

Retail Statement

Coal Drops Yard

King's Cross Central General Partner Ltd

October 2015

King's Cross

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KING'S CROSS CENTRAL COAL DROPS YARD RETAIL STATEMENT

Introduction

The proposals for the Coal Drops Yard comprise the refurbishment and redevelopment of existing buildings and the creation of additional new floorspace, to create a retail destination at the heart of King's Cross Central. The Coal Drops Yard (CDY) (comprising the Grade II listed Eastern Coal Drops and viaduct (ECD), Western Coal Drops and viaduct (WCD), new Upper Level spanning the two Coal Drops buildings, Lower Stable Street (LSS) and the 16 westernmost Wharf Road Arches (WWRA)) are proposed to house a range of retail units within A1 - A4 use classes. Retail is the established principal land use for this area within the King's Cross Central site under the Outline Planning Permission dated 22 December 2006 (ref. 2004/2307/P) (the "Outline Planning Permission"). The proposals would provide for 13,348m² GEA of retail floorspace (2,937m² GEA more retail floorspace across the site as a whole than anticipated under the Outline Planning Permission) plus plant and cycle stores, brought forward under a submission comprising applications for reserved matters approval, listed building consent and full planning permission, as detailed in the accompanying Planning Statement.

In line with the principles established by the Outline Planning Permission, the vision for the CDY is to:

- breathe new life into the heritage assets, namely the ECD, the WCD and the WWRA and surrounds;
- create a unique shopping destination at the heart of King's Cross;
- provide increased circulation and permeability through the CDY site to the surrounding development site;
- bold re-use of historic buildings combined with contemporary architecture;
- facilitate an inclusive and varied occupier mix within an eclectic 'King's Cross' offer; and
- create a sense of place that people will wish to dwell in as well as shop, adding to and reinforcing the attractiveness of already popular public realm areas such as Granary Square and Lewis Cubitt Square and Park.

The existing heritage buildings, together with the proposed contemporary architectural design of the proposed new Upper Level, the mix of retail unit types and occupiers and carefully curated public realm will help create a distinctive retail offer that complements existing retail destinations in Camden and wider London. Appended to this statement is a Retail Impact Assessment, prepared by Nathaniel Lichfield & Partners, to accompany the submission. The proposals result in an increase to the retail floorspace permitted under the Outline Planning Permission, by 2,937m² GEA. This is a minimal increase within the overall quantum permitted under the Outline Planning Permission (approximately 6%) however the assessment has been carried out for completeness and clarity. The assessment explains that the proposed additional floorspace results in a minimal impact on surrounding centres. Further, it explains that there is some unmet demand for retail floorspace in the surrounding areas and expected increase in expenditure. The proposals, rather than causing a negative impact, will go some way to meeting this unmet demand. The envisaged type of offer is

also likely to complement rather than compete with surrounding retail centres, both district and major.

The Outline Planning Permission

The Outline Planning Permission established the principle of retail use within the CDY and sets out the maximum floorspace and uses, both site wide and for each Development Zone, including Development Zones I and M, within which the CDY lies. Development Zone M (ECD, WCD and LSS) would comprise “works to facilitate a range of specified new uses, i.e. those within the A1/A2/A3/A4/A5, D1 and D2 use classes and night clubs.” Zone I (Fish & Coal Offices, EWRA and WWRA) would comprise “works to facilitate a range of specified new uses, i.e. business and employment (B1) and shopping/food and drink (A1/A2/A3/A4/A5) uses. Details of reserved matters for the Fish & Coal Offices (FCO) within Zone I, along with the 10 easternmost Wharf Road Arches, were approved, for B1, A3 and A4 uses, with reference 2014/5272/P. A linked full planning permission authorises a new contemporary conservatory extension, with reference 2014/5273/P.

The Proposals

The proposals for the Coal Drops Yard would deliver 55-60 A1 retail units, up to 6 cafes and one restaurant within the refurbished and new build units within the CDY.

The cellular nature of the unique heritage buildings lend themselves well to smaller distinct retail units as the spaces within each cellular unit are flexible and adaptable. The historic buildings will be fitted with shops and restaurants/cafes that correspond with the existing openings and bay structures as far as possible. However, as discussed within this statement, intensification of the retail offer, improved circulation and a variety of unit sizes is required to ensure the creation of a sustainable retail destination. The architectural design for the scheme has been led by the internationally renowned and local architectural practice Heatherwick Studio. Heatherwick Studio has experience of working with listed and conservation area buildings, such as the restoration and modern extensions to the Bombay Sapphire Distillery at Laverstoke Mill which re-opened in 2014 and also a number of retail projects, including the renovation of the shopping centre in Pacific Place, Hong Kong.

As detailed in the Design and Access Statement that accompanies this submission, the design has evolved as a result of a comprehensive consultation process with conservation, planning, urban design and transport officers at the London Borough of Camden, Historic England and numerous local stakeholder groups, such as the Canal and River Trust, King’s Cross Development Forum and the nearby Camley Street Natural Park.

The proposed architectural design has been developed to maximise the potential for a well-performing retail environment that will provide the best opportunity for a range of retailer occupiers and provide a sustainable secure future for important historic assets. The design delivers good circulation, full accessibility in the public realm and buildings and a mix of retail unit sizes and it increases the extent of weather cover.

The Central Yard, located in between the heritage buildings, is a unique space that will be curated at the heart of the retail, rather than as an extension to it. Located adjacent to the Regent’s Canal the public space will be pedestrianised and partially protected from wind and inclement weather and therefore will provide a family-friendly and social environment. The addition of link bridges between the buildings at Viaduct Level (as described in detail in the Design and Access Statement) will frame smaller and more intimate spaces, providing a variety of experiences around the retail units. The

Yard could be used for temporary events, pop-ups and installations that will support the retail occupiers and increase the sense of destination.

Unit sizes

The majority of the retail units in ECD and WCD are 'small', ranging from 20m² to 200m². This responds well to the existing form of the buildings; provides a diversity of retail offer enabling smaller, independent retailers and emerging talent to locate here; which in turn maximises the number and diversity of experiences each visitor can have. Several larger anchor units are also proposed, including within each Coal Drops and the Upper Level, which will be a single unit for a large retailer. This variety will in itself create a 'destination' appeal.

The configuration also echoes the more recent history of the buildings when they were partially subdivided for light industrial uses. The proposal of retail units in individual arches continues this tradition and will enhance the rhythm of the elevations; the arches and bays; and the existing internal cellular subdivision. Although some openings will require alterations, including for accessibility, the general approach is to conserve the surviving fabric with a minimum of changes and retain the legibility of the historic changes of use.

The WWRA units, all approximately 70m², is proposed to have a similarly diverse retail mix. The vibrancy of this location within the proposals is important, to draw visitors down the CDY ramp and into the Central Yard. Some retailers may have external seating outside of their units, in a similar manner as is existing within Granary Square, and as proposed within the approved eastern Wharf Road Arches, to maximise the activation of this area of public realm.

Lower Stable Street has the smallest units; the smallest ranging from 20m² to 30m². It is designed to feel more intimate, with several pocket spaces in between the units on both sides of the street. A modern 'souk' feel is envisaged here, again with outdoor seating. The frontages of the newly built units under Stable Street are fully openable to expose the unit fully to the street in hot weather, adding to the inclusive and intimate feel of this street. Further details can be found in the accompanying Design and Access Statement. As with the WWRA units, activity and well-designed visual merchandising will be developed with occupiers to help to draw people to this area.

Anchor units

Key to the retail unit size and variety of offer will be the larger 'anchor' units that will play a similar role as the larger stores within other shopping environments, such as department stores on Oxford Street or in shopping centres. Larger anchor stores which visitors specifically travel to, although of a smaller scale within the CDY, will be key to driving footfall and creating retail intensity at the site. This mix supports the smaller stores, creating the vision of a sustainable, exciting, mixed destination.

Four of these anchor units are proposed within the footprint of the existing buildings; at the north and south ends of the ECD and WCD, and range in size from 280m² to 1,600m² GEA. The proposed Upper Level forming the fifth anchor, above and between the ECD and WCD buildings, of 3,330m² GEA.

The south WCD anchor is proposed to be a two storey restaurant with outdoor seating located underneath and on top of the WCD Viaduct, the largest A3/A4 use within the proposals. With long views and the advantage of afternoon and evening sun, the seating area at the south end of the WCD is envisaged as a destination in its own right. It is proposed that this restaurant would be open from late morning with an all-day offer.

The Upper Level

The Upper Level will enhance the intensity of the retail offer and the variety in unit sizes within CDY. This modern addition was not envisaged at the time of the OPP and therefore forms part of the full planning application. The size of the unit is comparable to the minimum size for flagships stores in London's larger retail destinations such as Oxford Street, Regent Street and Covent Garden. The size of the unit will therefore appeal to department store style and international retailers that would otherwise not choose to operate within the smaller units of CDY.

The layout of the Upper Level unit is not 'orthodox' and has been driven by the architectural concept, which has taken direct inspiration from the existing buildings. To ensure the layout will be appealing to retailers it has been tested and refined with a retail interior architect, Checkland Kindleysides, and a number of retailers who would be appropriate for the CDY retail vision. The unit will have high levels of visibility from the surrounding public realm. This is an advantage as the views will draw visitors up into the space.

Discussions with retailers have also influenced the layout of the vertical circulation to the upper unit. It needs to be clear and instinctive. The circulation/cores are further explained in the accompanying Design and Access Statement. In addition to the Feature Core in the ECD, a dedicated core may also be installed by the retailer in the WCD (shown on the submitted drawings for approval). This would allow the retailer to signpost the circulation on the shopfront entrance, in the same way as the other retailers, and would assist in visitor circulation within the unit as there would be entrances and exits in both the ECD and WCD.

The appeal for retailers for the Upper Level unit will be the unique architectural design, high levels of visibility, generous volume of the space, the number of smaller neighbouring retailers and the wider heritage context.

Mix

CDY is proposed to be predominantly comparison A1 retail, providing a mix of fashion, lifestyle, arts and cultural retailers with a small element of convenience. Several cafes will be interspersed within the units to provide refreshment and a place for visitors to dwell and relax, with any external seating areas positioned to make the most of the microclimate.

The mix of occupiers within the units will be carefully curated, to build on the distinct sense of place already established at King's Cross and to complement the existing offer within King's Cross, King's Cross and St Pancras Stations and the wider surrounds including the Brunswick Centre, Camden Market, Camden High Street and Angel. CDY was historically an important part of London's energy generation and use, through the movement of coal. The careful curation of the retail in CDY will look to provide a new form of energy from the buildings, centred on human creativity and talent. Naturally inspiration, and perhaps even some future occupiers, will be taken from the adjacent University of the Arts London (and specifically Central Saint Martins). The CDY unit and occupier mix will also be curated to respond to the emerging future trends of retail, which draw on creativity, and include experience, learning, entertainment and community.

Lower Stable Street will be occupied with food and coffee kiosks as well as small design and craft retailers. There may also be some services in this area such as newsagent booths and florists. These units are the best suited within the scheme for the support and incubation of emerging retail talent

and for showcasing growing enterprises. This will further enhance the unique and eclectic retail mix and the sense of destination.

The target mix comprises a combination of 'best of British' retailers, encouraged to develop offerings specific and unique to CDY, strong international retailers looking to open their first store in London and emerging smaller talent keen to operate from a smaller unit, market stall or kiosk, with fewer chains and high street multiples and fewer high-end, exclusive brands than would be found in other retail destinations in London. Larger department store retailers may feature, with edited or diffusion collections due to the size constraints of the units. Getting the right balance here is of key importance: the larger, familiar retailers will drive footfall to the site, in turn supporting the smaller and lesser known retailers.

The 'anchor' retailers are envisaged to be internationally known with particular strengths in visual merchandising and will include retailers drawn from the fashion, technology, art and lifestyle world. Some of them may house concessions that promote new and emerging talent. The retail offers are likely to incorporate ancillary food and drink offers as well as event programmes, collaborations and installations to create an experiential shop. With high levels of visibility, these units will have active facades that draw people into CDY from the east and north.

It is envisaged that retailers will not open before mid to late morning because the Central Yard will be used for servicing and deliveries. However, retailers will be encouraged to stay open into the evening to create a London street feel. The WCD restaurant together with the restaurant and pub located within the Fish & Coal Offices and EWRA will help to activate the area through to late evening, albeit in a managed way.

The retail and restaurant offer will be supported by proposed public amenities such as public toilets, ATMs and cycle parking both for visitors and staff. These have been strategically placed in the WCD to provide amenity to the adjacent public realm in Lewis Cubitt Square and Park. Wayfinding (such as directional signs and store directories) will be designed to assist the public in understanding the retail mix and circulation and will draw inspiration from the existing buildings and the wider site wayfinding strategy.

CDY as part of the wider retail estate

The proposed mix within the CDY will be predominantly A1 retail use with a relatively low level of food and drink provision compared to similar retail environments in London. Within the wider context of KXC however, the CDY is surrounded by a large and diverse array of restaurants and cafes that have already opened or are planned. The surrounding environment will help to generate footfall from the site to other areas in KXC during the day and into the evening, contributing to the enlivenment of the wider estate.

King's Cross is already proving to be a successful visitor destination. The location and accessibility of the site, the volume of station travellers, the concentration of residents and office workers and the unique architectural heritage and exciting new development are all envisaged to contribute towards the creation of a sustainable retail destination. The estate and its retail offer will service local residents and workers as well as shoppers and visitors from a wider catchment, from surrounding neighbourhoods within London and from further afield via the many local, national and international transport links to the site. CDY is intended to be a unique and diverse 'retail street' environment within the wider urban context of King's Cross, with the emphasis on quality products and customer engagement.

A large Waitrose has just opened in the Midlands Goods Shed adjacent to Granary Square, providing a significant level of grocery and amenity shopping for local people and workers, predominantly. Other amenity retail services, such as dry cleaning, hairdressers, cobblers and convenience stores are envisaged to be located along Canal Reach, closer to the residential areas within and surrounding King's Cross. A cinema will be situated to the north of the CDY along Handyside Street, in Building R7, which will add to the offer and experience for visitors and local people, further helping to attract footfall through the CDY to the north.

To date, King's Cross has become known for its food and dining offer: the growing range of restaurants and cafes has helped shape the feel of the estate, particularly around and to the south of Granary Square. This comprises both restaurateurs who are well known but doing something a bit different at King's Cross and lesser known operators.

CDY will form a natural extension of Granary Square, Cubitt Square and the Wharf Road Viaduct and public realm surrounding the Fish and Coal Building. The CDY will sit alongside both the current and envisaged retail offer across the estate, including along King's Boulevard, within Pancras Square, along upper Stable Street within the Western Transit Shed, the Waitrose supermarket within the Midland Goods Shed and the clusters of retail within A1-A4 uses that will come forward in a phased manner across the north of the site.

It is envisaged that the refurbished heritage buildings complemented by the contemporary addition of the Upper Level will themselves draw visitors. The Upper Level unit increases the overall floor area at CDY and is key to the proposed intensity of footfall, activity, retail offer and experience. This will enhance the vibrant local shopping environment for residents, office workers and local people and create a new retail destination for Camden and London.

Executive Summary

This Retail Assessment has been produced on behalf of King's Cross Central Limited Partnership (KCCLP) to accompany the submission of a reserved matters application, a full planning application and an application for Listed Building Consent for the development of the Coal Drops Yard, which forms part of the King's Cross Central development site.

The Coal Drops Yard proposals will include a mix of Class A1-A4 floorspace. The majority of the floorspace proposed will be comparison retail floorspace, complemented by an element of convenience retail, together with Class A3 café/restaurant units.

The proposals for the Coal Drops Yard will result in an increase of the total permitted floorspace under the original Outline Planning Permission (2006). The total maximum Class A floorspace that is currently approved at King's Cross Central is 45,925 sq.m. The Coal Drops Yard proposals will exceed this overall approved quantum by 2,937 sq.m, an increase of around 6%.

The principle of retail use at the Coal Drops Yard has been established by the Outline Planning Permission. It is also of note that retail planning policies at all levels support retail development at the Coal Drops Yard within King's Cross Central.

The proposed development does not trigger the sequential test requirement. A retail impact assessment of the additional floorspace proposed at Coal Drops Yard has been undertaken for completeness to support the application.

The retail floorspace at King's Cross Central is likely to attract trade from a variety of different sources, including station travellers, King's Cross Central workers, visitors from the wider London area and beyond, and local residents from King's Cross and the surrounding area.

The impact assessment considers the baseline position of the quantum of Class A floorspace approved under the Outline Planning Permission, and the implications of increasing the retail floorspace by 2,937 sq.m gross. The additional floorspace is proposed to be Class A1-A4 floorspace. It will be comprised predominantly of A1 comparison retailing along with some A3 use. In this respect, the assessment considers the additional floorspace as 1,745 sq.m gross comparison goods and 1,192 sq.m gross food and beverage floorspace.

The comparison goods impact caused by the additional floorspace at Coal Drops Yard is negligible and not material. The estimated impact on the comparison turnover of Camden Town is just 0.09%, 0.07% on Angel, Islington, 0.03% on Nags Head/Holloway Road and 0.01% on Tottenham Court Road. These levels of impact are very low and would be more than offset by forecast future growth in expenditure.

For the food and beverage floorspace, again the impact caused by the additional floorspace at Coal Drops Yard is negligible. The estimated impact on the food and beverage turnover of Camden Town is just 0.18%, 0.12% on Angel, Islington, 0.06% on Nags Head/Holloway Road and 0.02% on Tottenham Court Road. These levels of impact are again very low and would be more than offset by forecast future growth in expenditure.

The forecast levels of trade diversion demonstrate that there is no predicted significant adverse effect on these centres or any other centre, as a result of the additional floorspace proposed at the Coal Drops Yard.

The nature and scale of the proposed development would not have any negative trading impacts on existing centres. Impact is expected to be dispersed amongst a number of shopping destinations, which reflects existing shopping patterns and high levels of expenditure leakage from the area. The predicted levels of trade diversion and impact on all centres are expected to be more than offset by future population and expenditure growth, and overall the vitality and viability of these centres will improve.

Based on this conclusion, the proposals will not have a significant adverse impact. Rather, it is evident that there is unmet demand for additional retail floorspace within the King's Cross area, and the additional floorspace proposed at the Coal Drops Yard will go some way towards meeting this demand.

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1.0 Introduction

1.1 This Retail Impact Assessment has been produced on behalf of King's Cross Central Limited Partnership (KCCLP) to accompany the submission of a reserved matters application and a full planning application for the development of the Coal Drops Yard, which forms part of the King's Cross Central Development Site.

1.2 As detailed in the accompanying Planning Statement, the suite of applications will comprise:

- a full planning application (for the Western Coal Drops ('WCD'), Eastern Coal Drops ('ECD') (less the southern anchor unit), their respective viaducts, the new upper level and Lower Stable Street ('LSS'));
- an application for reserved matters approval (for the Western Wharf Road Arches ('WWRA'), the southern anchor unit in ECD and the public realm in the Yard); and
- an application for listed building consent (for the ECD).

1.3 This report supports the suite of applications and hence considers both the requirements of the Outline Planning Permission dated 22 December 2006 (reference 2004/2307/P) ('OPP') (in relation to the reserved matters application) and current development plan policy together with other material considerations (in relation to the full planning application).

1.4 The suite of applications seek consent for the refurbishment of the existing Western Coal Drops, Eastern Coal Drops (and their respective viaducts), the Western Wharf Road Arches and Lower Stable Street (together referred to here as the Coal Drops Yard ('CDY')) and the addition of a new upper level to connect the two Coal Drops buildings, to create a retail destination providing a range and mix of retail units. The proposals and vision for the proposed retail destination are fully described within the accompanying Design and Access Statement.

1.5 The proposals for the Coal Drops Yard comprise a total of 13,348 sq.m (GEA) flexible A1-A4 floorspace, of which circa 10,380 sq.m (GEA) is expected to be Use Class A1/A2 and circa 2,816 sq.m (GEA) is expected to be Use Class A3/A4, plus 152 sq.m (GEA) for cycle storage. The total floorspace will be split between the two applications as follows:

- Reserved matters application: 2,071 sq.m (GEA); and
- Full planning application: 11,277 sq.m (GEA).

1.6 As with other full planning applications at the King's Cross Central ('KXC') site and as explained in more detail within the Planning Statement, the proposals seek to meet the principles of the Outline Planning Permission where possible and the majority of the floorspace proposed by the full planning application will

count towards various triggers, thresholds and land use maxima set by the conditions and Section 106 obligations within the Outline Planning Permission. The CDY proposals do, however, propose an intensification of retail floorspace within the CDY (and hence at KXC) of 2,937 sq.m (GEA) over the site-wide maximum of 45,925 sq.m set by the Outline Planning Permission. It is this additional floorspace, not anticipated by the Outline Planning Permission, that is specifically addressed by this report.

Outline Planning Permission

- 1.7 Outline Planning Permission was granted for the development of the King's Cross Central main site in December 2006 (ref. 2004/2307/P, the 'OPP'). The description of development attached to the OPP described the uses approved as:
- "... business and employment uses within the B1 use class; residential uses (including student accommodation), serviced apartments and hotels; shopping, food and drink and financial and professional services within the A1, A2, A3, A4 and A5 use classes; the full range of community, health, education, cultural, assembly and leisure facilities, within the D1 and D2 use classes; night clubs..."*
- 1.8 Within the OPP, the maximum floorspace proposed for all new uses within the site as a whole (as revised) comprises:
- 244,250 sq.m to the south of the Regent's Canal;
 - 468,840 sq.m to the north of the Regent's Canal;
 - 713,090 sq.m in total.
- 1.9 The Revised Development Specification that forms a part of the OPP defines the maximum floorspace figures for each category of approved use. The total maximum shopping/food and drink floorspace (Class A1/A2/A3/A4/A5) that is permitted to be developed within the site is 45,925 sq.m, of which 30,865 sq.m will be located north of Regent's Canal and 15,060 sq.m south of Regent's Canal. Under the OPP, the maximum Class A1 comparison goods floorspace permitted is 24,800 sq.m gross and the maximum Class A3 floorspace is 15,000 sq.m gross.
- 1.10 The OPP establishes the principle of retail use within Coal Drops Yard. Coal Drops Yard site is within Development Zones I and M, and is described in the Revised Development Specification as:
- "The Eastern and Western Coal Drops, together with their adjacent viaducts. The application proposes works to facilitate a range of specified new uses, ie. those within the A1/A2/A3/A4/A5, D1 and D2 use classes and night clubs."*
- 1.11 As set out above, the current proposals for the Coal Drops Yard incorporate a total of 13,348 sq.m Class A1-A4 floorspace. The Coal Drops Yard proposals will result in an increase of the total permitted floorspace under the original Outline Planning Permission. As noted above, the total maximum Class A floorspace that is currently approved at King's Cross Central is 45,925 sq.m.

The Coal Drops Yard proposals will exceed this overall approved quantum by 2,937 sq.m, an increase of around 6%.

Scope of Report

1.12 This increase in the quantum of Class A floorspace proposed (2,937 sq.m) is not considered to be significant compared to the overall Class A floorspace already permitted within the wider King's Cross Central development (45,925 sq.m). However, notwithstanding this, we have undertaken a retail impact assessment to consider the implications of the proposed additional retail floorspace, particularly in terms of the effect on existing centres.

1.13 Within this context, the scope of the report is as follows:

- Section 2 provides a review of the King's Cross Central development, in terms of the retail development that has been approved and taken place so far;
- Section 3 provides an overview of changing retail trends;
- Section 4 sets out the retail concept and provides a more detailed description of the proposed Coal Drops Yard development;
- Section 5 summarises the retail planning policy framework;
- Section 6 provides an assessment of the retail impact and implications for existing centres; and
- Section 7 contains the summary and conclusions.

2.0 King's Cross Central Development

2.1 This section provides the retail context for the proposed development, summarising what has been developed so far within King's Cross Central, and what development has been approved or is coming forward.

Approved Class A Floorspace

2.2 The Outline Planning Application for King's Cross Central was accompanied by a Retail Impact Assessment (RIA, March 2004) prepared by Arup. This study reviewed current policy and the retail data available to formulate a picture of future market demand for retail activity compared with planned levels of retail provision at King's Cross Central.

2.3 The RIA assessed the then proposed retail and leisure provision in the redevelopment of King's Cross Central within the context of the surrounding centres, in order to ensure a sustainable retail and leisure strategy, compliant with planning policy. The RIA assessed the implications of the total Class A floorspace proposed, up to 45,925 sq.m. The RIA confirmed that this is not considered to be a "major" scheme in scale, in the context of the potential markets that the scheme may serve.

2.4 The RIA acknowledged that neither the retail nor the leisure component would be the main use of the floorspace on the site, but both would play an important part in creating a sense of place and successful mixed use environment within the King's Cross Central development. The 45,925 sq.m of Class A floorspace approved under the OPP represents just 6% of the total floorspace within the OPP. The RIA stated that while retail and leisure provision will play a particular role at King's Cross Central, it would not be a major retail development or in any way a retail-led scheme overall. In this respect, the retail floorspace is complementary to the wider development, and will help to animate the public places created and make them successful.

2.5 The Floorspace Schedule for the Coal Drops Yard (Development Zone M and part Zone I) is combined with the remainder of Zone I – the Fish and Coal Offices and Wharf Road Arches – within the Outline Planning Permission, where a range of Class B1 and Class A1/A2/A3/A4/A5 uses are permitted.

2.6 Reserved Matters were approved in October 2014 for part of Development Zone I - the Fish and Coal Offices and the 10 easternmost Wharf Road Arches (ref. 2014/5272/P). The development covered by the Reserved Matters related to the refurbishment of the Fish and Coal Offices for office use (Class B1a) and a restaurant/public house (Class A3/A4). The floorspace approved comprises:

- Class B1 Offices: 1,442 sq.m;
- Class A3/A4 Restaurant/Pub: 963 sq.m;

- Conservatory (full planning permission): 82 sq.m;
- Total Floorspace: 2,487 sq.m.

2.7

In addition to the Coal Drops Yard and Fish and Coal Offices (Zones I and M), a number of the other zones within King’s Cross Central include retail/food and drink floorspace. Figure 2.1 below¹ shows the aspirational Retail Masterplan for proposed Class A retail floorspace within King’s Cross Central, together with the existing station retail provision. It should be noted that Figure 2.1 shows both approved and potential retail provision, including that envisaged within Coal Drops Yard.

Figure 2.1: Extract from “Retail at King’s Cross” Brochure (2015)

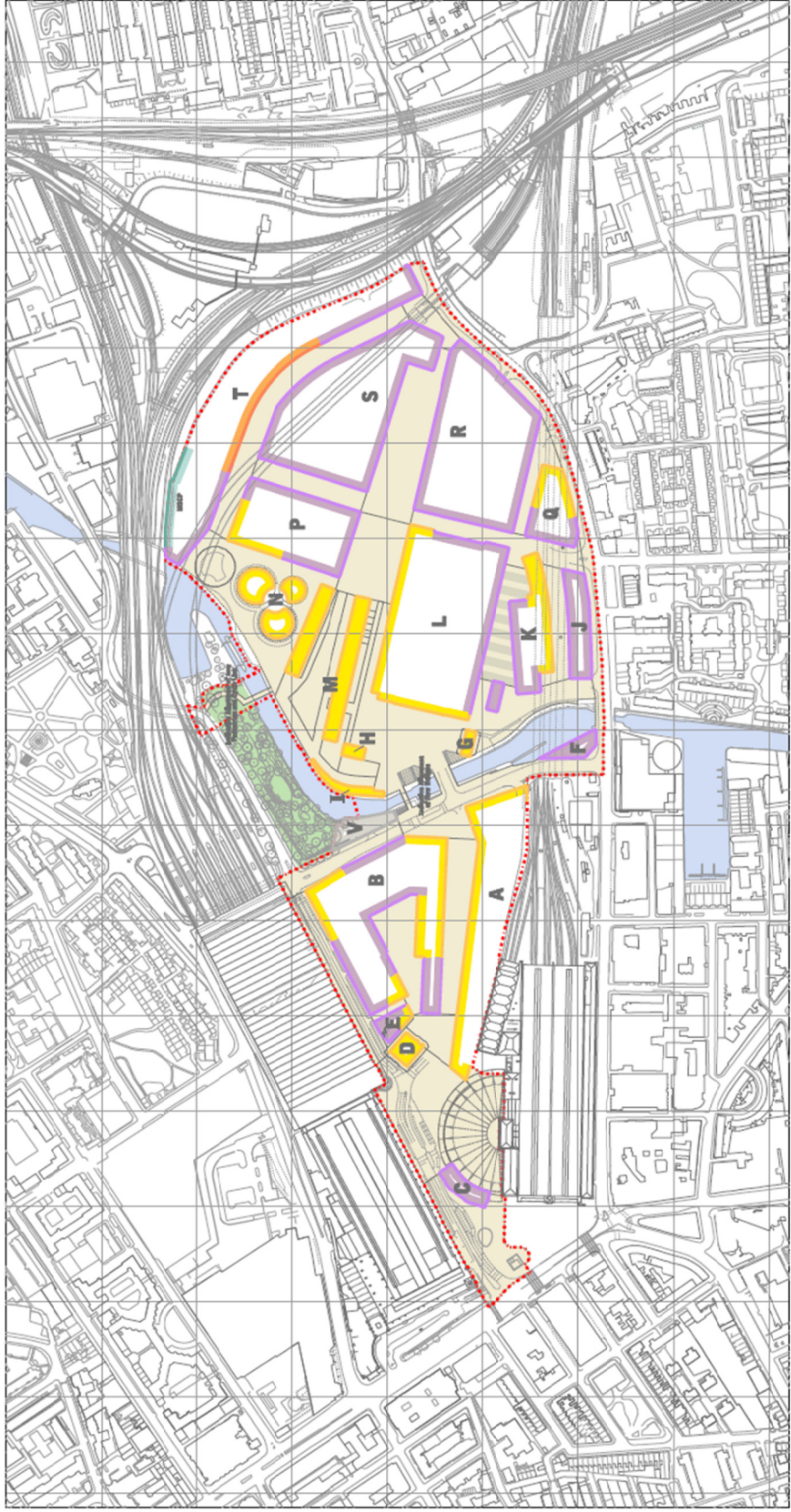


¹ Source: <https://www.kingscross.co.uk/retail-and-restaurant-space> Retail at Kings Cross Brochure

Characteristics of King's Cross Central Zones

- 2.8 The RIA submitted with the Outline Planning Application divided the King's Cross Central development into separate zones, and provided an overview of their characteristics, as summarised below.
- 2.9 **The Southern Hub:** the area to the south, around the remodelled transport system, would be a mainly commercial area. Shopping and food and drink facilities would prove important in animating this area. The ground floor space of office developments would be available for shops and restaurants. Comparison retail provision is likely to be mid to upper range high street multiples catering for the office workers and local communities, similar to the provision that has developed at Moorgate. Food and drink providers are likely to include a range of shops and restaurants meeting the varied needs of office workers and travellers.
- 2.10 **The Heritage Area:** the area to the north of Regent's Canal containing a number of heritage buildings to be remodelled and brought back into economic use. The character of the retail and leisure provision will be significantly influenced by the constraints imposed by the heritage buildings, with the main focus of retail and leisure provision within the Eastern and Western Coal Drops and the Granary complex. The RIA noted that the Coal Drops were once used for the loading and unloading of trains, and as a consequence consist of lower levels of small areas of floorspace that would be difficult to expand, while upper levels contain larger spaces that are poorly lit.
- 2.11 The RIA stated that the Granary and Assembly Shed could accommodate a mix of uses, including a cinema, restaurants and other services, and a supermarket may be developed, with a floorspace of 3,000 – 4,000 sq.m gross. The Western Transit Shed could also contain food and drink units and retail facilities, while the Eastern Transit Shed would provide office space. The RIA suggested that other heritage buildings may also contain elements of retail and leisure activity, including potential restaurant/food and drink units within the gas holders and the Fish and Coal Offices, and a health and fitness/leisure facility within the Midland Goods Shed.
- 2.12 The RIA identified in terms of retail provision that the remodelled heritage buildings would act as the core of the development, offering a range of convenience and comparison retailing and leisure facilities, and central to this is the scope for specialist retailing in the Coal Drops Yard. The approved Parameter Plans for King's Cross Central show that a significant proportion of the Development Zones include frontages that should be "*predominantly shops/food & drink/community & leisure uses (A1/A2/A3/A4/A5/D1/D2/nightclubs)*" at ground and upper floor levels, as shown in yellow on Figures 2.2 and 2.3 below. The Plans also show the focus of retail development within the heritage areas, to the north of Regent's Canal.

Figure 2.2: Extract from Parameter Plans – Ground Floor Land Uses



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Argent (Kings Cross) Limited
King's Cross Central
 Main Site Planning Application
 Revised Development Specification
 Revised Parameter Plans
 Scale 1:4000 @ A3

Key:

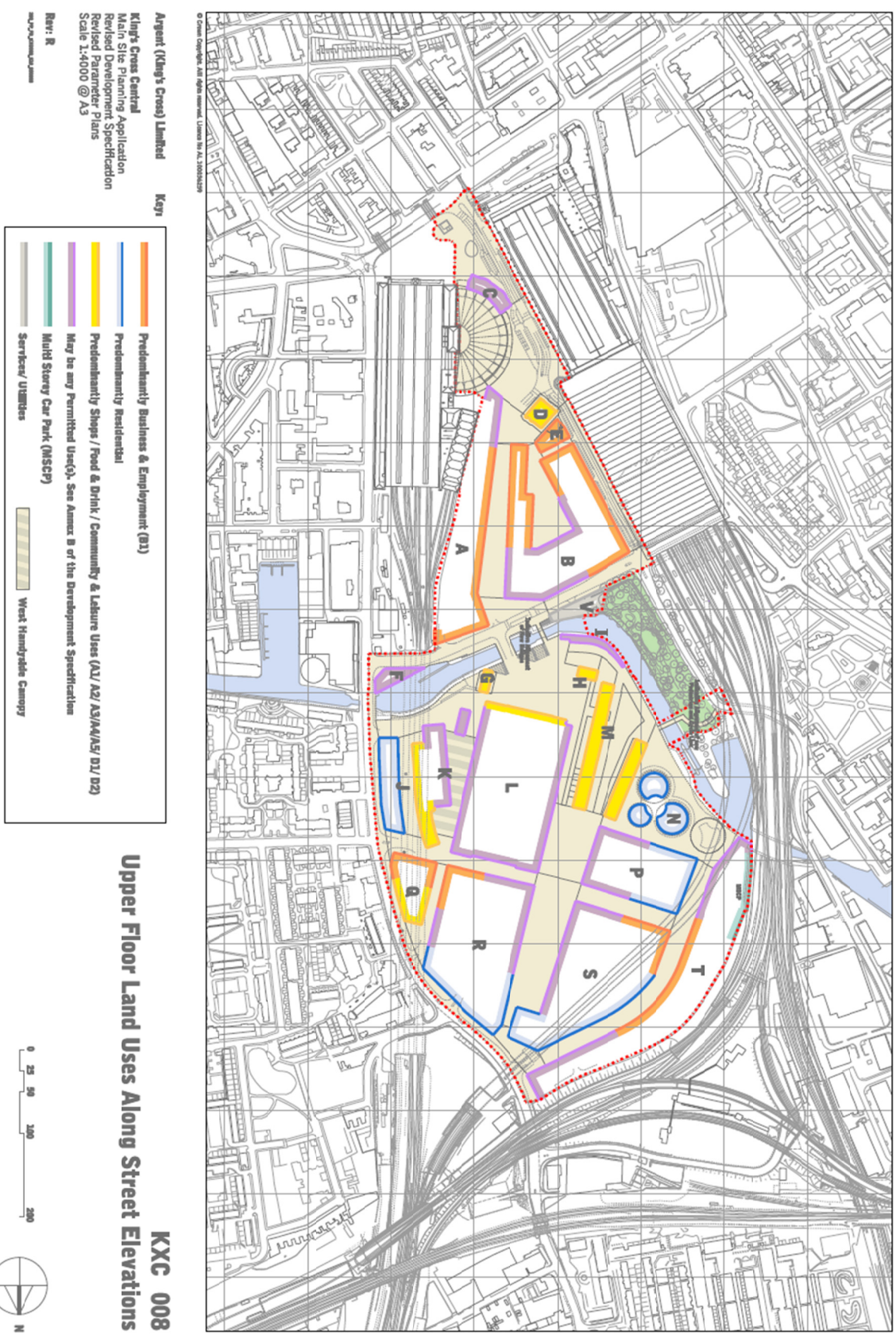
- █ Predominantly Business & Employment (B1)
- █ Predominantly Residential
- █ Predominantly Shops / Food & Drink / Community & Leisure Uses (A1/ A2/ A3/ A4/ A5/ B1/ B2/ Nightclubs)
- █ May be any Permitted Use(s). See Annex B of the Development Specification
- █ Multi Storey Car Park (MSCP)
- █ Services / Utilities
- █ West Handmade Canopy

Rev: P
 16.12.2016 10:00 AM

KXC 009
Ground Floor Land Uses
Along Street Frontages



Figure 2.3: Extract from Parameter Plans – Upper Floor Land Uses



- 2.13 **New Development in the North:** the majority of land in this area would be used for housing and employment uses. Some shopping and food and drink units would be developed to support local residents, workers and the local community.

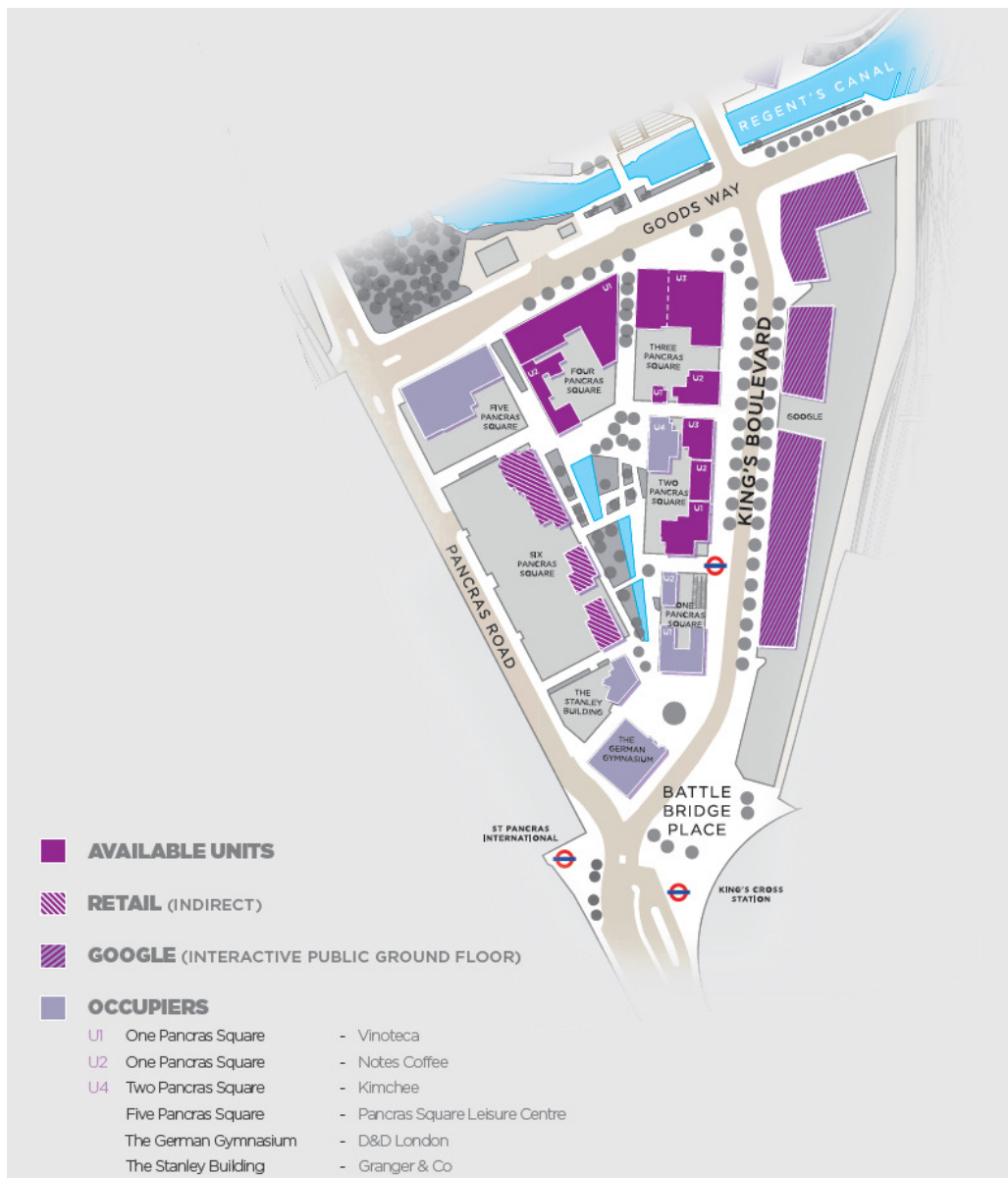
Progress of Development

- 2.14 Since the Outline Planning Permission was granted, a significant amount of development has taken place within King's Cross Central. In terms of the Class A uses that are trading, these are predominantly restaurant/café (Class A3) uses, focused around Granary Square and along Stable Street to the north of Regent's Canal, and around Pancras Square to the south of the canal.
- 2.15 Granary Square, adjacent to the Coal Drops Yard, is already a vibrant hub of activity, and has become a food destination, with a diverse range of options. At Granary Square and along Stable Street, restaurants include Caravan, Grain Store and Dishoom, together with KERB, a selection of street food traders that change on a daily basis. Granary Square is also host to events and activities, including markets, concerts, film screenings and art exhibitions.
- 2.16 The recently approved Fish and Coal Offices ('FCO') and Eastern Wharf Road Arches ('EWRA') proposals will add to the activity in this area, and will incorporate Jamie Oliver's plans for a new pub and restaurant in King's Cross. The buildings will be renovated to create the new food offerings, as well as office space and test kitchens. The western end of the Fish and Coal Offices will be converted into a pub, with a new roof conservatory and an outdoor roof terrace overlooking the canal. Blocks 1, 2 and 3 of the Fish and Coal building and two arches of the EWRA will provide office accommodation for the Jamie Oliver Group, while the remainder of the lower level EWRA will form a new restaurant.
- 2.17 Landscaping proposals for the surface of the Wharf Road Viaduct have also been approved running on top of the Wharf Road Arches, which will eventually link to the Coal Drops Yard and Gasholder Park. The Wharf Road Viaduct will connect the emerging Gasholder Park and Granary Square, forming a pedestrian green corridor between the two, inspired by the High Line in New York and Promenade Plantée in Paris.
- 2.18 These elements will all add to the interest and activity within the area around the Coal Drops Yard.
- 2.19 In terms of the overall Class A floorspace that has been developed within King's Cross Central to date, or is coming forward in the near future, this can be summarised as:
- 1 **Zone B:** ground floor Class A floorspace within buildings B1, B2, B4, B5 and B6 around Pancras Square. Units within One Pancras Square (B2) are currently occupied by Vinoteca and Notes. Tenants within Six Pancras Square (B1) comprise Wasabi, Tortilla, Drake and Morgan. We

understand Kimchee restaurant will occupy a unit within Two Pancras Square (B4).

- 2 **Zone D:** the German Gymnasium, will be occupied by D&D Restaurants. The ground floor will house a 150-cover brasserie and bar with outdoor terraces seating up to 70. The mezzanine will house a smaller restaurant and elegant dining room overlooking the brasserie below. The restaurant is due to open late 2015.
- 3 **Zone E:** this zone includes the redeveloped Stanley Building, and the ground floor includes a restaurant unit occupied by Granger & Co.

Figure 2.4 –Units within Zones B, D and E by 2015, Extract from “Retail at King’s Cross” Brochure ²

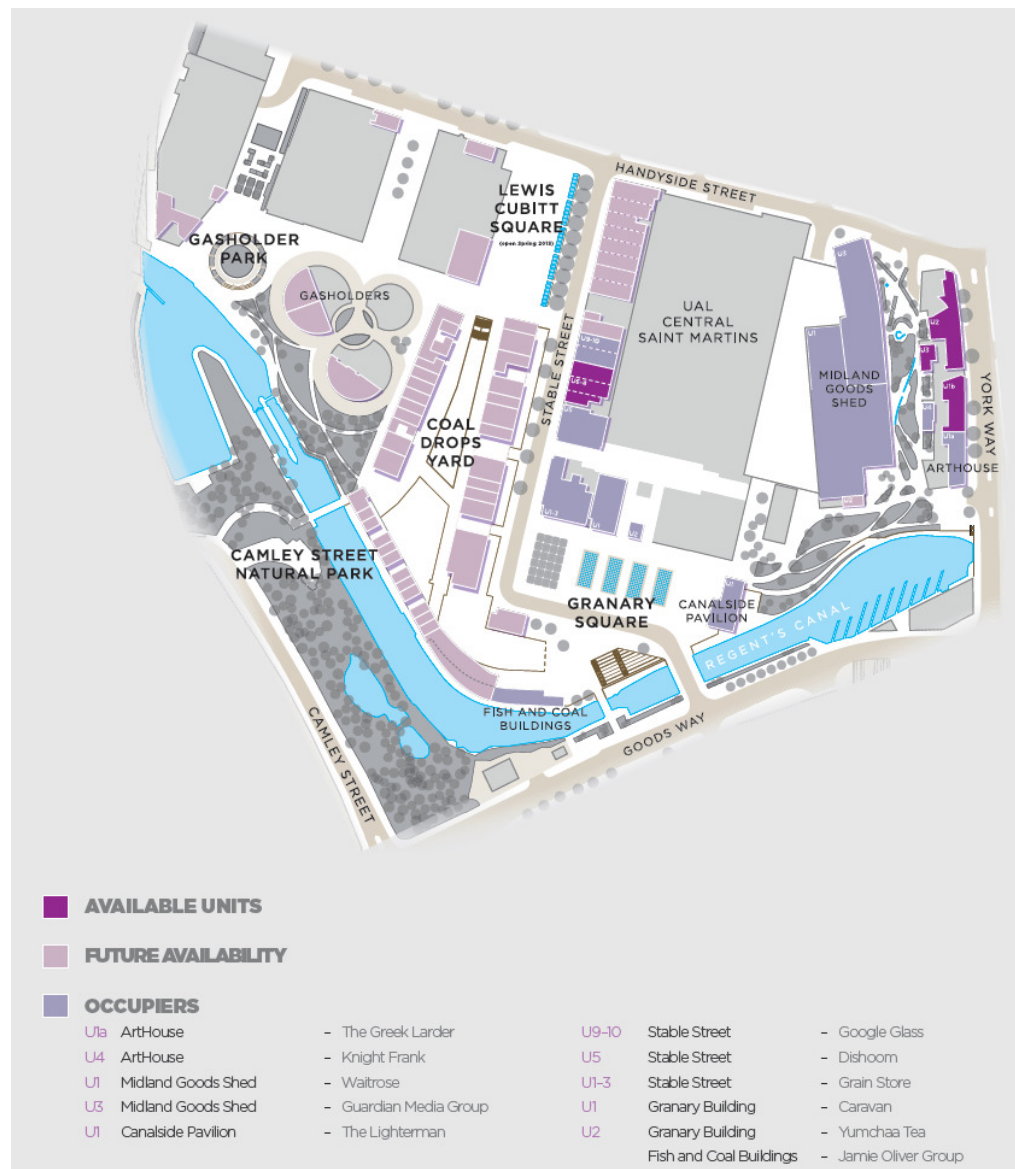


- 4 **Zone G:** the Canalside Pavilion, to be occupied by a new 3-level pub/bar with outside terraces.

² Source: <https://www.kingscross.co.uk/retail-and-restaurant-space> Retail at Kings Cross Brochure

- 5 **Zone J:** the 'ArtHouse' development along York Way, with ground floor Class A units. Unit U1A ArtHouse is occupied by The Greek Larder, and Unit 4 is occupied by Knight Frank. Frame fitness studio has also now opened in Unit 1B.
- 6 **Zone K:** Midland Goods Shed. A new format Waitrose supermarket, wine store and cookery school has recently opened (September 2015), alongside flexible space being developed for the Guardian Media Group.
- 7 **Zone L:** The Granary Building/Stable Street. Occupiers within the Granary Building/Stable Street include Caravan, Grain Store, Dishoom and Yumchaa

Figure 2.5 –Units within Zones G-P by 2015, Extract from "Retail at King's Cross" Brochure³



³ Source: <https://www.kingscross.co.uk/retail-and-restaurant-space> Retail at Kings Cross Brochure

Summary

2.20

As demonstrated above, there are Class A retail uses throughout the King's Cross Central development already approved under existing Reserved Matters approvals, and coming forward in accordance with the principles set by the Outline Planning Permission, a significant proportion of which are A3 restaurant/café uses. The Coal Drops Yard will be predominantly in A1 use, and is envisaged to be the principal focus of A1 use at the site.

3.0 **Changing Retail Trends**

Recession Recovery

- 3.1 The recent recession resulted in a nationwide economic stagnation and retailing was hit hard with a number of high profile retailers entering administration. However the recovery started in 2012 with more positive signs in London.
- 3.2 London continues to serve as a national and international retailing destination and remains home to a large number of globally-renowned brands. If anything, there is now more competition for investment in Central London. There continues to be high demand for retail space in the West End. Demand is arguably spreading out, given the regeneration emphasis around King's Cross, Wembley, White City, Stratford (home of Westfield Stratford City since 2011) and the Thames Gateway more generally.

The Current Position

- 3.3 The national retail sector has been and continues to undergo a huge structural change and the proposed Coal Drops Yard development responds to these changes.
- 3.4 The underlying trend in retail is for a reduction in the number of traditional retail shop units within some centres caused by the increase in online/multi-channel shopping and increasing retail operating costs. In response to these changes, retail centres have had to change and diversify to continue to attract visitors.
- 3.5 For retail centres to compete with the ease of home/internet shopping, every effort has to be made to make people want to go shopping, and getting the mix and balance of uses right will make shopping centres more attractive and successful. People's behaviour and their expectations of what constitutes a "shopping experience" has changed. Embracing this change is vital to delivering schemes that align with what people want and create successful destinations. Moving forward, retail centres need to become leisure "hubs" providing an interesting and unique tenant mix, food and drink options and/or family entertainment to enhance the shopping experience and extend the length of customer visits.
- 3.6 The Coal Drops Yard development aims to become a special destination with a unique mix of shops, supported by the café and restaurant offer within the wider King's Cross Central, to achieve success as a retail destination as shoppers increasingly demand and appreciate an all-round experience. This is considered further in the following sections and in the Retail Vision Statement that accompanies this Report. With a higher proportion of disposable income spent on entertainment, people increasingly expect the shopping experience to include retail, leisure and catering options.

- 3.7 The Coal Drops Yard benefits from its location within the wider King's Cross Central development, supported by the different but complementary draws of the existing and future restaurant and leisure offer, together with the public spaces and events with Granary Square and Cubitt Square. This diverse mix sets King's Cross Central apart from traditional retail centres and aligns with evolving, broader expectations of a "shopping experience". Fulfilling these expectations will be particularly important for the success of Coal Drops Yard, as a specialist, smaller destination that can never "compete" on scale, breadth of offer or large format stores. Rather, Coal Drops Yard must trade on its individuality and unique experience.
- 3.8 The diversification and uniqueness of the Coal Drops Yard proposals will enable the development to compete in the changing retail landscape and become a visitor attraction as well as a tourist destination.

4.0 **The Coal Drops Yard Proposals**

4.1 The Retail Vision Statement that accompanies this Report provides an overview of the retail concept for Coal Drops Yard.

4.2 Coal Drops Yard will incorporate a distinctive mix of historic and contemporary architecture. The buildings are being refurbished and combined with an exciting contemporary addition at Upper Level, created by the internationally acclaimed Heatherwick Studio, to develop a unique new shopping destination with a dynamic atmosphere and character that will appeal to both Londoners and tourists and which will be complemented by the offer in the wider King's Cross Central site.

4.3 The Coal Drops Yard will include a mix of Class A1-A4 floorspace. The majority of the floorspace proposed will be comparison retail floorspace, complemented by an element of convenience retail, together with Class A3 café/restaurant units.

4.4 Visitors to the Coal Drops Yard will include local residents within King's Cross Central and the surrounding area, office workers, station travellers, students from Central Saint Martins, plus visitors and tourists from the wider London area and beyond.

4.5 In order to create a successful destination that will encourage people to visit, there needs to be a critical mass of floorspace and a range of store formats to generate a sufficient draw of customers. The development needs to provide a good mix and choice of shops and services to provide this critical mass.

The Shopping Hierarchy

4.6 Where King's Cross Central and Coal Drops Yard sit within the shopping hierarchy in practical terms needs to be considered. The London Plan (FALP as consolidated with alterations, March 2015) provides different classifications for centres and commercial areas within London. The FALP provides a helpful description of how the shopping network functions in London.

4.7 The Central Activity Zone (CAZ) as defined by the FALP, covers the main commercial area in central London and includes a number of shopping areas (CAZ Frontages) e.g. Oxford Street, Covent Garden, Marylebone High Street and Tottenham Court Road. The FALP indicates the CAZ includes mixed use areas, usually with a predominant retail function. Policy 2.10 of the FALP seeks to enhance the role of the CAZ and seeks to improve the retail offer. Beyond the CAZ, the FALP identifies five broad types of town centre, i.e. *International, Metropolitan, Major, District* and *Neighbourhood/Local*.

- 4.8 All of the centres in proximity to King's Cross are either Major Centres (Camden Town, Angel, Nag's Head/Holloway Road) or CAZ Frontages (King's Cross, Tottenham Court Road).
- 4.9 King's Cross Central is not currently designated as a town centre or CAZ Frontage in the FALP and is not listed as a potential new centre or frontage. However, King's Cross Central is identified as an Opportunity Area (within the CAZ) that will include a new commercial quarter. This new commercial quarter will need to compete with the network of centres and shopping areas within the CAZ identified within the FALP. Although not a designated new centre, the scale of commercial development at King's Cross Central needs to be considered in relative terms in the context of the network of centres identified by the FALP.
- 4.10 The FALP's identified network of shopping centres across London indicates that centres with up to 10,000 sq.m gross of Class A1-A5 floorspace are of local significance only, and they have relatively small catchment areas i.e. they serve the day to day needs of local residents or employees. These types of centres tend to focus on food and grocery shopping, non-retail services and a very limited provision of comparison shopping focusing on lower order goods purchased on a day to day basis.
- 4.11 District centres in London vary significantly in terms of size, usually 10,000 to 50,000 sq.m gross of Class A1-A5. Smaller district centres within this range tend to be anchored by a large food store, supported by smaller shops and services. The provision of comparison shops tends to focus on lower order goods and the choice of shops is limited.
- 4.12 Larger shopping centres also provide day to day shops and services, but also have a stronger focus on higher order comparison shopping. Higher order comparison goods tend to be higher value goods purchased on a more occasional basis, where customers will want to browse and compare produce. A wide range and choice of shops and products is required to successfully attract higher order comparison shops. A critical mass of shops and services is required to attract sufficient numbers of customers to make the comparison shopping destination successful.
- 4.13 International, Metropolitan, Major, District and Neighbourhood/Local centres and CAZ Frontages as defined in the FALP vary in size and perform different but complementary roles. Each centre/frontage performs at a different tier in the shopping hierarchy, although the catchment areas overlap. In general centres will compete with other similar centres within the same tier.
- 4.14 Retail facilities within King's Cross Central will need to compete with CAZ Frontages and centres outside of the CAZ. The scale of Class A development already permitted at King's Cross Central (45,925 sq.m) represents a significant expansion of the facilities currently available within the King's Cross CAZ Frontage. This includes floorspace already permitted at Coal Drops Yard, which is a critical element of the proposed new commercial quarter. The current Coal Drops Yard proposals increase the amount of approved retail

floorspace at King's Cross Central (overall) by 2,937 sq.m, increasing the concentration of retail floorspace at Coal Drops Yard to 13,348 sq.m, and effectively increasing the overall quantum of retail floorspace at King's Cross Central to 48,862 sq.m.

- 4.15 By way of comparison with the definitions of designations outside the CAZ, the scale of development at King's Cross Central falls between the *Major* and *District* centre tiers within the London hierarchy. The FALP describes these centres as follows:
- Major centres** – typically found in inner and some parts of outer London with a borough wide catchments. They generally contain over 50,000 sq.m of retail, leisure and service floorspace with a relatively high proportion of comparison goods relative to convenience goods. They may also have significant employment, leisure, service and civic functions.*
- District centres** – distributed more widely than the Metropolitan and Major centres, providing convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000–50,000 sq.m of retail, leisure and service floorspace. Some District centres have developed specialist shopping functions.”*
- 4.16 Despite being within the CAZ, in relative terms only the FALP description for *Major* centres perhaps best describes what is coming forward at King's Cross Central, because it will have significant employment, leisure and service functions.
- 4.17 The amount of floorspace currently permitted at King's Cross Central is at the top end of the range for a *District* centre in London and the lower end of the range for a *Major* centre. Where the total amount of floorspace approaches 50,000 sq.m, one would normally expect to find a good choice of comparison shops selling higher order comparison goods (as described above) supported by convenience goods shopping and non-retail services (Class A2 to A5 uses). These centres provide a broad mix of uses.
- 4.18 The enlarged Coal Drops Yards proposals will help to ensure King's Cross Central provides the required critical mass and broad mix of uses, i.e. a level of provision that will allow King's Cross Central to compete with large CAZ Frontages and *Major* centres alike. In particular it will help to provide a good range and choice of comparison goods shopping that will complement the good provision of Class A3 – A5 food/beverage provision already proposed.
- 4.19 In terms of the total amount of retail and service floorspace in other centres in LB Camden⁴, Camden Town is a *Major* centre and has a total of 110,703 sq.m gross. Angel/Islington is also a *Major* centre and provides around 102,200 sq.m gross⁵. These figures compare with *District* centres at Hampstead town centre with only 21,238 sq.m gross; Kentish Town with 30,379 sq.m gross and West Hampstead with 19,222 sq.m gross⁶. King's Cross Central is already

⁴ Source: Camden Town Centre and Retail Study 2013

⁵ Source: GLA 2013 London Town Centre Health Check Analysis Report

⁶ Source: Camden Town Centre and Retail Study 2013

much larger than these *District* centres, and needs to operate at the next tier above, i.e. at a level with Camden Town and Angel/Islington.

4.20

King's Cross Central needs to operate at this level by providing a good range and choice of shops and service, sufficient to attract visitor numbers to generate the footfall and atmosphere that is essential to make this destination successful and viable. The intensification of the proposed retail floorspace within Coal Drops Yard will help to create the necessary critical mass to ensure the area functions at the *Major* centre tier in the shopping hierarchy.

5.0 **Retail Planning Policy**

5.1 The principle of retail use at the Coal Drops Yard has been established by the Outline Planning Permission. It is also of note that retail planning policies at all levels support retail development at the Coal Drops Yard within King's Cross Central.

National Planning Policy Framework

5.2 The National Planning Policy Framework (NPPF, 2012) sets out the Government's overarching aim for the planning system, with a particular emphasis on a presumption in favour of sustainable development. The Planning Practice Guidance (PPG, 2014) provides advice on the interpretation of the NPPF.

5.3 Under the NPPF, decision-makers are required to support applications for sustainable development without delay. In particular, para. 14 states that for decision-taking, this means approving development proposals that accord with the development plan without delay.

5.4 In terms of retail and town centre uses, para. 24 of the NPPF requires LPAs to apply a sequential test to planning applications for such uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan. Para. 26 requires an impact assessment for retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date Local Plan, if the development is over a proportionate, locally set floorspace threshold, and where there is no locally set threshold, the default threshold is 2,500 sq.m. If an impact assessment is required, this needs to address:

- the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
- the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area.

5.5 The NPPF states that where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the above factors, it should be refused.

5.6 In terms of the sequential approach, the PPG states that the application of the test should be proportionate and appropriate for the given proposal (2b-010) and acknowledges that there can be particular market and locational requirements that mean that the proposed town centre uses can only be accommodated in specific locations (2b-011).

5.7 For retail impact, the PPG advises that the impact test should be undertaken in a proportionate and locally appropriate way, drawing on existing information

where possible (2b-015). The PPG (2b-017) provides guidance on undertaking an impact assessment, and confirms that a judgement as to whether the likely adverse impacts are significant can only be reached in light of local circumstances. The PPG advises that where evidence shows that there would be no likely significant impact on a town centre, the local planning authority must then consider all other material considerations in determining the application.

London Plan

- 5.8 Within the London Plan (FALP as consolidated with alterations, March 2015), King's Cross is identified as an opportunity area under Policy 2.13. The opportunity areas are designated as London's major reservoirs of brownfield land with significant capacity to accommodate new housing, commercial and other development linked to existing or potential improvements to public transport accessibility.
- 5.9 Specifically in relation to the King's Cross-St Pancras Opportunity Area, the FALP states:
- "King's Cross-St Pancras now functions as a European passenger gateway and has the highest public transport accessibility in London. This accessibility will improve further with the completion of Thameslink. A new commercial quarter is rapidly emerging. Planning permissions are being implemented in both Camden and Islington for high-density commercial development, office, retail, leisure and housing. There may be scope to consider linkages between the academic sector and businesses clustered in this location in conjunction with those in the neighbouring City Fringe/ Tech City Opportunity Area. The implementation of development must capture heritage value, secure environmental quality and minimise car use. It is vital to integrate the major rail termini, underground station and brownfield sites with the regeneration of neighbourhoods in the wider area."*
- 5.10 The FALP therefore supports high density commercial development at King's Cross Central, including retail floorspace.
- 5.11 King's Cross Central also lies within the Central Activities Zone (CAZ), as defined in the FALP. The CAZ is recognised to cover London's geographic, economic and administrative core. Policy 2.10 sets out the strategic priorities for the CAZ, and states that the Mayor, boroughs and other relevant strategic partners should enhance and promote the unique international, national and London-wide roles of the CAZ, supporting its distinct offer based on a rich mix of local as well as strategic uses, and should support and improve the retail offer of CAZ for residents, workers and visitors, especially Knightsbridge and the West End.
- 5.12 Para. 2.49 of the FALP notes that the CAZ includes many of the sights, attractions, heritage assets and facilities at the centre of London's visitor offer, complemented by the presence of specialist retail and leisure uses. The FALP identifies that the visitor economy is important to London as a

whole, and there will be a need to ensure that the CAZ retains its status as a world-class visitor destination, while also meeting the needs of those who live and work there.

- 5.13 In more general terms, Policy 4.7 of the FALP relates to retail and town centre development, and identifies the principles that should be applied in taking planning decisions on proposed retail and town centre development, including that the scale of retail, commercial, culture and leisure development should be related to the size, role and function of a town centre and its catchment, that retail, commercial, culture and leisure development should be focused on sites within town centres, or if no sites are available, on sites on the edges of centres that are, or can be, well integrated with the existing centre and public transport, and that proposals for new, or extensions to existing, edge or out of centre development will be subject to an assessment of impact.
- 5.14 The FALP recognises that there is a significant demand for additional retail floorspace, but notes that at a time of significant change in London's economy, demography, consumer behaviour and retailing there are inevitably uncertainties in projecting future consumer expenditure and shopping floorspace requirements (para. 4.40).
- 5.15 Policy 4.8 of the FALP supports a successful, competitive and diverse retail sector which promotes sustainable access to the goods and services that Londoners need. The FALP notes (para. 4.47) that a vibrant, diverse retail sector is essential to London's success, and identifies that not only is it vital to ensuring that Londoners have access to the goods and services they need, but it plays a key role in London's economy, employing over 400,000 people and supporting the economic vitality and health of the whole range of town centres across London.
- 5.16 The FALP also identifies (para. 4.50A) that it is important that the planning system is used to help manage clusters of uses to provide diverse and more vital and viable centres, and the FALP supports and promotes the contribution to London's economy made by specialist clusters of economic activity.

Central Activities Zone Draft Supplementary Planning Guidance

- 5.17 On 15 September 2015, the Mayor published draft Supplementary Planning Guidance (SPG) on London's Central Activities Zone (CAZ) for public consultation. The intention of the draft SPG is to provide guidance on London policies, to ensure that the right balance is struck in different parts of the CAZ. The draft SPG only has limited weight at this consultation stage, but is still a material consideration.
- 5.18 The draft SPG refers to the estimate that over the period to 2036, the CAZ is projected to need between 700,000 to 900,000 sq.m of additional comparison goods retail floorspace (Experian Business Strategies Consumer Expenditure and Comparison Goods Floorspace Need in London. GLA,

2013). In terms of accommodating retail development, the draft SPG states at paras. 2.4.3 and 2.4.4:

“Whilst retail is a key strategic function of the CAZ it is not necessarily appropriate in all parts of the CAZ and a more nuanced policy approach should be taken which reflects the different circumstances of different parts of the CAZ.

As a general principle large scale (greater than 2,500 sq.m) retail development and comparison goods retail should be focused on the International centres and other significant retail centres – the London Plan CAZ Frontages (which include some clusters associated with public transport termini, for example at Kings Cross/St. Pancras). Retail of a more local scale and catchment, and in particular convenience goods floorspace, can be focussed on any of the clusters [in paragraph 2.4.1] including locally identified CAZ retail frontages.”

- 5.19 The draft SPG (para. 2.4.5) encourages Boroughs to make clear in Local Plans where new retail development (comparison and convenience goods) will be encouraged in the CAZ, and indicate where proposals will need to fulfil sequential and impact testing in the terms of the NPPF and London Plan policy 4.7. The draft SPG states that this is important, in order to ensure that the vitality and viability of all retail clusters in the CAZ and town centres, particularly those just outside the CAZ, are not undermined by new retail development within the Zone itself.
- 5.20 The draft SPG recognises that as well as the quantity of retail space, regard should be taken to the quality of space to meet modern retailer requirements with flexibility for innovative retail formats sensitively designed and integrated within the distinctive CAZ environment (para. 2.4.6).

Camden Development Plan

Core Strategy

- 5.21 Camden’s Core Strategy was adopted in November 2010. Policy CS1 relates to the distribution of growth in the Borough, and states that the Council will promote a concentration of development in the growth areas, including King’s Cross. Para. 1.12 notes that King’s Cross will be the focus of the most growth in Camden up to 2025, with large-scale redevelopment transforming the area and creating a new quarter for Camden and London. Policy CS2 relates to the concentration of development in the Growth Areas, and development in these areas is expected to maximise site opportunities.
- 5.22 The Core Strategy states that King’s Cross is the Borough’s largest development area providing the opportunity to create a vibrant and successful new quarter for London, and will be the major focus for new homes, offices and retail development in the Borough. The Council’s aspiration for King’s Cross is to secure a vibrant, attractive, safe destination with a mix of uses, in particular offices, homes, retail, leisure and community facilities.
- 5.23 Policy CS7 relates to the distribution of retail across Camden, and states:

“The Council will promote the following distribution of retail growth across the borough:

a) in the range of 20,000 square metres net retail floorspace at King’s Cross/St Pancras ...”

- 5.24 Para. 7.4 of the accompanying text to Policy CS7 identifies that significant new development for a range of commercial uses is already in the pipeline in the King’s Cross/St Pancras area, with a total of around 20,000 sq.m (net) of additional A1 retail floorspace committed or provided through the development of the King’s Cross growth area (Outline Planning Permission granted for approximately 15,500 sq.m) and the redevelopment of St Pancras Station (approximately 4,500 sq.m). Para. 7.4 also refers to an identified need for around 27-31,000 sq.m of new retail floorspace in the Borough by 2026, in addition to that to be provided at King’s Cross and St Pancras.
- 5.25 Outside the identified areas of growth, policy CS7 states that the sequential approach will be applied to retail and other town centre uses. The Policy seeks to promote and enhance Camden’s centres, and this will be achieved through, among other things, providing for, and maintaining, a range of shops, services, food, drink and entertainment and other suitable uses to provide variety, vibrancy and choice; and making sure that food, drink and entertainment uses do not have a harmful impact on residents and the local area, and focusing such uses in Camden’s Central London Frontages, Town Centres and the King’s Cross Opportunity Area.
- 5.26 In relation to King’s Cross, para. 7.6 states:
“The growth area of King’s Cross will provide the major focus for new shop provision in Camden. The King’s Cross Central redevelopment will include shops, services and facilities of a scale similar to a town centre to meet the needs of the large numbers of people who will be living in, working in, or visiting the area. Planning permission has been granted for 45,000 sq.m of retail, food and drink floorspace (in A use classes). This will be spread throughout the site and will open in phases.”
- 5.27 Policy CS9 seeks to achieve a successful Central London (the area included within the CAZ), and states that the Council will support and promote the Central London area of Camden as a successful and vibrant part of the capital to live in, work in and visit. The Council will, among other things, recognise its unique role, character and challenges, support Central London as a focus for Camden’s future growth in homes, offices, hotels, shops and other uses, and seek to ensure that development in Central London, in the growth areas of King’s Cross, Euston, Tottenham Court Road and Holborn and beyond, contributes to London’s economic, social and cultural role while meeting the needs of local residents and respecting their quality of life.

Development Policies Document

- 5.28 Camden’s Development Policies Document was adopted in November 2010. Policy DP12 identifies a range of factors that the Council will take into account

when making decisions on planning applications, and states that the Council will ensure that the development of shopping, services, food, drink, entertainment and other town centre uses does not cause harm to the character, function, vitality and viability of a centre, the local area or the amenity of neighbours.

5.29 Para. 12.5 notes that new shops, services, food, drink and entertainment uses can add to the vitality and vibrancy of Camden's centres and local areas but they can also have other impacts such as diverting trade and displacing existing town centre functions. The Council will guide such uses to locations where their impact can be minimised.

5.30 Para. 12.6 states that the Council will not grant planning permission for development that it considers would cause harm to the character, amenity, function, vitality and viability of a centre or local area, in terms of an unacceptable impact on trade/turnover, vitality and viability, the character, quality and attractiveness of a centre, levels of vacancy, crime and antisocial behaviour, the range of services provided, and a centre's character and role in the social and economic life of the local community. The cumulative impact of additional shopping floorspace on the viability of other centres, and the cumulative impact of non-shopping uses on the character of the area will also be considered.

Site Allocations Document

5.31 Camden's Site Allocations document was adopted in September 2013. The King's Cross Growth Area is identified as Site 1 in this document as a comprehensive and phased mixed-use development of former railway lands. This area includes the King's Cross Central area, plus St Pancras and King's Cross stations. The document sets out development guidance for the site, which includes that development will be expected to be carried out in accordance with the Outline Planning Permission for King's Cross Central, and support an appropriate balance of retail and food and drink uses within and around the stations for travellers and the local residential and working populations. The document notes that the King's Cross Central site will be the major focus for new homes, offices and retail development in the borough, and development of the site is likely to take 10 to 15 years, depending on market conditions.

5.32 In line with Camden's policies, the Camden Retail and Town Centre Study (CRTCS, November 2013) advised that the focus for new retail growth should be within the central London frontages, the Growth Areas and other town centres.

Draft Camden Local Plan

5.33 The draft Camden Local Plan was published in early 2015, and will eventually replace the Core Strategy. It is currently at a relatively early stage in the adoption process, and a further consultation draft is expected in late 2015. The draft Local Plan will then be submitted for a public examination.

- 5.34 Policy G1 of the draft Local Plan sets out the Council's strategy for delivery and location of growth. As with the adopted Core Strategy, the most significant growth is expected to be delivered through a concentration of development in the growth areas.
- 5.35 Paras. 2.23 and 2.24 relate to the King's Cross Growth Area, and state:
"Kings Cross is the borough's largest development area and is rapidly taking shape as the high density mixed use redevelopment continues to bring life back to the area. Significant parts of the site have been developed, with more housing and commercial premises becoming occupied all the time. The new Camden Council offices, leisure centre and library opened in July 2014 and there is a creative buzz around the area thanks to the Central St Martin arts college and the forthcoming Google headquarters, together with high quality new public squares and routes through the area. Camden continues to work with the surrounding residential communities to harness the benefits of this major redevelopment and work in partnership with landowners.
The Council's aspiration for King's Cross is to continue to secure the development of a high quality, successful, attractive, vibrant and safe places with a mix of uses, in particular offices, homes, retail, leisure and community facilities."
- 5.36 Policy TC1 of the draft Local Plan relates to the quantity and location of retail development, and states that the Council will focus new shopping and related uses in Camden's designated growth areas and existing centres, having regard to the level of capacity available in these locations. The policy refers to significant development in the King's Cross / St Pancras Growth Area, with approximately 30,000 sq.m net additional retail (A1 to A5 use classes) floorspace anticipated.
- 5.37 In terms of the King's Cross Growth Area, the draft Local Plan identifies that this will provide the major focus for new shop provision in Camden, and confirms that the King's Cross Central redevelopment will include shops, services and facilities of a scale similar to a town centre to meet the needs of the large numbers of people who will be living in, working in, or visiting the area. The draft Local Plan refers to the Outline Planning Permission for 45,000 sq.m of retail, food and drink floorspace (in A use classes) that will be spread throughout the site and will open in phases. The draft Local Plan notes that approximately 30,000 sq.m of this is yet to be built out.
- 5.38 Para. 9.6 states that the Council will require an impact assessment for large retail development proposals (of 2,500 sq.m or more) that are not in accordance with the approach in policy and would be in an edge of centre or out of centre location, or would be in an existing centre and have the potential to have a harmful impact on other centres.

King's Cross Opportunity Area Planning & Development Brief

- 5.39 Camden adopted the King's Cross Opportunity Area Planning & Development Brief in January 2004. While the Development Brief is less relevant, following

the grant of the Outline Planning Permission and the adoption of subsequent policy documents, it is useful to note that the Brief includes a range of leisure, cultural, retail, entertainment, community and other services and facilities that will be appropriate to the scale and mix of development and King's Cross's location and particular metropolitan significance, and equally available to local communities. The Brief identifies that these uses will be particularly important to the creation of lively, safe and attractive streets, and to the beneficial re-use of heritage buildings. The Brief states that retail development, encompassing a range of convenience, comparison, service and food and drink uses, should address the needs of the new resident, working and visiting population, and also the gaps in provision for surrounding communities.

Compliance with Retail Planning Policy

5.40 The NPPF tests for retail proposals are:

- 1 the sequential test applies to "...*applications for main town centre uses that are not in accordance with an up-to-date Local Plan*";
- 2 the impact test applies to "...*applications for retail, leisure and office developments outside of town centres, which are not in accordance with an up-to-date Local Plan*" and 2,500 sq.m is the default threshold for requiring impact assessments, where there is no locally set threshold.

5.41 The development of retail floorspace at the Coal Drops Yard within King's Cross Central is in accordance with the up to date Camden development plan. The site is allocated as a growth area and the proposed minor increase in retail floorspace proposed at the Coal Drops Yard is in line with the adopted and emerging Camden policies and the NPPF.

Sequential Test

5.42 The NPPF (para. 24) indicates only applications not in accordance with an up-to-date plan are required to comply with the sequential test. The proposals for the Coal Drops Yard do not trigger the sequential test.

5.43 Even if the sequential approach was a relevant test in this case, it would only be necessary to apply this test to the additional floorspace now proposed at Coal Drops Yard. It would not be necessary to apply the test to the level of floorspace that already has planning permission at King's Cross.

5.44 The NPPF (para. 24) sets out the need to apply flexibility in terms of format and scale when undertaking a sequential assessment, but does not refer to disaggregation. In the case of Coal Drops Yard it is necessary to consider whether the additional floorspace proposed can be disaggregated away from the floorspace that already has planning permission.

5.45 The recent "Rushden" Secretary of State decision⁷ confirms that there is no requirement to disaggregate proposals, with para. 8.47 of the Inspector's

⁷ June 2014, appeal ref. APP/G2815/V/12/2190175

Report, stating:

“The last sentence of NPPF [24] states that: “Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale.” This contrasts strikingly with what was said previously in PPS4 in policy EC15.1 at (d) (iv) and 15.2 which contained an explicit requirement for disaggregation. There is no longer any such requirement stated in the NPPF. It is no answer to this to refer to the words “such as” in the last sentence of NPPF [24]. These words cannot be read so as to imply that a major, and extremely controversial, part of previously stated national policy lives on by implication in the NPPF. Had the Government intended to retain disaggregation as a requirement it would and should have explicitly stated this in the NPPF. If it had been intended to carry on with the requirement then all that would have been required is the addition of the word “disaggregation” at the end of NPPF [24].”

- 5.46 In this case the applicant is not required to disaggregate the proposed additional floorspace away from the uses already permitted at Coal Drops Yard and/or King’s Cross Central more generally. It would not be suitable or viable to provide the proposed additional floorspace at another destination, away from King’s Cross Central, because the development would not serve the customer base the Coal Drops Yard proposals seek to serve, i.e. visitors, employees and residents in the King’s Cross area.
- 5.47 This issue is acknowledged in the PPG, which indicates there can be particular market and locational requirements that mean that the proposed town centre uses can only be accommodated in specific locations (2b-011). These market and locational requirements apply to the Coal Drops Yard proposals, because the development specifically seeks to serve the needs of the King’s Cross Central area.
- 5.48 There are other location specific issues. The application proposals are complementary to the wider King’s Cross Central regeneration area. The proposed uses create active frontages and animate the public places created at King’s Cross Central. The area has a unique heritage with a combination of new architecture and period buildings. King’s Cross Central has already been established as an attractive place to visit, with a strong sense of place. Coal Drops Yard is a critical element that will reinforce this sense of place. The additional floorspace proposed will help to create a unique retail, leisure and entertainment offer that will surround and enliven the public spaces. This cannot be achieved if the proposed uses were provided in an alternative location.
- 5.49 The NPPF indicates that a sequential analysis is not required and case law indicates the applicant is not required to disaggregate their proposals.

Retail Impact

- 5.50 The NPPF (para. 24) indicates only applications not in accordance with an up-to-date plan are required to comply with the impact test. Notwithstanding the

NPPF guidance, for completeness a retail impact assessment has been prepared in any event to assist the Council's consideration of the planning application. The increase in retail (Class A) floorspace (2,937 sq.m) proposed at King's Cross exceeds the NPPF threshold by only 437 sq.m.

Compliance with Policy

- 5.51 As indicated above, the Coal Drops Yard retail proposals are supported by policy at all levels. The FALP recognises that there is demand for additional retail floorspace and also that a vibrant, diverse retail sector is essential to London's success. The CAZ, Opportunity Areas and growth areas are all locations that are suitable for intensification of retail use. King's Cross Central, and hence the Coal Drops Yard, sits within all three of the FALP designations. As noted in other supporting documentation accompanying these applications, regard has been had to the amenity of neighbours, as required by policy.
- 5.52 It is also interesting to note the direction of policy, although currently of limited weight, within the recent draft CAZ SPG, which notes that regard should be had to the quality of space which should meet the needs of modern retailers with flexibility for innovative retail formats sensitively designed and integrated within the distinctive CAZ environment.

6.0 **Retail Impact and Implications for Existing Centres**

Introduction

- 6.1 This section provides a review of the implications for existing centres as a result of the proposed development at Coal Drops Yard. As set out in Section 3, the type of retail floorspace within Coal Drops Yard is proposed to provide a different offer from that found in existing centres in the surrounding area. There will therefore be limited overlap between the Coal Drops Yard proposals and the existing centres, which predominantly serve a local catchment population, and which the Coal Drops Yard seeks to complement. The following impact assessment considers the potential comparison goods and food and beverage impacts, and if anything may have overestimated the impacts, given the unique nature of the proposed Coal Drops Yard offer.
- 6.2 As identified in the previous section, the proposed development results in a minor increase in the overall approved retail floorspace of King's Cross Central. For completeness, a retail impact assessment of this additional floorspace has been undertaken.
- 6.3 The 2004 RIA provided a review of the existing town centre network around King's Cross Central. The RIA noted that the characteristics of the surrounding centres are varied in nature, and they would coexist with Kings Cross Central in different, albeit positive, relationships. The study assessed the scale and mix of retail uses that can be accommodated at King's Cross Central without impacting on the viability and vitality of existing centres.
- 6.4 Detailed health checks were undertaken of the existing town centres surrounding King's Cross within the 2004 RIA, together with an overview of the neighbourhood centres. The centres included in these assessments comprise:
- a Town Centres:
 - Camden Town;
 - Angel Islington;
 - Nags Head/Holloway Road; and
 - Tottenham Court Road.
 - b Neighbourhood Centres:
 - Caledonian Road;
 - Chalton Street;
 - Eversholt Street;
 - Goodge Street;
 - Brunswick Centre;
 - Marchmont Street/Tavistock Place;
 - Lambs Conduit Street;

- Exmouth Market; and
- Drummond Street.

- 6.5 The 2004 RIA concluded that the proposed development at King's Cross Central would not have an adverse impact on the health of the town and neighbourhood centres in the surrounding area.
- 6.6 Importantly, the 2004 RIA assessed the potential impact and implications arising from the entire retail floorspace within the King's Cross Central development, i.e. 45,925 sq.m. The increase in floorspace above that approved under the Outline Planning Permission is 2,937 sq.m, or an increase of just 6% over the approved total that was assessed within the 2004 RIA.
- 6.7 Since the 2004 RIA was undertaken, more recent work has been produced that provides health checks of centres, including the Camden Retail and Town Centre Study (CRTCS, November 2013), Islington Town Centres/Local Shopping Areas: Review and Healthcheck (April 2012), and the GLA 2013 London Town Centre Health Check Analysis Report (March 2014).
- 6.8 The Camden Retail and Town Centre Study (CRTCS, November 2013) refers to the King's Cross Central scheme as a retail commitment. The CRTCS assumed that as part of Phase One, 1,823 sq.m net of Class A1 convenience goods floorspace will be delivered by 2018, that Phase Two will provide an additional 2,126 sq.m net by 2023, and Phase Three will deliver an additional 2,126 sq.m net by 2028. For Class A1 comparison goods floorspace, the CRTCS assumed that as part of Phase One, 7,013 sq.m net comparison floorspace will be delivered by 2018, that Phase Two will provide an additional 8,181 sq.m net by 2023, and Phase Three will deliver an additional 8,181 sq.m net by 2028. This therefore assumes a total of 29,450 sq.m net of Class A1 retail floorspace will be provided within King's Cross Central.

Retail Impact

- 6.9 This section assesses the impact of the proposed development on the turnover of existing town centres, and impact on planned investment. Impact assessments need to take into account existing planning permissions and commitments and consider the cumulative impact.

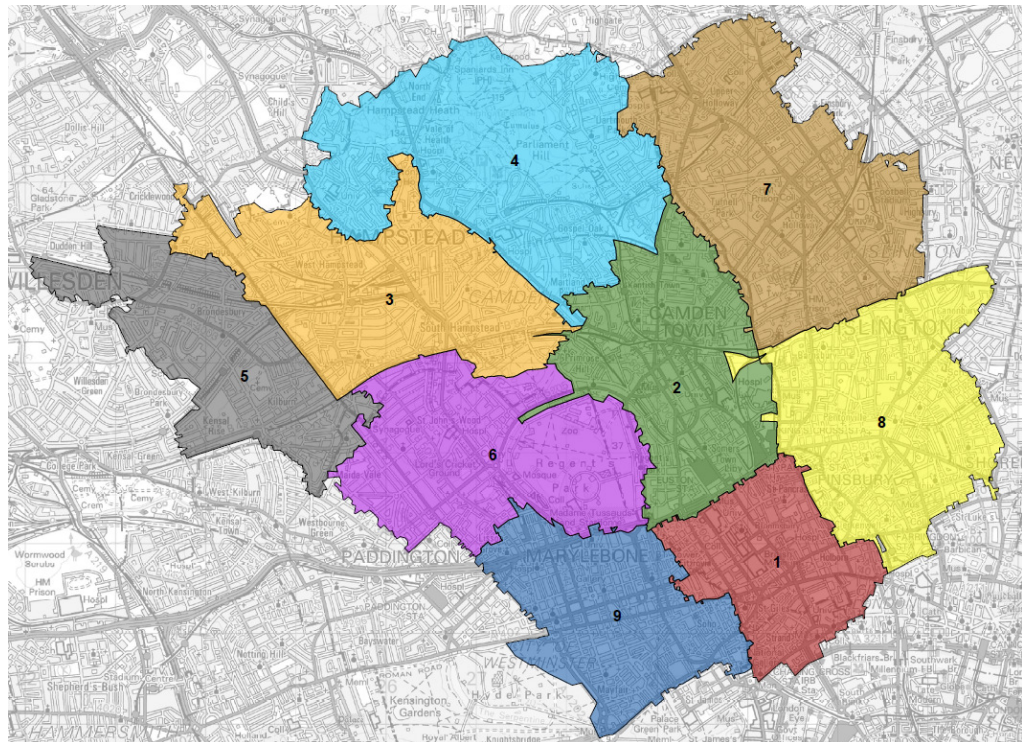
Methodology and Data

- 6.10 This assessment is based on information contained within the Camden Town Centre and Retail Study (CTCRS, November 2013) prepared by GVA and the 2004 RIA that accompanied the original application for King's Cross Central. The retail floorspace at King's Cross Central is likely to attract trade from a variety of different sources, including station travellers, King's Cross Central workers, visitors from the wider London area and beyond, and local residents from the surrounding area.
- 6.11 The impact assessment considers the baseline position of the quantum of Class A floorspace approved under the Outline Planning Permission, and the

implications of increasing the retail floorspace by 2,937 sq.m gross. The additional floorspace is proposed to be flexible Class A1-A4 floorspace. It is likely to be comprised predominantly of A1 comparison retailing along with A3 use. The expected split of A1-A4 uses is indicative only at this stage, but for the purposes of this assessment, we have considered the additional floorspace as 1,745 sq.m gross comparison goods and 1,192 sq.m gross food and beverage floorspace.

- 6.12 The quantitative impact analysis assesses the potential impact in terms of trade diversion from existing centres in the surrounding area, based on the study area defined in the CTCRS, shown in Figure 6.1 below and Appendix 1.

Figure 6.1: Study Area



- 6.13 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population.
- 6.14 All monetary values expressed in this study are at 2013 prices, consistent with Experian's base year expenditure figures for 2013 (Retail Planner Briefing Note 12.1, October 2014) which is the most up to date information available.
- 6.15 Population estimates from the 2011 Census have been obtained from Experian for each zone, and Experian's population projections have been used to estimate the population growth in the study area, as shown in Table 1, Appendix 2.
- 6.16 Building on RTP's retail assessment, we have assessed the proposed development. This assessment examines trading patterns in the base year (2015) and the design year (2020), assuming that all retail commitments, including the King's Cross Central development (as approved under the

Outline Planning Permission), have been implemented by 2020. The implications of the additional floorspace at the Coal Drops Yard scheme are then assessed.

- 6.17 The Coal Drops Yard is forecast to open in 2018. The PPG identifies that the design year for impact testing should be selected to represent the year when the proposal has achieved a 'mature' trading pattern, which is conventionally taken as the second full calendar year of trading after opening. The design year 2020 is considered to be the earliest year the scheme will achieve full and settled trading patterns.

Comparison Goods Expenditure Data

- 6.18 The most recent available local consumer expenditure estimates (2013) for comparison goods for each of the study area zones have been obtained from Experian, which is then forecast forward.
- 6.19 Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 12.1, October 2014) has been used to forecast expenditure within the study area, as shown in Figure 6.1 above. Experian's EBS growth forecast rates for 2013 to 2016 reflect the current economic circumstances and provide an appropriate growth rate for the short term (for comparison goods: +5.6% for 2013-2014, +4.4% for 2014-2015 and +3.1% for 2016).
- 6.20 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth average forecasts have been adopted ie. 3.3% per annum growth for comparison goods. These growth rates are relatively cautious when compared with past growth rates, but in our view represent realistic forecast for future growth. These growth figures relate to real growth and exclude inflation.
- 6.21 A reduction has been made to allow for special forms of trading (SFT) that includes other forms of retail expenditure not spent in shops, such as mail order, e-tail (non-retail businesses), market stalls and vending machines. The proportion of SFT expenditure is predicted to increase in the future. For comparison goods, Experian estimate the reduction for SFT is 11.1% in 2013, increasing to 12.5% in 2015 and 15.7% by 2020.
- 6.22 Comparison goods expenditure per capita figures are shown in Table 2 in Appendix 2. The levels of available spending are derived by combining the population and the per capita spending figures and shown in Table 3, Appendix 2.
- 6.23 As a consequence of growth in population and per capita spending, comparison goods spending of residents within the study area (Figure 6.1 above), is forecast to increase by around 21% from £2,108.31 million in 2015 to £2,545.19 million in 2020, as shown in Table 3, Appendix 2.
- 6.24 Existing comparison goods expenditure patterns have been modelled based on the CTCRS market shares for comparison goods spending. Base year (2015)

penetration rates are shown in Table 4, Appendix 2 and expenditure patterns are shown in Table 5.

Food and Beverage Expenditure Data

- 6.25 Experian's latest 2013 local expenditure figures for food and beverage expenditure have been adopted. Food and beverage expenditure per capita projections are shown in Table 2, Appendix 3. These figures indicate that the average expenditure in the study area for food and beverages consumed away from the home plus takeaways eaten at home is £1,908 per capita in 2015. The total food and beverage expenditure in the study area is £1,044.09 million in 2015 (Table 3, Appendix 3).
- 6.26 Food and beverage expenditure per capita is expected to increase in real terms (excluding inflation) by 6.7% between 2015 and 2020. Taking into account population growth, total food and drink expenditure within the study area is expected to increase from £1,044.09 million in 2015 to £1,188.78 million in 2020, an increase of about 14% (Table 3, Appendix 3).
- 6.27 Existing comparison goods expenditure patterns have been modelled based on the CTCRS market shares. Base year (2015) penetration rates are shown in Table 4, Appendix 2 and expenditure patterns are shown in Table 5.

Floorspace and Turnover of Proposed Development

- 6.28 The proposed additional floorspace at Coal Drops Yard comprises 2,937 sq.m gross. Of this, 1,745 sq.m is expected to be Class A1 retail floorspace, and the remaining 1,192 sq.m will be Class A3 food and beverage floorspace. We have assumed that all of the Class A1 retail floorspace will be comparison retail based on the envisaged tenant mix. This represents the highest possible comparison turnover for the scheme in terms of assessing the retail impact of the proposed development.
- 6.29 Table 6.1 below estimates the total turnover of the additional floorspace at Coal Drops Yard in 2020.

Table 6.1: Turnover of Coal Drops Yard Floorspace

	sq.m gross	sq.m net	£ per sq.m	Turnover (£m)
Comparison Goods	1,795	1,257	£6,000	£7.54m
Food and Beverage	1,192	-	£5,000	£5.96m
Total	2,937			£13.50m

Comparison Goods Trade Diversion and Impact

Base year (2015) shopping patterns

- 6.30 The first stage of the impact assessment is to establish the state of existing centres and the nature of current, ie. 2015, shopping patterns (the base year). Base year market shares for comparison goods shopping are shown in Table 4

in Appendix 2. This table is based on the CTCRS's assessment of current shopping patterns and NLP estimates based on our experience of other retail studies in London.

- 6.31 This analysis shows that £1,763.47 million of comparison expenditure is currently leaking from the study area (Figure 6.1 above, 84% out of £2,108.31 million), the majority of which is directed to the West End, Brent Cross, Angel, Islington and other centres outside LB Camden (Table 5, Appendix 2). Within the local King's Cross area (Zone 2) £132.34 million (or 62%) is currently leaking from this zone to centres outside LB Camden.
- 6.32 The turnover of comparison facilities in LB Camden is estimated to be £982.29 million (last column of Table 5). The CTCRS suggests total comparison goods floorspace in LB Camden's centres is 75,696 sq.m net, based on Goad plan data, which suggests that the 2015 turnover density of comparison floorspace is about £12,977 per sq.m net. This is a high turnover density, reflecting the retail offer within the centres, when compared with available company average information from high street multiple retailers. The Goad plan data referred to in the CTCRS provides a breakdown of uses and floorspace for individual retail centres across the Country, focusing on the core retail and commercial areas within each centre. Due to the sprawling nature of centres in London, it is likely that there is additional floorspace outside of the Goad defined centre boundaries that is not captured within the CTCRS, which may account for the inflated turnover. These figures suggests that the centres within Camden are currently strong centres with a healthy average turnover.
- 6.33 The turnover of comparison facilities in Camden Town is estimated to be £223.82 million. The CTCRS suggests comparison floorspace in the centre is 19,434 sq.m net, suggesting a healthy average turnover density of £11,517 per sq.m net.
- 6.34 The turnover of comparison facilities in Angel, Islington is estimated to be £219.19 million. The comparison floorspace in Angel, Islington is estimated to be around 23,000 sq.m net, based on the GLA 2013 London Town Centre Health Check Analysis Report, which suggests that the 2015 turnover density of comparison floorspace is about £9,530 per sq.m net.
- 6.35 The turnover of comparison facilities in Nags Head/Holloway Road is estimated to be £154.00 million. The comparison floorspace in Nags Head/Holloway Road is estimated to be around 17,500 sq.m net, based on the GLA 2013 London Town Centre Health Check Analysis Report, which suggests that a sales density of about £8,795 per sq.m net.
- 6.36 For Tottenham Court Road, the turnover of comparison facilities is estimated to be £432.30 million. The CTCRS suggests comparison floorspace in the centre is 15,413 sq.m net, suggesting an exceptionally high average turnover density of £28,058 per sq.m net, reflecting the predominance of electrical and higher order retailers.

Future trading patterns in 2020 - with commitments

- 6.37 The estimated trade draw and turnover of the comparison goods retail commitments, including King's Cross Central (as approved under the Outline Planning Permission) and those identified in the CTCRS, is set in Table 6 in Appendix 2. The adjusted shopping patterns in 2020 taking these commitments into account are set out in Table 7. This assumes that the retail floorspace throughout King's Cross Central, including the Coal Drops Yard as consented under the Outline Planning Permission, is fully implemented by 2020.
- 6.38 The pattern of trade diverted from existing facilities is based on current shopping patterns, the expected trade draw of King's Cross Central and the other commitments and judgments about the propensity of the development to compete with other comparison shopping destinations. It has been assumed that 70% of the turnover of King's Cross Central will be generated by inflow from outside of the study area, due to the fact that visitors will be attracted from a wide area and are not predominantly local customers.
- 6.39 It should be noted that the majority of the commitments are located within existing retail centres, and as such, will add to the overall turnover of the centre, and will offset the forecast impact on the respective centre. For example, the turnover of the Hawley Wharf/Camden Lock Village scheme is estimated to be £26.58 million, which will result in a significant boost to the overall comparison goods turnover of Camden Town.

Future trading patterns in 2020 - with additional Coal Drops Yard floorspace

- 6.40 The expected pattern of trade draw for the increase in comparison goods retail floorspace at King's Cross, focused within Coal Drops Yard, over and above the Outline Planning Permission is shown in Table 8 in Appendix 2, based on a comparison turnover of £7.54 million (as set out in Table 6.1 above).
- 6.41 The revised shopping patterns with all commitments and the additional floorspace at Coal Drops Yard in 2020 are shown in Table 9 in Appendix 2. The pattern of trade diverted from existing facilities is based on current shopping patterns, the expected trade draw of the additional retail at Coal Drops Yard shown in Table 8 and judgments about the propensity of the development to compete with other comparison shopping destinations. Again, it is anticipated that the development will draw customers from a wide area in addition to local customers.
- 6.42 The comparison goods impact as a result of the additional floorspace proposed at the Coal Drops Yard is set out in Table 10 of Appendix 2. The estimated impact on the comparison turnover of Camden Town is just 0.09%, 0.07% on Angel, Islington, 0.03% on Nags Head/Holloway Road and 0.01% on Tottenham Court Road. These levels of impact are negligible and would be more than offset by forecast future growth in expenditure.

- 6.43 The forecast impact also needs to be considered in the context of the increase in expenditure that is attracted to LB Camden. The proposed development will claw back resident expenditure that is currently leaking to facilities outside of LB Camden, in particular the West End, and will also attract expenditure from outside the Borough. This is evident in Table 10, with the 2015 turnover of centres in LB Camden estimated at £982.29 million increasing to £1,333.09 million in 2020 with the inclusion of the commitments and the proposed additional floorspace at Coal Drops Yard.
- 6.44 These predicted levels of trade diversion and impact on centres will be more than offset by growth between 2015 and 2020 (population and growth in expenditure per person), even without adding in the additional turnover of the centres as a result of the retail commitments (see para. 6.39 above). The residual turnover of Camden Town in 2020 will be £264.76 million, compared with the 2015 turnover of £223.82 million. Angel, Islington's residual turnover in 2020 will be £260.69 million compared with the 2015 turnover of £219.19 million. The residual turnover of Nags Head/Holloway Road in 2020 will be £185.09 million, compared with the 2015 turnover of £154.00 million, and Tottenham Court Road's residual turnover in 2020 will be £521.28 million compared with the 2015 turnover of £432.30 million.

Food and Beverage Trade Diversion and Impact

Base Year (2015) Shopping Patterns

- 6.45 Base year market shares for food and beverage facilities are shown in Table 4 in Appendix 3. This table is based on CTCRS's assessment of current shopping patterns.
- 6.46 This analysis shows that £880.27 million of food and beverage expenditure is currently leaking from the study area (84% out of £1,044.09 million), the majority of which is directed to the West End (Table 5, Appendix 2). Within the local King's Cross area (Zone 2) £63.47 million (or 62%) is currently leaking from this zone to centres outside LB Camden.
- 6.47 The turnover of food and beverage facilities in LB Camden is estimated to be £426.24 million (last column of Table 5). The turnover of food and beverage facilities in Camden Town is estimated to be £110.66 million. The turnover of food and beverage facilities in Angel, Islington is estimated to be £111.24 million. The turnover of food and beverage facilities in Nags Head/Holloway Road is estimated to be £77.26 million. For Tottenham Court Road, the turnover of food and beverage facilities is estimated to be £165.59 million.

Future trading patterns in 2020 - with commitments

- 6.48 The expected trade draw of the King's Cross Central commitment, as approved under the Outline Planning Permission, is shown in Table 6 in Appendix 3, based on a food and beverage turnover of £75.00 million. This represents the maximum food and beverage floorspace, in order to assess the "worst case"

scenario in terms of impact. This assumes that the food and beverage floorspace throughout King's Cross Central is fully implemented by 2020.

- 6.49 Table 7 in Appendix 3 provides adjusted shopping patterns to take account of the King's Cross Central scheme. The pattern of trade diverted from existing facilities is based on current shopping patterns, the expected trade draw of King's Cross Central and judgments about the propensity of the development to compete with other food and beverage destinations. It has been assumed that 70% of the turnover of King's Cross Central will be generated by inflow from outside of the study area, due to the fact that visitors will be attracted from a wide area and are not predominantly local customers.
- 6.50 Table 11 in Appendix 3 shows that the impact of the King's Cross Central scheme in isolation is expected to be just 2.22% on the food and beverage turnover of Camden Town, 1.54% on Angel, Islington, 0.76% on Nags Head/Holloway Road and 0.28% on Tottenham Court Road. These levels of impact are very low and would be more than offset by forecast future growth in expenditure.

Future trading patterns in 2020 - with additional Coal Drops Yard floorspace

- 6.51 The expected pattern of trade draw for the increase in food and beverage floorspace at King's Cross, focused within Coal Drops Yard, over and above the Outline Planning Permission is shown in Table 8 in Appendix 3, based on a turnover of £5.96 million (as set out in Table 6.1 above).
- 6.52 The revised shopping patterns with both the approved King's Cross Central scheme and the additional food and beverage floorspace at Coal Drops Yard in 2020 are shown in Table 9 in Appendix 3. The pattern of trade diverted from existing facilities is based on current shopping patterns, the expected trade draw of the additional retail at Coal Drops Yard shown in Table 8 and judgments about the propensity of the development to compete with other food and beverage destinations. Again, it is anticipated that the development will draw customers from a wide area in addition to local customers.
- 6.53 The food and beverage impact as a result of the additional floorspace proposed at the Coal Drops Yard is set out in Table 10 of Appendix 3. The estimated impact on the food and beverage turnover of Camden Town is just 0.18%, 0.12% on Angel, Islington, 0.06% on Nags Head/Holloway Road and 0.02% on Tottenham Court Road. These levels of impact are negligible and would be more than offset by forecast future growth in expenditure.
- 6.54 The forecast impact also needs to be considered in the context of the increase in expenditure that is attracted to LB Camden. The proposed development will claw back resident expenditure that is currently leaking to facilities outside of LB Camden, in particular the West End, and will also attract expenditure from outside the Borough. This is evident in Table 10, with the 2015 turnover of centres in LB Camden prior to the implementation of the King's Cross Central scheme and the additional floorspace at Coal Drops Yard estimated at £426.24

million increasing to £561.98 million in 2020 with the inclusion of the commitments and the proposed additional floorspace at Coal Drops Yard.

Implications for Existing Centres

King's Cross CAZ Frontage

- 6.55 The designated King's Cross CAZ frontage continues to experience intense pressure for further food and drink uses, signifying that it continues to be a thriving, vibrant area that serves the local worker, resident and traveller population.
- 6.56 Its proximity to King's Cross Central means that some limited additional trade diversion from the CAZ frontage may occur. Nonetheless, retailers provide a convenience function that serves the local residents, travellers and workers.
- 6.57 The area is likely to experience the wider regeneration benefits resulting from King's Cross Central redevelopment, and as a result, current trade from workers and residents is likely to grow.

Camden Town

- 6.58 Camden Town is located around 1km to the west of King's Cross Central.
- 6.59 The CRTCS undertook a detailed audit of Camden Town in 2013, including a review of the health of the centre compared with its previous performance in the 2004 and 2008 Retail Studies. The 2013 health check of Camden Town identified that the centre is a successful, vibrant and unique retail and leisure destination, combining an eclectic mix of bohemian shops, thriving street markets and legendary music and entertainment venues which attract a significant number of tourists each year, as well as shops and services catering to the needs of local residents and workers. The CRTCS noted that there is a particularly strong leisure offer including restaurants, cafés, bars and clubs which make Camden a distinctive daytime and evening visitor destination in its own right.
- 6.60 The CRTCS concluded that overall, Camden Town is a vital and viable town centre, which continues to attract strong levels of retailer demand and low vacancy rates, despite the continued recession. The CRTCS advised that it will be crucial for Camden to maintain its unique provision of markets and breadth of independent retailers to continue to attract local residents and tourists to visit and spend time in the centre, and redevelopment opportunities should provide improved and extended market stall provision and other town centre uses to ensure that Camden Town continues to attract and accommodate new retailers.
- 6.61 It is clear that Camden Town is an attractive retail destination, with the main draws being the markets, Camden Lock and the leisure offer, and local convenience and service uses catering for local residents. This particular mix

will continue to attract visitors in the future regardless of developments elsewhere.

- 6.62 When assessing the King's Cross Central development, as approved under the Outline Planning Permission, the 2004 RIA concluded that Camden Town will remain a vibrant centre, continuing to meet the needs of locals and tourists, stating that:
- “Development at KXC is unlikely to have a significant adverse impact on the health of Camden Town. Those who use convenience retailing provision tend to travel very short distances and are unlikely to divert to KXC unless they work considerably closer to this area. This will be true in some cases, but trade is sufficiently strong to cope with this diversion. Those who travel from beyond Camden Town’s immediate vicinity do so in order to visit an attraction with a distinct appeal which KXC would not replicate. Indeed, the different nature of the proposed development at KXC may enhance the prospects of Camden Town by encouraging a more diverse range of visitors to the area and relieve pressure on the centre.”*
- 6.63 The conclusions remain the same as the 2004 RIA. Camden Town has three principle functions: local convenience provision for those working and living in the immediate locality; its attractions for the international and national tourist market; and the success of its evening economy. Retail is not as dominant as in other Major town centres, but other specialist roles have been developed such as the markets and the evening economy.
- 6.64 Camden Town has a strong record of attraction of both retailers and investors. It is a vibrant centre with the nature of specialist retail provision contributing to the dynamism of the town centre. However, it has little opportunity for expansion and it is unlikely that Camden Town will be able to satisfactorily respond to unmet demand for more mainstream comparison retailing from residents in the vicinity.
- 6.65 Development at King's Cross Central and the additional floorspace proposed at Coal Drops Yard is unlikely to have a significant adverse impact on the health of Camden Town.
- 6.66 The quantitative retail impact assessment demonstrates that the solus comparison goods impact on Camden Town arising from the additional floorspace at Coal Drops Yard is just 0.09%, and the solus food and beverage impact is just 0.18%. The cumulative comparison goods impact on Camden Town resulting from the existing commitments, King's Cross Central and the additional floorspace at Coal Drops Yard will be just 2.41%, and the food and beverage cumulative impact will be 2.39%. These forecast levels of impact are very low and will be more than offset by the growth in available expenditure as a result of population increase and growth in expenditure per person between 2015 and 2020. In addition, the implementation of the Hawley Wharf/Camden Lock Village scheme will increase the turnover of Camden Town, and will add to the overall vitality and viability of the centre.

6.67 The fact that the Hawley Wharf/Camden Lock Village development is progressing in the full knowledge of the scale of retail development currently proposed within the King's Cross Central scheme demonstrates that there is no harmful impact on planned investment in Camden Town. The additional floorspace proposed at Coal Drops Yard would not have an impact on this proposed investment.

Angel Islington

6.68 Angel, Islington is located just over 1km to the east of King's Cross Central, in the London Borough of Islington.

6.69 The 2004 RIA noted that Angel has improved its retail and leisure offer in recent years, and concluded that:

"... redevelopment at King's Cross is unlikely to have an unduly negative impact on this area. It is inevitable that some convenience and comparison expenditure would be diverted from Angel but the area would remain the centre of a community of workers and residents, partly as a result of the transport infrastructure, which generates demand for the wide range of convenience retail in particular. Furthermore, the specialist retail element of KXC and Angel should be sufficiently different that the success of the latter is not undermined. The future health of Angel will be boosted by the continuing popularity, especially amongst young professionals, of the vibrant evening entertainment scene which KXC would act to complement."

6.70 NLP's analysis suggests Angel still performs very strongly overall. The high proportion of retail uses in the core area, together with the vibrant cultural and entertainment uses, make Angel the strongest centre in Islington, attracting significant numbers of visitors from outside of the Borough. The key strengths of the centre are identified as the wide variety of shops, bars, restaurants and cultural facilities catering for dynamic daytime and night time economy, the popular specialist shopping area at Camden Passage, the street market at Chapel Market, low levels of vacancies, the open space at Islington Green and public transport links. Angel's weaknesses are identified as high levels of road traffic, lack of development opportunities and street crime.

6.71 Demand for floorspace from major high-street retailers is largely unmet at Angel. Angel is a popular centre, but it still does not meet all the comparison purchase needs of visitors. The scope for development in the centre is limited, due to a shortage of sites and redevelopment opportunities.

6.72 The retail and entertainment element of Angel makes a significant contribution to the prosperity of the area. The varied convenience and comparison retail provision meets the different needs of the diverse local community and the vibrant entertainment scene attract visitors from a wider area. Angel and Upper Street remain the main focal points for eating and drinking in central and North London. Although there is demand for more comparison retailing in Angel, there is little capacity for significant expansion of either this or convenience

retail provision. This demand is likely to be captured in the short to intermediate term by the additional capacity at King's Cross Central.

- 6.73 Angel is a strong centre and the Coal Drops Yard would not affect the vitality and viability of this healthy town centre.
- 6.74 The quantitative retail impact assessment demonstrates that the solus comparison goods impact on Angel arising from the additional floorspace at Coal Drops Yard is just 0.07%, and the solus food and beverage impact is just 0.12%. The cumulative comparison goods impact on Angel resulting from the existing commitments, King's Cross Central and the additional floorspace at Coal Drops Yard will be just 1.41%, and the food and beverage cumulative impact will be 1.66%. These forecast levels of impact are very low and will be more than offset by the growth in available expenditure as a result of population increase and growth in expenditure per person between 2015 and 2020.

Nags Head/Holloway Road

- 6.75 Nags Head/Holloway Road is located around 2.5 km to the north east of King's Cross Central, in the London Borough of Islington.
- 6.76 The 2004 RIA identified that Nags Head/Holloway Road provides important convenience and comparison retail services to the surrounding community, despite the poor environment, and that the centre is in need of regeneration if the centre is to prosper in the future. In terms of the King's Cross Central proposals, the RIA stated:
"The strong local draw of the area combined with its distance from King's Cross Central should limit the impact retail development at King's Cross has on the centre – especially if short-term planned regeneration efforts are successful. Retail provision at King's Cross Central is unlikely to compete directly with that of Holloway Road."
- 6.77 NLP's analysis suggests Nags Head/Holloway Road continues to perform well in terms of its retail offer, but there is a need to diversify and improve its overall environmental quality.
- 6.78 The key strengths of the centre are identified as a good mix of shops, cafés and restaurants, well performing frontages, low vacancy levels and serving as an important centre for local education establishments. Nags Head/Holloway Road's weaknesses are traffic through the centre affecting pedestrian movement and accessibility, some areas of the centre suffer from a lower level of environmental quality, lack of cultural facilities and lack of public space.
- 6.79 Nags Head/Holloway Road provides important convenience and comparison retail services to the surrounding community. The centre is likely to continue to appeal to local residents and workers. A significant student population supports the retailing, services provision and the evening and leisure economy of the centre. Although not the main shopping centre of the majority of visitors the area attracts greater loyalty than other surrounding centres. This strong local

draw combined with its distance from King's Cross Central and the potential for successful regeneration should limit the impact retail development at King's Cross has on the centre.

- 6.80 Nags Head/Holloway Road primarily serves a local catchment, and this role would not be affected by the development at Coal Drops Yard.
- 6.81 The quantitative retail impact assessment demonstrates that the solus comparison goods impact on Nags Head/Holloway Road arising from the additional floorspace at Coal Drops Yard is just 0.03%, and the solus food and beverage impact is just 0.06%. The cumulative comparison goods impact on Nags Head/Holloway Road resulting from the existing commitments, King's Cross Central and the additional floorspace at Coal Drops Yard will be just 0.47%, and the food and beverage cumulative impact will be 0.83%. These forecast levels of impact are negligible and will be more than offset by the growth in available expenditure as a result of population increase and growth in expenditure per person between 2015 and 2020.

Tottenham Court Road

- 6.82 Tottenham Court Road is located around 1.2 km to the south west of King's Cross Central. The Tottenham Court Road Central London Frontage extends south from Euston Road along Tottenham Court Road and Charing Cross Road to Cambridge Circus.
- 6.83 The 2004 RIA identified that Tottenham Court Road is a successful centre which serves the local resident and worker population and those visiting to make specialist purchases, and demand from the local community will continue as the area remains a popular location for companies and the traditional home of large institutions such as UCL. The RIA concluded that:
- “Development at King's Cross Central is unlikely to draw convenience trade or those shopping for furniture or electronics away from Tottenham Court Road. Moreover, even if the furniture or electronics sectors were to decline or specialise further in the future (towards the upper-end of the market, for example), it is more likely that competition would emanate from elsewhere rather than King's Cross. More likely competitors are sectors such as out-of-centre retail warehousing (such as the North Circular, and Purley Way), and Internet/mail order suppliers. The future prosperity of Tottenham Court Road will also depend on developments at the eastern end of Oxford Street.”*
- 6.84 The CRTCS undertook a detailed audit of Tottenham Court Road in 2013, including a review of the health of the centre compared with its previous performance in the 2004 and 2008 Retail Studies. The 2013 health check identified that Tottenham Court Road is performing relatively strongly against a number of key health check indicators. Retailing is focused towards the comparison goods market, which has historically been associated with specialist furniture, electricals, book and music shops, however these sectors are currently in decline, reflecting a wider trend towards multichannel retailing,

and the CRTCS noted that there must be no complacency about the strength of the specialist comparison goods retailing on Tottenham Court Road.

- 6.85 The CRTCS expected Tottenham Court Road to continue to perform specialist retailing functions, however states that there may need to be a more flexible approach towards allowing a range of town centre uses to come forward within these areas to maintain the strength of the centre.
- 6.86 NLP's analysis suggests Tottenham Court Road is a thriving, successful centre, which serves the local resident and worker population and those visiting to make specialist purchases. Market indicators show the centre is performing well. Visitors travel from long distances to work or visit the furniture or electrical shops, and benefit from the high concentration of restaurants.
- 6.87 The health of the retail economy is likely to be sustained by visitors and demand from the local community. King's Cross Central is unlikely to draw convenience trade or those shopping for furniture or electronics away from Tottenham Court Road. Future development of Tottenham Court Road, together with the new Crossrail station development, has the potential to complement and enhance the prosperity of the existing Tottenham Court Road retail centre.
- 6.88 Given the specialist nature of the retail provision along Tottenham Court Road, the Coal Drops Yard would not compete directly and there would not be any adverse implications for Tottenham Court Road resulting from the proposed development.
- 6.89 The quantitative retail impact assessment demonstrates that the solus comparison goods impact on Tottenham Court Road arising from the additional floorspace at Coal Drops Yard is just 0.01%, and the solus food and beverage impact is just 0.02%. The cumulative comparison goods impact on Tottenham Court Road resulting from the existing commitments, King's Cross Central and the additional floorspace at Coal Drops Yard will be just 0.27%, and the food and beverage cumulative impact will be 0.30%. These forecast levels of impact are negligible and will be more than offset by the growth in available expenditure as a result of population increase and growth in expenditure per person between 2015 and 2020.

Neighbourhood Centres

- 6.90 In terms of the neighbourhood centres, the 2004 RIA identified that these centres perform a localised convenience function only, as residents in the surrounding area tend to do most of their shopping in supermarkets or comparison retail units in existing town centres. The RIA concluded that it is unlikely any of the centres will be negatively affected by retail development at King's Cross Central, as for the most part, they perform a very immediate localised or specialist function. Further, the regenerative effects of the King's Cross Central development may contribute to improvements to the centres.

- 6.91 The neighbourhood centres serve a local role, primarily providing a convenience offer to local residents. The type of retail proposed at Coal Drops Yard would not compete directly with the neighbourhood centres, and these centres would continue to serve their important local role.

Summary

- 6.92 Based on the forecast levels of trade diversion, there is no predicted significant adverse effect on these centres or any other centre, as a result of the additional floorspace proposed at the Coal Drops Yard.
- 6.93 The nature and scale of the proposed development would not have any negative trading impacts on existing centres. Impact is expected to be dispersed amongst a number of shopping destinations, which reflects existing shopping patterns and high levels of expenditure leakage from the area. The predicted levels of trade diversion and impact on all centres are expected to be more than offset by future population and expenditure growth, and overall the vitality and viability of these centres will improve.
- 6.94 As set out in Section 3, the type of retail floorspace within Coal Drops Yard is proposed to provide a different offer from that found in existing centres in the surrounding area. There will therefore be limited overlap between the Coal Drops Yard proposals and the existing centres, which predominantly serve a local catchment population.
- 6.95 The conclusions remain the same as the 2004 RIA, which assessed the whole of the Class A floorspace within King's Cross Central. The additional retail development at the Coal Drops Yard will not have any adverse implications for existing centres in the surrounding area. Based on this conclusion, the proposals will not have a significant adverse impact, and therefore comply with the tests set out in the NPPF.

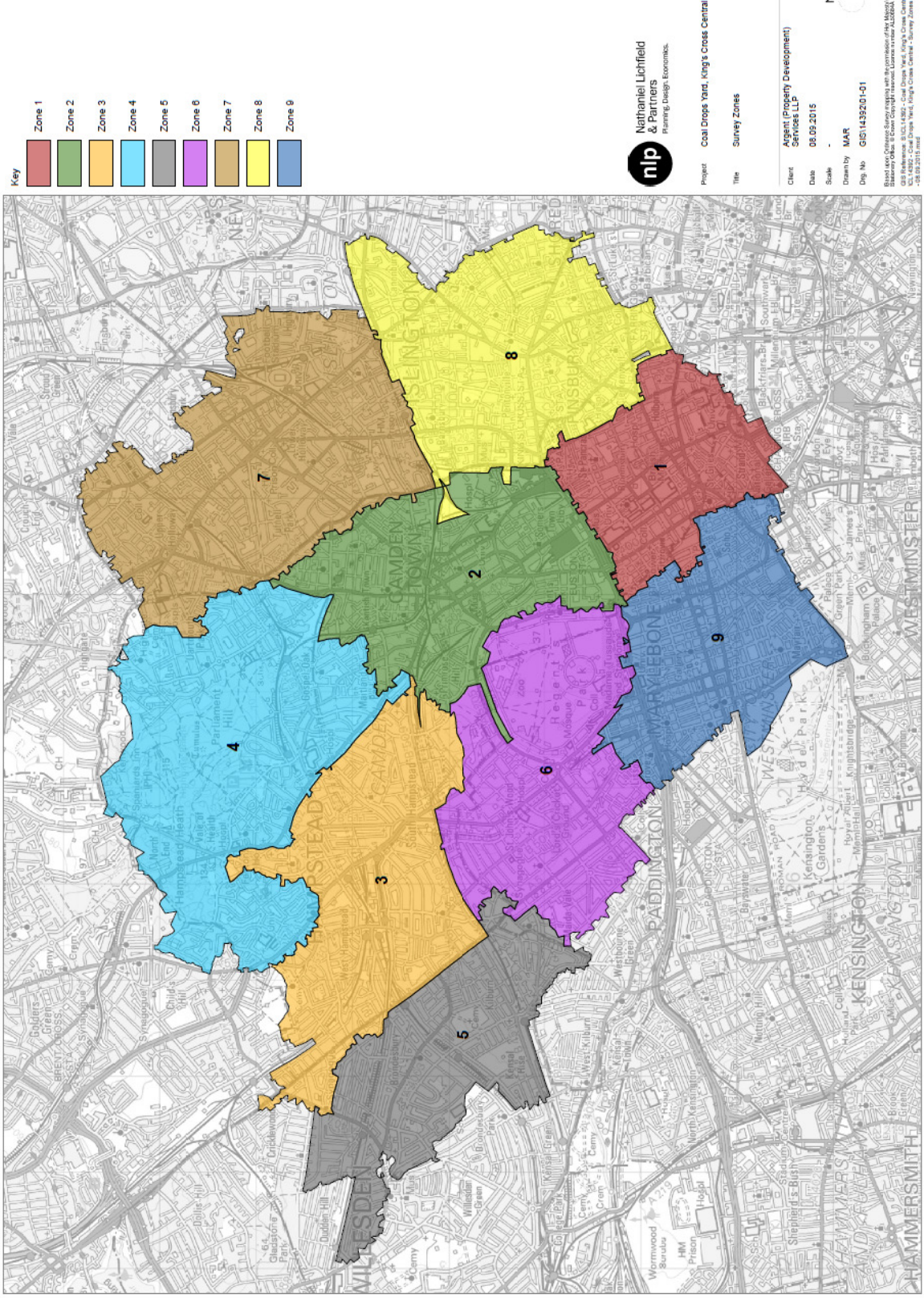
7.0 Summary and Conclusions

- 7.1 This Retail Assessment has been produced on behalf of King's Cross Central Limited Partnership (KCCLP) to accompany the submission of part Reserved Matters and part Full Planning Application for the development of the Coal Drops Yard, which forms part of the King's Cross Central Development Site. The applications comprise:
- a full planning application (for the Western Coal Drops ('WCD'), Eastern Coal Drops ('ECD') (less the southern anchor unit), their respective viaducts, the new upper level and Lower Stable Street ('LSS'));
 - an application for reserved matters approval (for the Western Wharf Road Arches ('WWRA'), the southern anchor unit in ECD and the public realm in the Yard); and
 - an application for listed building consent (for ECD).
- 7.2 The total maximum Class A floorspace permitted under the Outline Planning Permission within the King's Cross Central site is 45,925 sq.m. The current proposals for the Coal Drops Yard incorporate a total of 13,348 sq.m Class A1-A4 floorspace, which will result in the total retail floorspace at King's Cross permitted under the original Outline Planning Permission being exceeded by 2,937 sq.m, an overall increase of around 6%.
- 7.3 This increase in the quantum of Class A floorspace proposed is not significant compared to the overall Class A floorspace permitted within the wider King's Cross Central development.
- 7.4 The increase in retail (Class A) floorspace proposed exceeds the Outline Planning Permission retail floorspace allowance by 2,937 sq.m. Although this is only a minor increase in the overall floorspace of King's Cross Central, which fully complies with the up to date development plan, a retail impact assessment of this additional floorspace has been undertaken, for completeness.
- 7.5 The type of retail floorspace that is proposed within Coal Drops Yard is likely to provide a different offer from that found in existing centres in the surrounding area. There will therefore be limited overlap between the Coal Drops Yard proposals and the existing centres, which predominantly serve a local catchment population.
- 7.6 Given that the proposed additional floorspace at Coal Drops Yard forms a key element of the King's Cross Central proposals, it would not be appropriate to disaggregate the floorspace. Furthermore, case law indicates the applicant is not required to disaggregate the proposed additional floorspace away from the uses already permitted at Coal Drops Yard.
- 7.7 The application proposals are complementary to the wider King's Cross Central regeneration area. The proposed uses create active frontages and

animate the public places created at King's Cross Central. The additional floorspace proposed will help to create a unique offer that will surround and enliven the area's public spaces.

- 7.8 The retail impact assessment considers the extent to which the forecast retail turnover of the proposed development will impact upon the vitality and viability of existing centres and facilities. Based on the forecast levels of trade diversion, there is no predicted significant adverse effect on any centre or facility as a result of the additional floorspace proposed at the Coal Drops Yard.
- 7.9 Impact is expected to be dispersed amongst a number of shopping destinations, which reflects existing shopping patterns and high levels of expenditure leakage from the area. The predicted levels of trade diversion and impact are expected to be more than offset by future population and expenditure growth.
- 7.10 Based on this conclusion, the proposals will not have a significant adverse impact, and therefore comply with the tests set out in the NPPF. Rather, it is evident that there is unmet demand for additional retail floorspace within the King's Cross area, and the additional floorspace proposed at the Coal Drops Yard will go some way towards meeting this demand.

Appendix 1 Study Area



Appendix 2 Comparison Goods Retail Impact Tables

Table 1: Population Projections

Study Area Zone	2011	2015	2020
Zone 1	34,425	38,753	41,806
Zone 2	62,745	68,297	73,252
Zone 3	70,546	76,047	81,346
Zone 4	44,090	47,142	50,559
Zone 5	50,551	51,676	53,418
Zone 6	50,222	52,405	56,015
Zone 7	93,323	101,434	108,283
Zone 8	81,151	87,156	92,893
Zone 9	36,352	42,663	45,641
Total	523,405	565,573	603,213

Sources:

Camden Town Centre and Retail Study 2013 - adopted study area zones

2011 Census - Experian

Experian MMG3 Population Projections

Table 2: Comparison Goods Expenditure Per Capita (2013 Prices)

	2015	2020	Growth 2015 - 2020
Zone 1	£4,198	£4,748	13.1%
Zone 2	£3,105	£3,512	13.1%
Zone 3	£4,199	£4,749	13.1%
Zone 4	£3,835	£4,338	13.1%
Zone 5	£2,953	£3,340	13.1%
Zone 6	£3,896	£4,407	13.1%
Zone 7	£3,262	£3,690	13.1%
Zone 8	£3,497	£3,955	13.1%
Zone 9	£5,647	£6,387	13.1%

Experian Local Expenditure 2013 (2013 prices)

Growth Rates: 5.6% 2013-2014, 4.4% 2014-2015, 3.1% 2015-2016 and 3.3% p.a. from 2016

Excludes Special Forms of Trading

Table 3: Total Comparison Goods Expenditure (£M - 2013 Prices)

	2015	2020
Zone 1	£162.69	£198.51
Zone 2	£212.08	£257.27
Zone 3	£319.33	£386.35
Zone 4	£180.81	£219.33
Zone 5	£152.59	£178.40
Zone 6	£204.18	£246.85
Zone 7	£330.93	£399.56
Zone 8	£304.77	£367.40
Zone 9	£240.92	£291.51
Total	£2,108.31	£2,545.19

Sources: Tables 1 and 2

Table 4: Comparison Shopping Penetration Rates - 2015

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow
LB Camden										
Camden Town	4.3%	28.0%	1.9%	10.8%	0.7%	1.8%	2.5%	1.3%	0.3%	51.0%
Kilburn High Road	0.0%	0.8%	4.6%	0.3%	12.6%	7.9%	0.0%	0.0%	0.0%	35.0%
Finchley Road / Swiss Cottage	0.2%	1.3%	9.7%	3.7%	1.5%	7.3%	0.1%	0.9%	0.7%	30.0%
Hampstead	0.0%	0.6%	3.2%	7.0%	1.0%	0.3%	1.2%	0.0%	0.2%	52.0%
Kentish Town	0.0%	4.5%	0.0%	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%	10.0%
West Hampstead	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	20.0%
Tottenham Court Road	6.6%	2.4%	0.8%	1.1%	1.9%	1.2%	2.7%	2.8%	5.4%	87.0%
Holborn	2.9%	0.0%	0.0%	0.1%	0.0%	0.0%	0.1%	1.0%	0.0%	87.0%
LB Camden Total	14.0%	37.6%	21.8%	28.7%	17.7%	18.5%	6.6%	6.0%	6.6%	
Other Centres										
West End	64.9%	47.1%	41.4%	39.4%	29.1%	63.3%	34.7%	41.5%	73.1%	90.0%
Angel / Upper Street	0.4%	0.5%	0.3%	0.4%	0.0%	0.0%	10.1%	23.8%	0.1%	50.0%
Marylebone	0.9%	0.4%	0.0%	0.7%	0.0%	1.6%	0.0%	0.0%	10.3%	90.0%
Nags Head / Holloway Road	1.1%	0.7%	0.0%	0.8%	0.0%	0.0%	17.9%	4.2%	0.1%	50.0%
Brent Cross	0.2%	3.0%	22.6%	14.3%	26.8%	3.9%	5.9%	1.8%	0.5%	90.0%
Tottenham Hale Retail Park	0.3%	0.2%	0.0%	1.2%	0.0%	0.0%	3.7%	3.3%	0.0%	90.0%
Staples Corner Retail Park	0.0%	0.7%	2.0%	1.6%	6.8%	1.5%	0.0%	0.0%	0.1%	90.0%
Other	18.2%	9.8%	11.9%	12.9%	19.6%	11.2%	21.1%	19.4%	9.2%	n/a
Other Total	86.0%	62.4%	78.2%	71.3%	82.3%	81.5%	93.4%	94.0%	93.4%	
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: Camden Town Centre and Retail Study 2013 Appendix 3, Table 4 - Comparison Goods Market Shares and Table 5 (inflow for LB Camden centres) and NLP estimates

Table 5: Comparison Shopping Expenditure Patterns - 2015 (£ Millions)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total Turnover
Expenditure £M	162.69	212.08	319.33	180.81	152.59	204.18	330.93	304.77	240.92		
LB Camden											
Camden Town	7.00	59.38	6.07	19.53	1.07	3.68	8.27	3.96	0.72	114.15	223.82
Kilburn High Road	0.00	1.70	14.69	0.54	19.23	16.13	0.00	0.00	0.00	28.15	80.44
Finchley Road / Swiss Cottage	0.33	2.76	30.98	6.69	2.29	14.91	0.33	2.74	1.69	26.87	89.57
Hampstead	0.00	1.27	10.22	12.66	1.53	0.61	3.97	0.00	0.48	33.30	64.04
Kentish Town	0.00	9.54	0.00	10.31	0.00	0.00	0.00	0.00	0.00	2.21	22.06
West Hampstead	0.00	0.00	5.11	0.00	0.00	0.00	0.00	0.00	0.00	1.28	6.39
Tottenham Court Road	10.74	5.09	2.55	1.99	2.90	2.45	8.93	8.53	13.01	376.10	432.30
Holborn	4.72	0.00	0.00	0.18	0.00	0.00	0.33	3.05	0.00	55.40	63.67
LB Camden Total	22.78	79.74	69.61	51.89	27.01	37.77	21.84	18.29	15.90	637.46	982.29
Other Centres											
West End	105.59	99.89	132.20	71.24	44.40	129.25	114.83	126.48	176.11	8,999.97	9,999.97
Angel / Upper Street	0.65	1.06	0.96	0.72	0.00	0.00	33.42	72.54	0.24	109.59	219.19
Marylebone	1.46	0.85	0.00	1.27	0.00	3.27	0.00	0.00	24.81	284.94	316.60
Nags Head / Holloway Road	1.79	1.48	0.00	1.45	0.00	0.00	59.24	12.80	0.24	77.00	154.00
Brent Cross	0.33	6.36	72.17	25.86	40.89	7.96	19.52	5.49	1.20	1,618.07	1,797.85
Tottenham Hale Retail Park	0.49	0.42	0.00	2.17	0.00	0.00	12.24	10.06	0.00	228.45	253.84
Staples Corner Retail Park	0.00	1.48	6.39	2.89	10.38	3.06	0.00	0.00	0.24	220.00	244.44
Other	29.61	20.78	38.00	23.32	29.91	22.87	69.83	59.13	22.16	n/a	315.61
Other Total	139.92	132.34	249.72	128.92	125.58	166.41	309.08	286.49	225.02	11,538.02	13,301.49
TOTAL	162.69	212.08	319.33	180.81	152.59	204.18	330.93	304.77	240.92	12,175.48	14,283.78

Source: Tables 3 and 4

Table 6: Comparison Goods Commitments Trade Draw and Turnover

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total	
King's Cross Central (OPP)												
% Trade Draw from Zone	5%	5%	2%	2%	2%	2%	5%	5%	2%	70%	100%	
Turnover from Zone £ Millions	5.10	5.10	2.04	2.04	2.04	2.04	5.10	5.10	2.04	71.44	102.06	
Hawley Wharf/Camden Lock												
% Trade Draw from Zone	4%	27%	2%	10%	1%	2%	2%	1%	1%	50%	100%	
Turnover from Zone £ Millions	1.06	7.18	0.53	2.66	0.27	0.53	0.53	0.27	0.27	13.29	26.58	
Tottenham Court Road												
% Trade Draw from Zone	4%	1%	0%	1%	1%	1%	2%	2%	3%	85%	100%	
Turnover from Zone £ Millions	0.36	0.09	0.00	0.09	0.09	0.09	0.18	0.18	0.27	7.64	8.99	
West Hampstead												
% Trade Draw from Zone	0%	0%	80%	0%	0%	0%	0%	0%	0%	20%	100%	
Turnover from Zone £ Millions	0.00	0.00	3.38	0.00	0.00	0.00	0.00	0.00	0.00	0.84	4.22	
Pentonville Road												
% Trade Draw from Zone	1%	1%	0%	1%	0%	0%	14%	33%	0%	50%	100%	
Turnover from Zone £ Millions	0.03	0.03	0.00	0.03	0.00	0.00	0.48	1.14	0.00	1.72	3.44	
The O2 Centre												
% Trade Draw from Zone	1%	2%	19%	7%	3%	14%	1%	2%	1%	50%	100%	
Turnover from Zone £ Millions	0.03	0.07	0.64	0.24	0.10	0.47	0.03	0.07	0.03	1.69	3.38	
Total £ Million Trade Draw	1.49	7.37	4.55	3.02	0.46	1.09	1.23	1.65	0.57	25.19	46.61	

Notes

Approved Kings Cross Central scheme - maximum Class A1 comparison goods floorspace 24,800 sq m gross (17,010 sq m net sales) at £6,000 per sq m net = £102.06 million
 Other commitments taken from LB Camden Retail and Town Centre Study 2013 (Table 11):
 Hawley Wharf/Camden Lock Village (ref. 2012/4628/P) - net comparison goods floorspace of 4,430 sq.m at £6,000 per sq.m net = £26.58 million
 Central Cross/1 Stephen Street, Tottenham Court Road (ref. 2012/2232/P) - net comparison goods floorspace of 1,498 sq.m at £6,000 per sq.m net = £8.99 million
 187-199 West End Lane, West Hampstead (ref. 2011/6129/P) - net comparison goods floorspace of 704 sq.m at £6,000 per sq.m net = £4.22 million
 The Lighthouse Block, 283-297 Pentonville Road (ref. 2008/5358/P) - net comparison goods floorspace of 573 sq.m at £6,000 per sq.m net = £3.44 million
 Unit 2, The O2 Centre, Swiss Cottage / Finchley Road (Ref. 2009/4698/P) - net comparison goods floorspace of 563 sq.m at £6,000 per sq.m net = £3.38 million

Table 7: Comparison Shopping Expenditure Patterns - 2020 with Commitments (£ Millions)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total Turnover
Expenditure £M	198.51	257.27	386.35	219.33	178.40	246.85	399.56	367.40	291.51		
Commitments											
<i>Kings Cross Central</i>	5.10	5.10	2.04	2.04	2.04	2.04	5.10	5.10	2.04	71.44	102.06
<i>Other Commitments</i>	1.48	7.31	4.54	3.00	0.45	1.09	1.22	1.64	0.57	25.12	46.42
LB Camden Centres											
Camden Town	8.26	68.36	7.17	22.99	1.23	4.38	9.81	4.69	0.87	137.23	264.99
Kilburn High Road	0.00	1.99	17.54	0.65	22.13	19.29	0.00	0.00	0.00	33.41	95.00
Finchley Road / Swiss Cottage	0.39	3.28	37.13	8.02	2.66	17.92	0.40	3.28	2.03	32.37	107.48
Hampstead	0.00	1.53	12.31	15.26	1.78	0.74	4.78	0.00	0.58	40.19	77.17
Kentish Town	0.00	11.52	0.00	12.46	0.00	0.00	0.00	0.00	0.00	2.67	26.66
West Hampstead	0.00	0.00	6.16	0.00	0.00	0.00	0.00	0.00	0.00	1.54	7.70
Tottenham Court Road	13.00	6.07	3.07	2.39	3.38	2.95	10.74	10.24	15.70	453.80	521.34
Holborn	5.72	0.00	0.00	0.22	0.00	0.00	0.40	3.66	0.00	67.15	77.14
LB Camden Total	33.94	105.15	89.96	67.04	33.66	48.42	32.45	28.62	21.79	864.93	1,325.96
Other Centres											
West End	124.63	114.99	156.32	83.89	51.00	154.14	136.20	149.70	211.02	10,790.25	11,972.13
Angel / Upper Street	0.77	1.22	1.13	0.85	0.00	0.00	39.64	85.85	0.29	131.13	260.89
Marylebone	1.78	1.02	0.00	1.53	0.00	3.94	0.00	0.00	29.97	344.45	382.69
Nags Head / Holloway Road	2.16	1.78	0.00	1.74	0.00	0.00	71.09	15.34	0.29	92.74	185.14
Brent Cross	0.39	7.64	86.92	31.18	47.64	9.60	23.49	6.59	1.45	1,939.73	2,154.64
Tottenham Hale Retail Park	0.59	0.51	0.00	2.62	0.00	0.00	14.76	12.10	0.00	275.63	306.22
Staples Corner Retail Park	0.00	1.79	7.71	3.50	12.11	3.70	0.00	0.00	0.29	262.25	291.35
Other	34.25	23.17	44.31	26.97	33.98	27.05	81.93	69.21	26.40	n/a	367.27
Other Total	164.57	152.12	296.39	152.29	144.74	198.43	367.11	338.79	269.72	13,836.18	15,920.34
TOTAL	198.51	257.27	386.35	219.33	178.40	246.85	399.56	367.40	291.51	14,701.11	17,246.30

Table 8: Comparison Goods Trade Draw and Turnover - Additional Floorspace at Coal Drops Yard

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
% Trade Draw from Zone	5%	5%	2%	2%	2%	2%	5%	5%	2%	70%	100.0%
Turnover from Zone £ Millions	0.38	0.38	0.15	0.15	0.15	0.15	0.38	0.38	0.15	5.28	7.54

Notes

Proposed additional floorspace at Coal Drops Yard - 1,795 sq.m gross (1,257 sq.m net sales) at £6,000 per sq m net = £7.54 million

Table 9: Comparison Shopping Expenditure Patterns - 2020 with Commitments and additional Coal Drops Yard floorspace (£ Millions)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total Turnover
Coal Drops Yard	198.51	257.27	386.35	219.33	178.40	246.85	399.56	367.40	291.51		
Commitments											
<i>Kings Cross Central</i>	5.10	5.10	2.04	2.04	2.04	2.04	5.10	5.10	2.04	71.44	102.06
<i>Other Commitments</i>	1.47	7.30	4.54	3.00	0.45	1.09	1.22	1.64	0.57	25.12	46.41
LB Camden Centres											
Camden Town	8.24	68.25	7.17	22.97	1.23	4.38	9.80	4.68	0.87	137.17	264.76
Kilburn High Road	0.00	1.99	17.53	0.64	22.11	19.28	0.00	0.00	0.00	33.39	94.94
Finchley Road / Swiss Cottage	0.39	3.27	37.13	8.02	2.66	17.92	0.40	3.28	2.03	32.36	107.46
Hampstead	0.00	1.53	12.31	15.26	1.78	0.74	4.78	0.00	0.58	40.19	77.16
Kentish Town	0.00	11.52	0.00	12.46	0.00	0.00	0.00	0.00	0.00	2.67	26.65
West Hampstead	0.00	0.00	6.16	0.00	0.00	0.00	0.00	0.00	0.00	1.54	7.70
Tottenham Court Road	12.99	6.07	3.07	2.39	3.37	2.95	10.74	10.24	15.70	453.76	521.28
Holborn	5.72	0.00	0.00	0.22	0.00	0.00	0.40	3.66	0.00	67.14	77.13
LB Camden Total	34.30	105.40	90.08	67.16	33.79	48.55	32.81	28.98	21.94	870.07	1,333.09
Other Centres											
West End	124.38	114.80	156.24	83.81	50.95	154.04	136.06	149.54	210.90	10,785.42	11,966.14
Angel / Upper Street	0.77	1.22	1.13	0.85	0.00	0.00	39.60	85.76	0.29	131.07	260.69
Marylebone	1.78	1.02	0.00	1.53	0.00	3.94	0.00	0.00	29.97	344.42	382.65
Nags Head / Holloway Road	2.16	1.78	0.00	1.74	0.00	0.00	71.06	15.33	0.29	92.72	185.09
Brent Cross	0.39	7.64	86.91	31.17	47.63	9.60	23.49	6.59	1.45	1,939.56	2,154.43
Tottenham Hale Retail Park	0.59	0.51	0.00	2.62	0.00	0.00	14.76	12.10	0.00	275.61	306.20
Staples Corner Retail Park	0.00	1.79	7.71	3.50	12.11	3.70	0.00	0.00	0.29	262.24	291.34
Other	34.14	23.11	44.28	26.94	33.93	27.02	81.79	69.09	26.38	n/a	366.67
Other Total	164.21	151.87	296.26	152.17	144.62	198.30	366.75	338.42	269.57	13,831.04	15,913.21
TOTAL	198.51	257.27	386.35	219.33	178.40	246.85	399.56	367.40	291.51	14,701.11	17,246.30

Table 10: Comparison Retail Impact Summary (£Millions)

Centre/Facilities	Base Year 2015 Turnover	2020 Turnover (with Commitments)	2020 Turnover (with Coal Drops Yard)	2020 % Impact	Change in Turnover 2015 to 2020
LB Camden					
Coal Drops Yard	n/a	n/a	7.54	n/a	n/a
Kings Cross Central	n/a	102.06	102.06	n/a	n/a
Other Commitments	n/a	46.42	46.41	n/a	n/a
Camden Town	223.82	264.99	264.76	-0.09%	40.94
Kilburn High Road	80.44	95.00	94.94	-0.07%	14.50
Finchley Road / Swiss Cottage	89.57	107.48	107.46	-0.02%	17.88
Hampstead	64.04	77.17	77.16	-0.01%	13.12
Kentish Town	22.06	26.66	26.65	-0.01%	4.60
West Hampstead	6.39	7.70	7.70	-0.01%	1.31
Tottenham Court Road	432.30	521.34	521.28	-0.01%	88.98
Holborn	63.67	77.14	77.13	-0.01%	13.46
LB Camden Total	982.29	1,325.96	1,333.09		350.79
Other Centres					
West End	9,999.97	11,972.13	11,966.14	-0.05%	1,966.17
Angel / Upper Street	219.19	260.89	260.69	-0.07%	41.51
Marylebone	316.60	382.69	382.65	-0.01%	66.05
Nags Head / Holloway Road	154.00	185.14	185.09	-0.03%	31.09
Brent Cross	1,797.85	2,154.64	2,154.43	-0.01%	356.58
Tottenham Hale Retail Park	253.84	306.22	306.20	-0.01%	52.36
Staples Corner Retail Park	244.44	291.35	291.34	0.00%	46.90
Other	315.61	367.27	366.67	n/a	n/a
Other Total	13,301.49	15,920.34	15,913.21		2,560.66
TOTAL	14,283.78	17,246.30	17,246.30		2,911.46

Appendix 3 Food and Beverage Impact Tables

Table 1: Population Projections

Study Area Zone	2011	2015	2020
Zone 1	34,425	38,753	41,806
Zone 2	62,745	68,297	73,252
Zone 3	70,546	76,047	81,346
Zone 4	44,090	47,142	50,559
Zone 5	50,551	51,676	53,418
Zone 6	50,222	52,405	56,015
Zone 7	93,323	101,434	108,283
Zone 8	81,151	87,156	92,893
Zone 9	36,352	42,663	45,641
Total	523,405	565,573	603,213

Sources:

Camden Town Centre and Retail Study 2013 - adopted study area zones

2011 Census - Experian

Experian MMG3 Population Projections

Table 2: Food and Beverage Expenditure Per Capita (2013 Prices)

	2015	2020	Growth 2015 - 2020
Zone 1	£2,066	£2,203	6.7%
Zone 2	£1,499	£1,599	6.7%
Zone 3	£2,143	£2,286	6.7%
Zone 4	£1,907	£2,034	6.7%
Zone 5	£1,453	£1,550	6.7%
Zone 6	£1,939	£2,068	6.7%
Zone 7	£1,600	£1,706	6.7%
Zone 8	£1,687	£1,799	6.7%
Zone 9	£2,880	£3,072	6.7%

Experian Local Expenditure 2013 (2013 prices)

Growth Rates: 2.1% 2013-2014, 2.8% 2014-2015 and 1.3% p.a. from 2015

Table 3: Total Food and Beverage Expenditure (£M - 2013 Prices)

	2015	2020
Zone 1	£80.05	£92.11
Zone 2	£102.36	£117.12
Zone 3	£162.99	£185.98
Zone 4	£89.90	£102.85
Zone 5	£75.07	£82.77
Zone 6	£101.59	£115.83
Zone 7	£162.25	£184.76
Zone 8	£147.00	£167.13
Zone 9	£122.87	£140.22
Total	£1,044.09	£1,188.78

Sources: Tables 1 and 2

Table 4: Food and Beverage Penetration Rates - 2015

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	% Inflow
LB Camden										
Camden Town	5%	30%	2%	10%	0%	2%	3%	1%	0%	50%
Kilburn High Road	0%	0%	5%	0%	15%	8%	0%	0%	0%	35%
Finchley Road / Swiss Cottage	0%	1%	10%	4%	2%	7%	0%	0%	0%	30%
Hampstead	0%	0%	3%	7%	1%	0%	0%	0%	0%	50%
Kentish Town	0%	5%	0%	6%	0%	0%	0%	0%	0%	10%
West Hampstead	0%	0%	2%	0%	0%	0%	0%	0%	0%	20%
Tottenham Court Road	7%	2%	0%	0%	1%	1%	3%	3%	5%	85%
Holborn	3%	0%	0%	0%	0%	0%	0%	1%	0%	85%
LB Camden Total	15%	38%	22%	27%	19%	18%	6%	5%	5%	
Other Centres										
West End	65%	48%	42%	41%	31%	64%	36%	43%	76%	90%
Angel / Upper Street	0%	1%	0%	0%	0%	0%	11%	25%	0%	50%
Marylebone	1%	0%	0%	1%	0%	2%	0%	0%	10%	90%
Nags Head / Holloway Road	0%	1%	0%	1%	0%	0%	19%	4%	0%	50%
Brent Cross	0%	3%	23%	15%	29%	4%	6%	2%	0%	90%
Other	19%	9%	13%	15%	21%	12%	22%	21%	9%	n/a
Other Total	85%	62%	78%	73%	81%	82%	94%	95%	95%	
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	

Source: Camden Town Centre and Retail Study 2013 Comparison Goods Market Shares and NLP estimates

Table 5: Food and Beverage Expenditure Patterns - 2015 (£ Millions)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total Turnover
Expenditure £M	80.05	102.36	162.99	89.90	75.07	101.59	162.25	147.00	122.87		
LB Camden											
Camden Town	4.00	30.71	3.26	8.99	0.00	2.03	4.87	1.47	0.00	55.33	110.66
Kilburn High Road	0.00	0.00	8.15	0.00	11.26	8.13	0.00	0.00	0.00	14.83	42.36
Finchley Road / Swiss Cottage	0.00	1.02	16.30	3.60	1.50	7.11	0.00	0.00	0.00	12.66	42.19
Hampstead	0.00	0.00	4.89	6.29	0.75	0.00	0.00	0.00	0.00	11.93	23.87
Kentish Town	0.00	5.12	0.00	5.39	0.00	0.00	0.00	0.00	0.00	1.17	11.68
West Hampstead	0.00	0.00	3.26	0.00	0.00	0.00	0.00	0.00	0.00	0.81	4.07
Tottenham Court Road	5.60	2.05	0.00	0.00	0.75	1.02	4.87	4.41	6.14	140.75	165.59
Holborn	2.40	0.00	0.00	0.00	0.00	0.00	0.00	1.47	0.00	21.94	25.81
LB Camden Total	12.01	38.90	35.86	24.27	14.26	18.29	9.74	7.35	6.14	259.42	426.24
Other Centres											
West End	52.03	49.13	68.46	36.86	23.27	65.02	58.41	63.21	93.38	4,587.99	5,097.77
Angel / Upper Street	0.00	1.02	0.00	0.00	0.00	0.00	17.85	36.75	0.00	55.62	111.24
Marylebone	0.80	0.00	0.00	0.90	0.00	2.03	0.00	0.00	12.29	144.17	160.19
Nags Head / Holloway Road	0.00	1.02	0.00	0.90	0.00	0.00	30.83	5.88	0.00	38.63	77.26
Brent Cross	0.00	3.07	37.49	13.49	21.77	4.06	9.74	2.94	0.00	832.97	925.52
Other	15.21	9.21	21.19	13.49	15.76	12.19	35.70	30.87	11.06	n/a	164.68
Other Total	68.04	63.47	127.13	65.63	60.80	83.31	152.52	139.65	116.73	5,659.38	6,536.65
TOTAL	80.05	102.36	162.99	89.90	75.07	101.59	162.25	147.00	122.87	5,918.80	6,962.89

Source: Tables 3 and 4

Table 6: Food and Beverage Commitments Trade Draw and Turnover

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
King's Cross Central (OPP)											
% Trade Draw from Zone	5%	5%	2%	2%	2%	2%	5%	5%	2%	70%	100%
Turnover from Zone £ Millions	3.75	3.75	1.50	1.50	1.50	1.50	3.75	3.75	1.50	52.50	75.00

Notes

Approved Kings Cross Central scheme - maximum Class A3/A5 floorspace 15,000sq.m gross at £5,000 per sq m net = £75 million

Table 7: Food and Beverage Shopping Expenditure Patterns - 2020 with Commitments (£ Millions)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total Turnover
Expenditure £M	92.11	117.12	185.98	102.85	82.77	115.83	184.76	167.13	140.22		
Commitments											
<i>Kings Cross Central</i>	3.75	3.75	1.50	1.50	1.50	1.50	3.75	3.75	1.50	52.50	75.00
LB Camden Centres											
Camden Town	4.38	33.78	3.67	10.07	0.00	2.28	5.40	1.63	0.00	62.55	123.75
Kilburn High Road	0.00	0.00	9.18	0.00	12.10	9.12	0.00	0.00	0.00	16.49	46.90
Finchley Road / Swiss Cottage	0.00	1.15	18.51	4.08	1.64	8.06	0.00	0.00	0.00	14.35	47.79
Hampstead	0.00	0.00	5.57	7.17	0.82	0.00	0.00	0.00	0.00	13.58	27.13
Kentish Town	0.00	5.81	0.00	6.14	0.00	0.00	0.00	0.00	0.00	1.33	13.29
West Hampstead	0.00	0.00	3.71	0.00	0.00	0.00	0.00	0.00	0.00	0.93	4.64
Tottenham Court Road	6.38	2.32	0.00	0.00	0.82	1.15	5.51	4.99	6.99	160.25	188.43
Holborn	2.74	0.00	0.00	0.00	0.00	0.00	0.00	1.66	0.00	25.07	29.47
LB Camden Total	17.25	46.81	42.14	28.96	16.89	22.11	14.66	12.03	8.49	347.06	556.39
Other Centres											
West End	57.50	54.48	77.34	41.45	25.14	73.17	65.10	70.32	105.34	5,182.25	5,752.10
Angel / Upper Street	0.00	1.13	0.00	0.00	0.00	0.00	19.89	40.88	0.00	62.70	124.61
Marylebone	0.91	0.00	0.00	1.02	0.00	2.31	0.00	0.00	13.98	164.22	182.45
Nags Head / Holloway Road	0.00	1.15	0.00	1.02	0.00	0.00	34.73	6.61	0.00	43.79	87.31
Brent Cross	0.00	3.49	42.67	15.36	23.88	4.62	11.03	3.32	0.00	940.89	1,045.26
Other	16.46	10.05	23.82	15.03	16.86	13.63	39.35	33.97	12.40	n/a	181.57
Other Total	74.87	70.30	143.84	73.89	65.88	93.73	170.10	155.11	131.73	6,393.84	7,373.29
TOTAL	92.11	117.12	185.98	102.85	82.77	115.83	184.76	167.13	140.22	6,740.30	7,929.69

Table 8: Food and Beverage Trade Draw and Turnover - Additional Floorspace at Coal Drops Yard

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
% Trade Draw from Zone	5%	5%	2%	2%	2%	2%	5%	5%	2%	70%	100.0%
Turnover from Zone £ Millions	0.30	0.30	0.12	0.12	0.12	0.12	0.30	0.30	0.12	4.17	5.96

Notes

Proposed additional floorspace at Coal Drops Yard - 1,192 sq.m gross at £5,000 per sq m gross = £5.96 million

Table 9: Food and Beverage Expenditure Patterns - 2020 with Commitments and additional Coal Drops Yard floorspace (£ Millions)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total Turnover
Expenditure £M	92.11	117.12	185.98	102.85	82.77	115.83	184.76	167.13	140.22		
Coal Drops Yard	0.30	0.30	0.12	0.12	0.12	0.12	0.30	0.30	0.12	4.17	5.96
Commitments											
Kings Cross Central	3.75	3.75	1.50	1.50	1.50	1.50	3.75	3.75	1.50	52.50	75.00
LB Camden Centres											
Camden Town	4.36	33.67	3.67	10.05	0.00	2.28	5.38	1.62	0.00	62.50	123.53
Kilburn High Road	0.00	0.00	9.18	0.00	12.08	9.10	0.00	0.00	0.00	16.48	46.84
Finchley Road / Swiss Cottage	0.00	1.15	18.50	4.08	1.64	8.05	0.00	0.00	0.00	14.35	47.77
Hampstead	0.00	0.00	5.56	7.17	0.82	0.00	0.00	0.00	0.00	13.57	27.13
Kentish Town	0.00	5.81	0.00	6.14	0.00	0.00	0.00	0.00	0.00	1.33	13.28
West Hampstead	0.00	0.00	3.71	0.00	0.00	0.00	0.00	0.00	0.00	0.93	4.64
Tottenham Court Road	6.38	2.32	0.00	0.00	0.82	1.15	5.51	4.98	6.99	160.22	188.39
Holborn	2.73	0.00	0.00	0.00	0.00	0.00	0.00	1.66	0.00	25.07	29.46
LB Camden Total	17.52	47.00	42.24	29.05	16.98	22.21	14.94	12.32	8.61	351.12	561.98
Other Centres											
West End	57.31	54.34	77.28	41.40	25.10	73.09	64.99	70.20	105.25	5,178.46	5,747.41
Angel / Upper Street	0.00	1.13	0.00	0.00	0.00	0.00	19.86	40.81	0.00	62.65	124.46
Marylebone	0.91	0.00	0.00	1.02	0.00	2.31	0.00	0.00	13.98	164.19	182.41
Nags Head / Holloway Road	0.00	1.15	0.00	1.02	0.00	0.00	34.70	6.61	0.00	43.77	87.25
Brent Cross	0.00	3.48	42.66	15.36	23.87	4.62	11.02	3.32	0.00	940.71	1,045.05
Other	16.38	10.01	23.79	15.00	16.82	13.61	39.25	33.88	12.39	n/a	181.12
Other Total	74.60	70.12	143.74	73.80	65.79	93.63	169.82	154.82	131.61	6,389.79	7,367.70
TOTAL	92.11	117.12	185.98	102.85	82.77	115.83	184.76	167.13	140.22	6,740.90	7,929.69

Table 10: Food and Beverage Retail Impact Summary (£Millions)

Centre/Facilities	Base Year 2015 Turnover	2020 Turnover (with Commitments)	2020 Turnover (with Coal Drops Yard)	2020 % Impact	Change in Turnover 2015 to 2020
LB Camden					
Coal Drops Yard	n/a	n/a	5.96	n/a	n/a
Kings Cross Central	n/a	75.00	75.00	n/a	n/a
Camden Town	110.66	123.75	123.53	-0.18%	12.86
Kilburn High Road	42.36	46.90	46.84	-0.13%	4.47
Finchley Road / Swiss Cottage	42.19	47.79	47.77	-0.05%	5.58
Hampstead	23.87	27.13	27.13	-0.02%	3.26
Kentish Town	11.68	13.29	13.28	-0.05%	1.60
West Hampstead	4.07	4.64	4.64	-0.02%	0.56
Tottenham Court Road	165.59	188.43	188.39	-0.02%	22.80
Holborn	25.81	29.47	29.46	-0.03%	3.65
LB Camden Total	426.24	556.39	561.98		135.75
Other Centres					
West End	5,097.77	5,752.10	5,747.41	-0.08%	649.64
Angel / Upper Street	111.24	124.61	124.46	-0.12%	13.21
Marylebone	160.19	182.45	182.41	-0.02%	22.22
Nags Head / Holloway Road	77.26	87.31	87.25	-0.06%	9.99
Brent Cross	925.52	1,045.26	1,045.05	-0.02%	119.53
Other	164.68	181.57	181.12	n/a	n/a
Other Total	6,536.65	7,373.29	7,367.70		814.60
TOTAL	6,962.89	7,929.69	7,929.69		950.35

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