



Euston Area Plan – Land Use Mix and Delivery Study

Retail Planning Issues

November 2022

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1. Introduction

Scope and Purpose

- 1.1 The EAP update has been designed by LBC as a partial update to the Euston Area Plan ('EAP'), which was adopted in 2015. A decision was made to pursue the Update in 2020, commencing with a series of revised evidence base documents relating to viability and constraints¹, the Euston Station chapter of the adopted document, the land use chapter (focusing upon homes, jobs and the amount of retail provision) and sustainability issues.
- 1.2 As set out in a committee report dated February 2020, a partial update to the EAP was recommended as:
- the EAP was written at a point in time where the HS2 Act was not yet adopted and there was greater uncertainty about proposals, including the possibility of various station footprints being developed;
 - the landowners have committed to comprehensive development for the whole site through the appointment of Lendlease as the master development partner ('MDP') based on what we understand to be different viability assumptions to those in the EAP;
 - the background information for the EAP and the capacities identified were based on the station design constraints and information from 2013. As of February 2020, the available evidence base was circa 7 years out of date and LBC were aware that designs for the redevelopment of the station complex (and wider EAP area) have evolved and in some cases constraints, funding, deliverability and requirements had changed;
 - LBC need to ensure that it has a robust, up to date evidence base to be able to assess the appropriateness of different proposals; this will need to include an assessment of appropriate infrastructure.
- 1.3 With regards to retail and town centre planning policy issues, the content of this document is informed by the following:
- the adopted EAP;
 - research, feasibility and assessment work being undertaken in relation to the redevelopment of Euston railway station for Network Rail and HS2 surveys;
 - Euston Action Plan – Economic Land Use Vision (2013) ('the 2013 vision document');

¹ Including an updated assessment of the development capacity for specific areas in terms of new homes and employment floorspace.

- Camden Retail and Town Centre Study (November 2013) ('the 2013 retail study');
- Updated national planning policy and legislation introduced since the 2013 retail study and the adoption of the EAP.

Content of this Document

1.4 The remainder of this report is structured as follows:

- Section 2 provides background context for this updated baseline assessment.
- Section 3 provides an updated evidence base in relation to land use data.
- An analysis of the key issues associated with retail and town centre uses is provided in Section 4.
- Finally, a summary of the findings of this report can be found in Section 5.

1.5 All statistical information and other documents referred to in the main text can be found in appendices contained at the rear of this document.

2. Background Context

2.1 In order to set the context for the updated evidence base, it is important to review the background context on retail and town centre issues associated with the EAP and wider area. This incorporates three key areas:

- the current content of national planning policy and legislation, including any changes since the completion of the previous evidence base and adoption of the EAP;
- a review of the content of previous evidence base work on retail and town centre issues, including areas where updates are required; and
- a review of recent / current retail, leisure and town centre trends.

2.2 Each is assessed in turn below.

Planning Policy and Legislation

National Planning Policy Framework

2.3 At the time of adopting the EAP, the latest version of national planning policy in the National Planning Policy Framework ('NPPF') was the original 2012 version. This version of the NPPF will have also guided the preparation of the evidence base supporting the adopted EAP.

2.4 Since that time, the content of national planning policy towards retail and main town centre uses has not changed to any significant extent, with the latest version of the NPPF being published in July 2021, but the following changes are notable:

- Whilst the two main policy tests for proposals outside of town centres (and not in accordance with an up to date development plan) remain the sequential and impact tests, the updated versions of the NPPF has clarified the issue of availability of alternative sites (in the sequential test) as being available within 'a reasonable period of time'. However, there is no definition (or guidance) as to what is 'a reasonable period of time' in the context of proposals for main town centre uses.
- The revisions to the NPPF have deleted the formal requirement for local authorities to define primary and secondary retail frontages in development plan. The latest NPPF still requires local authorities to define town centre boundaries and primary shopping areas in defined 'town centres'.
- Whilst the requirement to allocate sites to meet identified needs remains, the revised NPPF indicates that this should be at least ten years ahead, rather than the full plan period as previously advised.

- The revised NPPF does not now provide any guidance on how 'needs' should be assessed for main town centre uses (previously quantitative and qualitative indicators were cited in previous versions of the NPPF).

2.5 Finally, the one notable amendment in the July 2021 version of the NPPF is the revision to national policy on Article 4 Directions. The existence of Article 4 Directions has been in place for some time and they are used to restrict permitted development rights in certain specific instances, across a range of land uses and for various different reasons. The revised version of paragraph 53 of the NPPF notes that:

"The use of Article 4 directions to remove national permitted development rights should:

- *where they relate to change from non-residential use to residential use, be limited to situations where an Article 4 direction is necessary to avoid wholly unacceptable adverse impacts (this could include the loss of the essential core of a primary shopping area which would seriously undermine its vitality and viability, but would be very unlikely to extend to the whole of a town centre)*
- *in other cases, be limited to situations where an Article 4 direction is necessary to protect local amenity or the well-being of the area (this could include the use of Article 4 directions to require planning permission for the demolition of local facilities)*
- *in all cases, be based on robust evidence, and apply to the smallest geographical area possible".*

2.6 Updated national planning policy does not loosen the tight controls over the imposition of Article 4 Directions, although given the changes to the use classes order and permitted development rights (see later in this section), the government has acknowledged that Directions may be appropriate in focused parts of certain town centres where the loss of certain main town centre / Class E uses would undermine town centre health.

Planning Practice Guidance ('PPG')

2.7 Following initial publication in 2014, the PPG on town centre planning policy was updated in July 2019 and again in September 2020. The latest version sets out the recommended content of town centre strategies, the indicators which are useful for planning for town centres and high streets, the permitted development rights which are available in relation to main town centre uses and also how local authorities should approach the application of the sequential and impact tests in terms of both plan making and development management issues.

Legislation: Permitted Development and the Use Classes Order

- 2.8 In recent years, in response to the on-going challenges faced by town centres and high street retailers (and other commercial uses), national government has introduced more flexibility into the permitted development rights system. Permitted development has long been an element of the planning system in England although, over time, further flexibility has been introduced in order to allow for changes, in certain circumstances, between some main town centre land use classes.
- 2.9 Since the adoption of the EAP there have been two major changes in national legislation. First, in July 2020, the government introduced a significant change to the land use classes order. The changes came into effect on the 1st September 2020 and revoked Parts A and D of the existing use classes order. The second involved further changes to permitted development rights.
- 2.10 In relation to retail and main town centre uses and the use classes order, the changes were as follows:
- A new Class E was introduced which encompasses the former A1, A2, A3, B1a, B1b, B1c and part of the D2 use class (for gyms and indoor recreational facilities)².
 - The former A4 and A5 uses have now become *sui generis* uses, along with part of the former Class D2 uses comprising cinemas, concert halls, bingo halls and dance halls. The remaining former Class D2 uses (community halls, swimming pools, skating rinks and outdoor sport and recreation uses) are now placed into Use Class F2.
 - The uses within the former Class D1 are split between the new Use Class E (health care uses, creches, day centres) and the new Use Class F1 (schools, museums, libraries, halls courts and places of worship).
- 2.11 Following the September 2020 use class order changes, the Government has now introduced permanent changes to permitted development rights (following a transitional period between September 2020 and July 2021), which focus upon changes to residential use, refinement of rights in relation to office to residential use, and the expansion of rights under the new class MA. These came into effect from 1st August 2021.
- 2.12 The key aspects of the August 2021 changes can be summarised as follows:
- Previous permitted development rights under classes O and M (office to residential and retail to residential) ended on 31st July 2021.

² Not involving vehicles or firearms

- The introduction of the new class MA (business and commercial to residential) and its expansion to include the whole of Use Class E (shops, offices, restaurants/cafes, health services, gyms, nurseries and leisure).
- Permitted development to change from Use Class E (commercial, business and service) to a use falling within Use Class C3 (dwellinghouses) will be subject, in certain circumstances, a number of prior approvals. There will also be limitations / exclusions, including the introduction of a size limit of 1,500sq m per building. Previously, in relation to the change from office to residential, there was no upper size limit.
- The automatic exclusions to this new right include buildings on land covered by, or within the curtilage of, designations such as SSSIs, Listed Buildings, a scheduled monument, an AONB, or a World Heritage Site. It is notable that Conservation Areas are not included in these automatic exclusions.
- In order to take advantage of this new right, a developer must apply to the local planning authority for a determination as to whether prior approval of the authority will be required in relation to one or more of the following factors:
 - transport
 - noise
 - flooding
 - contamination
 - residential amenity
 - in the case of buildings located in Conservation Areas³ consideration to be given to the impact of the change of use on the character or sustainability of the Conservation Area.
- It will also be noted that there has been a key change by the new Class MA: the removal of any consideration of the impact on the high street (for existing uses falling within the new Use Class E⁴). This has the potential to be very significant for town centre high streets.
- To benefit from Class MA, the use of the building must have fallen within Class E or one or more of the uses that it replaced for at least two years continuously prior to the date the prior approval application is made. However, there is some debate as to whether the building must have been in the same use or mix of uses for the two year period.

³ involving the change of use of part or all of the ground floor of the building

⁴ up until 31st July 2021 the 'impact on the high street' was a test for prior approval for uses outside of Class E

- The building must have been vacant for a continuous period of at least 3 months immediately prior to the date of the application for prior approval. A prior approval application can be made to change the use of part of the building only. The vacancy test applies to the building, but as the definition of a building in the GPDO relates to part of a building this might mean the vacancy test is only required for the part of the building to be converted. However, there is nothing in the regulation to stop a landlord making the property purposely empty, and no requirement to demonstrate the property has been marketed to prospective tenants in its current use, leaving many to suspect it will not present a significant barrier to take-up of the new right.
- The permitted development right under Class MA does not include any building operations (i.e. it does not include the external alterations allowance that was afforded by Class M). This means that a building must be both standards compliant from the outset but also capable of being converted in its current form. It is therefore considered by some that planning permission will be required in the majority of cases for external alterations to the building, including new doors and windows and other external details.

2.13 It should be noted that these changes have attracted some controversy in some parts of the property and built environment sectors, with a key focus being on their effect on the future of town centres. Whilst limitations and conditions remain in place, there is a general sense of concern in some quarters that some high streets could potentially suffer and this may have prompted the inclusion of specific reference to town centres in Article 4 Direction policy in the July 2021 version of the NPPF.

Local Planning Policy

2.14 The **EAP** was adopted in January 2015 and covers the area shown in Figure 2.1 below.

Figure 2.1: area covered by the adopted EAP

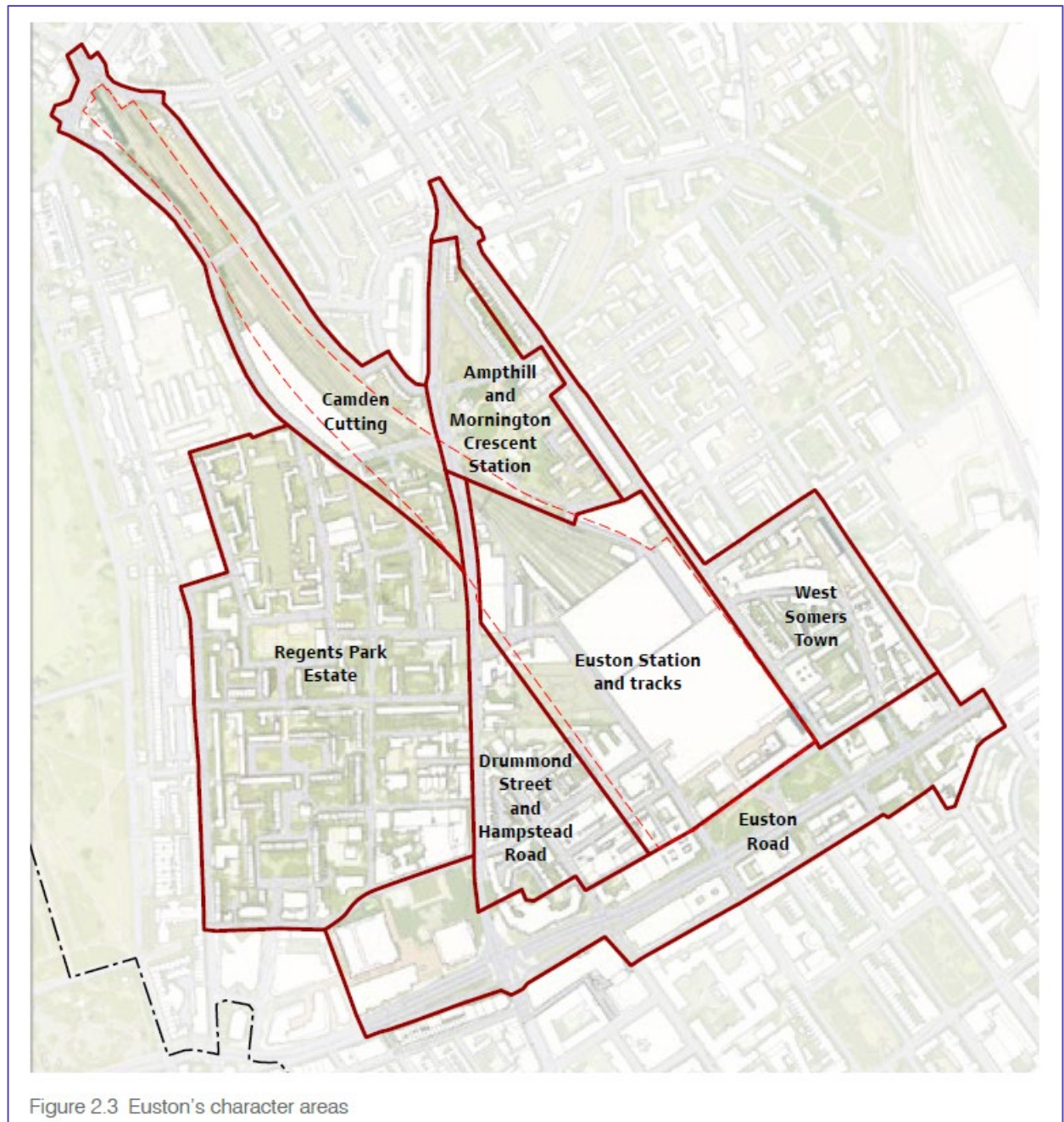


Figure 2.3 Euston's character areas

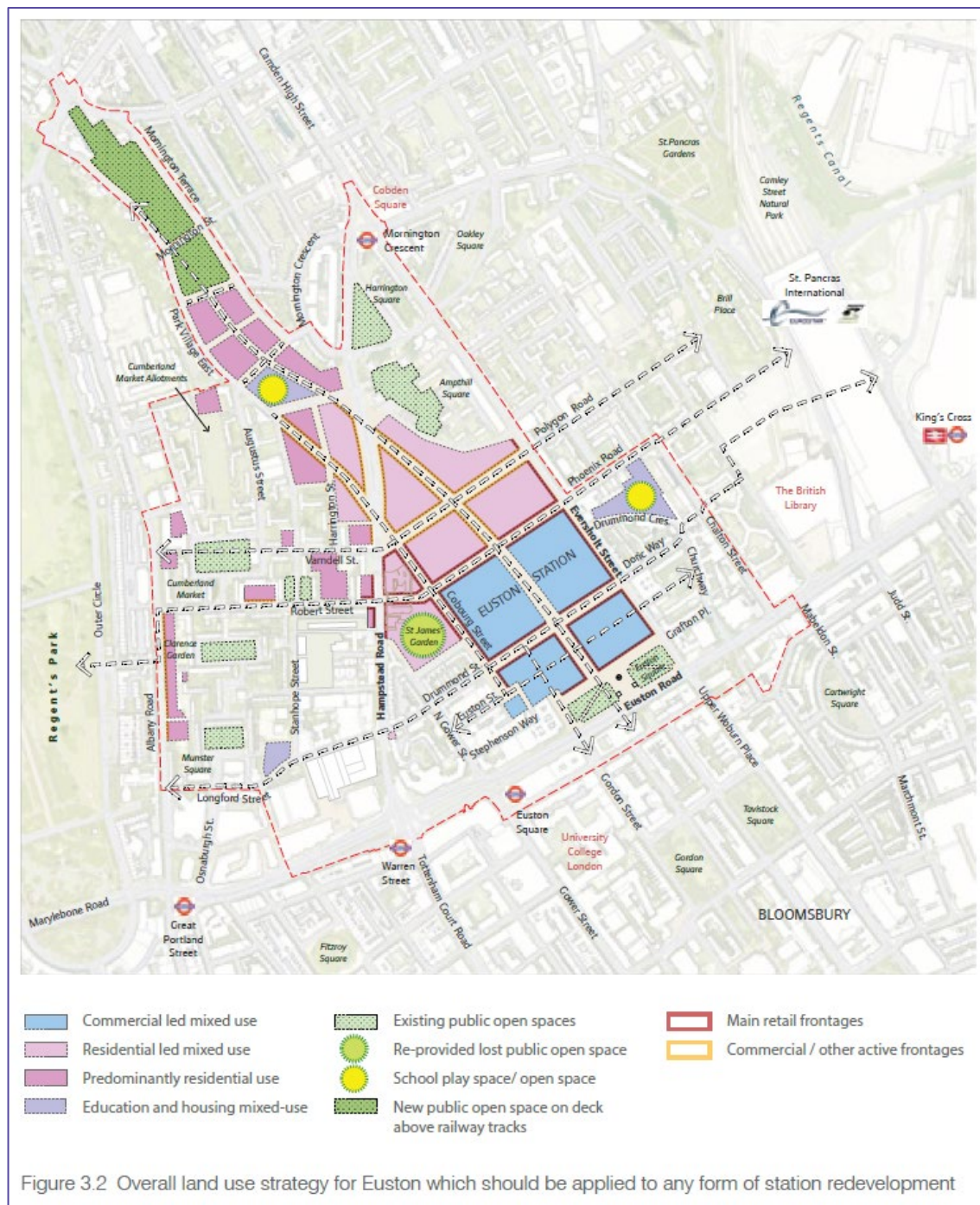
2.15 The EAP provides an overall development strategy for the plan area, along with individual strategies for the several character areas shown in Figure 2.1 above. Strategic Principle EAP1 notes that, in relation to retail and leisure uses:

“• In the region of 20,000 sqm of new and re-provided retail (use classes A1-A5) of which around 50% should be A1 shops to meet demand from Euston station, contribute to vibrant streets and reinforce the role of existing centres.

• New retail and leisure uses should be focused towards the Euston station site, to serve the needs of passengers and support growth and development here, and towards the Euston Road Central London Frontage where opportunities emerge. Smaller scale retail to meet the needs of local communities in neighbourhood centres and along key streets will also be supported”.

2.16 The overall land use strategy in the EAP is shown in Figure 2.2 below.

Figure 2.2: land use strategy diagram in the adopted EAP



2.17 The retail and leisure land use strategy in the EAP is as follows:

“Retail and leisure uses include A1 shops, other ‘A’ class uses including financial and professional services to the public, cafes restaurants and drinking establishments, D2 uses (assembly and leisure) and hotels.

1. Distribution of retail and leisure uses

There is the potential for significant additional retail to be provided as part of mixed use development at Euston, serving the needs of station passengers, local occupiers and residents, as well as contributing to the vibrancy of the area.

The Core Strategy allows for in the range of 20 – 30,000 sqm of additional A1 retail at Euston and Camden Town, with the majority expected to take place at Euston. It is anticipated that in the region of 20,000 sqm (use class A1-A5) retail could be provided at Euston largely focused around and within the station, based on updated retail analysis, further work in relation to the development potential of Euston Station, the creation of a mixed and vibrant place and apparent built constraints affecting the station site. This figure would deliver net growth of up to 16,450 sqm of retail (A1-A5 uses), as well as the re-provision of around 3,550 sqm of existing retail at Euston Station and would help to meet latent demand for additional retail provision at the station based on the current passenger numbers. Although this indicative figure does not necessarily represent a fixed limit on potential retail growth at Euston, the provision of further additional retail would require very careful consideration taking into account impacts on surrounding centres as well as the contribution made to wider objectives and policies in this plan.

In order to ensure an appropriate balance of shopping and leisure uses, and reflecting existing Camden policy and guidance for retail centres, around 50% of additional retail floorspace on each frontage (outside Euston Station concourse) should be A1 shops.

New retail and leisure uses will be focused around the Euston Station site, and the Euston Road Central London Frontage and neighbourhood centres, where opportunities emerge, along with limited retail uses along other key routes. This reflects the distribution established in the Camden Core Strategy, the role of retail in generating activity along key routes and spaces, and the limited capacity for retail growth in existing designated centres compared to the scale of growth envisaged at Euston Station. Priority locations for the provision of retail uses and active frontages are indicated in figure 3.2, where “main” and “other” retail frontages are identified.

It is anticipated that a significant proportion of the overall retail provision (at least 5,000 sqm) could serve Euston Station passengers only, based on current passenger numbers, and would be predominantly food and drink led with ancillary convenience and comparison retail. This level of provision would maintain the current role and function of Euston Station retail, and would have a limited impact on neighbouring centres. Retail provision over and above this level could change the role of the Station area, and a Retail Impact Assessment would therefore be required to assess potential impacts on other centres both within and outside the Euston Area Plan boundary, taking into account additional retail demand created by additional passenger numbers.

2. Type and form of new retail and leisure provision

New retail and leisure provision should be outward facing and contribute towards creating active streets and a vibrant public realm. Retail and leisure use will play an important role in supporting the vibrancy, character and identity of Euston, and therefore its attractiveness as a location for employment and investment.

New growth and development should ensure that new uses, including retail, serve to complement and reinforce existing centres. Key elements of the approach to retail provision are:

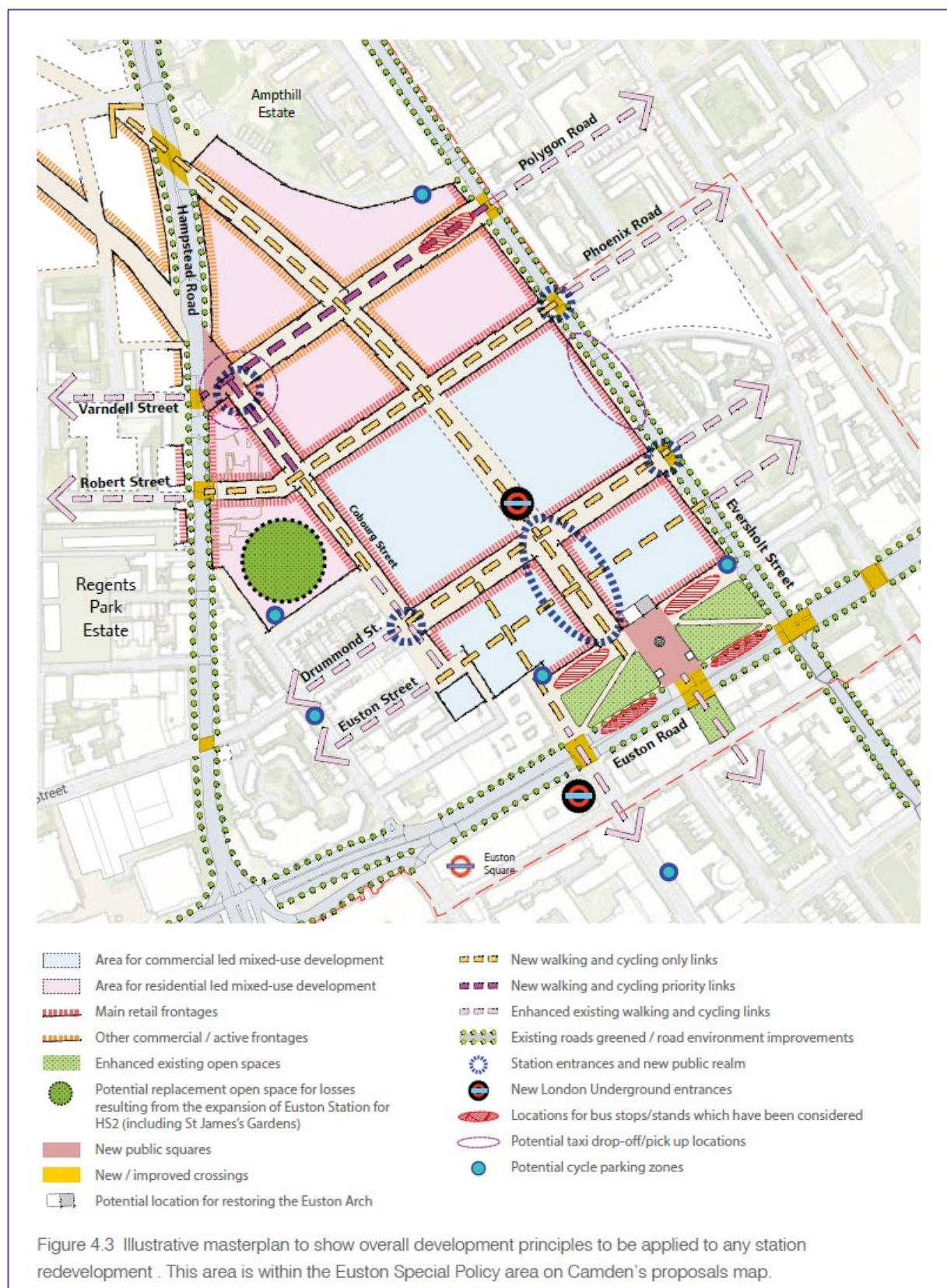
- *Euston Station site: new retail predominantly to meet the needs of passengers and the local community, as well as contributing to the creation of vibrant streets and public realm;*
- *Euston Road Central London Frontage: additional ground floor retail where opportunities emerge;*
- *Drummond Street: Protect and enhance its specialist character and role as a centre for ethnic shops and restaurants particularly through measures to support the continued operation of these businesses during and after the construction of HS2;*
- *Eversholt Street (south and north) and Chalton Street: Improve the character, vibrancy and vitality of these centres by building on opportunities created by change, growth and development in the area;*
- *Southern Eversholt Street: reinforce the neighbourhood centre by introducing A1 retail and other 'A' class uses along the west side of the street (Euston Station side); and*
- *Robert Street: Encourage active ground floor uses and potential additional trade resulting from growth and development at Euston Station.*

Where appropriate, Camden and TfL will seek to link funding for public realm enhancements with improvements to the vibrancy and attractiveness of centres.

Where appropriate, the loss of A1 shops and floorspace will be resisted where it would harm the character and vibrancy of existing centres. Where possible and appropriate, smaller shopping units will be protected in order to maintain the character of local centres. Reflecting the character of existing centres in the area and Camden's planning policies, small and independent retail will be sought as part of retail growth at Euston".

2.18 The masterplan for the Euston Station policy area is contained in Figure 2.3 below.

Figure 2.3: masterplan for the Euston Station Policy Area in the adopted EAP



2.19 The **Camden Local Plan** was adopted in 2017, with Section 9 of the adopted document dealing with town centres and shops. It sets out the hierarchy in the Borough, including: town centres, central London frontages, specialist shopping areas, growth areas and 37 neighbourhood centres. Euston is listed as one of six separate growth areas, with Policy TC1 noting the potential for 16,450sq m of A1-A5 retail uses.

2.20 Policy TC1 also notes that the sequential test will apply to retail and other town centre uses located outside of the above defined centres/areas, with a retail impact assessment required for proposals of 2,500sq m or more that are not in accordance with the locational strategy set out in TC1.

2.21 Paragraphs 9.8 and 9.9 of the supporting text to TC1 notes that:

“There is opportunity to deliver a significant amount of additional retail floorspace as part of the redevelopment of Euston Station. The Euston Area Plan anticipates that around 20,000 sqm of class A1 to A5 uses could be provided at Euston both around and within the station. This figure comprises 16,450 sqm of net growth and reprovision of around 3,550 sqm of retail to meet demand from current passenger numbers. Approximately 8,000 sqm of this could be in A1 retail use.

9.9 The precise quantum and type of retail to be provided will be subject to detailed site specific assessments and an assessment of any impacts on other centres”.

2.22 A Town Centres and Retail document was adopted as a SPD in 2021 and contains guidance on how the LBC will implement its policies for town centres and retail development. It includes detailed area specific information for each designated centre. This SPD document also provides further detailed information on the management of food, drink, and entertainment uses in designated centres. It concentrates upon existing ‘town centres’ in the defined hierarchy rather than the growth areas such as Euston.

Previous Evidence Base Work

2.23 With regards to retail and town centre issues, the two parts of the library previous of evidence base information which are relevant to this current review are:

- Camden Retail and Town Centre Study (November 2013) (‘the 2013 retail study’)
- the Euston Action Plan – Economic Land Use Vision (July 2013) (‘the 2013 Vision document’)
- Addendum to Euston Retail Assessment (November 2013) (‘the 2013 Addendum’)

The 2013 Retail Study

- 2.24 The 2013 retail study provided a comprehensive review of retail and town centre issues across the whole of the Borough of Camden. It included a review of retail and town centre trends, a survey of household shopping patterns, surveys of visitors to selected defined 'town centres', a review of town centre health issues, an assessment of the quantitative capacity for retail floorspace, along with an assessment of specific centre opportunities.
- 2.25 The 2013 retail study provided separate quantitative capacity forecasts for convenience and comparison goods floorspace for the whole of the Borough and also sub-divided them into the eight main areas (Camden, Kilburn High Road, Finchley Road/Swiss Cottage, Hampstead, Kentish Town, West Hampstead, Tottenham Court Road and Holborn). An extract from Section 7 of the 2013 retail study report showing these forecasts is contained below.

Figure 2.4: extract from 2013 Retail Study regarding retail expenditure / floorspace forecasts

Table 7.1: Baseline Capacity Forecasts for Convenience Goods in Camden

	2018	2023	2028	2031
Camden Borough Floorspace Capacity (sqm net)	9,045	9,455	10,591	11,619
Camden Town Indicative Capacity (sqm net)	4,858	5,545	6,735	7,143
Kilburn High Road Indicative Capacity (sqm net)	887	1,080	1,293	1,416
Finchley Road/Swiss Cottage Indicative Capacity (sqm net)	7,249	7,775	8,361	8,689
Hampstead Indicative Capacity (sqm net)	215	243	275	295
Kentish Town Indicative Capacity (sqm net)	469	548	712	758
West Hampstead Indicative Capacity (sqm net)	205	253	300	327
Tottenham Court Road Indicative Capacity (sqm net)	-3,190	-3,160	-3,123	-3,104
Holborn Indicative Capacity (sqm net)	-1,179	-1,149	-1,113	-1,114

Source: Appendix 2, Tables 12 - 20

Note: Retail capacity figures for the main town centres and central London frontages do not total the global capacity figure, which also includes commitments at Kings Cross and Abbey Road.

Table 7.2: Baseline Capacity Forecasts for Comparison Goods in Camden

	2018	2023	2028	2031
Camden Borough Floorspace Capacity (sqm net)	-1,278	2,922	13,789	20,724
Camden Town Indicative Capacity (sqm net)	609	2,292	5,945	7,428
Kilburn High Road Indicative Capacity (sqm net)	480	914	1,691	2,150
Finchley Road/Swiss Cottage Indicative Capacity (sqm net)	258	385	709	843
Hampstead Indicative Capacity (sqm net)	445	1,062	2,066	2,651
Kentish Town Indicative Capacity (sqm net)	70	791	1,962	2,641
West Hampstead Indicative Capacity (sqm net)	-655	-598	-515	-465
Tottenham Court Road Indicative Capacity (sqm net)	1,489	4,417	9,145	11,817
Holborn Indicative Capacity (sqm net)	479	895	1,515	1,881

Source: Appendix 3, Tables 12 - 20

- 2.26 The 2013 retail study concentrates primarily on existing defined 'town centres' in the Borough, although the following is noted in relation to the Euston area:

"8.15 The Euston Area Economic Vision, prepared by GVA, is an evidence base document to support the draft Euston Area Plan (EAP) (June 2013). The report concludes that on the basis of no significant change in footfall at Euston, there would be capacity to support c.4,800 sqm gross retail floorspace (use classes A1-A5). However, the report also considered the scope to support additional comparison goods floorspace within the Euston area to reinforce the station's current role and function. Due to the accessibility of the site, the Euston area could meet wider comparison goods shopping needs within the Borough, as part of a balanced network of centres.

8.16 A high level impact analysis was undertaken which tests the impact of a scenario of up to 8,000 sqm net use class A1 retail floorspace coming forward at Euston, which indicates that the development of a scheme such as this, would be likely to function more like a new District Centre, with limited impact on neighbourhood centres but having more of a significant draw on spend from the larger town centres existing in the area.

8.17 The EAP evidence base has not tested or considered the potential role of Euston to meet the wider needs of the Borough, however it is clear that some comparison goods need could be accommodated within the Euston area. The impact of the scale of such provision should be thoroughly tested should the Council seek to allocate significant levels of comparison goods floorspace to Euston".

The 2013 Vision Document

- 2.27 As part of evidence base library for the EAP, GVA (now AY) and AECOM prepared the 2013 Vision Document. It was published in June 2013 and covered a range of land use matters. Section 7 of the vision document deals with the retail role of the Euston area and specifically the redevelopment of the station area. Alongside an assessment of the current level of town centre provision in the immediate area, the retail analysis examined the potential expenditure capacity of the local area and also the potential financial impact of four different A1 retail floorspace scenarios.
- 2.28 With regards to expenditure capacity, the vision document indicated that:
- the expenditure potential associated with the potential planned new housing growth in the Euston area could generate the following:
 - convenience goods – between £23m and £26m
 - comparison goods – between £42m and 47m
 - food and beverage expenditure – between £21m and £24m
 - localised employment spend could generate up to £27.7m per annum.
 - the value of spending associated with purchases by passengers at Euston station by 2033 could be circa £162m.

- 2.29 The impact of four different retail floorspace scenarios were tested: 3,000sq m, 5,000sq m, 10,000sq m and 20,000sq m. In each scenario the impact assessment was based upon comparison goods floorspace and assumed that 50% of the overall floorspace was Class A1 (comparison) and the remainder was A2-5 floorspace. The scenarios tested are outlined in Figure 2.5 below.

Figure 2.5: potential comparison goods turnover for 2013 impact scenario testing

Potential Turnover of ESA Retail Floorspace at 2023					
Scenario	Retail Floorspace (sqm gross)	Comparison Goods Floorspace (sqm gross)	Comparison Goods floorspace (sqm net)	2023 Potential Turnover (£m) ⁵¹	
				Inside LBC SA ⁵²	Outside LBC SA
Scenario 1	3,000	1,800	1,440	2.5	8.9
Scenario 2	5,000	2,500	2,000	3.5	12.4
Scenario 3	10,000	5,000	4,000	7.0	24.7
Scenario 4	20,000	10,000	8,000	15.8	47.5

Source: GVA

- 2.30 Based upon the above scenarios, Figure 2.6 below outlines the findings of the impact assessment in relation to the main defined 'town centres' in the Borough.

Figure 2.6: potential financial impact levels across the four different comparison goods floorspace scenarios

Turnover of Nearby Centres and Potential Impact of Comparison Floorspace Development Scenarios at 2023					
	Turnover Incl. commitments (£m) ⁵³	Scenario 1 Impact (%)	Scenario 2 Impact (%)	Scenario 3 Impact (%)	Scenario 4 Impact (%)
West End	£8,558.6	0.0%	0.0%	0.0%	0.0%
Tottenham Court Road	£512.1	0.1%	0.1%	0.2%	0.5%
Camden Town	£313.6	0.0%	0.0%	0.1%	0.1%
Kings Cross	£108.7	0.4%	0.5%	1.0%	2.4%
Kentish Town	£25.6	0.7%	0.9%	1.9%	4.3%
Other ⁵⁴	£364.9	0.2%	0.3%	0.6%	1.4%

Source: GVA. Derived from 2013 LBC Retail Study

- 2.31 Further information regarding the data inputs and assumptions used in the capacity and impact analyses in the 2013 vision document, along with which elements have now been updated, can be found later in this document.

The 2013 Addendum

- 2.32 In November 2013, a clarification to the retail expenditure / floorspace analysis in the 2013 vision document was issued by GVA. It noted that:

"1.2 Our retail assessment identified capacity to support c.4,800 sqm gross retail floorspace (use classes A1-A5) on the basis of no significant change in footfall at Euston. However, there is considered scope to support additional retail floorspace within the Euston area over and above this, to address latent demand and reinforce the station's current role and function.

1.3 A high level impact analysis was undertaken which tested the impact of up to 8,000 sqm net A1 comparison retail floorspace at Euston (10,000 sqm gross). This assumed 50% of a scheme comprising 20,000 sqm gross (new and re-provided) retail floorspace (A1-A5 uses), would be given over to A1 comparison goods, reflecting the need to maintain a suitable balance of uses and also recognising the important role of food and drink related uses associated with the station.

1.4 Our analysis indicates that a scheme such as this would be likely to function more like a new District Centre (being of a similar scale to the level of A1 comparison retail provision in Hampstead and West Hampstead) and would divert spend from established nearby town centres. Kentish Town in particular was identified as being vulnerable to the impact of trade diversion to Euston given its comparatively lower turnover and the compounding effect of other retail commitments.

1.5 Whilst our assessment considered a scheme of up to 20,000 sqm gross (new and re-provided) A1-A5 retail floorspace at Euston, given its growth status, there is considered potential for the area to accommodate a greater quantum of retail floorspace. However, in light of the analysis already undertaken, a greater quantum would only serve to reinforce a change in the current role and function of Euston and could potentially create a 'shopping destination' in its own right which would increase direct competition with existing centres.

1.6 On the basis of our findings in respect of the impact of up to 20,000 sqm gross retail floorspace we suggest this is treated by the Council as the 'tipping point' above which additional retail floorspace at Euston could begin to significantly change the current role and function of the area and potentially lead to a more significant impact on existing centres. This does not preclude proposals from coming forward for a greater level of retail floorspace. However, in such circumstances the Council should ensure that the impact of the scale of such provision should be thoroughly tested".

Retail and Town Centre Trends

- 2.33 In order to provide a robust evidence base library on retail and town centre issues for this study it is important, in our opinion, to set the context in terms of recent, current and potential future trends in the economy.

Overview

- 2.34 The outbreak of coronavirus (Covid 19) and measures to contain it have had a considerable impact on the UK and global economies, seeing three national lockdowns, and some form of restrictions on economic life for almost 24 months. Over this period, the economy suffered an unprecedented

contraction; 600,000 fewer people were employed and over 9 million employees were furloughed. Consumer demand suffered during this time, given social distancing and low confidence, leading to a big drop in social consumption, especially for recreation, leisure and travel. In addition, investment fell markedly, as waning business confidence and deteriorating financial positions led to the postponement and cancellation of projects.

- 2.35 Exports have also been undermined by a fall in international demand for UK goods and services, as other countries enforce lockdown or social distancing measures to varying degrees. The temporary closure of factories and businesses meant disruptions to supply chains, reverberations of which remain on-going. Since then, a steady recovery in services, manufacturing and construction have all seen the UK's GDP rise above its pre-pandemic level as of November 2021. However, the behavioural shifts due to Omicron concerns weighed on economic activity into the start of 2022. Further into the year, the pace of the rebound remains uncertain and the sustainability at risk given inflationary headwinds.
- 2.36 A number of factors will weigh on the recovery over the coming months. Less likely is the renewal of economic restrictions in the form of a lockdown; however, the emergence of a 'variant of concern' may raise this likelihood in addition to inducing more cautious consumer behaviour. Lingering fears about the virus could prompt such behaviour from households and businesses, fuelling voluntary social distancing.
- 2.37 The success of the Coronavirus Job Retention Scheme ('CJRS') meant that any sharp spike in the unemployment rate did not materialise, at least immediately. Whilst a positive labour market outlook with soaring vacancies should lubricate the wheels of the economic recovery, a slight rise in unemployment may still emerge as redundancy periods are worked through following the CJRS lifting.
- 2.38 Looking beyond the impact of Covid 19, the bigger risk to the economy in the latter part of 2022 and going into 2023 is rising inflation (and wages not able to keep up), along with severe increases in the cost of energy and rising interest rates. As of August 2022, the following forecasts from the Bank of England provide relevant background information for the purposes of this study:
- The Bank of England has voted to increase interest rates at every one of its Monetary Policy Committee meetings in the last 12 months, with rates currently standing at 3%. This is against a backdrop of historically very low interest rates over many years and is starting to have an impact upon the housing market and the affordability of some mortgages. Interest rates are expected to increase further in 2023, Possibly to circa 5%.
 - Inflationary pressures in the United Kingdom and the rest of Europe have intensified significantly in 2022, which largely reflects a near doubling in wholesale gas prices since May 2022, owing to

Russia's restriction of gas supplies to Europe and the risk of further curbs. As this feeds through to retail energy prices, it will exacerbate the fall in real incomes for UK households and further increase UK CPI inflation in the near term. CPI inflation is expected to rise more than forecast, from 9.4% in June 2022 to just over 13% in 2022 Q4, and to remain at very elevated levels throughout much of 2023, before falling to the 2% target two years ahead.

- GDP growth in the United Kingdom is slowing. The latest rise in gas prices has led to another significant deterioration in the outlook for activity in the United Kingdom and the rest of Europe. The United Kingdom is now projected to enter recession from the fourth quarter of this year. Real household post-tax income is projected to fall sharply in 2022 and 2023, while consumption growth turns negative.
- Domestic inflationary pressures are projected to remain strong over the first half of the forecast period. Firms generally report that they expect to increase their selling prices markedly, reflecting the sharp rises in their costs. The labour market has remained tight, with vacancies at historically high levels. As a result, underlying nominal wage growth is expected to be higher than previously expected.
- Inflationary pressures are nevertheless expected to dissipate over time. Global commodity prices are assumed to rise no further, and tradable goods price inflation is expected to fall back, the first signs of which may already be evident. Although the labour market may loosen only slowly in response to falling demand, unemployment is expected to rise from 2023. Domestic inflationary pressures are therefore expected to subside in the second half of the forecast period, as the increasing degree of economic slack and lower headline inflation reduce the pressure on wage growth.

Consumer spending

- 2.39 Household spending rose by 2.7% quarter on quarter in the third quarter of 2021, making the largest contribution to expenditure, following the easing of public health restrictions. Spending on hospitality, travel and leisure all rose over this period. Retail, despite being a star performer during the pandemic, experienced weaker performance over this period of easing restrictions as consumers substituted away from durable goods to services. Experian has forecasted that this substitution from durable goods to services will persist, as inflationary pressures are higher in the former category, as compared to the latter. This will weigh on retail spending growth in the near term.

Retail

- 2.40 Retail sales volumes, despite being an area of economic activity with the swiftest recovery to pre-pandemic levels, has more recently lagged, with volumes falling the most since the third lockdown, in December 2021.
- 2.41 Sales remained elevated through the second half of 2021, though have since tailed off during 2022, as consumers substituted away from durable goods consumption, instead spending more in areas of the economy that had been, up to that point, locked down, i.e. travel and leisure, along with increasing household costs associated with large increases in fuel prices.
- 2.42 Hence, and as corroborated by the latest statistics, the biggest contributor to the most recent decline were non-food stores (includes department, clothing, household goods and other non-food stores). Additionally, sales of automotive fuel have grown, since the ending of work from home guidance in 2021, removing commuting costs for many office-workers, along with increasing fuel costs generally. Signifying its relative strength, online sales have remained high in proportional terms, though this category of goods also saw sales volumes contract.
- 2.43 Looking ahead, spending growth over the rest of 2022 and into the first part of 2023 is expected to weaken as worsening economic headwinds affect consumer fundamentals. The continuation of the Russia-Ukraine conflict is also having impacts across a number of sectors, particularly in fuel/energy costs, and inflationary pressures.
- 2.44 A tight labour market and wage growth that will struggle to keep pace with inflation will place stress on incomes, curbing consumer spending appetite. With inflation now above 10%, along with the rise in interest rates, plus the lifting of the Ofgem energy price cap, will have a greater impact on cost pressures. Against this backdrop, convenience spending will continue to perform relatively well as eating out remains subdued and significant numbers of households continue to work from home.
- 2.45 Prospects for comparison goods remain weak as discretionary spending is curbed but some product areas should buck this trend. For example, heightened residential repair and maintenance activity could provide a temporary boost for related products such as DIY equipment, household goods and furnishings. Also, the shift to greater spending online for both convenience and comparison goods is expected to persist in the near term.
- 2.46 With regards to retail expenditure, it is useful to compare the forecast annual changes in spending per head on convenience and comparison goods from the time of the 2013 retail study and the latest available forecasts from Experian. Table 1 below shows the year-on-year change from Experian's Retail

Planner Briefing Note 10.1⁵ for 2011-2031, which was referenced in the 2013 retail study, and compares this against the latest forecasts from Experian's Retail Planner Briefing Note 19⁶ for the same time period.

- 2.47 Table 2.1 indicates that the latest Experian forecasts are showing a materially lower rate of growth in per capita convenience goods spending: +1.4% up to 2031, compared with +10.9% from the time of the 2013 study.

Table 2.1: forecast year-on-year change in per capita convenience goods spending between 2011 and 2031

Year	Experian Retail Planner Briefing Note 10.1 (% change year-on-year)	Experian Retail Planner Briefing Note 19 (% change year-on-year)
2011	-3.2	0.9
2012	0.1	-4.0
2013	0.1	0.0
2014	0.0	-0.2
2015	0.4	-2.0
2016	0.7	3.8
2017	0.7	0.2
2018	0.8	0.0
2019	0.8	-1.2
2020	0.9	8.7
2021	1.0	-3.7
2022	1.0	-2.0
2023	1.0	0.1
2024	0.9	0.1
2025	0.9	0.1
2026	0.8	0.1
2027	0.8	0.1
2028	0.8	0.1
2029	0.8	0.1
2030	0.8	0.1
2031	0.8	0.1
Change, 2011-2031	+10.9	+1.4

Source: Experian Retail Planner Briefing Notes 10.1 and 19

⁵ September 2012

⁶ January 2022

- 2.48 Table 2.2 undertakes a similar exercise for comparison goods per capita expenditure, using the same Experian Retail Planner Briefing Notes.

Table 2.2: forecast year-on-year change in all per capita comparison goods spending between 2011 and 2031

Year	Experian Retail Planner Briefing Note 10.1 (% change year-on-year)	Experian Retail Planner Briefing Note 19 (% change year-on-year)
2011	0.5	0.7
2012	1.5	0.9
2013	1.8	5.6
2014	2.4	2.3
2015	3.0	6.0
2016	3.0	5.0
2017	2.9	3.9
2018	2.9	1.0
2019	2.9	2.2
2020	2.9	1.6
2021	2.9	1.9
2022	2.9	2.1
2023	2.9	2.8
2024	2.9	2.8
2025	3.0	2.8
2026	2.9	2.8
2027	2.9	2.9
2028	2.9	2.9
2029	2.9	2.9
2030	2.9	2.9
2031	2.9	2.9
Change, 2011-2031	+55.8	+58.9

Source: Experian Retail Planner Briefing Notes 10.1 and 19

- 2.49 The above data shows very little difference between the total comparison goods (per capita) expenditure forecasts referred to in the 2013 study and the latest Experian forecasts. Growth up to 2031 (from 2011 levels) is now forecast to be slightly higher, at +58.9%.
- 2.50 However, as the data in Table 2.3 below shows, when spending on comparison goods via purely internet-based sales is stripped out of the forecasts then the differences are significant. At the time of the 2013 retail study, per capita spending via physical comparison goods stores (including internet-related sales associated with physical stores) was forecast to rise by circa +46.2% up to 2035. However, the latest comparable forecasts published by Experian show that forecast (per capita) expenditure growth up to 2035 will now be much lower at circa +35.1%, with the growth from 2022 onwards also much lower (by around one third) in the latest forecasts (previously +27.8% and now +19.2%).

Table 2.3: forecast year-on-year change in per capita comparison goods spending between 2011 and 2031 (excluding pure internet sales)

Year	Experian Retail Planner Briefing Note 10.1 (% change year-on-year)	Experian Retail Planner Briefing Note 19 (% change year-on-year)
2011	0.1	-0.3
2012	0.4	0.1
2013	0.9	4.9
2014	1.6	1.7
2015	2.2	5.7
2016	2.2	3.4
2017	2.0	1.6
2018	2.1	-0.8
2019	2.2	0.8
2020	2.3	-7.6
2021	2.4	0.5
2022	2.6	5.9
2023	2.8	1.8
2024	2.9	1.8
2025	3.0	1.9
2026	2.0	2.0
2027	2.9	2.1
2028	2.9	2.3
2029	2.9	2.4
2030	2.9	2.4
2031	2.9	2.5
Change, 2015-2035	+46.2	+35.1

Source: Experian Retail Planner Briefing Notes 10.1 and 19. Figures include spending via the internet which is fulfilled via physical stores.

- 2.51 The continued increasing influence of comparison goods shopping via the internet is demonstrated by the figures in Table 2.10 below which show the rise in market share in this channel. At the time of the 2013 retail study, the market share of sales via the internet were forecast to rise from 9.9% in 2012 to 16.1% in 2029. However, the forecast level of growth in market share to 2035 has now significantly increased to circa 23.9% in 2022 and circa 28.6% in 2029.
- 2.52 It is therefore clear from the latest (2022) forecasts that there will be a materially lower amount of available comparison goods expenditure to support in-centre and out-of-centre comparison goods floorspace.

Table 2.4: market share of internet sales for comparison goods shopping, 2012-2029

Year	Experian Retail Planner Briefing Note 10.1	Experian Retail Planner Briefing Note 19
2012	9.9	10.7
2013	10.7	11.4
2014	11.5	11.9
2015	12.2	12.3
2016	12.9	13.7
2017	13.6	15.6
2018	14.3	17.1
2019	14.9	18.2
2020	15.4	25.6
2021	15.8	26.6
2022	16.0	23.9
2023	16.1	24.7
2024	16.0	25.4
2025	16.0	26.1
2026	16.0	26.7
2027	16.0	27.2
2028	16.1	27.6
2029	16.1	28.0

Source: Experian Retail Planner Briefing Notes 10.1 and 19.

3. Recent / Current Research – An Updated Evidence Base

3.1 In order to inform this latest assessment, it will be important to provide appropriate updates to the evidence information surrounding retail, leisure and ‘town centre’ issues associated with the Euston area.

3.2 There are two main areas of updated research data which should be taken into account:

- the recent assessment work which has been undertaken on the proposed redevelopment of Euston station for HS2 and Network Rail train services; and
- updated land use information on retail provision in the surrounding area from Experian GOAD’s regular research.

3.3 Each is explored and analysed in turn below.

HS2 – Campus Retail Integration Study (April 2021)

3.4 The salient content of the 2021 HS2/Network Rail research can be found in the next section of this document.

Local Retail and ‘Town Centre’ Provision

3.5 Within Section 7 of the 2013 Vision, a review of existing retail uses was undertaken within the area immediately surrounding Euston Station. This included the station itself, along with nearby designated centres at Eversholt Street, Chalton Street, Euston Road⁷, Robert Street / Albany Street and Drummond Street. Retail provision along Hampstead Road⁸ was also reviewed although this is not a designed ‘town centre’ in the hierarchy. It should be noted that all of these areas are within the EAP boundary, although there are further defined ‘town centres’ in the immediate surrounding area.

3.6 In order to provide an updated set of evidence base information we have examined the latest land use research collected by Experian GOAD across two contrasting areas of geography.

- the areas covered by the various Experian GOAD land use surveys; and
- at a local focused level, an examination of the Experian GOAD data in order to translate it into the geographic areas covered by the defined ‘town centre’ boundaries in the development plan.

⁷ East of Euston Square, towards St Pancras

⁸ between Drummond Street and Robert Street

Experian GOAD Plan Data

- 3.7 In terms of the survey areas covered by Experian GOAD, the focus will be on **the Euston area**, which covers the railway station itself and also the immediate surrounding area. A copy of the GOAD plan for this area is contained at Appendix I to this report. The latest (August 2021) land use survey results are shown in Table 3.1 below.

Table 3.1: retail land use composition of the Euston area GOAD plan, 2021

Sector	Units			Floorspace (sq m gross)		
	No.	%	National Average (%)	No.	%	National Average (%)
Convenience	12	15.8	10.1	780	10.3	18.8
Comparison	13	17.1	34.2	1654	21.8	38.7
Service	38	50.0	39.3	3939	51.8	25.6
Other	0	0.0	0.0	0	0.0	0.0
Vacant	13	17.1	15.3	1226	16.1	16.2
Total	76	100	100	5,165	100	100

Source: Experian GOAD, 2021

- 3.8 The above data shows that convenience retail and retail service uses dominate the land use and floorspace profile of the area around Euston. Half of all surveyed units (and floorspace) are in the retail service category, with the proportion of convenience goods retailers also five percentage points above the national average. The proportion of comparison goods retailers is around half of the national average, which is to be expected given the function of the local area and the influence of retail facilities in the surrounding area, such as Camden and Tottenham Court Road.
- 3.9 At the time of the most recent Experian GOAD survey, 17% of surveyed units were vacant, which is around two percentage points above the national average (15%). The amount of vacant floorspace is also commensurate with the national average for vacant floorspace in surveyed town centres across the country.
- 3.10 In addition to the level of retail and service use provision in the immediate Euston area, broadly within the EAP boundary, it is also useful to examine the level and type of retail and service provision in the surrounding area. The Experian GOAD land use surveys which are relevant are: Kings Cross, Camden, Tottenham Court Road, and Holborn Brunswick.
- 3.11 The Kings Cross area surveyed by Experian GOAD mainly lies to the east of the EAP boundary, with the area covered by the survey shown on the plan at Appendix II.

Table 3.2: retail land use composition of the Kings Cross area GOAD plan, 2021

Sector	Units			Floorspace (sq m gross)		
	No.	%	National Average (%)	No.	%	National Average (%)
Convenience	26	9.2	10.1	4,041	9.4	18.8
Comparison	99	35.1	34.2	15,905	37.0	38.7
Service	119	42.2	39.3	16,212	37.7	25.6
Other	2	0.7	0.0	84	0.2	0.0
Vacant	36	12.8	15.3	6,735	15.7	16.2
Total	282	100	100	42,977	100	100

Source: Experian GOAD, 2021

3.12 The Camden Town area lies to the north of the EAP area and the main railway station complex. The main retail area is linear in nature and runs along Camden High Street from its junction with Mornington Crescent and Crowndale Road in the south to Chalk Farm Road and Regents Park Road in the north. The Experian GOAD plan showing this area is contained at Appendix III to this report. The retail land use composition of this area is contained in Table 3.3 below.

Table 3.3: retail land use composition of the Camden Town area GOAD plan, 2021

Sector	Units			Floorspace (sq m gross)		
	No.	%	National Average (%)	No.	%	National Average (%)
Convenience	66	10.8	10.1	17,912	18.5	18.8
Comparison	196	31.9	34.2	29,822	30.9	38.7
Service	254	41.4	39.3	29,199	30.2	25.6
Other	4	0.7	0.0	214	0.2	0.0
Vacant	94	15.3	15.3	19,500	20.2	16.2
Total	614	100	100	96,467	100	100

Source: Experian GOAD, 2021

3.13 The Holborn Brunswick area lies immediately to the south of the Euston / EAP area and includes Leigh Street, Marchmont Street, Woburn Place and the Brunswick shopping centre. This area is shown on the Experian GOAD plan contained at Appendix IV to this report. The land use data for this area from the latest Experian GOAD survey is contained in Table 3.4 below.

Table 3.4: retail land use composition of the Holborn Brunswick area GOAD plan, 2021

Sector	Units			Floorspace (sq m gross)		
	No.	%	National Average (%)	No.	%	National Average (%)
Convenience	17	12.6	10.1	5,816	28.8	18.8
Comparison	28	20.7	34.2	3,577	17.7	38.7
Service	65	48.2	39.3	7,265	36.0	25.6
Other	1	0.7	0.0	56	0.3	0.0
Vacant	24	17.8	15.3	3,475	17.2	16.2
Total	135	100	100	20,188	100	100

Source: Experian GOAD, 2021

3.14 We now turn to a finer grained analysis based upon the defined centres in the local area and those areas covered by the 2013 vision document.

Eversholt Street

3.15 This neighbourhood centre lies immediately to the east of Euston station, with the defined frontages along the eastern side of Eversholt Street between Phoenix Road and Grafton Place. The most recent survey indicates that the following land uses are present:

- two public houses
- three adult shops
- Mail Boxes business services
- three vacancies / units under alteration
- three office units
- two restaurants
- pharmacy
- hair salon
- café
- grocery store
- amusement arcade

3.16 In total, the survey data from Experian GOAD suggests 1,880sq m gross ground floor footprint. This can be broken down into 60sq m of convenience floorspace, 570sq m comparison goods, 870sq m retail service floorspace (including public houses), 190sq m of office floorspace and 170sq m which was vacant or under alternation.

Chalton Street

3.17 Chalton Street runs parallel to the east of Eversholt Street.

- Deli
- Three hair salons
- Six restaurants / cafés
- Pharmacy
- Estate agent
- Newsagent
- health and beauty goods store
- Travel agent
- Art gallery
- Grocery store
- Office one vacant unit
- Dental surgery

3.18 Excluding the units not covered by the most recent Experian GOAD survey, the gross ground floor area covered by this centre extends to 1,740sq m (80sq m convenience, 500sq m comparison, 1,040sq m retail service uses, 70sq m offices and 50sq m of vacant floorspace).

Euston Road

3.19 The defined boundary of Euston Road centre lies on both sides of the highway, immediately to the south-eastern corner of the railway station complex. Based upon the latest survey of the local area, the following land uses are present in the defined centre boundary:

- Café
- Travel agent
- Dental surgery
- sandwich shop
- office

- restaurant
- bank
- vacant unit
- Three hotels
- Three public houses
- Youth hostel
- Bureau de change

3.20 In total there is 6,730sq m of gross ground floor floorspace within the defined centre, with a considerable proportion of this space being devoted to hotel uses. 2,310sq m of this space is also devoted to service uses (including mainly food and beverage uses), with no provision for convenience or comparison goods retail outlets.

Robert Street / Albany Street

3.21 The Robert Street / Albany Street area lies in the western part of the EAP area, within part of a post-war housing estate. The defined boundary of the centre contains a small unit of units including: a hair salon, take-aways, convenience stores, a bakery, an off-licence, dry cleaning outlet, a pharmacy, a bookmakers and a small number of specialist comparison goods retailers. This centre is not covered by Experian GOAD's regular land use surveys.

Drummond Street

3.22 Drummond Street is also situated to the west of the EAP area and the main railway station area. The defined centre boundary encompasses properties on both sides of Drummond Street, either side of North Gower Street. There is not an up-to-date land use survey of this area from Experian GOAD, but the suite of land uses along Drummond Street includes:

- pharmacy
- health and beauty outlets
- various take-aways and restaurants
- a public house
- a Costcutter convenience store, along with other independent convenience / grocery stores
- dry cleaners

Hampstead Road

- 3.23 Hampstead Road is not a designated centre in the development plan hierarchy but contains a small collection of retail and other main town centre uses between Drummond Street and Robert Street. Uses within this area include a Sainsburys Local convenience store, a number of other grocery and convenience stores, estate agents, plus a restaurant / take-away.

4. Key Issues

Introduction

4.1 In order to provide an update to the previous evidence base for the EAP and to inform the review of the EAP, the following matters are considered by this section:

- an updated assessment of retail expenditure capacity for the local area;
- an updated impact assessment based upon the updated assessment of retail expenditure capacity and the latest proposals for the redevelopment of Euston railway station; and
- an analysis of planning policy issues.

4.2 Each of the above issues is discussed in turn below.

Updated Retail and Leisure Need Forecasts

4.3 As noted earlier in this report, the 2013 vision document examined the retail expenditure potential of the Euston area split between users of the railway station complex and the local resident / workforce population. The expenditure potential forecasts were not translated into floorspace equivalents due to the broad nature of the users of the local area (i.e. local residents, workforce, rail users/commuters and tourists).

4.4 The previous assessment considers the current level of potential expenditure capacity across the different (railway station and local resident / workforce groups) and then forecast potential levels of growth based upon the increases in local residential and workforce at the time of the 2013 study. Those forecasts have been summarised earlier in this document.

4.5 In order to update the previous forecasts, the following data and research has been examined:

- The 'Campus Retail Integration Study' prepared by Mace and Dragados for HS2;
- the content of the adopted EAP; and
- the latest population, retail and leisure expenditure, and economic forecasts provided by Experian.

4.6 In relation to the redevelopment of the railway station complex itself, the 2013 assessment utilised the latest projections at that time (from TfL and Network Rail) in relation to projected passenger numbers and then applied the results of the on-street survey (conducted for the 2013 study) to provide a split between the reasons for visiting and using the Euston station area. This enabled a subsequent

assessment of the potential expenditure by trip / use type in order to inform the scale and type of land uses which could be provided. This assessment informed the content of the EAP.

4.7 Subsequent to these events, research and assessment work has continued on the redevelopment of the railway station complex and this is encapsulated in the 2021 research assessment conducted for HS2/Network Rail. This research provides an updated assessment of the projected number of passenger numbers for the redevelopment of the station complex, for both 'standard' Network Rail and HS2 services. It also provides an estimate of the retail expenditure capacity based on this updated assessment of visitor/user numbers.

4.8 For the purposes of this updated assessment we have taken the approach whereby the April HS2 forecasts should supersede the relevant part of the previous assessment and therefore the following factors are important to note:

- It is estimated that there will be 107.6 million passengers travelling through the redeveloped Euston station complex by 2041, split equally between HS2 and Network Rail services. This is considerably higher, in terms of passenger numbers, than was adopted for the 2013 vision document, albeit that was based upon 2010 / 2011 data and was not projected forward.
- The latest HS2 research has provided an updated split on the types of user for both HS2 and Network Rail services. This is shown in Table 4.1 below⁹. It shows that, in general terms, the forecast proportion of commuter and business uses travelling through the station will be higher than previously assumed, with a consequential drop in leisure users.

Table 4.1: comparison between split of user trips through Euston station (2013 & 2021 research)

Type	2021 Research			2013
	HS2	Network Rail	Blended %	Previous (2013)
Commuter	19%	28%	24%	79%
Business	44%	44%	44%	
Leisure	37%	28%	33%	21%

- The 2021 HS2 research indicates that there is a forecast current £67m spend potential within the station complex from workers, which will rise to £72m (presumably by 2041). This is lower than the £223.9m forecast in the 2013 vision document although there are two points to note: (1) whilst the in-street survey commissioned to inform the 2013 vision document was undertaken inside the railway station complex, there is a reasonable possibility that some of the 'average spend' will be

⁹ the categorisations between the 2013 and 2021 research do not exactly match and therefore we have made the following assumptions: it has been assumed that the local resident % in the 2013 assessment should be aligned to the leisure category in the 2021 research; the 'worker' and 'student' categories in the 2013 assessment have been combined and compared against the commuter and business categories in the 2021 HS2 assessment.

related to facilities outside of the main station complex¹⁰; (2) the lower level of potential expenditure would appear to derive from a more focused assessment of the amount of expenditure and types of trip associated with the station complex itself.

- As a consequence of the above, we would recommend that the 2021 HS2 research should be adopted as part of the basis for assessing future retail and leisure floorspace requirements within the railway station element of the EAP area.

4.9 Based upon the above, the April 2021 HS2 research assessment recommends the following breakdown of retail and food/beverage floorspace within the redeveloped station complex:

Table 4.2: retail, food/beverage and service floorspace allocation in redeveloped Euston station complex (square metres)

Type of Space	HS2	Network Rail	Total
Essential Retail	3560	3265	6825
Retail	680	615	1295
Supermarket / convenience	715	655	1370
Grab & go (food and beverage)	780	720	1500
Coffee	840	795	1635
Fast food	545	480	1025
Key Retail	2325	1975	4300
Retail	875	790	1665
Pub / bar	990	780	1770
Services	460	405	865
Other Retail	1525	1275	2800
Retail	390	355	745
Restaurant	825	650	1475
Services	310	270	580
TOTAL	7410	6515	13925

Notes: all data given in sq m.

4.10 The above data can be summarised into the following land use categories:

- Retail (Class E(a): 5,075sq m
- Café / restaurant (Class E(b)): 3,110sq m
- Sui generis (take-away / pub / bar / etc): 4,295sq m
- Service uses (Class E(c)): 1,445sq m

¹⁰ even though the results associated with the in-street surveys outside of the station complex were excluded from that particular (2013) assessment.

- 4.11 In addition to the floorspace potential of the redeveloped station complex itself, the planned residential growth in the EAP area will provide a growing level of resident population. Within the 2013 vision document identified three sources of expenditure: (A) the existing local resident population (and natural growth associated with this group; (B) the local workforce; and (C) retail expenditure associated with planned future development.
- 4.12 In relation to the local existing resident population, the analysis on page 85 of the 2013 vision indicated that the local population would rise from 21,982 people in 2013 to 26,981 in 2028. Taking into account forecast growth of retail and food/beverage expenditure, the 2013 assessment forecast that convenience goods expenditure would rise by about one quarter, from £33.6m to £44.7m between 2013 and 2028, with comparison goods expenditure rising from £45.5m to £80.1m over the same period. Expenditure on food and beverages was forecast to rise from £34.5m in 2013 to £59.4m in 2028.
- 4.13 The 2013 assessment has been updated using the following inputs and assumptions:
- The timeframe for the analysis has been set between 2019 and 2041. This is based upon the latest population and per capita expenditure data provided by Experian being set at 2019 and the most important future dates being 2031 (the current end date for the adopted EAP) and 2041 (the end date for the recently adopted new London Plan).
 - The study area for the assessment remains the same – i.e. based upon postcode sectors NW1 1/2/3/4. Whilst not exactly the same as the adopted EAP boundary, this (postcode sector boundary) area provides a reasonably good fit in terms of the geographic boundary of the EAP.
 - New population data for the study area has been provided by Experian.
 - We have also sought new per capita expenditure from Experian for the convenience and comparison retail goods categories and also expenditure on food and beverage purchases at cafes, restaurants, pubs/bars and take-aways. The base year for this data is 2019 and this has been projected forward using forecasts contained within Experian's Retail Planner Briefing Note 19¹¹. For convenience and comparison goods, expenditure on special forms of trading (i.e. internet sales)¹² has been excluded from the analysis.

¹¹ January 2022

¹² expenditure has been excluded from the analysis based upon purely internet sales – i.e. sales which are fulfilled via stock in physical stores remains within the analysis

4.14 Based upon the above data inputs and assumptions, our expenditure capacity analysis is contained at Appendix V and is structured in the following manner:

- Table 1: resident population levels across the four postcode sector areas in the study area.
- Table 2: per capita convenience goods expenditure levels in each part of the study area.
- Table 3: per capita comparison goods expenditure levels in each part of the study area.
- Table 4: per capita expenditure on food and beverage purchases across each part of the study area.
- Table 5: total convenience retail goods expenditure within the study area
- Table 6: total comparison retail goods expenditure within the study area
- Table 7: total expenditure on food and beverage purchases within the study area

4.15 The analysis contained at Appendix V can be summarised as follows (including Table 4.3 below):

- There is a modest amount of growth associated with convenience goods expenditure: £3.9m from 2022-2031 and £8.5m from 2022-2041.
- Growth in comparison goods expenditure is much higher at +33% between 2022-2031 and +88% between 2022-2041.
- Growth in expenditure on food and beverage purchases from cafes, restaurants, pubs/bars and take-aways is even higher, at +43% between 2022-2031 and +109% between 2022-2041.

Table 4.3: growth in retail and food/beverage expenditure in Euston study area, 2022-2031-2041

	Year			Change, 2022-2031		Change, 2022-2041	
	2022	2031	2041	No.	%	No.	%
Convenience Goods	£43.0	£46.9	£51.4	£3.9	9%	£8.5	20%
Comparison Goods	£35.7	£47.5	£67.3	£11.7	33%	£31.6	88%
Food and Beverage Purchases	£43.1	£61.7	£90.3	£18.6	43%	£47.2	109%

4.16 Based upon these levels of expenditure growth, the total potential floorspace equivalents could be:

- Convenience goods: assuming an indicative national grocery retailer convenience goods floorspace density of £12,000/sq m, then the forecast growth in expenditure between 2022 and 2041 would equate to 700sq m net sales area of net additional convenience goods floorspace.
- Comparison goods: assuming an indicative sales density of £6,000/sq m then the forecast growth in expenditure generated by local residents would, in totality, support circa 5,250sq m of net sales area.

- Food and beverage floorspace: if it were to be assumed that new modern food and beverage floorspace had a sales density of £6,000/sq m, then the growth in expenditure between 2022 and 2041 would, in totality, support circa 7,800sq m of floorspace.
- It is important to note, however, that the above figures are the total amount of floorspace which could be supported by the growth in expenditure between 2022 and 2041. The 2013 vision document makes the important point that the local population travel further afield for a large proportion of shopping and other services. Therefore, it is likely that the above floorspace amounts are unrealistic in terms of potential provision in the EAP area, for the following reasons:
 - For convenience goods shopping, the household survey commissioned to inform the 2013 retail study indicated that, in terms of main food shopping, stores in the EAP area had around a 0.5% market share for first choice trips and a 1% share of second choice trips. Convenience stores in the EAP area have a circa 2% market share of top-up food shopping trips.
 - As documented in the 2013 vision document, the EAP does not have a measurable market share for comparison goods shopping trips. There are a limited amount of comparison goods stores in the EAP area, although the lack of a measurable market share can be explained via a number of factors, including: (A) the considerable level of provision in the surrounding areas such as Camden Town and Tottenham Court Road; and (B) the specialist nature of the comparison goods shops which do exist in the EAP area.
 - A similar situation exists for food and beverage purchases in the local area. According to the household survey commissioned for the 2013 retail study, and also used to inform the 2013 vision document, the market share of food and beverage outlets in the Euston area was no greater than 1%.

4.17 It is therefore interesting to assess how the above market shares translate into available expenditure for convenience goods and food/beverage purchases. This is shown in Table 4.4 below and uses the same broad format as Table 4.3 above. It indicates that, based upon previously forecast market share levels, the local population provides a small contribution convenience goods store turnover levels, between £0.28m (2022) and £0.33m (2041), alongside £0.43m (2022) and £0.90m (2041) for food/beverage outlets. Based upon these levels of locally generated 'available' expenditure, there is materially higher growth potential for food/beverage purchases. Table 4.4 below also considers what an increase in local market share levels could look like in terms of an increase in 'available' expenditure. A ten-fold increase in market share has been modelled, which is considered to be an 'optimistic' scenario and at the top-end of expectations. This would provide £2.79m of current (2022) convenience goods expenditure, rising to £3.34m by 2041. That would provide an additional £2.5m-£3.0m of

convenience goods expenditure, which would broadly equate¹³ to 250sq m of net additional convenience goods sales floorspace. For food and beverage expenditure, a ten-fold increase in market share could provide an additional £8m of expenditure for the local area by 2041. That would equivalent to circa 8,000sq m of net additional floorspace¹⁴.

Table 4.4: potential locally-generated 'available' convenience goods and food/beverage expenditure – comparison between previously forecast (2013) market share levels and a ten-fold increase in market share

	Year			Change, 2022-2031		Change, 2022-2041	
	2022	2031	2041	No.	%	No.	%
EXISTING MARKET SHARE							
Convenience Goods	£0.28	£0.30	£0.33	£0.03		£0.06	
Comparison Goods							
Food and Beverage Purchases	£0.43	£0.62	£0.90	£0.19		£0.47	
TEN-FOLD INCREASE IN MARKET SHARE							
Convenience Goods	£2.79	£3.05	£3.34	£0.26		£0.55	
Comparison Goods							
Food and Beverage Purchases	£4.31	£6.17	£9.03	£1.86		£4.72	

- 4.18 At the time of producing the 2013 vision document there was no certainty over the exact level of future development supportable in the EAP area. The number of new dwellings was estimated to be between 4,929 and 5,578, whilst the number of new jobs was estimated to be between 9,143 and 9,188. These assumptions led to a forecast level of expenditure of between £86.6m and £98.0m for the local population and £27.7m for the growing local workforce.
- 4.19 Since the completion of the 2013 vision document the EAP has been adopted and, in addition, further development area capacity work has been undertaken and provided to AY in November 2022. number of additional homes is currently planned to be 2,465, with the number of new jobs 17,411.
- 4.20 Based upon these updated figures, Tables 4.5 and 4.6 below compare the previous 2013 forecasts against the updated (2022) forecasts. In doing so, we adopt the same average workforce spend profile as the 2013 assessment, but incorporate updated data on per capita expenditure for convenience and comparison retail goods and food/beverage items.

¹³ based on an indicative sales density of £12,000/sq m

¹⁴ based on an indicative sales density of £6,000/sq m

Table 4.5: potential retail and food/beverage space of additional local resident population (2013 assessment and updated 2022 assessment)

New Residential Units	Population	Convenience Goods (£m)	Comparison Goods (£m)	Food/Beverage (£m)	Total Expenditure (£m)
2013 Assessment					
4,929	10,499	£23.3	£41.9	£21.4	£86.6
5,578	11,881	£26.4	£47.4	£24.3	£98.0
Updated 2022 Assessment					
2,465	5,250	£9.8	£8.2	£10.2	£28.2
3,800	8,094	£15.2	£12.6	£15.7	£43.5

Table 4.6: potential retail and food/beverage spend of additional local Euston workforce

Additional Workforce	Spend per annum (£)	Total Spend (£m)
17,411	£3,016	£52.5

- 4.21 Based upon the above analysis, the amount of expenditure on retail goods and food/beverage purchases associated with the growth in the local residential population has dropped by more than 50% when compared with the levels forecast in 2013. Clearly this comparison of potential expenditure levels needs to be put into context as the 2013 assessment was based upon potential growth levels at that time and was not based upon the contents of a formally adopted development plan document or the latest more detailed development site capacity work.
- 4.22 The contents of Table 4.5 suggest that, based upon previously forecast market share levels, the growth in the local residential population in the Euston area would not provide, on its own, a significant increase in 'available' expenditure capacity for convenience goods or food/beverage purchases. If local market share levels were to increase then this would potentially add additional (locally generated) expenditure capacity. If the same ten-fold increase in market share was to be assumed then this would generate an additional £0.64m of convenience goods expenditure and £1.02m of food/beverage expenditure. Again, this would not be a substantial increase but nevertheless demonstrates the potential of the local area to support additional floorspace associated with a growing local resident population.
- 4.23 However, it should be noted that any potential increases in local market share for any retail or food/beverage facilities in the Euston area will be dependent upon the scale and quality of new provision and how it relates to both existing residential and workspace areas and also planned new residential and employment land use growth areas. In other words, any growth in market share cannot be automatically assumed and will be dependent upon the specifics of individual allocations and proposals.

- 4.24 In relation to the additional retail and food/beverage expenditure associated with the growing local workforce, it should be noted that this spend is likely to be split between facilities within the station complex and also the surrounding area.
- 4.25 In relation to the future opportunity for retail and food/beverage floorspace in the Euston area, the starting point for this updated analysis is to acknowledge a number of factors:
- As noted earlier in this document, the evidence base underpinning the adopted EAP, contained within the 2013 vision document, did not provide a specific prediction regarding the expenditure and equivalent floorspace capacity for the Euston area. An indication was provided regarding floorspace potential associated with the latent demand for floorspace without any major change in the land use profile of the local area, but this did not include the additional expenditure associated with: (A) an increased level of residential property via a substantial increase in house-building; (B) an increased level of the local workforce via a substantial increase in the amount of workspace in the local area; and (C) the additional expenditure opportunities associated with the redevelopment of the Euston station complex.
 - It should also be noted that the levels of estimated growth in expenditure across the various categories/themes may well overlap, and this is a further reason for not being able to provide a single precise figure for floorspace capacity in the local area. For example, the estimated spending power of the local workforce may well also make a contribution to the retail floorspace capacity which is being assumed for the HS2/Network Rail redevelopment of Euston station.
 - Finally, it is important to note that the existing allocation in the EAP is for 20,000sq m of new and re-provided retail floorspace (with 50% of this total retail shops¹⁵ and remainder within service and food/beverage uses¹⁶). Therefore, not all of this allocation should be assumed to be net additional floorspace. The 2013 vision document indicated that the current floorspace within the station complex is circa 3,550sq m which would suggest that the net additional floorspace would be circa 16,500sq m gross.
- 4.26 Bearing in mind the above, a comparison between the existing EAP allocation and the latest HS2/Network Rail research would suggest that the net additional floorspace in the redeveloped station complex will be circa 10,375sq m. This is broadly 60% of the net additional floorspace allocation allowed for under the existing EAP policy, leaving, based upon the adopted policy, circa 6,000sq m to be provided outside of the station.

¹⁵ former Class A1 land use category, now Class E(a)

¹⁶ former A2/3/4/5 land use categories, now Classes E(b) and E(c) plus sui generis

4.27 Bearing in mind the limitations outlined above in terms of the overlapping nature of some of the pots of expenditure and how this is used to support local facilities, the provision of a net additional floorspace of circa 6,000sq m across all retail, service and food/beverage categories outside of the station complex, does not appear to sit uncomfortably with the level of additional expenditure which can be generated by the growing local resident population and workforce (when potential increases in market share are taken into account). Therefore, we do not consider that there is any available significant evidence to suggest that the 20,000sq m floorspace allocation in Strategic Principle EAP1 needs to be amended in any update to the EAP document.

4.28 With regards to the type of new provision, the current EAP allocation seeks broadly half of new and re-provided floorspace to be retail (i.e. Class E(a), or former Class A1) with the remainder in Classes E(b), E(c) and sui generis service and food/beverage use (i.e. former Classes A2/3/4/5). When deciding whether this remains an appropriate balance, we consider that the following factors need to be taken into account:

- The most recent HS2/Network Rail research indicates that around one third (36%) of the floorspace provision within the redeveloped station should be Class E(a) retail. This is clearly a response to customer requirements and, no doubt, experience from other railway station development schemes elsewhere and places the greater emphasis on food and beverage provision.
- The HS2/Network Rail approach outlined above is also supported by the proportions of forecast expenditure growth in the local area and also the lack of opportunity for certain types of retail (i.e. comparison goods retail). In particular, there is forecast to be a higher level of growth in expenditure in the food and beverage sector than the convenience goods sector.
- There is also the issue of the type of floorspace which is required to service the users of the redeveloped station complex and the surrounding area. Within the station complex itself, the clear focus will be on food and beverage facilities and this is likely to be more than the 50% of non-Class E(a) accounted for in the existing EAP allocation. The balance might be slightly different in the surrounding area as convenience goods provision (i.e. top-up food shopping) and service uses become more important to the local resident population.
- Finally, there is also the issue of the changing nature of town centre land use profiles in recent years. As will be discussed further in the next section of this report, and also discussed earlier in Section 3, there has been a shift away from retail uses being the mainstay of underpinning town centre health.

4.29 In light of the above, there is a reasonable case for removing / revising the 50% guide for Class E(a)¹⁷ retail floorspace provision in Strategic Principle EAP1. It now be no longer required in terms of the type and scale of provision which is required in the local area, although, that said, there may be a stronger case for a more varied level of provision outside of the main station complex (in order the meet the day to day requirements of the local residential and workforce population). Therefore, it may well be the case that a varied approach in an update to EAP1 is required, which: (A) takes a more relaxed approach to the balance of land uses with the redevelopment of the station complex; and (B) takes a more specific and focused approach for the surrounding area to ensure a more balanced set of uses is available for the local residential and workforce population.

4.30 In relation to the location of provision, we do not consider that there is any material reason why there should be a change in the general approach in the adopted EAP. In particular:

- It remains important that the majority of new and replacement provision is provided around the redeveloped station complex. This will be important in terms of making the new HS2/Network Rail station attractive to users, notwithstanding that it is already to focus for most of retail, service and food/beverage provision in the local area.
- Depending upon how the existing spatial strategy allocations in the current EAP are retained / adapted, it will also be important for a modest amount of provision to be provided within the new residential-led mixed use neighbourhoods. Assuming that no new defined 'town centres' are planned for, we do not recommend such a course of action bearing in mind the spatial distribution of existing defined 'town centres' in the local area, this type of provision should be limited in order that it does not significantly impact upon the health of, and existing investment within, existing defined centres.
- Finally, outside of the redevelopment of the main station complex, the first port of call for providing net additional and improved replacement floorspace should be within or on the edge of existing defined 'town centres'.

Assumptions

4.31 When making the above forecasts, it has been assumed that the retail, service and food/beverage floorspace within the redeveloped station complex is generally confined to users of the station itself and will not be a day-to-day (specific trip) resource for the local resident and workforce population.

¹⁷ former Class A1

That said, this area of provision could be used by the local resident / workforce population insofar as they use the redeveloped station complex for local or national rail journeys.

- 4.32 It should also be noted that some users of the redeveloped railway station complex may also use facilities in the surrounding area, thus providing further expenditure capacity support.

Impact Assessment

- 4.33 Within the 2013 vision document, a high-level impact assessment for new retail floorspace was provided. This was based upon the assumption of 20,000sq m of new floorspace and adopted the worst-case view that all of the 20,000sq m of floorspace was net additional. It concentrated upon various comparison goods floorspace scenarios which, due the passage of time, and also due to the lower level of influence of comparison goods, may need to be amended in order to take into account the latest floorspace capacity assessments for the redeveloped station complex and changes in the baseline expenditure data.

- 4.34 In order to update our previous impact assessment the following scenarios have been tested:

- Updated 2013 assessment. A useful starting point for the updated impact assessment is to adopt the same proposed (Euston) floorspace assumptions as the 2013 assessment and apply these to the updated evidence base data (see below). This enables an understanding of how impact levels may (or may not) have changed over the past several years as a consequence of changing economic forecasts and internet shopping levels.
- New impact Scenario A. Following an updated version of the 2013 assessment, we have undertaken two further impact assessments with alternative levels of retail and food/beverage floorspace. The first, in Scenario A, continues to adhere to the EAP allocation of 20,000sq m and 50% of this space being Class E(a) retail floorspace, but acknowledges that not all of the 10,000sq m of retail space will be comparison goods floorspace. This takes it from the recent work undertaken for the Euston station redevelopment which acknowledges that part of the retail floorspace will comprise convenience goods sales. Therefore, the following has been assumed for the purposes of this scenario:
 - 10,000sq m gross Class E(a) retail floorspace, split between 7,000sq m comparison goods retail and 3,000sq m convenience goods retail.
 - 10,000sq m gross of other floorspace (including Class E sui generis food and beverage floorspace), split between 8,000sq m food/beverage and 2,000sq m service (and other main town centre land use) floorspace.

- New impact Scenario B. The second new scenario, Scenario B, diverts from the EAP allocation and previous impact assessment assumptions and assumes a smaller amount of retail (Class E(a)) floorspace and a varied amount of other Class E and sui generis floorspace (food and beverage), which is again influenced by the work recently undertaken for the Euston station redevelopment. The following has been assumed:
 - 7,000sq m of Class E(a) retail floorspace, including 5,000sq m of comparison goods floorspace and 2,500sq m of convenience goods floorspace, plus 12,500sq m of other floorspace (including 9,500sq m of food and beverage floorspace and 3,000sq m of service and other main town centre land use floorspace).

4.35 In order to undertake the scenario updated impact scenarios outlined above, the following data inputs and assumptions have been utilised:

- Focus for the assessment. In line with the 2013 assessment, the focus for the assessment of likely impact has been on new comparison goods floorspace within the EAP area. Whilst an allowance for convenience goods floorspace provision has been made, this is considered to be a minority part of the proposed Class E(a) retail floorspace.
- Food and beverage floorspace. The 2013 study acknowledged that an element of the 20,000sq m EAP allocation would be utilised for food/beverage floorspace (Class A3/4/5 at that time) although an impact assessment was not provided. Given the potentially growing allowance for this type of use, we have expanded our impact assessment and this is dealt with later in this section.
- Commitments. For the purposes of this assessment, it has been assumed that the commitments contained within the 2013 impact assessment remain valid. It is likely that some of these have been implemented over the past several years although given that we continue to use the previous household survey results, it remains appropriate for these schemes to be treated as commitments as they will not have been taken into account in the baseline market share data.
- Trade draw and trade diversion. We have retained the same trade draw and trade diversion assumptions as the 2013 assessment.
- Population and expenditure. In order to provide an up-to-date assessment, we have utilised new population and per capita retail expenditure data from Experian, for each of the study area zones. The previous assessment utilised base 2011 retail expenditure and this has now been superseded by the latest data from Experian which uses a 2020 base year. Per capita retail expenditure data has been projected forward across the assessment period using the latest forecasts contained within Experian's Retail Planner Briefing Note 19 (2022).

- Net to gross floorspace ratios. In line with the previous assessment, a net to gross ratio of 80% has been used for comparison goods floorspace.

4.36 The results of the three updated impact assessment scenarios, for the main nearby centres, are summarised in Table 4.7 below. They have been provided alongside the results of the 2013 impact assessment for ease of reference.

Table 4.7: updated impact assessment for comparison goods floorspace at Euston, impact on 2028 turnover levels

	2013 Scenario 4 Impact (%)	Updated 2013 Scenario 4 Impact (%)	2022 Assessment – Scenario A (%)	2022 Assessment – Scenario B (%)
West End	0.0%	-0.1%	-0.0%	-0.0%
Tottenham Court Road	-0.5%	-0.5%	-0.3%	-0.3%
Camden Town	-0.1%	-0.2%	-0.1%	-0.1%
Kings Cross	-2.0%	-1.9%	-1.1%	-0.9%
Kentish Town	-4.3%	-5.3%	-3.3%	-2.6%

4.37 Based upon the above data, the two key 'headline' issues for the various impact scenarios are as follows:

- Applying the same floorspace and trade draw/diversion estimates as Scenario No.4 in the 2013 assessment provides for both slightly higher and lower levels of impact on potential 2028 turnover levels for surrounding areas. For example, the impact on Kings Cross is 0.1% lower at -1.9%, whilst the impact on West End, Camden Town and Kentish Town is slightly higher at between +0.1% and +1.0%. (with the highest increase being +1.0% for Kentish Town). These differences arise as a consequence of changing levels of available comparison goods expenditure which, in turn, influence pre-impact store turnover levels. An increase in the level of negative proportionate impact in this particular scenario is caused by a slightly lower level of turnover. The main cause of this comparably lower is lower (than previous) economic growth forecasts.
- The updated impact assessments, which utilise lower levels of comparison goods floorspace, as outlined above, unsurprisingly show lower levels of direct impact. In general terms, the levels of impact are between 40% to 50% lower than the updated 2013 impact assessment.

4.38 Within the 2013 impact assessment, it was concluded that the small direct impacts upon West End, Tottenham Court Road and Camden Town were not a cause for concern, whilst the small level of impact on Kings Cross took into account both the substantial planned growth in that area and the fact that it

was not a defined district centre (leading to a situation where no specific areas of concern were raised). The high level impact assessment on Kentish Town attracted more focus, due to the level of cumulative impact and lower comparison goods turnover of that centre (at the time of the 2013 assessment). This ultimately led to two recommendations being made: first, that more detailed assessments would be required as and when specific proposals came forward; and, second, a subsequent addendum note indicated that a gross (A1-A5) retail floorspace¹⁸ of 20,000sq m should be seen as a 'tipping point' in order to avoid Euston becoming a shopping destination in its own right.

4.39 The updated impact assessments outlined above does not fundamentally change the previous advice, although the lower level of comparison goods floorspace, influenced by the work being undertaken for the Euston station redevelopment, do not raise any new or heightened concerns over town centre health.

4.40 In addition to the updated assessment of comparison goods floorspace impact, we have also undertaken an assessment of the potential direct impacts associated with the provision of food/beverage floorspace with the EAP area (split between the Euston station redevelopment and other parts of the EAP area). The likely provision of replacement and net additional food and beverage floorspace has always been an assumption the EAP main town centre land use strategy and given that there is potential for this particular land use to form a reasonably significant part of the overall main town centre land use mix, we consider it useful to assess potential impact levels. Taking into account the impact scenarios outlined above, the following data inputs and assumptions have been utilised:

- Focus of impact assessment. Our assessment has concentrated upon solus impact of new and replacement food and beverage floorspace in the EAP area, using the two new scenarios (A & B) outlined above. The assessment is essentially 'worse case' as it includes all food and beverage floorspace in each scenario, whether it is new or replacement of existing. The focus of the assessment is the same as the comparison goods assessment: West End, Camden Town, Kentish Town, Kings Cross, Tottenham Court Road.
- Population and per capita expenditure data. In order to match the comparison goods assessment, we have adopted new population data for each of the study area zones and obtained per capita expenditure data from Experian for food and beverage expenditure in cafes, restaurants, take-aways and drinking establishments. The base date for the new Experian data is 2020 and this has been projected forward using forecasts in Experian's Retail Planner Briefing Note 19 (2022). For the purposes of assessing impact, we have set the design year at 2028.

¹⁸ now part of Class E and sui generis uses

- Turnover of proposed food and beverage floorspace. In order to estimate the total turnover of the new and replacement food and beverage floorspace, we have adopted a sales density of £5,000/sq m. Limited detailed research information exists for food and beverage average store turnover / sales density levels, although research undertaken by AY a couple of years ago for a basket of national multiple F&B businesses suggested a sales density range of between £3,000/sq m and £4,000/sq m. Using this as a guide, we have factored in the Central London location of the EAP area and also the likely high levels of pedestrian footfall in the area. As a consequence, we have adopted an average density of £4,500/sq m for all new and replacement floorspace. When applying this turnover to the impact assessment, we have, like the retail floorspace assessment, taken into account the likelihood that a fair proportion of turnover will comprise inflow of expenditure into the study area. In order to estimate the pre-impact turnover of existing facilities we have adopted the same inflow assumptions as the comparison goods assessment. In relation expenditure inflow associated with new / replacement F&B floorspace in the EAP area, we have assumed that 25% of turnover derives from residents of the study area¹⁹, 25% of turnover which comprises expenditure inflow which is already spent in the local area, with the remaining 50% comprising expenditure inflow which is not currently spent in businesses in the study area. As a consequence, 50% of the turnover of the proposal has been included in the impact assessment²⁰.
- Pattern of trade diversion. Our forecast pattern of trade diversion has taken into account a number of factors, including: the type and offer of the likely food and beverage floorspace within and adjacent to the redeveloped station complex, food and beverage visiting rates/patterns from the household survey used to inform the 2013 assessment, plus the location and offer of competing facilities.
- Kings Cross area. It should be noted that the baseline data used to assess patterns of usage of food and beverage facilities prior to the redevelopment of part of the Kings Cross area. Within the comparison goods assessment, various stages of development were taken into account as commitments with a view to boosting the turnover of the Kings Cross area for the purposes of the cumulative impact assessment. For the purposes of the food and beverage assessment, we have also taken into account the potential for this recent new development to boost the food and beverage expenditure directed towards the Kings Cross area and have increased the turnover of this area by a multiple of 2.5 (and correspondingly removed an element of turnover from nearby defined 'town centres' in order to allow for this cumulative impact).

¹⁹ which matches the assumption used for the comparison goods assessment.

²⁰ which is higher than the 25% of turnover included in the comparison goods assessment.

4.41 Based upon the above assumptions and data inputs, the results of our two impact assessment scenarios are outlined in Tables 4.8 and 4.9 below. Table 4.8 shows the cumulative impact on existing facilities of new and replacement F&B floorspace in the EAP area alongside the new floorspace in the Kings Cross area. Table 4.9 focuses solely on the solus impact of the EAP F&B provision.

Table 4.8: cumulative impact assessment for food and beverage floorspace at Euston (plus Kings Cross), impact on 2028 turnover levels

	2022 Assessment – Scenario A (%)	2022 Assessment – Scenario B (%)
Camden Town	-4.7%	-4.9%
Kentish Town	-3.6%	-3.8%
Kings Cross	+133.4%	+130.4%
Tottenham Court Road	-2.5%	-2.6%
West End	-0.2%	-0.3%

Table 4.9: solus impact assessment for food and beverage floorspace at Euston, impact on 2028 turnover levels

	2022 Assessment – Scenario A (%)	2022 Assessment – Scenario B (%)
Camden Town	-1.1%	-1.3%
Kentish Town	-0.9%	-1.1%
Kings Cross	-6.4%	-7.6%
Tottenham Court Road	-1.0%	-1.2%
West End	-0.1%	-0.2%

4.42 The result of the two scenarios indicates that:

- Kentish Town and Camden Town are likely to receive the highest level of cumulative impacts, followed by Tottenham Court Road. Camden Town will be a particular focus for trade diversion for both Kings Cross and Euston due to its close proximity and also due to a combination of its high market share in the local area and also wider popularity. However, whilst the cumulative impact on Camden Town is forecast to be around -5%, its strength as a trading location is unlikely to raise any particular future viability concerns.
- It will also be noted from Tables 4.8 and 4.9 that around three quarters of the cumulative impact on Camden Town and Kentish Town and one half of the impact on Tottenham Court Road will be due to the increasing level of provision at Kings Cross. Given that the Kings Cross development phases will have occurred before the EAP retail / F&B floorspace provision, it is likely that a large element of the Euston trade diversion will fall upon Kings Cross.

4.43 Overall, the foregoing F&B analysis predicts relatively small levels of trade diversion and resultant direct impacts from the provision of new and replacement F&B floorspace within the F&B area, even on the basis of a growing element of F&B floorspace within the overall total floorspace of, for example, 20,000sq m gross. We consider that these levels of indicative impact are unlikely to lead to any particular concerns over future viability levels of defined 'town centres' in the local centre hierarchy, particularly as we have modelled the impact of replacement F&B floorspace being 'new' floorspace. However, we would also repeat previous comments, requiring a more detailed assessment, with new up to date evidence base information, as and when specific proposals come forward.

Planning Policy

- 4.44 The final area to consider is in relation to the content of the planning policies in the adopted EAP.
- 4.45 The general scale and type of retail provision has been covered earlier in this section, although there are some further matters to consider, including: (A) any updates to EAP1 in terms of the scale and location of provision; (B) the general approach to existing defined centres in the EAP area.
- 4.46 In relation to the scale of provision, we would reiterate the comments contained earlier in this section that: (A) the existing allocation of 20,000sq m of retail and food/beverage floorspace for the whole of the EAP area remains reasonable and appropriate; and (B) the main focus for provision will be within and immediately around the redeveloped station complex, with opportunities taken to reinforce provision in and adjacent to existing defined 'town centres' and also provide modest amounts of new provision as part of new residential led mixed use developments.
- 4.47 In relation to the general approach to existing defined centres, it must be appreciated that the EAP is a subservient document to the Local Plan. Therefore, an update to the EAP may not be an appropriate place to designate any new 'town centres' in the LB Camden centre hierarchy. However, this is unlikely to be a particular issue for the purposes of this report as there is no particular identified requirement for any new defined centres within the EAP area.
- 4.48 With regards to land uses in the existing defined centres, pages 42 and 43 of the existing EAP note that:
- new retail and leisure will be focused around the station site;

- a significant proportion of the overall provision (at least 5,000sq m) could serve Euston station passengers only (based predominantly on food and beverage uses with ancillary convenience and comparison retail);
- the strategy goes on to note that retail provision over and above this level could change the role of the station area and a retail impact assessment would therefore be required to assess potential impacts on other centres both within and outside of the EAP boundary, taking into account additional retail demand created by additional passenger numbers;
- the strategy on page 43 of the EAP outlines the approach to retail and provision, including spatial distribution, in different parts of the plan boundary;
- finally, the strategy notes that, where appropriate, the loss of A1 shops and floorspace will be resisted where it would harm the character and vibrancy of existing centres. Where possible and appropriate, smaller shopping units will be protected in order to maintain the character of local centres. Reflecting the character of existing centres in the area and Camden's planning policies, small and independent retail will be sought as part of retail growth at Euston.

4.49 Based upon the content of the existing adopted land use strategy the level of retail, service and food/beverage provision proposed within the latest HS2/Network Rail assessment would trigger the need for an impact assessment as part of any future planning application. Until such time as the EAP document is formally updated then this requirement will remain and, in addition, we would recommend the following:

- whilst there is no reason why the threshold for the submission of an impact assessment could not change, the continuation of the requirement, in principle, for such an assessment remains a valid and reasonable one.
- It is unclear from the text on page 42 of the EAP whether the 5,000sq m requirement relates to net additional floorspace or all retail floorspace within a particular redevelopment proposal, and this should be clarified in any update to the EAP. However, we have assumed that it should be the latter bearing in mind the content of EAP1. Whichever it is, this threshold appears to remain a reasonable one as it would represent a material increase in provision. How such an impact assessment should be conducted should follow PPG guidance and be proportionate to the scale and type of provision being provided, and this is discussed further below.
- whilst this document cannot, in itself, change the requirement for an impact assessment, it can provide useful guidance on what should be required (and this can also be enshrined in any future updates to the EAP). The following principles should be followed:

- As noted above, any impact assessment should be proportionate in line with PPG guidance. In particular, the level of detail in any assessment should consider the form of the proposal in question, including the scale (and type) of floorspace uplift from existing provision and also its intended purpose.
- The impact assessment should, in line with national planning policy, consider all retail and leisure uses (including uses within Classes E(a), (b) and (d) plus those sui generis uses which relate to pubs/bars, take-aways and commercial uses).
- Given the nuances of the Euston area, the impact assessment should take into account how provision is to be organised and used. For example, it may well be relevant for the impact assessment to take into account those retail and other outlets in the station complex which have, to one extent or another, restricted access as this may affect the potential impact upon surrounding 'standard' main town centre land use provision.²¹
- It will also be important for any future impact assessment to be informed by up to date evidence base data. This should include:
 - Depending upon the study area chosen for the assessment, up to date population and per capita retail and leisure expenditure data should be utilised, taking into account the latest economic forecasts for future change in expenditure levels and the rate of population growth / house-building in the local area.
 - It will be important for a robust assessment of likely impact to be informed by new data on household shopping and leisure patterns in the local area and, where relevant, further data (via in-street surveys) on how local retail and main town centre facilities are used.
 - In order to ensure that a complete picture of the likely impact upon existing facilities is provided, any future impact assessments should incorporate robust data around retail and leisure floorspace commitments in the local area.

4.50 Finally, with regards to other development management policy, we consider that it is appropriate to reconsider the current EAP policy of requiring 50% of additional 'retail' provision to be within the former Class A1 category (now Class E(a)). Since the formulation of the current EAP document there have been, in our opinion, material changes in circumstance which would prompt the removal of the 50% former Class A1 requirement. For example: (A) general market trends would suggest that former Class A1 (now Class E(a)) uses are becoming a smaller proportion of the make-up of town centres; (B) national

²¹ It may well be the case that retail and food/beverage facilities within the redeveloped station complex will have a partially differentiated effect upon 'high street' provision in the surrounding area; particularly for those users of the station that have no direct relationship with the wider Euston area and have no reason to depart from the station complex.

planning policy has now moved away from formally requiring local authorities to define primary and secondary retail frontages; and (C) there has been a change in use class legislation to remove the formal distinction between retail and a number of other main town centre service and leisure uses (i.e. Use Class E).

- 4.51 This material change may also influence the current requirement on page 43 of the adopted EAP which indicates that the loss of former Class A1 shops will be resisted. In our opinion, this requirement should be revised, in light of the material change in circumstances over the past several years (and changes in national legislation) and should be replaced with an alternative which allows for the retail (Class E(a) function of defined 'town centres' to be protected alongside a wider set of main town centre land uses, so long as they support the health and attractiveness of defined 'town centres' in the local area (including, for example, maintaining and enhancing footfall/vitality, and providing active ground floor frontages).

5. Summary and Conclusions

5.1 This report on Retail Planning Issues has been prepared by Avison Young ('AY') for the London Borough of Camden ('LBC') in relation to the Euston Action Plan Update ('EAPU'). Working with HETA Architects, AY has been instructed to prepare two inter-related pieces of work: a Land Use Mix Report and a Deliverability and Viability Assessment. This document is primarily intended to contribute to the Land Use Mix Report and provides:

- a review of the robustness of the existing evidence base informing the adopted Euston Area Plan;
- a partially updated evidence base (including a review of land use provision in defined 'town centres' in the surrounding area);
- updated retail and leisure floorspace need forecasts (including an impact assessment of the proposed retail and food/beverage floorspace); and
- advice on planning policy associated with retail, leisure and town centre issues.

5.2 The adopted EAP was underpinned by a series of evidence base documents, including a Economic Land Use Vision²² published in July 2013 ('the 2013 vision document') which assessed the potential for a wide variety of land uses (and utilised some of the evidence base is also used in the Camden Retail and Town Centre Study²³).

5.3 This new evidence base report has taken into account a number of factors which have changed since the adoption of the EAP and the completion of the 2013 vision document and has found that:

- Due to a combination of the ever-changing nature of town centres and the impact of COVID-19, town centres are facing new challenges and pressures, and this has resulted in a shift in the land use profile of 'town centres' and the types of land uses which makes them attractive and relevant to local communities. This will have an impact upon how planning policy addresses the strategy for the future of the EAP area.
- There have not been any significant changes in national planning policy towards retail, leisure and main town centre uses, with: (A) the allocation of development plan sites being based upon an assessment of 'need'; and (B) the two development management policy tests remaining as the sequential test and the impact test. However, there has been a change in the national planning

²² GVA

²³ GVA, November 2013

policy approach to 'town centres' with the removal of the requirement to define primary and secondary frontages and the focus being on defining town centre and primary shopping centre boundaries.

- In response to changes in retail, leisure and town centre trends, central Government has also amended legislation in relation to the use classes order, amalgamating parts of the former use class A into the new use class E and also moving some food/beverage and leisure uses to sui generis.
- Our analysis of the latest retail expenditure forecasts has found that: (A) the forecast growth in convenience and comparison goods expenditure (minus purely internet sales) is now materially lower than forecast in 2013; and (B) the lower rate of growth in comparison goods expenditure is compounded by a much higher proportion of expenditure on internet sales (which will reduce the amount of expenditure available to physical shops on the high street).
- Following initial research taken into account in the 2013 vision document, there has been more recent (2021) HS2/Network Rail research which has provided a more detailed assessment of: (A) the amount of floorspace which is forecast to be required for both elements of the station redevelopment; and (B) also, the type of retail, service and food/beverage floorspace to be provided. For the purposes of our assessment, the content of this 2021 research assessment has been adopted in its entirety.

5.4 With regards to expenditure capacity, this document provides an updated assessment which is based upon: (A) adopting the scale and type of retail, service and food/beverage floorspace in the recent HS2/Network Rail research; (B) updated population and per capita expenditure forecasts from Experian; (C) the latest updated house-building and employment floorspace/job allocation forecasts for the EAP prepared in 2022. Taking these factors into account, our updated analysis there remains the potential to support the 20,000sq m (new / replacement) retail, service and food/beverage floorspace allocation in the adopted EAP²⁴, in order to meet: (A) growing rail passenger demand as a result of the redeveloped station complex, in terms of both the scale and type of provision; and (B) a growing local resident / workforce population. In line with the previous 2013 assessment, it is not possible to provide a precise floorspace capacity figure for the EAP area due to the over-lapping nature of demand and how different residents and visitors the local area use local retail, service and food/beverage facilities. Nevertheless, we consider that it is appropriate to continue with the existing floorspace allocation as it would allow for the amount of new and replacement floorspace within the redeveloped station

²⁴ Please note that the adopted EAP allocation of 20,000sq m is for Class A1-5 floorspace, which has now been certain Class E and sui generis uses, which will need to be reflected in any update to the wording of the existing EAP policy.

complex and an additional reasonable amount of provision in the surrounding area to support existing centres and modest amounts of new provision within mixed use developments.

5.5 Finally, recommendations have been provided in relation to various policies in the current EAP. These include:

- Retaining the general guide of providing around new and replacement 20,000sq m of retail, service and food/beverage floorspace.
- Retaining the locational strategy whereby the majority of new and replacement retail, service and food/beverage provision is placed in and adjacent to the redeveloped Euston station complex.
- Removing the requirement for 50% of new floorspace provision to be within the former Class A1 (now Class E(a)) land use category.
- Revising the current approach which seeks to guard against the loss of retail (A1 / E(a)) floorspace / units within defined 'town centres' in the Euston area where the overall shopping / retail of a defined 'town centre' is materially (whilst at the same time allowing for a wider mix of Class E and some sui generis uses which contribute to the vitality, viability and attractiveness of a centre).
- Retaining the requirement for the submission of an impact assessment for proposals involving a significant amount of retail and leisure floorspace.

Appendix I

Euston Area GOAD Plan



Experian Goad Plan Created: 26/04/2022
Created By: Avison Young

Appendix II

Kings Cross Area GOAD Plan



Experian Goad Plan Created: 26/04/2022
Created By: Avison Young

50 metres



Experian Goad Plan Created: 26/04/2022
Created By: Avison Young



North

Experian Goad Plan Created: 26/04/2022
Created By: Avison Young

50 metres

Appendix III

Camden Town GOAD Plan



50 metres

Experian Goad Plan Created: 27/04/2022
Created By: Avison Young

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50 metres

Experian Goad Plan Created: 27/04/2022
Created By: Avison Young

Appendix IV

Holborn Brunswick GOAD Plan



50 metres

Experian Goad Plan Created: 27/04/2022
Created By: Avison Young

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Appendix V

Expenditure Capacity Analysis

TABLE 1: POPULATION WITHIN EUSTON STUDY AREA

	Postcode Sector				Total
	NW 1 1	NW 1 2	NW 1 3	NW 1 4	
Population Projection 2020	8204	2912	7945	4036	23097
Population Projection 2021	8334	2959	8073	4086	23452
Population Projection 2022	8473	2992	8207	4139	23811
Population Projection 2023	8596	3021	8325	4189	24131
Population Projection 2024	8701	3044	8430	4230	24405
Population Projection 2025	8794	3075	8535	4269	24673
Population Projection 2026	8886	3107	8637	4296	24926
Population Projection 2027	8993	3140	8747	4323	25203
Population Projection 2028	9090	3168	8860	4348	25466
Population Projection 2029	9184	3192	8970	4373	25719
Population Projection 2030	9263	3216	9077	4396	25952
Population Projection 2031	9358	3241	9197	4426	26222
Population Projection 2032	9454	3265	9312	4455	26486
Population Projection 2033	9552	3295	9418	4486	26751
Population Projection 2034	9651	3323	9517	4517	27008
Population Projection 2035	9740	3355	9631	4541	27267
Population Projection 2036	9836	3378	9730	4564	27508
Population Projection 2037	9914	3406	9833	4584	27737
Population Projection 2038	10006	3430	9908	4599	27943
Population Projection 2039	10084	3457	10001	4609	28151
Population Projection 2040	10183	3486	10109	4639	28417
Population Projection 2041	10280	3513	10216	4668	28678

Notes:

Population data for Euston Study Area (Postcode Sectors NW1 1/2/3/4) provided by Experian.

TABLE 2: PER CAPITA CONVENIENCE GOODS EXPENDITURE WITHIN EUSTON STUDY AREA

	Postcode Sector			
	NW 1 1	NW 1 2	NW 1 3	NW 1 4
2019	£1,733	£1,722	£1,671	£2,627
2020	£1,782	£1,770	£1,718	£2,701
2021	£1,700	£1,689	£1,639	£2,576
2022	£1,676	£1,665	£1,616	£2,540
2023	£1,673	£1,662	£1,613	£2,535
2024	£1,669	£1,659	£1,609	£2,530
2025	£1,667	£1,657	£1,608	£2,528
2026	£1,666	£1,655	£1,606	£2,525
2027	£1,664	£1,654	£1,605	£2,523
2028	£1,664	£1,654	£1,605	£2,523
2029	£1,664	£1,654	£1,605	£2,523
2030	£1,664	£1,654	£1,605	£2,523
2031	£1,666	£1,655	£1,606	£2,525
2032	£1,667	£1,657	£1,608	£2,528
2033	£1,669	£1,659	£1,609	£2,530
2034	£1,671	£1,660	£1,611	£2,533
2035	£1,672	£1,662	£1,613	£2,535
2036	£1,674	£1,664	£1,614	£2,538
2037	£1,676	£1,665	£1,616	£2,540
2038	£1,676	£1,665	£1,616	£2,540
2039	£1,676	£1,665	£1,616	£2,540
2040	£1,676	£1,665	£1,616	£2,540
2041	£1,676	£1,665	£1,616	£2,540

Notes:

Base 2019 per capita expenditure provided by Experian.

Post-2019 expenditure projections exclude expenditure on special forms of trading (i.e. pure internet shopping, not in stores)

Post-2019 expenditure projections based upon advice provided in Retail Planner Briefing Note 19 (January 2022).

TABLE 3: PER CAPITA COMPARISON GOODS EXPENDITURE WITHIN EUSTON STUDY AREA

	Postcode Sector			
	NW 1 1	NW 1 2	NW 1 3	NW 1 4
2019	£1,733	£1,722	£1,671	£2,627
2020	£1,310	£1,302	£1,263	£1,986
2021	£1,316	£1,308	£1,269	£1,995
2022	£1,394	£1,385	£1,344	£2,113
2023	£1,419	£1,410	£1,368	£2,151
2024	£1,445	£1,436	£1,393	£2,190
2025	£1,472	£1,463	£1,419	£2,232
2026	£1,502	£1,492	£1,448	£2,276
2027	£1,533	£1,523	£1,478	£2,324
2028	£1,568	£1,558	£1,512	£2,377
2029	£1,606	£1,596	£1,549	£2,435
2030	£1,645	£1,634	£1,586	£2,493
2031	£1,686	£1,675	£1,625	£2,555
2032	£1,730	£1,719	£1,668	£2,622
2033	£1,774	£1,763	£1,711	£2,690
2034	£1,821	£1,809	£1,756	£2,760
2035	£1,870	£1,858	£1,803	£2,834
2036	£1,920	£1,908	£1,852	£2,911
2037	£1,972	£1,960	£1,902	£2,989
2038	£2,025	£2,013	£1,953	£3,070
2039	£2,080	£2,067	£2,006	£3,153
2040	£2,136	£2,123	£2,060	£3,238
2041	£2,194	£2,180	£2,115	£3,326

Notes:

Base 2019 per capita expenditure provided by Experian.

Post-2019 expenditure projections exclude expenditure on special forms of trading (i.e. pure internet shopping, not in stores)

Post-2019 expenditure projections based upon advice provided in Retail Planner Briefing Note 19 (January 2022).

TABLE 4: PER CAPITA EXPENDITURE ON FOOD AND BEVERAGE PURCHASES WITHIN STUDY AREA

	Postcode Sector			
	NW 1 1	NW 1 2	NW 1 3	NW 1 4
2019	£1,417	£1,638	£1,428	£2,612
2020	£1,460	£1,687	£1,471	£2,690
2021	£1,503	£1,738	£1,515	£2,771
2022	£1,548	£1,790	£1,560	£2,854
2023	£1,595	£1,844	£1,607	£2,940
2024	£1,643	£1,899	£1,655	£3,028
2025	£1,692	£1,956	£1,705	£3,119
2026	£1,743	£2,015	£1,756	£3,212
2027	£1,795	£2,075	£1,809	£3,309
2028	£1,849	£2,137	£1,863	£3,408
2029	£1,904	£2,201	£1,919	£3,510
2030	£1,961	£2,267	£1,977	£3,616
2031	£2,020	£2,335	£2,036	£3,724
2032	£2,081	£2,405	£2,097	£3,836
2033	£2,143	£2,478	£2,160	£3,951
2034	£2,208	£2,552	£2,225	£4,069
2035	£2,274	£2,629	£2,292	£4,191
2036	£2,342	£2,707	£2,360	£4,317
2037	£2,412	£2,789	£2,431	£4,447
2038	£2,485	£2,872	£2,504	£4,580
2039	£2,559	£2,958	£2,579	£4,718
2040	£2,636	£3,047	£2,657	£4,859
2041	£2,715	£3,139	£2,736	£5,005

Notes:

Base 2019 per capita expenditure provided by Experian.

Post-2019 expenditure projections based upon advice provided in Retail Planner Briefing Note 19 (January 2022).

TABLE 5: TOTAL CONVENIENCE GOODS EXPENDITURE WITHIN EUSTON STUDY AREA

	Postcode Sector				Total
	NW 1 1	NW 1 2	NW 1 3	NW 1 4	
2020	£14.6	£5.2	£13.6	£10.9	£44.3
2021	£14.2	£5.0	£13.2	£10.5	£42.9
2022	£14.2	£5.0	£13.3	£10.5	£43.0
2023	£14.4	£5.0	£13.4	£10.6	£43.4
2024	£14.5	£5.0	£13.6	£10.7	£43.8
2025	£14.7	£5.1	£13.7	£10.8	£44.3
2026	£14.8	£5.1	£13.9	£10.8	£44.7
2027	£15.0	£5.2	£14.0	£10.9	£45.1
2028	£15.1	£5.2	£14.2	£11.0	£45.6
2029	£15.3	£5.3	£14.4	£11.0	£46.0
2030	£15.4	£5.3	£14.6	£11.1	£46.4
2031	£15.6	£5.4	£14.8	£11.2	£46.9
2032	£15.8	£5.4	£15.0	£11.3	£47.4
2033	£15.9	£5.5	£15.2	£11.4	£47.9
2034	£16.1	£5.5	£15.3	£11.4	£48.4
2035	£16.3	£5.6	£15.5	£11.5	£48.9
2036	£16.5	£5.6	£15.7	£11.6	£49.4
2037	£16.6	£5.7	£15.9	£11.6	£49.8
2038	£16.8	£5.7	£16.0	£11.7	£50.2
2039	£16.9	£5.8	£16.2	£11.7	£50.5
2040	£17.1	£5.8	£16.3	£11.8	£51.0
2041	£17.2	£5.9	£16.5	£11.9	£51.4

Notes:

TABLE 6: TOTAL COMPARISON GOODS EXPENDITURE WITHIN EUSTON STUDY AREA

	Postcode Sector				Total
	NW 1 1	NW 1 2	NW 1 3	NW 1 4	
2020	£10.7	£3.8	£10.0	£8.0	£32.6
2021	£11.0	£3.9	£10.2	£8.2	£33.2
2022	£11.8	£4.1	£11.0	£8.7	£35.7
2023	£12.2	£4.3	£11.4	£9.0	£36.9
2024	£12.6	£4.4	£11.7	£9.3	£37.9
2025	£12.9	£4.5	£12.1	£9.5	£39.1
2026	£13.3	£4.6	£12.5	£9.8	£40.3
2027	£13.8	£4.8	£12.9	£10.0	£41.5
2028	£14.3	£4.9	£13.4	£10.3	£42.9
2029	£14.7	£5.1	£13.9	£10.6	£44.4
2030	£15.2	£5.3	£14.4	£11.0	£45.8
2031	£15.8	£5.4	£14.9	£11.3	£47.5
2032	£16.4	£5.6	£15.5	£11.7	£49.2
2033	£17.0	£5.8	£16.1	£12.1	£50.9
2034	£17.6	£6.0	£16.7	£12.5	£52.8
2035	£18.2	£6.2	£17.4	£12.9	£54.7
2036	£18.9	£6.4	£18.0	£13.3	£56.6
2037	£19.6	£6.7	£18.7	£13.7	£58.6
2038	£20.3	£6.9	£19.3	£14.1	£60.6
2039	£21.0	£7.1	£20.1	£14.5	£62.7
2040	£21.8	£7.4	£20.8	£15.0	£65.0
2041	£22.6	£7.7	£21.6	£15.5	£67.3

Notes:

TABLE 7: TOTAL EXPENDITURE ON FOOD AND BEVERAGE PURCHASES WITHIN EUSTON STUDY AREA

	Postcode Sector				Total
	NW 1 1	NW 1 2	NW 1 3	NW 1 4	
2020	£12.0	£4.9	£11.7	£10.9	£39.4
2021	£12.5	£5.1	£12.2	£11.3	£41.2
2022	£13.1	£5.4	£12.8	£11.8	£43.1
2023	£13.7	£5.6	£13.4	£12.3	£45.0
2024	£14.3	£5.8	£14.0	£12.8	£46.8
2025	£14.9	£6.0	£14.6	£13.3	£48.8
2026	£15.5	£6.3	£15.2	£13.8	£50.7
2027	£16.1	£6.5	£15.8	£14.3	£52.8
2028	£16.8	£6.8	£16.5	£14.8	£54.9
2029	£17.5	£7.0	£17.2	£15.4	£57.1
2030	£18.2	£7.3	£17.9	£15.9	£59.3
2031	£18.9	£7.6	£18.7	£16.5	£61.7
2032	£19.7	£7.9	£19.5	£17.1	£64.1
2033	£20.5	£8.2	£20.3	£17.7	£66.7
2034	£21.3	£8.5	£21.2	£18.4	£69.3
2035	£22.1	£8.8	£22.1	£19.0	£72.1
2036	£23.0	£9.1	£23.0	£19.7	£74.9
2037	£23.9	£9.5	£23.9	£20.4	£77.7
2038	£24.9	£9.9	£24.8	£21.1	£80.6
2039	£25.8	£10.2	£25.8	£21.7	£83.6
2040	£26.8	£10.6	£26.9	£22.5	£86.9
2041	£27.9	£11.0	£28.0	£23.4	£90.3

Notes: