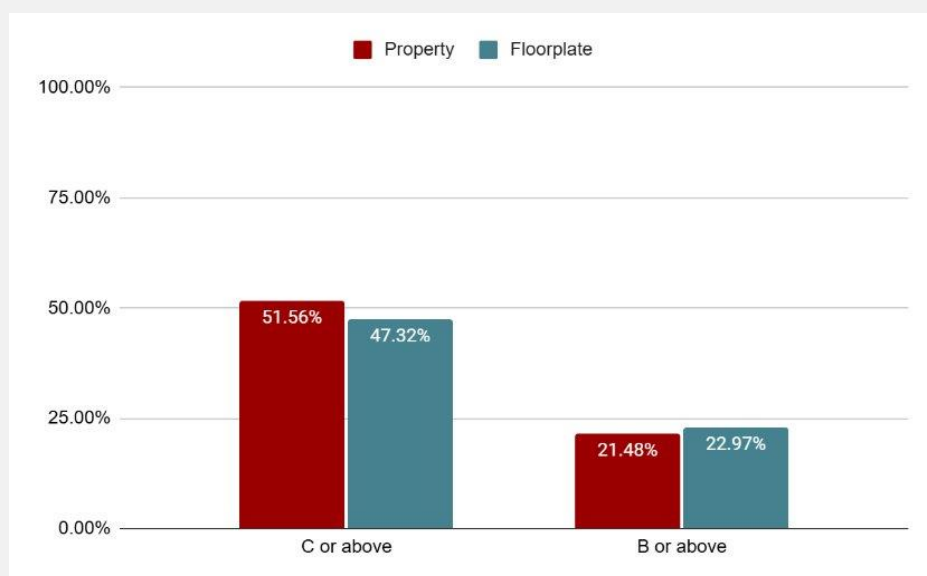


Figure 11: EPC rating in Fitzrovia for non-domestic properties

The research also reveals that the office sector, which accounts for 76% of the area's commercial floorplate, is at similar levels of compliance as shown below

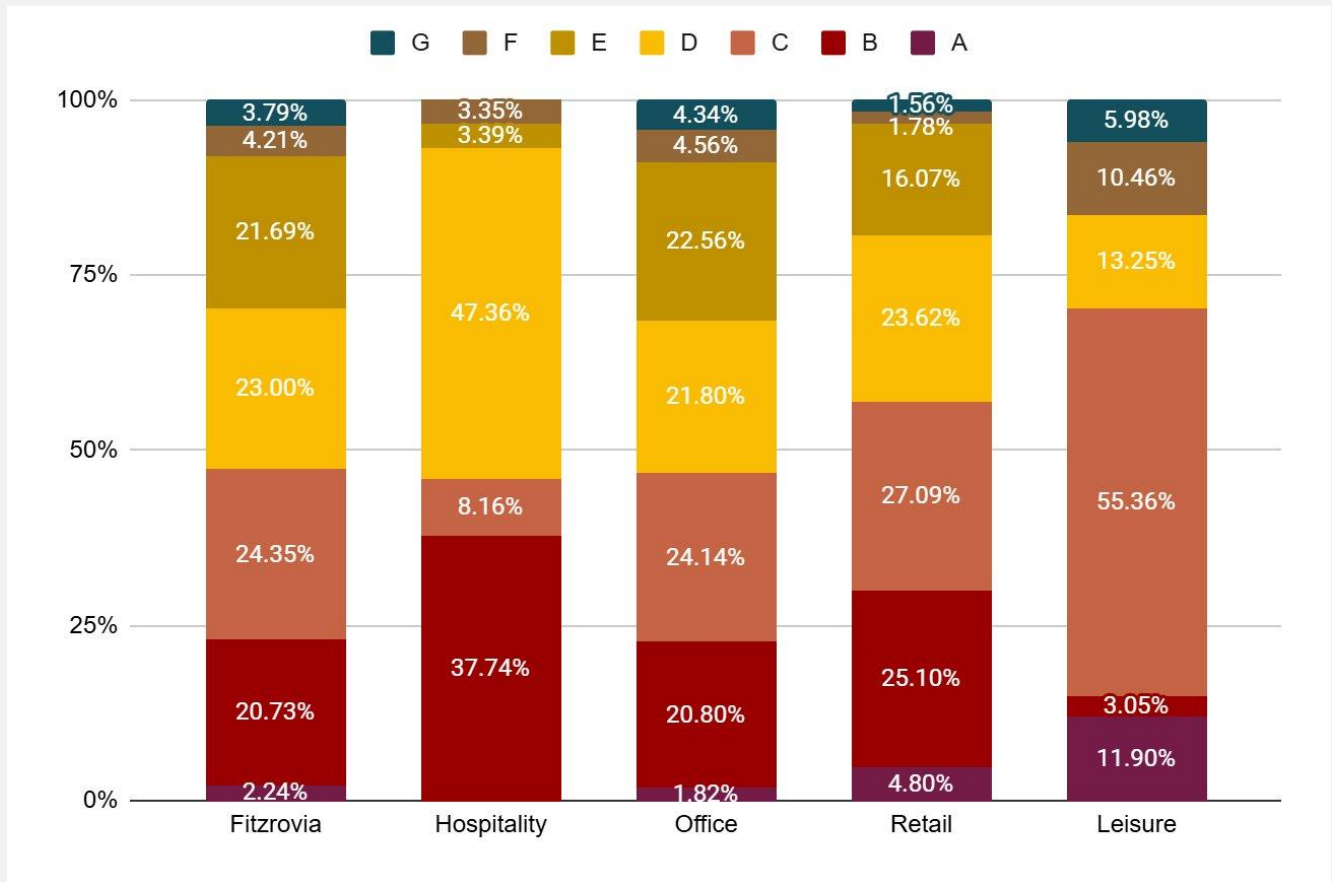


Figure 12: EPC ratings by commercial sector

These buildings might not be lettable in the future unless measures are introduced to improve their energy efficiency.

Fitzrovia's people and community

Population

Fitzrovia is both a residential and commercial district of central London. There are an estimated 12,500 residents living in Fitzrovia, according to the 2021 Census.

Education

In Fitzrovia, the 2021 Census found that for residents aged 16+, more than half (55.5%) were educated to degree level or equivalent. This is slightly lower than Camden's average of 57% and Westminster's average of 58%. However, 8.3% of Fitzrovia residents have no qualifications at all, which is lower than Camden and Westminster's average of 12% and 13% respectively.

Employment

Across Fitzrovia, employment data from the 2021 census shows that 52% of people aged 16 years and over (excluding full-time students) are economically active. This is slightly lower than Camden's average of 55.3% and Westminster's average of 55.6%.

A higher proportion of residents have professional and managerial occupations, 55% in Fitzrovia (Bloomsbury Ward) and 59% in Fitzrovia (West End) compared with 47% for England. The graph at Figure 12, below, illustrates the main occupations of Fitzrovia's residents.

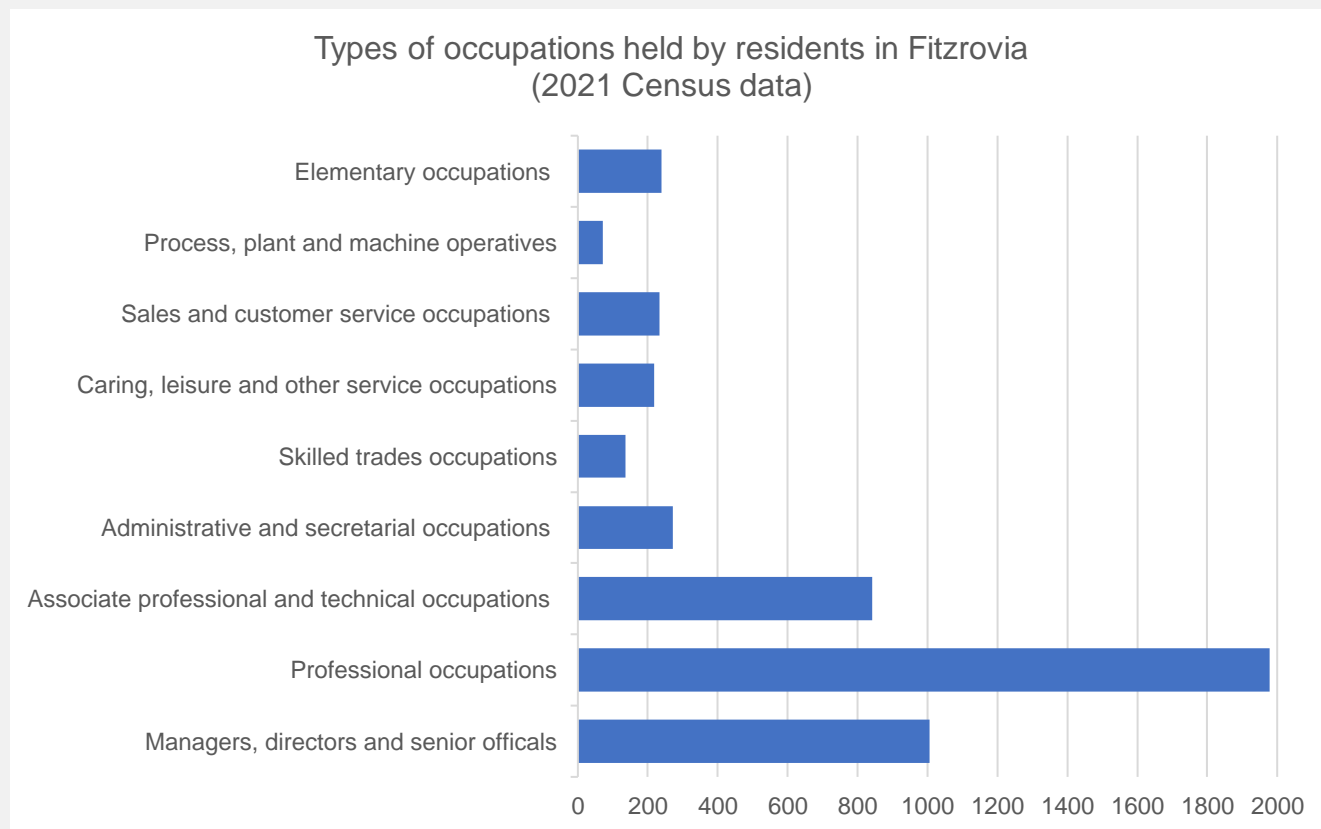


Figure 13: Occupations held by residents of Fitzrovia

Deprivation

10.6% of Fitzrovia's residents experience deprivation, compared with 19.1% in Camden and 13.5% in Westminster. The map at Figure 10, below, shows there are slightly higher levels of deprivation in the southwestern areas of Fitzrovia.

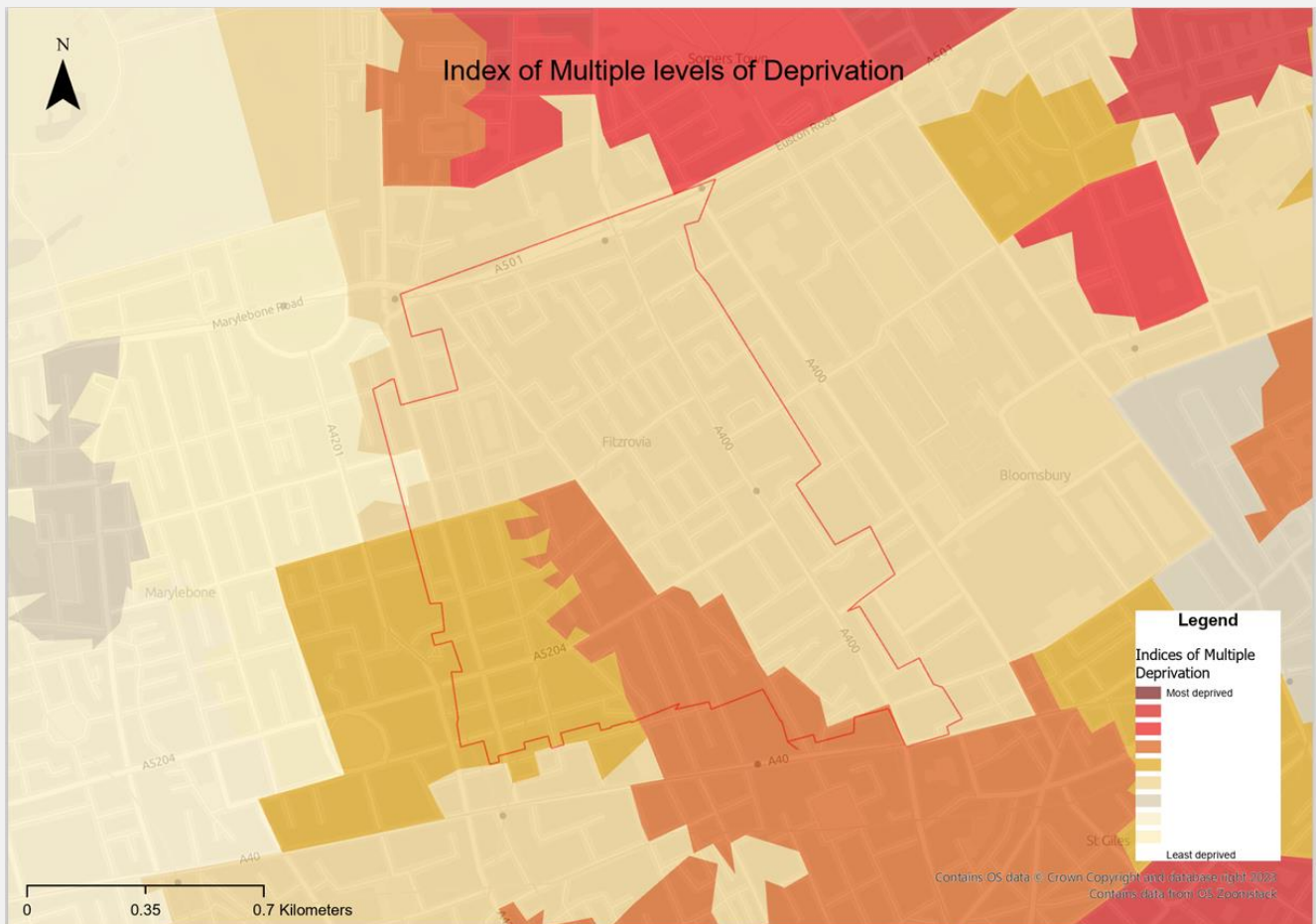


Figure 14: Index of Multiple Deprivation

Diversity

Fitzrovia has a relatively ethnically diverse resident population. 57% of the population are from a white ethnic background, with the next biggest ethnic group being Asian (30.4% of the population). Black people comprise 5% of Fitzrovia's residents.

Disability

5.43% of Fitzrovia's residents describe themselves as limited a lot by disability and 8.25% of residents describe themselves as limited a little by disability, according to the 2021 Census. These are lower than the averages for Camden at 6.7% and Westminster at 6.5% of residents who are limited a lot by disability (figures supplied by Trust for London, 2021).

Life expectancy

The life expectancy of Fitzrovia's residents is higher than the average for Camden and Westminster, as the table at Figure 14, below, indicates:

Life Expectancy (years)	Women	Men
Bloomsbury (Camden)	86	82
West End (Westminster)	84	80
London Average	83	79

Figure 15: Life Expectancy

Health

Based on the 2021 Census data, 87% of residents in Fitzrovia reported their health as being good or very good. This is higher than the average proportion of 81.3% of residents in Camden and 82.2% in Westminster. Similarly, 4.3% of residents described their health as being bad or very bad, which was lower than the 6.5% of Camden's residents and 6.2% of Westminster's residents.

Crime

Analysis of recent crime statistics indicates that most crimes in the area are thefts from another person, antisocial behaviour or incidences of violence and sexual assault. There is an average of around 600 crimes reported per month according to the Metropolitan Police. Parts of Fitzrovia, including Whitfield Gardens, Tottenham Court Road and areas in front of the Underground stations are hot spots for crime and antisocial behaviour.

Summary

Overall, Fitzrovia has a diverse, healthy, well-educated and comparatively affluent local population. There are pockets of deprivation within Fitzrovia and in the surrounding area. The comparatively high crime statistics highlight the need for more safety interventions.

Review of businesses' economic and social governance strategies

A sample of The Fitzrovia Partnership's members' ESG strategies were reviewed and the key findings summarised in the table below. Members are active across many areas, particularly in reducing carbon emissions from their operations. Key findings are that governance that starts with board leadership, a clear plan and measuring and reporting on performance are all key to delivering progress in becoming a more sustainable organisation.

Member Organisation	Sustainability policies and actions	Social policies and actions
Arup	<p>Commitment to the UN Sustainable Development Goals, creating shared value for clients, communities and planet. Guided by six principles, to:</p> <ul style="list-style-type: none"> • Improve human health, safety, and well-being through the quality of the built environment and health of the planet • Transition to a zero- carbon world • Adopt circular economy principles leading to decoupling of economic growth and consumption • Enhance communities' resilience to climate change and risks • Create social value to achieve a more inclusive, equitable and just society • Restore nature and respect planetary boundaries. <p>Strong governance structure and board leadership</p>	Social Policy Statement, which covers supplier requirements such as paying the London Living Wage
David Miller Architects – Social Value statement	<p>Working towards reaching net zero carbon by 2030</p> <p>Supports Heart of the City, a charity that provides a climate action programme for SMEs</p>	Received industry recognition for recruitment of people from a broad range of backgrounds
Derwent London	<p>Target to reach net zero carbon by 2030</p> <p>Transparent governance, with board leadership and representation</p>	Social Value framework and reporting as part of seven pillars of Responsibility Delivery Framework

	Extensive policy documents including supply chain responsibility	Three social value themes: part of the community, great places to work, and a thriving local economy Supports the Fitzrovia Arts Festival through its community investment fund
Kafi Café	Uses recycled glassware; sources coffee roasted in nearby Bethnal Green and local produce such as honey	-
Marks and Spencer	'Plan A' ESG Strategy. Aim to reach net zero carbon by 2040 across its value chains Transparent and tiered ESG governance with board leadership, executive committee and business forum	'Marks & Start' provides work opportunities for disadvantaged people. Individuals are given a work experience placement and 80% are offered a job upon completion Supports a range of charities
Gardiner and Theobald	Publishes an ESG annual report Reducing carbon emissions across all three scope types	An armed forces-friendly employer Employee volunteering days
Heal's	Focus on producing furniture that lasts as alternative to throw-away consumption Donates unsold furniture to the British Heart Foundation Implementing measures to reduce emissions from its buildings	Supports charities with a focus on design and creativity for people with additional needs
Metro Bank	Aims to make all its operations net zero by 2030	Metro Bank provides a paid day of local volunteering for its employees called a 'Day to Amaze'
NEXT15	ESG Governance Committee Aligning with BCorp Corporate report Reducing emissions based on Science Based Targets Initiative	Strong focus on equality, diversity and inclusion in policy, actions and measurement Has an 'Impact Plan' Supports Women's Aid charity
UCL	Comprehensive 'Green Plan' with ambitious targets: 80% of its waste recycled by 2025, and an 80% reduction in its energy use by 2025	-
Wiggin LLP	Strategy to reduce and, where necessary, offset emissions across all three scope types Supporting a design competition open to manufacturers, researchers	Partners with https://www.mybigcareer.org and Roundhouse to support young people from disadvantaged backgrounds

and inventors to create the world's
first zero carbon emission
commercially- viable transatlantic
flight

Remy Cointreau	Investing in strategy to convert to agroecological methods, use of renewable energies for production, raising awareness and training of employees in sustainability and responsible consumption, eco-design of packaging and the launch of pilot projects including circularity of glass	CSR governance, board leadership, CSR champions and CSR days
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Figure 66: Summary of sustainability strategies

Policy overview

Below is a summary of the most relevant government strategies, policies, priorities and frameworks set at neighbourhood, local, regional, national (prior to the July 2024 general election) and global levels.

Policy	High-level summary	Relevance for TFP
International Frameworks		
United Nations Sustainable Development Goals (SDGs)	17 global goals for sustainable development	TFP is using the framework to shape the local strategy. TFP has a direct role in relation to goal 17, partnerships that no other organisation in Fitzrovia can fulfil
Paris Agreement	International treaty to limit global temperature rise well below 2 degrees Celsius, aiming for 1.5 degrees Celsius, by reducing greenhouse gas emissions	TFP's climate actions should align with global targets for emissions reduction and climate resilience and the more recent COP26 agreements
UK Government (pre-2024 general election)		
25 Year Environment Plan	Government plan for improving the natural environment, including waste reduction and biodiversity enhancement	Sets out actions for TFP in promoting environmental sustainability. Targets for waste reduction, biodiversity enhancement, and resource efficiency
Climate Change Act 2008	UK commitment to achieving net-zero greenhouse gas emissions by 2050, with binding carbon reduction targets	Require TFP to align with national targets for reducing carbon emissions and improving environmental sustainability
Net Zero Strategy	UK strategy to achieve net-zero emissions by 2050 across all sectors, aiming for decarbonisation of the economy	Set policies and targets for TFP to contribute to achieving net-zero emissions, focusing on energy efficiency and renewable energy adoption

Environment Act 2021	Legislation focusing on biodiversity, waste reduction, and resource efficiency to enhance environmental sustainability	Influence local environmental policies in TFP to promote biodiversity enhancement and sustainable resource management
National Planning Policy Framework (NPPF)	Guidelines on sustainable development, promoting renewable energy and efficient land use	Adoption of renewable energy technologies, efficient land use planning and sustainable transport systems
Heating and Building Strategy	Strategy for decarbonising homes and buildings in UK, aiming for net zero emissions by 2050	Building energy efficiency standards, renewable heat adoption, and retrofitting targets
Green Financing Framework	Describes UK Government's plan to finance expenditures through green gilts and savings bonds	Potential funding avenues for TFP's green infrastructure projects
UK Clean Growth Strategy	Commits to economic growth while reducing greenhouse gas emissions, aiming for net zero by 2050	Guides TFP in promoting green technologies and sustainable economic development
London region		
London Plan	Spatial development strategy for London focusing on sustainable development, infrastructure, and environmental quality improvements	Shapes TFP's urban planning strategies to enhance sustainability, resilience to climate change, and promote green infrastructure development
London Environment Strategy	Net zero carbon London by 2030. Addresses climate change, air quality, waste management, and green spaces across London, aiming for improved environmental quality and public health outcomes	Guides TFP in improving air quality, reducing waste, and enhancing green spaces to support community health and environmental sustainability
London Infrastructure Plan 2050	Strategic plan for infrastructure development in London, focusing on transport, energy, water, and digital infrastructure	Directs TFP's infrastructure planning to support sustainable growth and resilience
London City Resilience Strategy	Strategy to address long-term resilience challenges in London, focusing on climate change impacts and city-wide resilience	Guides TFP's resilience planning, promoting adaptive strategies and risk management
All Green London Grid	Policy framework for green infrastructure and urban greening in London, enhancing biodiversity and open spaces	Shapes TFP's green infrastructure initiatives, promoting biodiversity and urban sustainability
Mayor's Transport Strategy	Healthy Streets framework and targets to increase healthy and active travel (walking, cycling and public transport) to 80 percent by 2041	Impacts local transport infrastructure and air quality improvement in TFP area, promoting sustainable mobility, reducing collisions, reducing emissions and improving access to jobs.

80% all trips by healthy modes by 2024.
Central London Zero Emission Zone by 2025
All of London clean air/low emissions zone by 2030

London Borough of Camden		
We Make Camden	Strategy to address inequality and health and well-being in Camden	TFP's initiatives to promote social equity and sustainable development can be aligned with, and contribute to, this strategy
Camden Local Plan 2024	Local development plan guiding infrastructure, housing and sustainability in Camden, aiming for sustainable neighbourhood growth	TFP's development goals to include sustainable housing, green infrastructure and community resilience
Camden Clean Air Strategy 2019-2034	Strategy to improve air quality in Camden, aiming to meet WHO air quality standards	Air quality improvement targets, emission reduction milestones and health impact assessments
Camden Climate Action Plan 2020-2025	Sets targets for Camden to achieve net-zero carbon emissions by 2030 through renewable energy adoption, energy efficiency and sustainable transport initiatives. Designates Charlotte Street and surroundings as Special Policy Shopping Area	Guides TFP's climate actions to achieve local emissions reduction goals, improving air quality and promoting sustainable mobility
Fitzrovia Action Plan	2014 plan identified development sites to respond to the significant pressure for development in Fitzrovia and co-ordinates development proposals	Most of these sites have now been developed
Creating a space for nature in Camden – biodiversity action plan	A live document outlining interventions to support biodiversity across Camden	Enhance green spaces, create urban gardens and support biodiversity projects
Camden health and well-being strategy 2022-2030	Strategy promoting health equity, community well-being, and social inclusion in Camden	Guides TFP's health-focused initiatives, addressing community needs and promoting well-being. Health outcomes, social inclusion indicators, community well-being assessments
Westminster City Council		
Westminster Climate Action Plan	Aims for Westminster to become a net-zero borough by 2040 through reducing carbon emissions from	Guides TFP in reducing carbon footprint, enhancing energy efficiency, and

	buildings, transportation, and waste management	implementing sustainable waste management practices
Westminster City Plan 2019 – 2040	Development plan focusing on housing, transport, environment and economic growth in Westminster, aiming for increased green spaces and sustainable transport	Guides TFP in sustainable urban planning, including improving air quality, reducing congestion and enhancing public spaces
Fairer Westminster Delivery Plan	Focuses on reducing inequality, fair housing, sustainable economy and environmental sustainability in Westminster	Shapes TFP's initiatives to promote social equity and sustainable development
Westminster Economic Strategy	Strategy for resilient businesses, vibrant West End and employment opportunities in Westminster	Guides TFP's economic development initiatives, promoting sustainable growth and innovation
Air Quality Action Plan	Strategy to improve air quality in Westminster, aiming to meet World Health Organisation air quality standards	Air quality index improvements, emission reduction targets and public health enhancement
FitzWest Neighbourhood Plan		
Neighbourhood Plan	The adopted plan sets out five objectives, which align with TFP vision for Fitzrovia and its sustainability aspirations, including: promoting regeneration, supporting businesses and growth, protecting and increasing green space, improving environment quality and better connectivity for sustainable modes	Strong alignment on policy and opportunity to collaborate in the delivery of sustainability projects as part of the action plan
	FitzWest commissioned consultants to identify potential public realm improvements. Three of its five proposals are in TFP's footprint and have been included in this study's proposals, although scope and recommendations updated	Secure funding and deliver with FitzWest priority public realm improvements

Figure 17: Policy overview

