



**AND**

**ABERFELDY VILLAGE  
RETAIL IMPACT  
ASSESSMENT  
NARRATIVE**

**AUGUST 2022**



# ABERFELDY VILLAGE RETAIL IMPACT ASSESSMENT NARRATIVE

This report is an update to the previously submitted version that was submitted to the Council in support of the hybrid planning application. This updated version has been prepared in response to the changes to the planning application boundary as explained in the covering letter to accompany the amendments to the Proposed Development.

This Retail Impact Assessment has been prepared by AND London and is submitted in support of a hybrid planning application for the Aberfeldy Village Masterplan. The hybrid planning application is made in relation to the north of East India Dock Road (A13), east of the Blackwall Tunnel Northern Approach Road (A12) and to the south west of Abbot Road (the "Site") on behalf of The Aberfeldy New Village LLP' ("The Applicant"). The hybrid planning application is formed of detailed development proposals in respect of Phase A for which no matters are reserved ("Detailed Proposals"), and outline development proposals for the remainder of the Site, with all matters reserved ("Outline Proposals"). The Detailed Proposals and Outline Proposals together are referred to as the "Proposed Development".

The Proposed Development comprises the comprehensive redevelopment of the Site. The Proposed Development will provide new retail and workspace floorspace along with residential dwellings and the pedestrianisation of the A12 Abbott Road vehicular underpass to create a new east to west route. The Development will also provide significant, high quality public realm, including a new Town Square, a new High Street and a public park.

## **Purpose**

The purpose of the Retail Impact Assessment is to assess the development in terms of its impact on the surrounding major, neighbourhood and local retail centres to ensure the proposed scheme does not impact existing retail areas within the catchment area of the scheme.

## **Extant Outline Planning Application**

Outline Permission ref: PA/11/02716/P0 (granted June 2012): What has been delivered to date:

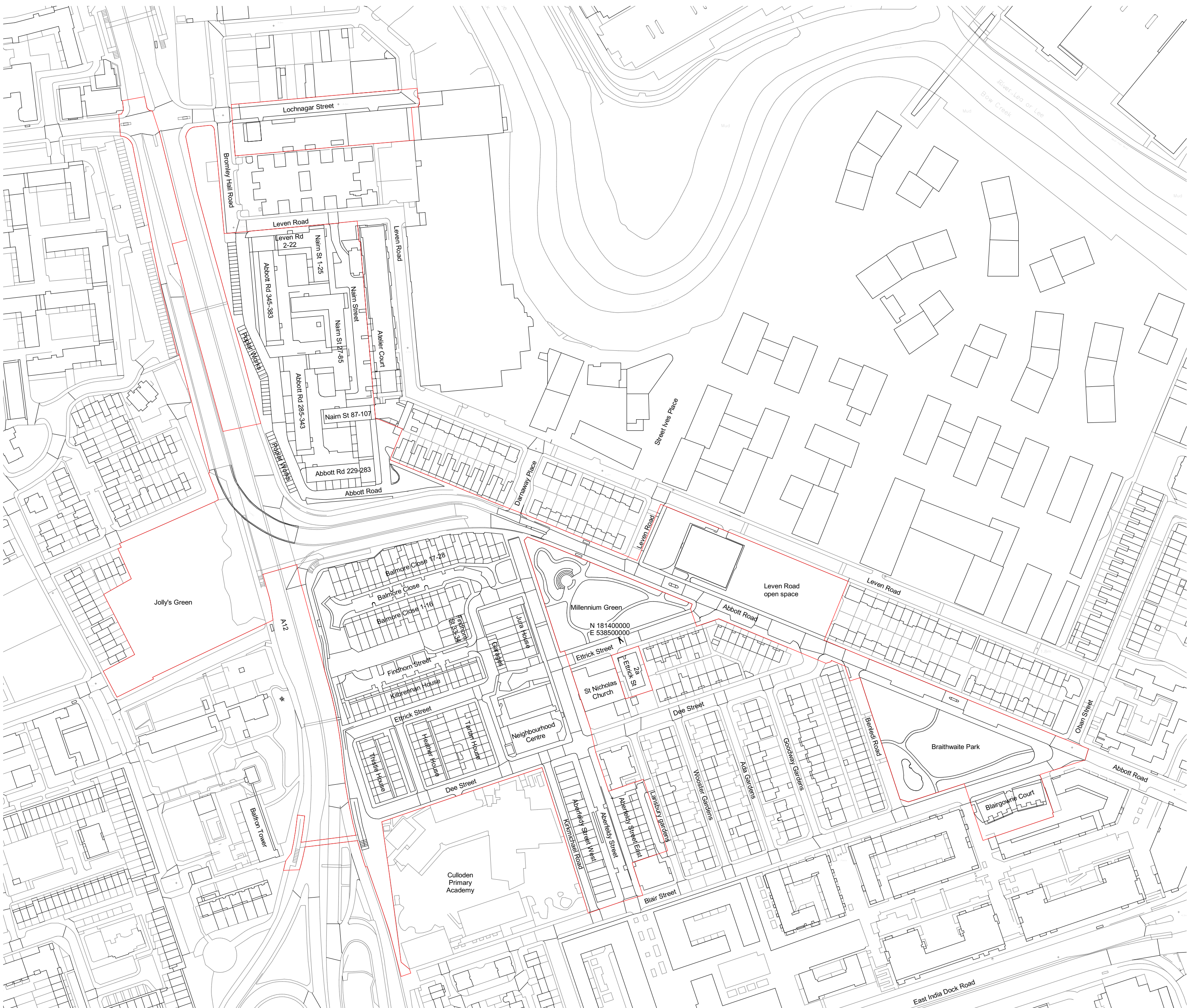
- Phases 1 and 2 built out, with Phase 3 under construction
- 901 new homes
- 29% affordable homes by habitable room or 9.18% affordable homes by habitable room on the uplift
- New larger Community Centre with improved facilities
- Larger modern Health Centre
- New retail floorspace
- New energy centre
- New and enhanced high quality open space including play-space and a linear park
- Heights: 2 to 10 storeys
- Parking ratio: 0.2 spaces

## **Format of the Planning Application**

Hybrid planning application with a detailed first phase referred to as the "Detailed Proposals" and a further three phases to be submitted in outline and referred to as the "Outline Proposals".

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## Redline Boundary



## Description of development

Hybrid application seeking detailed planning permission for Phase A and outline planning permission for future phases, comprising: Outline planning permission (all matters reserved) for the demolition of all existing structures and redevelopment to include a number of buildings (up to 100m AOD) and up to 141,014.4sqm (GEA) of floorspace comprising the following mix of uses:

- Residential (Class C3);
- Retail, workspace, food and drink uses (Class E);
- Car and cycle parking;

Formation of new pedestrian route through the conversion of the existing vehicular underpass;

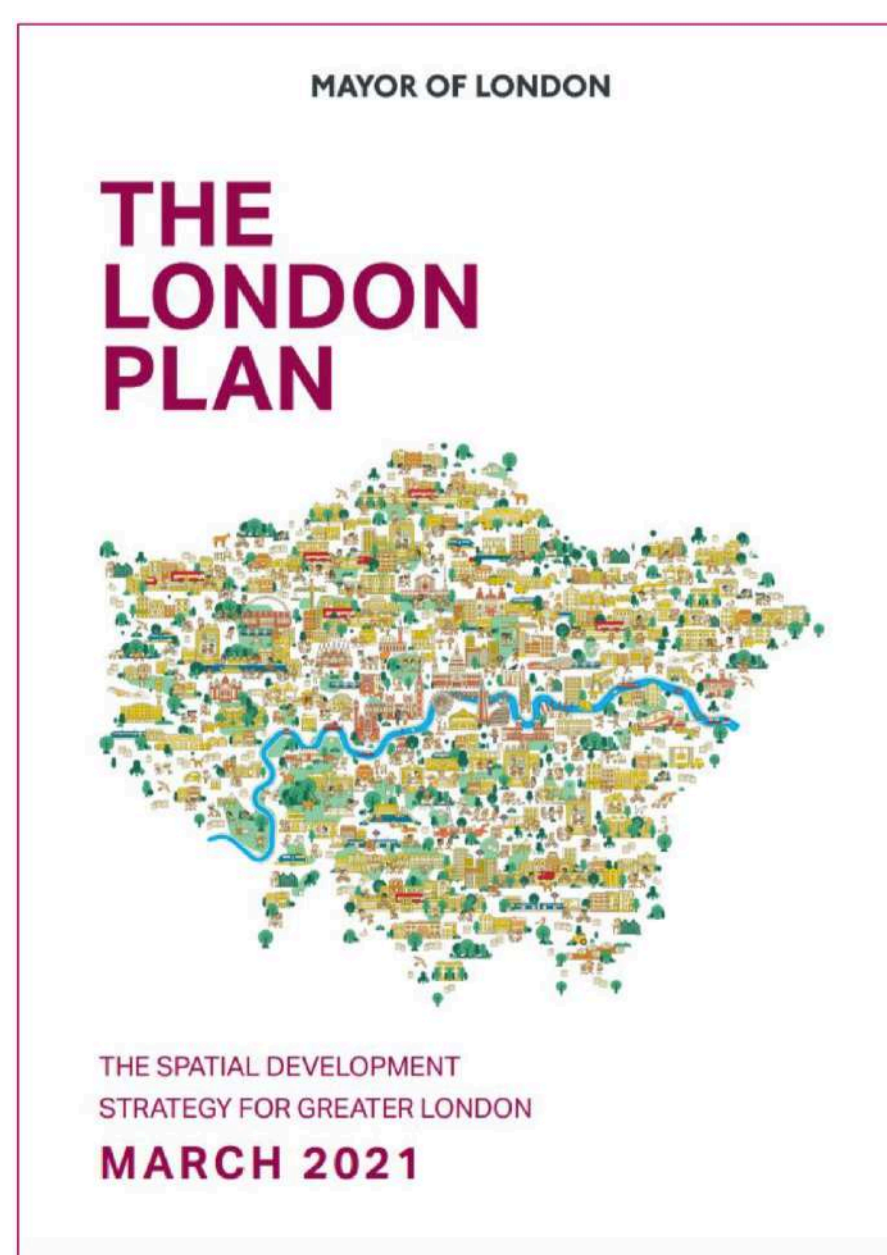
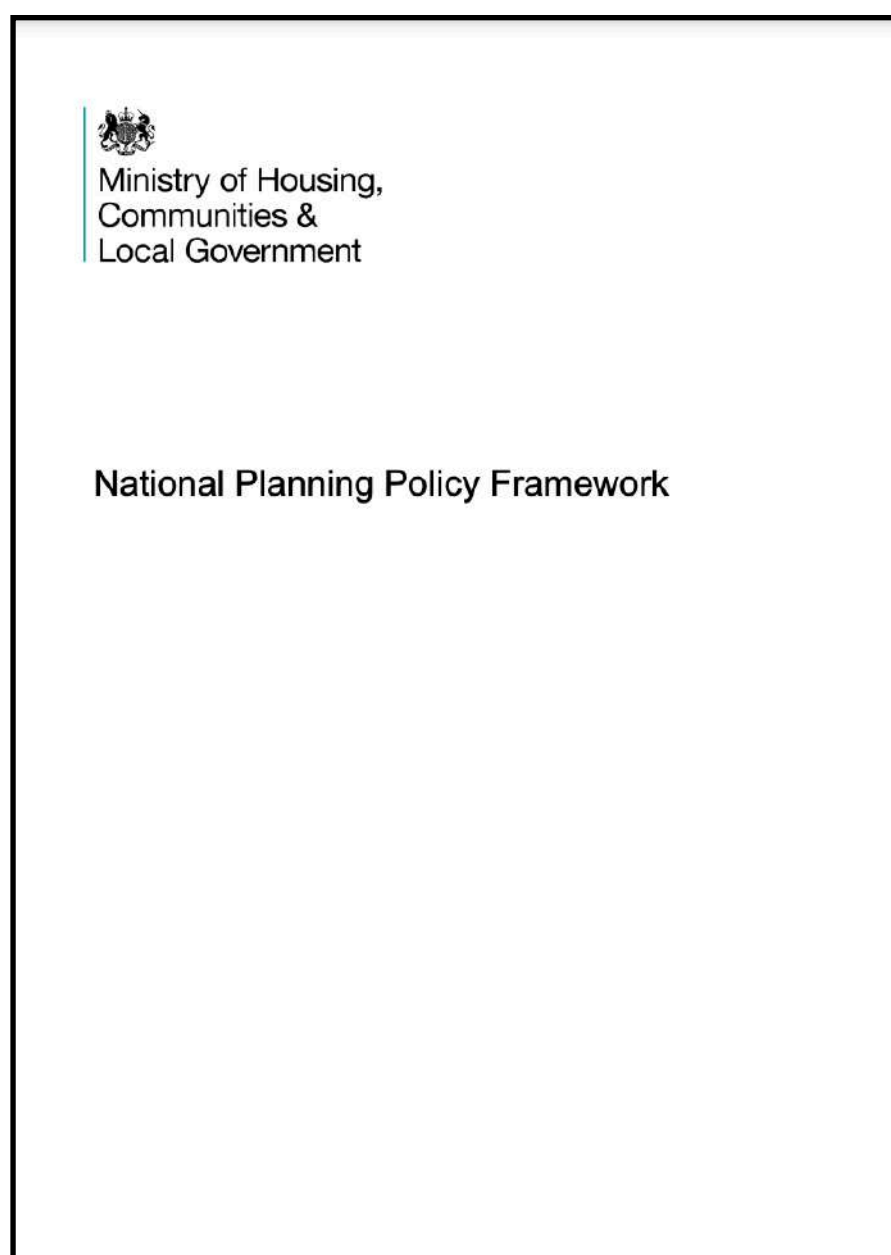
- Landscaping including open spaces and public realm; and
- New means of access, associated infrastructure and highways works.

In Full, for residential (Class C3), retail, food and drink uses and a temporary marketing suite (Class E and Sui Generis), together with access, car and cycle parking, associated landscaping and new public realm, and private open space .

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## Proposed Floor Areas

Use	Use Class	Phase B GEA (sqm)	Phase C GEA (sqm)	Phase D GEA (sqm)	Maximum GEA Cap by Use (sqm)
Retail	E	395	-	849	1,244
Workspace	E	1,026	2,174	-	3,200
Residential	C3	57,607	56,833	19,531	133,971
Podium Parking	C3	712	1,887	-	2,599
<b>Maximum GEA Cap per Zone (sqm)</b>	-	59,740	60,894	20,380	
<b>Total Maximum GEA Cap (sqm)</b>		141,014			



## Planning Policies

The following local, regional and sub regional planning policies were considered in the development of this strategy:

- National Planning Policy Framework (NPPF) July 2021
- National Planning Policy Guidance (NPPG) September 2020
- The London Plan 2021
- Tower Hamlets Local Plan 2031

### NPPF - Paragraph 90 and 91 - July 2021

When assessing applications for retail and leisure development outside town centres, which are not in accordance with an up-to-date plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500m<sup>2</sup> of gross floorspace).

This should include assessment of: a) the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and b) the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment (as applicable to the scale and nature of the scheme).  
91. Where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the considerations in paragraph 90, it should be refused.

### NPPG - Town Centres and Retail - September 2020

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### London Plan (2021), Policy SD6 Retail and Town Centres and High Streets

#### Policy SD6 Town Centres and High Streets

A. The vitality and viability of London's varied town centres should be promoted and enhanced by:

- 1) encouraging strong, resilient, accessible and inclusive hubs with a diverse range of uses that meet the needs of Londoners, including main town centre uses, night-time economy, civic, community, social and residential uses
- 2) identifying locations for mixed-use or housing-led intensification to optimise residential growth potential, securing a high-quality environment and complementing local character and heritage assets
- 3) delivering sustainable access to a competitive range of services and activities by walking, cycling and public transport
- 4) strengthening the role of town centres as a main focus for Londoners' sense of place and local identity in the capital
- 5) ensuring town centres are the primary locations for commercial activity beyond the CAZ and important contributors to the local as well as London-wide economy
- 6) supporting the role of town centres in building sustainable, healthy and walkable neighbourhoods with the Healthy Streets Approach embedded in their development and management.

B. The adaptation and diversification of town centres should be supported in response to the challenges and opportunities presented by multi-channel shopping and changes in technology and consumer behaviour, including improved management of servicing and deliveries.

C. The potential for new housing within and on the edges of town centres should be realised through mixed-use or residential development that makes best use of land, capitalising on the availability of services within walking and cycling distance, and their current and future accessibility by public transport.

D. The particular suitability of town centres to accommodate a diverse range of housing should be considered and encouraged, including smaller households, Build to Rent, older people's housing and student accommodation.

E. The redevelopment, change of use and intensification of identified surplus office space to other uses including housing should be supported, taking into account the impact of office to residential permitted development rights (see Policy E1 Offices) and the need for affordable and suitable business space (Policy E2 Providing suitable business space, Policy E3 Affordable workspace).

F. The management of vibrant daytime, evening and night-time activities should be promoted to enhance town centre vitality and viability, having regard to the role of individual centres in the night-time economy (see Figure 7.6 and Table A1.1) and supporting the development of cultural uses and activity.

G. Tourist infrastructure, attractions and hotels in town centre locations, especially in outer London, should be enhanced and promoted (see Policy E10 Visitor infrastructure).

H. The delivery of a barrier-free and inclusive town centre environment that meets the needs of all Londoners, including disabled and older Londoners and families with young children, should be provided. This may include Shopmobility schemes, the provision of suitably designed crossing points, dropped kerbs and tactile paving, seating and public toilets.

I. The varied role of London's high streets should be supported and enhanced.

J. The provision of social infrastructure should be enhanced, particularly where it is necessary to support the identified need from town centre and local residents, and facilities should be located in places that maximise footfall to surrounding town centre uses. Safety and security should be improved, and active street frontages should be secured in new development, including where there are ground floor residential frontages.

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Tower Hamlets Local Plan 2031 (January 2020)

Policies S.TC1, D.TC2, and D.TC3 of the LBTH Local Plan 2031 (January 2020)

Policy S.TC1

### Policy S.TC1

#### Supporting the network and hierarchy of centres

1. Development is required to support the role and function of the borough's town centre hierarchy and the provision of town centre uses in line with the principles set out below.

Tier	Location	Functions / roles
Central Activities Zone	Refer to the Policies Map	a. Apply the London Plan's approach to development within the Central Activities Zone.
Major Centre	Canary Wharf	a. Provide a high proportion of comparison retail compared to convenience along with leisure and civic uses. b. Continue to support its role as a key global employment centre. c. Improve local accessibility to Canary Wharf and its strategic transport interchange, and legibility and way-finding across the area.
Tower Hamlets Activity Areas	Refer to the Policies Map	a. Provide areas of transition between the scale, activity and character of the Central Activities Zone and Canary Wharf Major Centre and their surrounding areas. b. Support a mix of uses which make a positive contribution to health and well-being. c. Promote active uses at ground floor level.
District Centres	<ul style="list-style-type: none"> <li>● Bethnal Green Road</li> <li>● Brick Lane</li> <li>● Chrisp Street</li> <li>● Crossharbour</li> <li>● Roman Road East</li> <li>● Roman Road West</li> <li>● Watney Market</li> <li>● Whitechapel</li> </ul>	a. Promote as vibrant hubs containing a wide range of shops, services and employment. b. Direct a new civic centre for the borough to Whitechapel District Centre.

Tier	Location	Functions / roles
Neighbourhood Centres	<ul style="list-style-type: none"> <li>● Aberfeldy Street</li> <li>● Barkantine Estate</li> <li>● Ben Jonson Road</li> <li>● Burdett Road South</li> <li>● Cambridge Heath</li> <li>● Columbia Road</li> <li>● Devons Road</li> <li>● Limehouse</li> <li>● London City Island</li> <li>● Mile End</li> <li>● Poplar High Street</li> <li>● Redchurch Street</li> <li>● Salmon Lane</li> <li>● South Quay</li> <li>● Stroudley Walk</li> <li>● Stepney Green</li> <li>● Thomas More</li> <li>● Wapping Lane</li> </ul>	a. Provide a range of shops and services to meet the needs of their local catchments. b. Support the specialist functions that exist within Redchurch Street and Columbia Road Neighbourhood Centres to continue providing vibrant shopping and leisure destinations which attract visitors to the borough. c. Ensure development is appropriate to the nature and scale of each individual centre.
Neighbourhood Parades	<ul style="list-style-type: none"> <li>● Bow Road</li> <li>● Burslem Street</li> <li>● Cambridge Heath Road</li> <li>● Caspian Wharf</li> <li>● Castalia Square</li> <li>● Cleveland Way</li> <li>● Manchester Road</li> <li>● Mile End Road</li> <li>● Old Ford Road</li> <li>● St Leonards Street</li> <li>● St Pauls Way</li> <li>● Westferry Road</li> <li>● West India Dock Road/ Pennyfields</li> </ul>	a. Ensure that Neighbourhood Parades meet the needs of their local catchments and complement the role of other centres further up the hierarchy.

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### Policy D.TC2

Protecting retail in our town centres.

1. Within the Primary Frontages of the District Centres and within the boundaries of Columbia Road and Redchurch Street Neighbourhood Centres, as shown on the Policies Map, development should:

- a. contribute to achieving a minimum of 60% of ground floor units as A1 (retail) use, and
- b. contribute to the activity and vitality of the town centre by offering space to meet and relax, subject to A1 (retail) units not falling below the threshold set out above.

2. Development will not be supported where it would have a negative or potentially negative impact on the vitality and viability of Primary Frontages, Columbia Road and Redchurch Street Neighbourhood Centres as well as the health and well-being of local people.

3. Within the Secondary Frontages, development should:

- a. contribute to achieving a minimum of 40% of ground floor units as A1 (retail) use, and
- b. support a broad range of non-retail commercial and community uses which support the overall function of the town centre.

4. Outside of the Primary and Secondary Frontages within the District Centres, uses that do not require high levels of footfall (e.g. offices) and supporting town centre functions will be supported alongside retail uses.

5. Within Neighbourhood Centres (except Columbia Road and Redchurch Street) and Neighbourhood Parades, the proportion of units within A1 retail use should not fall below 40% of all units within the designated centre. New development should also be appropriate to the nature and scale of the individual Neighbourhood Centre/Parade.

6. Where the loss of A1 retail units is proposed that results in the overall level of A1 units falling below the proportions set out within parts 1, 3 and 5, it must be demonstrated that the shop has been vacant for a period of more than 12 months and robust evidence of efforts made to market the shop over that period at an appropriate rent (providing three comparable shop unit rents within the town centre).

7. Where a reduction of A1 retail floorspace is proposed within Major, District and Neighbourhood Centres, development must demonstrate that:

- a. where there is sub-division of a large unit, where the new units are of a size and scale conducive to supporting the role and function of their surroundings
- b. within Primary Frontages and the boundaries of Columbia Road and Redchurch Street Neighbourhood Centres, any loss of floorspace is of a scale that will not materially alter the nature of the unit, its future viability and the function of the host shopping area, and
- c. outside of Primary Frontages, the boundaries of Columbia Road and Redchurch Street Neighbourhood Centres, robust evidence is provided demonstrating the existing level of floorspace genuinely cannot be maintained and that appropriate height, width and depth of floorspace would remain for town centre uses.

### Policy D.TC3

Retail outside our town centres.

1. Outside of the borough's Major, District and Neighbourhood Centres, new retail development will be subject to:

- a. a sequential test, and
- b. an impact assessment where individual units or extensions exceed 200 square metres gross floorspace.

2. Development resulting in the loss of A1 shops outside of Major, District or Neighbourhood Centres will only be supported where:

- a. the shop is within a 300 metres walking distance of the nearest alternative A1 shops, and
- b. the shop has been vacant for a period of more than 12 months and robust evidence is provided of efforts made to market the shop unit over that period at an appropriate rent (providing examples of three comparable shop unit rents within the vicinity), or
- c. the site is unsuitable for continued retail use due to its accessibility, size or condition and there is no viable prospect of a retail use on the site, taking account of the projected residential growth in the vicinity.

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### Policy D.TC4

Financial and professional services.

1. Outside of the borough's Major, District or Neighbourhood Centres, financial and professional services use will be supported where they are local in scale and there is a reasonable prospect of the unit being occupied.
2. Payday loan shops will only be permitted in the Central Activities Zone, Major Centre, Tower Hamlets Activity Areas and secondary frontages of the District Centres providing there would not be an over concentration of similar businesses.

### Policy D.TC5

Food, drink, entertainment and the night-time economy.

1. Cafés, restaurants and drinking establishments (use classes A3, A4 and AA) will be supported within the Central Activities Zone, Canary Wharf Major Centre, Tower Hamlets Activity Areas, District Centres and Neighbourhood Centres (as shown on the Policies Map) provided that:

- a. it can be demonstrated that the overall vitality and viability of the town centre would be enhanced, and
- b. where proposed within Primary or Secondary Frontages, the proportion of A1 (retail) units would not fall below the levels set out in Policy D.TC2.

2. Cafés/restaurants and drinking establishments (use classes A3 and A4) in Neighbourhood Parades and outside of the town centre hierarchy will only be supported once provided that they meet the following criteria:

- a. Cafés and restaurants (A3 uses) can demonstrate that the proposal would support surrounding uses and would not undermine the function of nearby town centres, or form part of a concentration of uses that would cumulatively cause harm to the viability of the borough's town centres.
- b. Drinking establishments (A4 and AA uses) will only be permitted where they are local in nature and scale.

3. Development of hot food takeaways (use class A5) will only be supported within the Central Activities Zone, Tower Hamlets Activity Areas, Canary Wharf Major Centre, Secondary Frontages of District Centres, Neighbourhood Centres or Neighbourhood Parades where they meet the following criteria:

- a. There must be a separation of at least four non-A5 units between each new hot food takeaway unit.
- b. The percentage of A5 units would not exceed 5% of the total number of units within Major, District or Neighbourhood Centres.
- c. Within Neighbourhood Parades there would be no more than one A5 unit.
- d. The proposal is not within 200 metres walking distance from an existing (or proposed) school and/or a local authority leisure centre.
- e. The proposal will not harm the amenity of surrounding properties.

4. New betting offices/shops will only be supported within the Central Activities Zone, Tower Hamlets Activity Areas, Canary Wharf, Major Centre or Secondary Frontages within District Centres. New amusement centres, casinos and lap-dancing clubs will only be supported within the Central Activities Zone, Tower Hamlets Activity Areas or Canary Wharf Major Centre. Such uses will be resisted where:

- a. there is an over concentration of such uses which could give rise to negative cumulative social impacts
- b. the site is in close proximity to a school or sensitive community, cultural or social facility, and
- c. the proposal would detrimentally impact the amenity and character of the area.

5. Development of entertainment venues within the D2 or sui generis use classes not referenced in Policy D.TC5 will be:

- a. directed to the Central Activities Zone, Tower Hamlets Activity Areas, Canary Wharf Major Centre and the other town centres (except Neighbourhood Parades) where they are compatible with other uses within the town centre
- b. only permitted within Neighbourhood Parades or non- designated locations where:
  - i. it can be demonstrated that such uses will not result in adverse impacts on the amenity of the surrounding area
  - ii. the location has good public transport accessibility, and
  - iii. existing venues in town centres would not be undermined



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The Council's evidence base into retail and town centre considerations is comprised of the 2016 Town Centre Retail Capacity Study and the 2018 Retail Impact Threshold Study. This is the evidence base which underpins the relevant policies in the recently adopted Local Plan 2020. The 2016 study was informed by a household telephone survey of shopping habits undertaken in the same year. This is the most recent study and is relied upon by Tower Hamlets. It should be noted that any impact of the pandemic is not taken into account, given that it is based on projections made in 2016.

The assessment has relied upon the above studies, information within relevant 'commitment' planning applications, and our own professional judgement. These schemes have extant planning permission, or at least a resolution to grant planning permission.

It adopts a catchment which is co-terminus with the study area used for the Council's 2016 study. Arguably this catchment is oversized for the proposed development, however it has been used to allow for a consistent approach, and ease of reference.

The methodology used follows the guidance set out in paragraph 18 of the National Planning Policy Guidance's Town Centre and Retail section (NPPG – ref: 2b-018-20190722).

The base year is 2021 and the assessment year is 2026. As a 'worst-case' scenario, the assessment assumes that all of the proposed non-residential floorspace would be accommodated by comparison goods retailers.

Population and expenditure data for 2021 and 2026 has been taken directly from the Council's 2016 study. Expenditure via 'special forms of trading' has been deducted, in accordance with the Council's 2016 study. This deduction accounted for approximately 15% of estimated spending in 2021 according to the 2016 study. (Appendix 4, Table 4). Table 1 (Population) thus comprises data taken directly from Table 1B of Appendix 4 of the Council's 2016 study. These data are derived from the Tower Hamlets Growth Model, which accounts for local factors such as the borough's housing targets when making projections. Similarly, Table 2 (Expenditure per Capita – Comparison Goods), is taken directly from Table 4 of Appendix 4 of the Council's 2016 study. The NPPG confirms that a full zonal breakdown may not necessary, and that assessment ought to be "undertaken in a proportionate and locally appropriate way". Given the scale of the proposal here, it is considered excessive to provide a full zonal breakdown, and instead the 'catchment' as a whole has been considered.

Table 3 (Total Expenditure - Comparison Goods) shows that, in the assessment year - 2026 - the total catchment population is forecast to be 450,826 and the total available expenditure generated from within the catchment is £1,462.9m. This is an increase of £316.7m compared to 2021.

<b>Table 1: Population</b>		
	<b>2021</b>	<b>2026</b>
<b>Total</b>	412,597	450,826

*Source: Carter Jonas - Town Centre Retail Capacity Study 2016 (Appendix 4, Table 1B)*

<b>Table 2: Expenditure per Capita - Comparison Goods (£)</b>		
	<b>2021</b>	<b>2026</b>
<b>Total</b>	2,883	3,369

*Source: Carter Jonas - Town Centre Retail Capacity Study 2016 (Appendix 4, Table 4)*

*This excludes special forms of trading*

<b>Table 3: Total Expenditure - Comparison Goods (£m)</b>		
	<b>2021</b>	<b>2026</b>
<b>Total</b>	1,146.2	1,462.9

*Table 1 combined with Table 2*

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### Understanding Existing Shopping Patterns

Table 4 (2021 Expenditure on Comparison Goods without Commitments) identifies existing shopping patterns for the year 2021. The first column considers the destination of expenditure generated within the Borough and is derived from Table 3 of Appendix 6 in the Council's 2016 study. It shows that only 26.6% of consumer spending is retained in the borough, with the remaining 73.4% being spent outside the borough in Central London, Stratford and Beckton among other locations. The second column incorporates data from Table 6 of Appendix 6 of the Council's 2016 study. It lists the money spent at locations within the borough, from consumers residing outside the borough – otherwise known as 'inflow'. Finally, the third column of Table 4 combines the preceding two, giving the total amount spent within the borough from both borough residents and those residing outside the borough.

Table 5 (2026 Expenditure on Comparison Goods without Commitments) replicates Table 4, but using projection for shopping patterns for the year 2026. It follows the same logic as Table 4 and its data are derived from the same tables within the Council's 2016 study.

**Table 4: 2021 Expenditure on Comparison Goods without Commitments (£m)**

Centre	Total Expenditure (£m)	Total Inflow (£m)	Total Combined (£m)
Canary Wharf	69.2	115.3	184.5
Bethnal Green	29.1	30.6	59.7
Brick Lane	2.3	2.9	5.2
Bromley by Bow	10.6	11.2	21.8
Chrip Street	15.0	15.8	30.8
Crossharbour	32.9	34.6	67.5
Roman Road East	21.3	22.4	43.7
Roman Road West	0.0	0.0	0.0
Watney Market	7.5	7.8	15.3
Whitechapel	43.4	45.7	89.1
City Fringe CAZ	5.6	7.0	12.6
Neighbourhood Centres	28.9	30.4	59.3
Stepney Green Retail Park	0.7	0.0	0.7
All other in Borough	38.5	41.1	79.6
<b>TOTAL BOROUGH</b>	<b>305.0</b>	<b>364.8</b>	<b>669.8</b>
Central London	126.1		
Stratford - Westfield	365.1		
Stratford - other	60.4		
Beckton	119.9		
Bluewater	2.6		
Hackney	12.9		
Surrey Quays	11.9		
Other (including street markets)	142.4		
<b>TOTAL OUTSIDE BOROUGH</b>	<b>841.3</b>		
<b>TOTAL MARKET SHARE</b>	<b>1146.3</b>		<b>1511.1</b>

Source: Carter Jonas - Town Centre Retail Capacity Study 2016 (Appendix 6, Table 3 & 6)

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**Table 5: 2026 Expenditure on Comparison Goods without Commitments (£m)**

Centre	Total Expenditure (£m)	Total Inflow (£m)	Total Combined (£m)
Canary Wharf	88.7	147.8	236.5
Bethnal Green	37.3	39.2	76.5
Brick Lane	3.0	3.8	6.8
Bromley by Bow	13.6	14.3	27.9
Chrisp Street	19.3	20.3	39.6
Crossharbour	42.2	44.4	86.6
Roman Road East	27.3	28.7	56.0
Roman Road West	0.0	0.0	0.0
Watney Market	9.6	10.1	19.7
Whitechapel	55.7	58.6	114.3
City Fringe CAZ	7.2	9.0	16.2
Neighbourhood Centres	37.1	39.0	76.1
Stepney Green Retail Park	0.7	0.0	0.7
All other in Borough	49.4	52.7	102.1
<b>TOTAL BOROUGH</b>	<b>390.9</b>	<b>467.9</b>	<b>859.0</b>
Central London	161.7		
Stratford - Westfield	465.5		
Stratford - other	75.9		
Beckton	152.4		
Bluewater	3.3		
Hackney	16.5		
Surrey Quays	15.3		
Other (including street markets)	181.4		
<b>TOTAL OUTSIDE BOROUGH</b>	<b>1072.0</b>		
<b>TOTAL MARKET SHARE</b>	<b>1462.9</b>		<b>1931.0</b>

Source: Carter Jonas - Town Centre Retail Capacity Study 2016 (Appendix 6, Table 4 & 6)

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### Relevant Commitments

In order to attain an accurate projection of the Tower Hamlets comparison goods shopping patterns in 2026, future schemes approved for development must also be taken into account. The first two columns of Table 6 (Relevant Commitments) lists these schemes and their planning reference numbers. A threshold of 1000m<sup>2</sup> (gross) of retail space was set when including commitments in the analysis. These commitments were identified in through three routes. First, the Council's 2016 study was consulted, as it listed some relevant commitments for comparison goods in Table 2 of Appendix 7. Second, Table 6.2 of the Council's 2018 study provided a more recent list of relevant commitments, so this resource was also used. Finally, since it was also necessary to include proposals that have been approved since 2018, the Council's Strategic Development Committee was a necessary resource. Details of all proposals approved by the Committee since the start of 2018 were reviewed, and those that met the 1000m<sup>2</sup> (gross) retail space threshold were also included as relevant commitments. This process yielded a total of nine relevant commitments.

The third to sixth columns of Table 6 (Relevant Commitments) provides gross and net floorspaces (GIA and NIA), sales densities and projected 2026 turnovers for all nine schemes. The floorspaces figures were taken from the supporting documents for each application, while sales density was assumed to be £6,000 per m<sup>2</sup> in most cases. A sales density of £8,000 per m<sup>2</sup> was used for Wood Wharf in line with the Retail Assessment associated with this proposal. Projected turnover was calculated simply by multiplying net floorspace by sales density. The seventh column gives a brief overview of each scheme to provide context.

The 'expenditure inflow' column of Table 6 provides the centre which will benefit from the proposed scheme and the amount of turnover that will be diverted to this centre. In most cases, the turnover diverted to the centre is equal to the projected turnover estimated earlier. However, for three schemes this is not the case. For example, the Wood Wharf proposal is projected to produce £210m turnover, but this does not correspond to a £210m inflow to the centre in which it is located – Canary Wharf. Instead, only £115.8m is expected to flow to Canary Wharf as a result of the development. This is because the development is expected to reduce sales density within Canary Wharf meaning that the turnover generated by Wood Wharf will be offset by reductions in turnover elsewhere in Canary Wharf. The degree of this reduction was defined in the Retail Assessment Addendum associated with this proposal and the calculations were accepted by the Council, in paragraph 12.19 to 12.21 of the officer's report.

The 'expenditure outflow' column of Table 6 explains where diverted expenditure originates. Generally, these figures were estimated through an assessment of the proposal's scale, location and nature of nearby centres. Where application included a Retail Assessment (or where a similar nearby scheme contained one), figures for diverted expenditure were taken directly from these reports. Where this is the case, a page reference has been provided for where these data have been taken from. The 'justification of figures' column provides details of this.

Table 6: Relevant Commitments

Commitment	Planning Reference	Maximum Comparison Floorspace (GIA)	Maximum Comparison Floorspace (NIA)	Sales Density (£ per sqm)	Projected 2026 Turnover (£m)	Summary of Scheme	Expenditure Inflow	Expenditure Outflow	Justification of Figures
Wood Wharf	PA/13/02966	35,000	26,250	8,000	210.0	Large mixed-use scheme currently under construction, due to be completed 2023. Development will provide at least 1,700 new homes, a hotel, offices, along with community and leisure uses. Retail Assessment with application assumes a sales density of £8,000.	Canary Wharf: 115.8  (increase in expenditure has been assumed to be £115.8m to account for the fact that this development would decrease sales density within Canary Wharf - based on Retail Statement Addendum for this application, which was accepted by the Council)	Central London: 43.8 Stratford Westfield: 38.7 Beckton: 16.5 Other Outside Borough: 15.8 Bluewater: 1	Ouflow figures based on interpretation of this application's retail statement addendum (p.18), which was accepted by the Council.
North Quay	PA/20/01421	25,000	18,750	6,000	112.5	Major development in Canary Wharf for a mixed use scheme reaching up to 65 storeys. The application is for outline permission, so the retail floorspace could be as low as 5,000 sqm. No retail assessment.	Canary Wharf: 62  (increase in expenditure has been assumed to be £62m to account for the fact that this development would decrease sales density within Canary Wharf, based on figures for Wood Wharf application)	Central London: 23.5 Stratford Westfield: 20.7 Beckton: 8.8 Other Outside Borough: 8.4 Bluewater: 0.6	This application did not contain a retail assessment but given its similarity to Wood Wharf, the outflow figures are simply a pro-rata adjustment of the Wood Wharf figures.
London Docks	PA/13/01276	14,571	10,928	6,000	65.6	Large mixed-use development containing over 200,000 total GEA. Mix of residential, office, retail, community, leisure uses. The scheme will also provide a new secondary school.	Other in Borough: 65.6	Central London: 30 Statford Westfield: 15 Canary Wharf: 12.6 Whitechapel: 7 City Fringe CAZ: 1	Ouflow figures represent my own estimations based on location and nature of the proposal.

Table 6: Relevant Commitments

Commitment	Planning Reference	Maximum Comparison Floorspace (GIA)	Maximum Comparison Floorspace (NIA)	Sales Density (£ per sqm)	Projected 2026 Turnover (£m)	Summary of Scheme	Expenditure Inflow	Expenditure Outflow	Justification of Figures
Blackwall Yard	PA/20/02509/A1	1,110	705	6,000	4.2	The site is currently a car park. The proposal is for a phased mixed-use development of 9 to 39 storeys. The uses include residential, school/nursery, commercial, community. The retail assessment uses a sales density of £6,000.	Other in Borough: 4.2	Canary Wharf: 3 Crisp Street: 1.2	NIA taken from table on page 84 of planning statement for this application, hence it is not simply 75% of GIA, as is this case with the other commitments. Outflow figures represent my own estimations based on location and nature of the proposal.
Leamouth Peninsula South	PA/14/03594/A1	1,590	1,193	6,000	7.2	Residential-led development containing 834 units. Retail uses were considered by the committee to be a major part of the development and proposed that the retail uses should be implemented in the first phase of the development.	Other in Borough: 7.2	Other Outside Borough: 5 Neighbourhood Centres: 1.1 Crisp Street: 1.1	Outflow figures represent my own estimations based on location and nature of the proposal.
Wickham House, 69-89 Mile End Road and 10 Cleveland Way	PA/14/03547	1,287	965	6,000	5.8	Former department store. The application seeks to refurbish the existing building and add flexible retail/leisure use in the basement and office use on the upper floors.	Other in Borough: 5.8	Whitechapel: 4 Bethnal Green: 1.8	Retail GIA based on figures provided in the planning statement (5.12, p.15). Outflow figures represent my own estimations based on location and nature of the proposal.

# ABERFELDY VILLAGE

## RETAIL IMPACT ASSESSMENT NARRATIVE

**Table 6: Relevant Commitments**

Commitment	Planning Reference	Maximum Comparison Floorspace (GIA)	Maximum Comparison Floorspace (NIA)	Sales Density (£ per sqm)	Projected 2026 Turnover (£m)	Summary of Scheme	Expenditure Inflow	Expenditure Outflow	Justification of Figures
Peterley Business Centre, 472 Hackney Road	PA/13/02722	1,521	1,141	6,000	6.8	Demolition of a 1980s light industrial estate to facilitate a residential-led development. The building will be part 4 to 12 storey and includes flexible commercial space.	Other in Borough: 6.8	Bethnal Green: 4 Neighbourhood Centres: 1.4 Other Outside Borough: 1.4	Ouflow figures represent my own estimations based on location and nature of the proposal.
Bishopsgate Goods Yard	PA/14/02011	18,390	15,075	6,000	90.5	Large mixed-use scheme with up to 500 homes, upto 130,000sqm of office space, a hotel, and retail, community and leisure uses.	City Fringe CAZ: 54.3  (Increase in expenditure has been assumed to be £54.3m, since the development will decrease the sales density in the area. This number is based on the Retail Assesment for this proposal)	Central London: 22.5 Other Outside Borough: 12.2 Whitechapel: 10 Roman Road East: 3.8 Neighbourhood Centres: 2.7 Hackney: 2 Brick Lane 1.1	NIA taken from Table 13 in Retail Assesment for applictaion, rather than taking 75% of GIA as in other cases. Ouflow figures represent my own interpretation of the Retail Assesment.
Land bounded by 2-10 Bethnal Green Road, 1-5 Chance Street (Huntingdon Industrial Estate) and 30-32 Redchurch Street	PA/20/00557	1,171	878	6,000	5.3	Demolition of existing buildings for a mixed office/retail development of up to 9 storeys. The retail use is defined as flexible, so it is unclear as of yet which tyoe of units will be included.	City Fringe CAZ: 5.3	Central London: 2.2 Other Outside Borough: 1.2 Whitechapel: 1 Roman Road East: 0.4 Neighbourhood Centres: 0.2 Hackney: 0.2 Brick Lane 0.1	Ouflow figures are a pro rata adjustment of those for Bishopsgate Goods Yard, since the developments are very close to one another.

Sources: Carter Jonas - Town Centre Retail Capacity Study 2016 (Appendix 7, Table 2), Retail Impact Threshold Study 2018 (Table 6.2) and supporting documents for planning applications listed.

Commitments with retail floorspace below 1,000sq.m have been discounted

# ABERFELDY VILLAGE

## RETAIL IMPACT ASSESSMENT NARRATIVE

### Impact of Commitments

Table 7 (2026 Expenditure Including Commitments) incorporates the expenditure diverted as a result of the commitments. The net gain column shows that change in expenditure owing to the nine proposals. Naturally, Canary Wharf experiences the largest increase in retail expenditure (£162.2m), since two large schemes – Wood Wharf and North Quay – are due to be developed there. On the other hand, Central London (-£115.4m) and Stratford Westfield (-£74.4m) are likely to have large reductions in income, as the large schemes in Canary Wharf are likely to divert expenditure from these locations. Overall, comparison goods expenditure within the Borough is expected to increase from £859.0m to £1.12bn.

Table 7: 2026 Expenditure Including Commitments			
Centre	Total Expenditure (£m)	Net Gain (£m)	Adjusted Expenditure (£m)
Canary Wharf	236.5	162.2	398.7
Bethnal Green	76.5	-5.8	70.7
Brick Lane	6.8	-1.2	5.6
Bromley by Bow	27.9		27.9
Chrip Street	39.6	-2.3	37.3
Crossharbour	86.6		86.6
Roman Road East	56.0	-4.2	51.8
Roman Road West	0.0		0.0
Watney Market	19.7		19.7
Whitechapel	114.3	-22.0	92.3
City Fringe CAZ	16.2	58.6	74.8
Neighbourhood Centres	76.1	-5.4	70.7
Stepney Green Retail Park	0.7		0.7
All other in Borough	102.1	89.6	191.7
<b>TOTAL BOROUGH</b>	<b>859.0</b>	<b>269.5</b>	<b>1128.5</b>
Central London	161.7	-122.0	39.7
Stratford - Westfield	465.5	-74.4	391.1
Stratford - other	75.9		75.9
Beckton	152.4	-25.3	127.1
Bluewater	3.3	-1.6	1.7
Hackney	16.5	-2.2	14.3
Surrey Quays	15.3		15.3
Other (including street markets)	181.4	-44.0	137.4
<b>TOTAL OUTSIDE BOROUGH</b>	<b>1072.0</b>	<b>-269.5</b>	<b>802.5</b>
<b>TOTAL MARKET SHARE</b>	<b>1931.0</b>	<b>0.0</b>	<b>1931.0</b>



# ABERFELDY VILLAGE RETAIL IMPACT ASSESSMENT NARRATIVE

## Impact of the Proposal

Table 8 (Aberfeldy Village Proposal) introduces the Aberfeldy Village Proposal. Using the floorspace schedule provided, and a sales density of £6,000 per m<sup>2</sup>, it is estimated that the scheme will generate a turnover of £10.6m. Since the site is not in a designated centre expenditure in the 'Other in Borough' category increases by £10.6m. Given the site's proximity to the neighbouring borough of Newham, it is estimated that £5m of this will be diverted from outside the borough, predominantly from Stratford Westfield. The site is located near the Crisp Street Town Centre, so it is estimated that £1.6m of expenditure will be diverted from there. In addition, the site is relatively close to Canary Wharf, so £1m of expenditure is expected to be diverted from there, although this represents a tiny percentage of expenditure in Canary Wharf. Since the site is not close to any other Town Centres in Tower Hamlets, the remaining £3m is estimated be diverted from multiple other out-of-centre locations in the borough.

Table 9 (2026 Expenditure Including Proposal and Commitments), incorporates the impact of the proposal to the expenditure projections for 2026. The second column shows that the proposal is expected to cause an increase of £5m spent on comparison goods within the borough, as explained by Table 8. The third column of Table 9 displays the combined effect of the nine commitments and the Aberfeldy Village scheme. When commitments are included the amount retained by the borough is expected to increase by £267.9m compared to the baseline 2026 projection. This emphasises that the Aberfeldy village proposal has a negligible effect on the retail market of Tower Hamlets and its surroundings relative to the potential impact of much larger proposals that have been approved.

Table 10 (2021 and 2026 Expenditure Comparison) compares retail expenditure in the base year (2021) with the 2026 projection that incorporates both the Aberfeldy Village proposal and the nine relevant commitments. It shows that overall expenditure on comparison goods rises from £1,511.1m in 2021 to £1,931m in 2026. During this phase, spending outside the borough is projected to decrease by £37.2m, while spending inside the borough is projected to increase by £457.1m.

The cumulative impact of the proposal is provided in Table 11. This compares the baseline scenario in 2021 with the projection for 2026 where both the proposal and commitments are included. The results find that none of the designated centres in Tower Hamlets would experience a negative impact as a result of the proposal. Areas outside of the borough experience negative effects, although this is largely as result of the large-scale commitments which will draw expenditure from outside the borough.

Table 12 (Sense Check) is based on inputting the unit mix on page 162 of the Aberfeldy Village Design and Access Statement into the GLA's population yield calculator. The result is that the proposed development is estimated to cause an increase in population of 3,369. This figure was multiplied by the projected expenditure on comparison per capita for 2026 listed earlier in Table 2 (£3,369). This resulted in a figure of £11.4m. This means that the new residents that move into Aberfeldy Village are projected to spend £11.4 on comparison goods in 2026, which is higher than the projected turnover from the retail element of the proposal (£10.6m).

## Conclusion

All of the Tower Hamlets designated centres would experience an increase in turnover over the assessment period, between 2021 and 2026, and hence there would be no adverse retail impact, either cumulatively or on a solus basis. Consequently the proposal would comply with paragraph 91 of the NPPF, and Policy D.TC3 of the Tower Hamlets Local Plan.

# ABERFELDY VILLAGE

## RETAIL IMPACT ASSESSMENT NARRATIVE

Table 8: Aberfeldy Village Proposal					
Maximum Comparison Floorspace (GIA)	Maximum Comparison Floorspace (NIA)	Sales Density (£ per sqm)	Projected 2026 Turnover (£m)	Expenditure Inflow	Expenditure Outflow
2,366	1,775	6,000	10.6	Other in Borough: 10.6	Stratford Westfield: 3 Other in Borough: 3 Chrip Street: 1.6 Canary Wharf: 1 Stratford Other: 1 Other Outside Borough: 1

Table 9: 2026 Expenditure Including Proposal and Commitments			
Centre	Total Expenditure (excluding proposal and commitments) (£m)	Total Expenditure (including proposal, excluding commitments) (£m)	Total Expenditure (including proposal and commitments) (£m)
Canary Wharf	236.5	235.5	397.7
Bethnal Green	76.5	76.5	70.7
Brick Lane	6.8	6.8	5.6
Bromley by Bow	27.9	27.9	27.9
Chrip Street	39.6	38.0	35.7
Crossharbour	86.6	86.6	86.6
Roman Road East	56.0	56.0	51.8
Roman Road West	0.0	0.0	0.0
Watney Market	19.7	19.7	19.7
Whitechapel	114.3	114.3	92.3
City Fringe CAZ	16.2	16.2	74.8
Neighbourhood Centres	76.1	76.1	70.1
Stepney Green Retail Park	0.7	0.7	0.7
All other in Borough	102.1	99.1	188.7
<b>TOTAL BOROUGH</b>	<b>859.0</b>	<b>853.4</b>	<b>1128.5</b>
Central London	161.7	161.7	39.7
Stratford - Westfield	465.5	462.5	388.1
Stratford - other	75.9	74.9	74.9
Beckton	152.4	152.4	127.1
Bluewater	3.3	3.3	1.7
Hackney	16.5	16.5	14.3
Surrey Quays	15.3	15.3	15.3
Other (including street markets)	181.4	180.4	136.4
<b>TOTAL OUTSIDE BOROUGH</b>	<b>1072.0</b>	<b>1067.0</b>	<b>802.5</b>
<b>TOTAL MARKET SHARE</b>	<b>1931.0</b>	<b>1931.0</b>	<b>1931.0</b>

# ABERFELDY VILLAGE

## RETAIL IMPACT ASSESSMENT NARRATIVE

Table 10: 2021 and 2026 Expenditure Comparison

Centre	2021 Expenditure (£m)	2026 Expenditure (Including Proposal and Commitments) (£m)
Canary Wharf	184.5	397.7
Bethnal Green	59.7	70.7
Brick Lane	5.2	5.6
Bromley by Bow	21.8	27.9
Chrip Street	30.8	35.7
Crossharbour	67.5	86.6
Roman Road East	43.7	51.8
Roman Road West	0	0.0
Watney Market	15.3	19.7
Whitechapel	89.1	92.3
City Fringe CAZ	12.6	74.8
Neighbourhood Centres	59.3	70.1
Stepney Green Retail Park	0.7	0.7
All other in Borough	79.6	188.7
<b>TOTAL BOROUGH</b>	<b>669.8</b>	<b>1128.5</b>
Central London	126.1	39.7
Stratford - Westfield	365.1	388.1
Stratford - other	60.4	74.9
Beckton	119.9	127.1
Bluewater	2.6	1.7
Hackney	12.9	14.3
Surrey Quays	11.9	15.3
Other (including street markets)	142.4	136.4
<b>TOTAL OUTSIDE BOROUGH</b>	<b>841.3</b>	<b>802.5</b>
<b>TOTAL MARKET SHARE</b>	<b>1511.1</b>	<b>1931.0</b>

# ABERFELDY VILLAGE RETAIL IMPACT ASSESSMENT NARRATIVE

**Table 11: Cumulative Impact of Proposal (2021 v 2026)**

Centre	Cumulative Impact (£m)	Cumulative Impact (%)
Canary Wharf	213.2	115.6
Bethnal Green	11.0	18.4
Brick Lane	0.4	7.7
Bromley by Bow	6.1	28.0
Chrisp Street	4.9	15.9
Crossharbour	19.1	28.3
Roman Road East	8.1	18.5
Roman Road West	0.0	0.0
Watney Market	4.4	28.8
Whitechapel	3.2	3.6
City Fringe CAZ	62.2	493.7
Neighbourhood Centres (Inc. Aberfeldy)	10.8	18.2
Stepney Green Retail Park	0.0	0.0
All other in Borough	109.1	137.1
<b>TOTAL BOROUGH</b>	<b>458.7</b>	<b>68.5</b>
Central London	-86.4	-68.5
Stratford - Westfield	23.0	6.3
Stratford - other	14.5	24.0
Beckton	7.2	6.0
Bluewater	-0.9	-34.6
Hackney	1.4	10.9
Surrey Quays	3.4	28.6
Other (including street markets)	-6.0	-4.2
<b>TOTAL OUTSIDE BOROUGH</b>	<b>-38.8</b>	<b>-4.6</b>

**Table 12: Sense Check**

Population Increase from Proposal	Expenditure per Resident (£)	Expected Expenditure by New Residents (£m)
3,369	3,369	11.4

*Population increase calculated using unit mix on page 162 of D&A Statement for Aberfeldy Village and GLA calculator for population yield.*

# ABERFELDY VILLAGE

## RETAIL IMPACT ASSESSMENT NARRATIVE

### APPENDIX 1

#### GLA Population Yield Calculator

	1 bed	2 bed	3 bed	4 bed
Market and Intermediate Units	606	624	31	0
Social Units	69	108	131	36

<b>Total Units</b>	<b>1605</b>
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Geographic Aggregation	London
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PTAL	PTAL 3-4
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#### Notes

Sample size of 39 sites

Shaded cells require user input

Select both geography and PTAL

For developments in Outer London with PTAL 5-6 use [London/PTAL 5-6] or [Outer London/3-4] to calculate yield

#### Yield from Development (persons)

	Market & Intermediate	Social	Total
Ages 0, 1, 2, 3 & 4	110.5	175.5	286.0
Ages 5, 6, 7, 8, 9, 10 & 11	70.7	151.1	221.8
Ages 12, 13, 14 & 15	13.0	91.9	104.9
Ages 16 & 17	6.9	48.5	55.4
18-64	2019.9	618.5	2638.4
65+	48.3	14.3	62.5
<b>Total Yield</b>	<b>2269.2</b>	<b>1099.8</b>	<b>3369.0</b>

#### Play Space Calculator

Total Children	<b>668.1</b>
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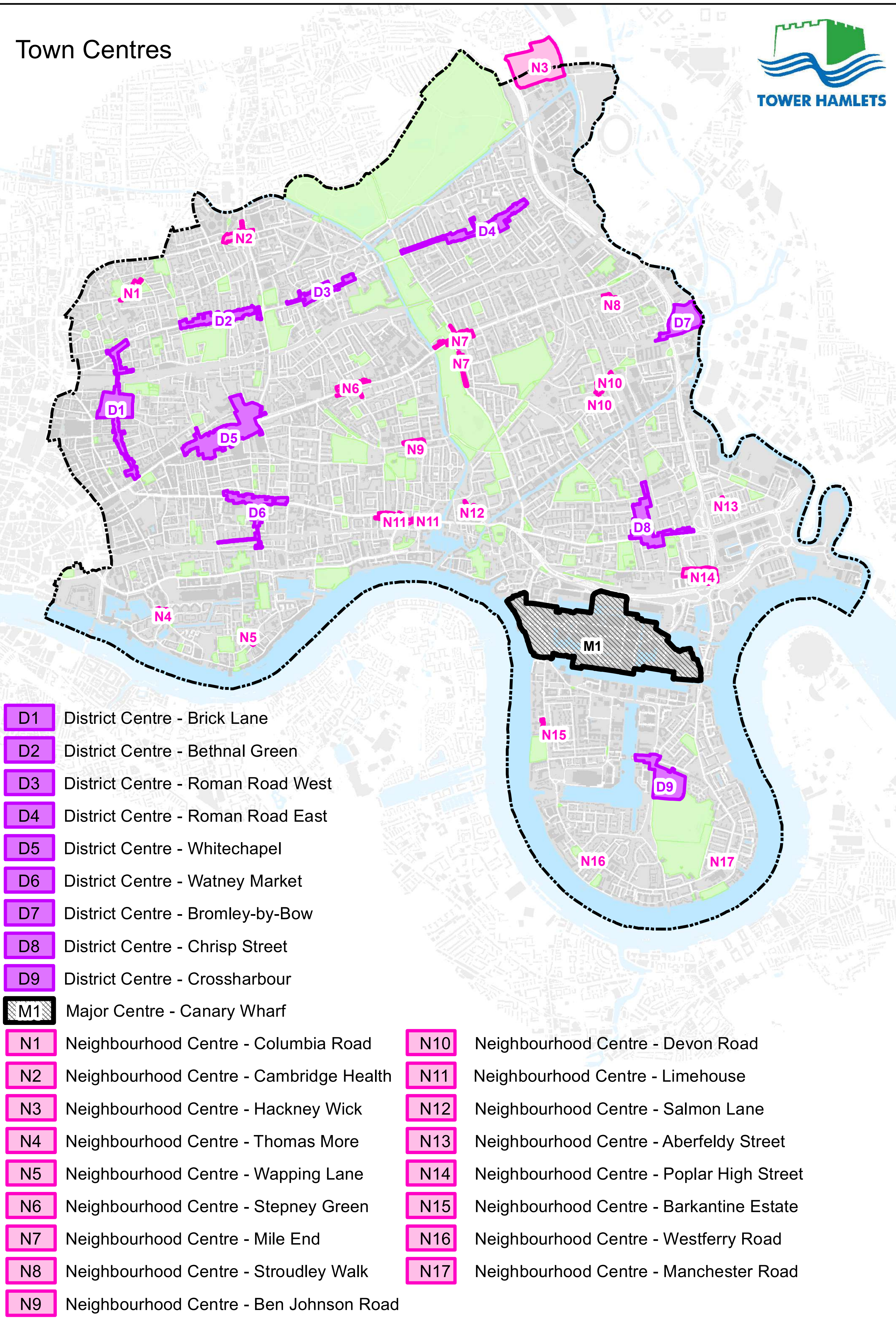
	Benchmark (m <sup>2</sup> )	Total play space (m <sup>2</sup> )
Play space requirement	10	6680.5

# APPENDIX 2

## Town Centres



Document Path: W:\Development & Renewal\Planning\1 - Maps\2015\AF392094PD - Town Centres\2 - Production\A4 Town Centres.mxd





## **CONTACT**

Andrew Sissons  
Managing Director  
[andrew@andrewsissonsconsulting.com](mailto:andrew@andrewsissonsconsulting.com)

Max Taylor-Smith  
Managing Director, Agency and Leasing  
[max@andlondon.net](mailto:max@andlondon.net)

0208 054 0418

