



London's Retail: exploring what works

The retail sector is undergoing fundamental structural changes but is far from dead. Contextualised by London's highly competitive retail climate, and defined by creative thinking, the responsive evolution of the sector can be clearly understood in some of London's new and established retail districts. This report looks at what lessons can be learned from these places, and the role the built environment sector is playing in shaping retail-led schemes that are able to withstand the test of time.

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With the golden era of British retail in faint memory, the retail sector continues to resiliently and creatively diversify its models to define the future of retail in London. As online consumption has supplanted ‘big box’ retail culture, London has faced an oversaturation of previously sought-after retail space, leading to an increase in vacancy rates and some of the most well-known high street names going into administration. While the rise of online shopping is demonstrative of consumers’ demand for convenience, unlimited choice, and optimal value, the shift to online is only one challenge facing the sector.

In a new age of conscious consumerism, shoppers are increasingly factoring ethical stances and sustainability into their purchasing decisions, ushering in the demand for a more circular economy. Larger retailers operating out of physical stores have also been hit by sharp spikes in business rates, particularly in the West End, where some have seen their liability double since the implementation of a business rates bill, part of the Government’s 2018 Autumn Budget.

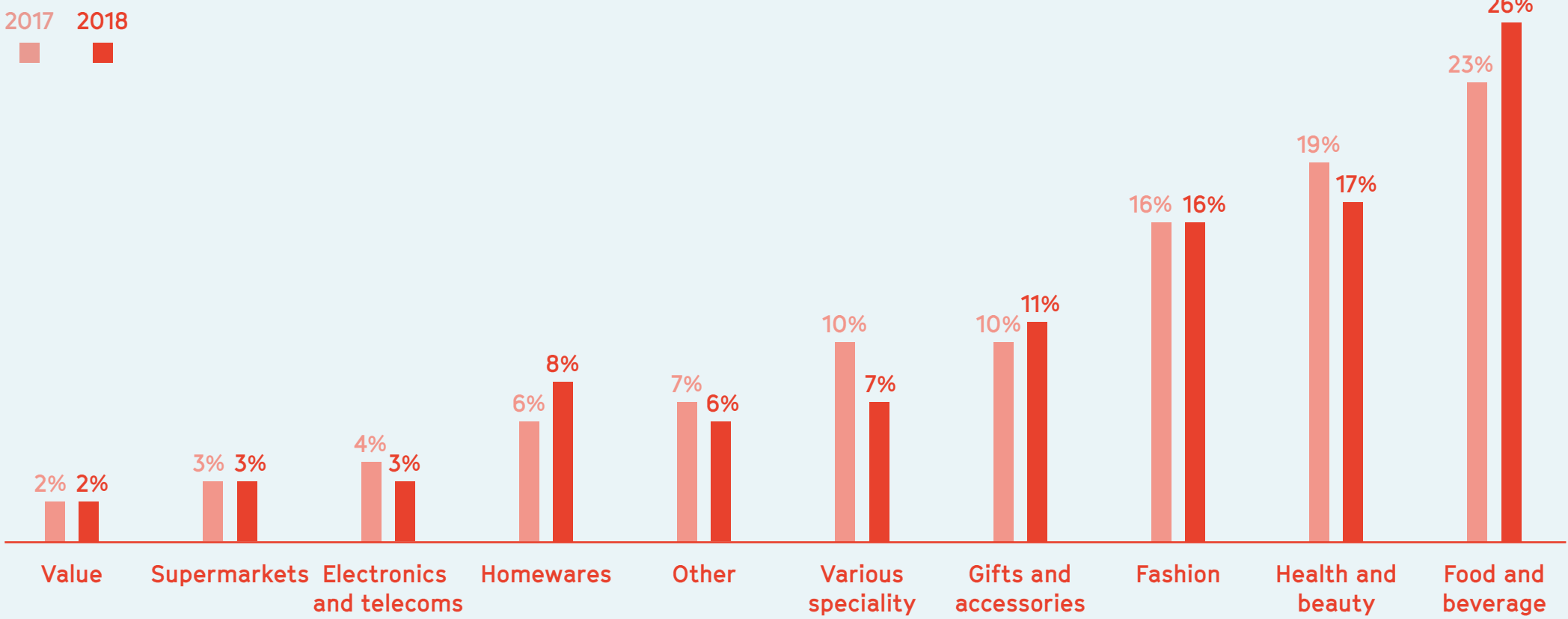
In response to the urgent pressure that has been building on the industry since the 2008 financial crash, the 2011 Portas Review notably galvanised central government support for the UK’s struggling high streets.¹ More recently, the government released *The High Street Report* alongside a Future High

Street Fund of £675m to support local town centres in England. Business Improvement Districts (BIDs) such as the New West End Company have helped in concentrating funds to help businesses and retailers thrive, straddling the public and private sector.²

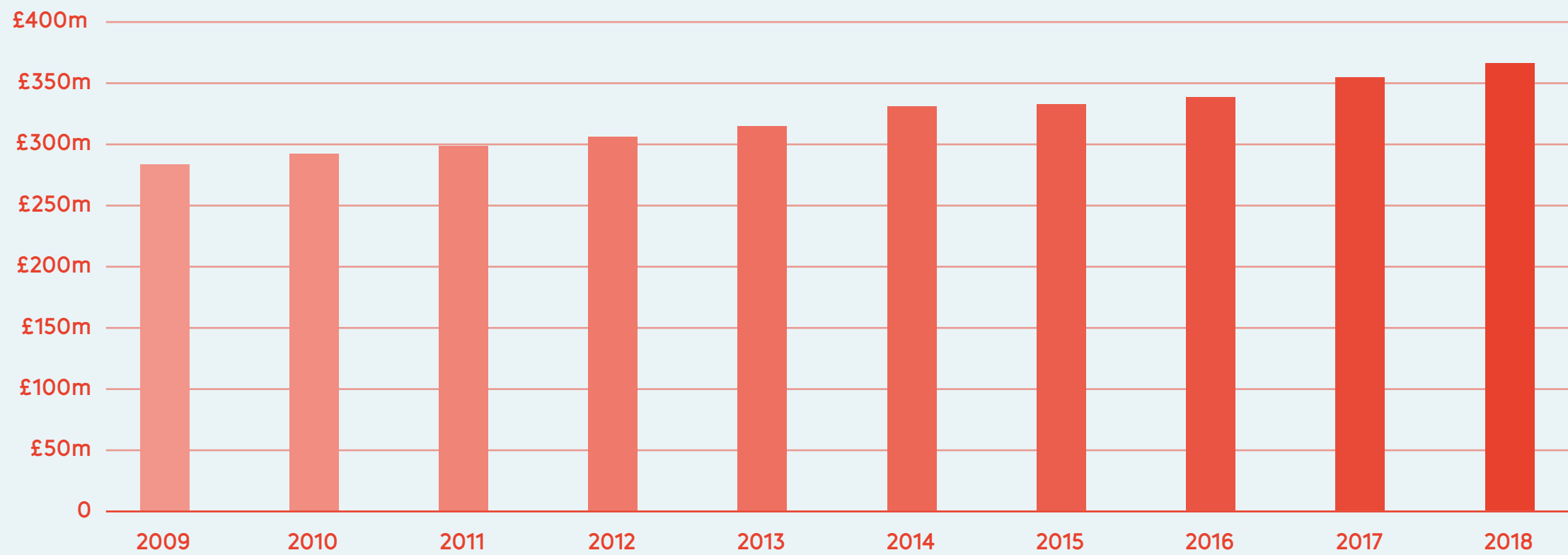
And yet, the number of international retailers opening debut stores in the capital was up 27 per cent last year according to Savills research, and vacancy remains below the national average.³ While footfall paints a mixed picture across the key shopping streets in the West End — Oxford Street, Regent Street and Bond Street — overall the district experienced an increase of 1.7 per cent in the first quarter of 2019 according to the New West End Company.

This research explores the responsive innovations currently being undertaken at the intersection of the built environment and retail sectors: from London’s world-famous West End shopping streets, town centre retail districts, local high streets and major transport hubs. ●

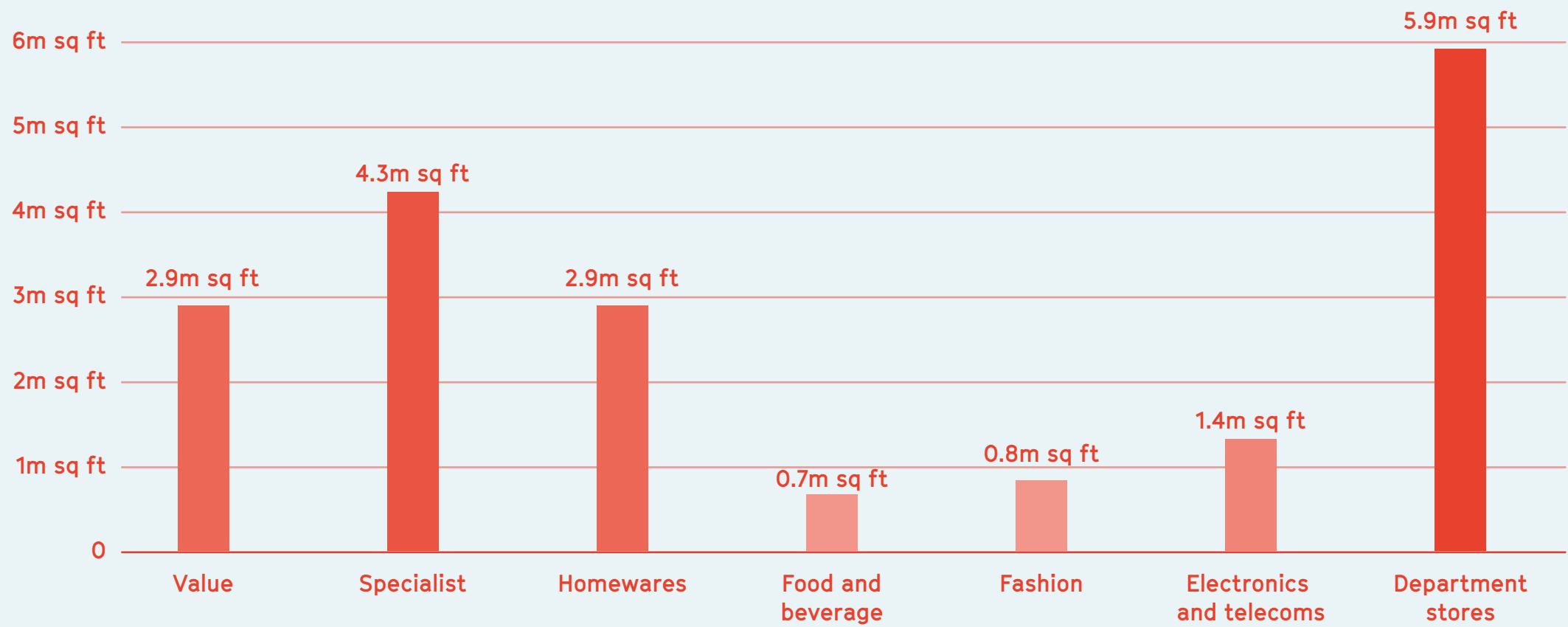
Most active retail occupier sectors 2017–2018, UK (% of total make up)



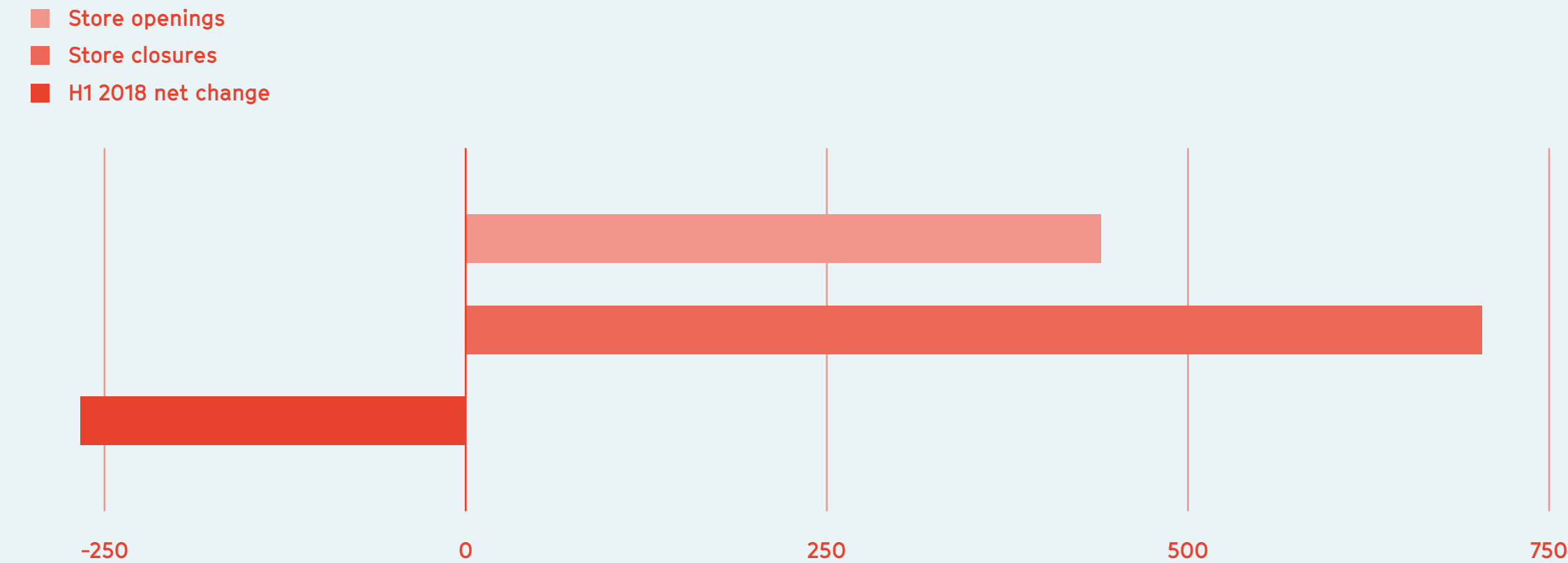
Total UK retail spending (excluding fuel)



Types of retail space vacated in 2018, UK



Retail openings and closures in the first half of 2018, Greater London



Sources: Radius Data Exchange and Local Data Company

+6.7%

Year-on-year growth in the quantity bought in retail sales in March 2019, the highest since October 2016, with a range of stores noting that the milder weather this year helped boost sales

−0.3%

Department stores were the only store type to decrease in the quantity bought when compared with March 2018

+18.6%

Increase of online sales as a proportion of all retailing in March 2019, from the 18.1% reported in February 2019

40%

of all money spent in London is in the retail industry, contributing significantly to the economy

9%

of all employment in the metropolitan area is in the retail industry (400,000 jobs)

78,000

jobs in clothing shops, the single largest type of specialist retail shops. Specialist food shops such as bakers and butchers follow second with 22,000

All figures refer to London. Sources: ons.gov.uk → and uncsbrp.org →

Part 1: Review

Place



Pavilion Road © Agnese Sanvito

It was through the introduction of café culture in the late 1990s that London’s purpose-built retail districts began to offer a reason to dwell, ushering in the demand for a more varied catering and leisure offer, and the need to integrate careful placemaking considerations in the provision of successful retail environments. Until this time, regeneration schemes were largely retail-led, designed for a singular function.

The conversation around ‘place’ has continued to evolve rapidly in response to present challenges and the competition to entice increasingly discerning shoppers, with retail development schemes increasingly employing placemaking strategies. Retail placemaking has begun to incorporate tailored branding and marketing campaigns into its toolkit, constructing multi-level narratives for retail environments as places to visit. The development of King’s Cross follows this approach; the site of a major transport hub, it includes workspaces, shops, restaurants, bars and a residential neighbourhood, but sitting at the heart of the mixed-use development is its public realm. For Craig White, former King’s Cross senior project director at Argent (now of U&I), successful retail places are wise to operate as an extension of the public space rather than the other way around. The public realm, he argues, ‘allows everyone to come together with no agenda, no access barriers... Granary Square never ceases to amaze

me when the sun comes out in the summer. You can see everyone, every member of society.’ With this approach, public realm can be curated with free events, activities, pop-ups and markets. Such public extensions to brick and mortar retail allow for a great deal of flexibility, whether seasonally or thematically, keeping a destination perpetually fresh and exciting.

Ros Barclay, director at Coverdale Barclay which specialises in PR, marketing and stakeholder engagement for places undergoing regeneration argues to this point that retail is a ‘red herring’ for the most successful schemes, and that ‘mix’ is key; ‘It’s about places, spaces where people want to spend their time in, and retail is a part of that.’ The process of transforming retail spaces in to places should be reflective of its public offering, nurturing this through a layering of uses, experiences, design and the quality of the built environment. Hugh Seaborn, CEO of Cadogan, custodian and landowner of 93 acres in Chelsea, agrees that a sense of ‘place’ can be the ultimate anchor, and that the power of a collective is greater than the individual. ‘No matter how brilliant a store, it is more powerful as part of the “whole” when positioned in the right environment and complementary to its adjacencies’.

Nimble models such as Boxpark and Pop Brixton channel the power of the collective through an especially agile approach to establishing ‘place’.

These new concepts have become attractive destinations not only for their vibrant market-style retail offer, but in how they create buzzing leisure destinations activated with popular bars, food stalls and public events. These models demonstrate that the focus has shifted from retail-centric commerce to an offer and environment that is more diverse in function and experience.

Establishing what the community need on a day to day basis from their town or urban centre is also vital to producing a place that is both meaningful and useful to local residents. Often, the offer of public services, such as doctors' surgeries, medical facilities, libraries and council facilities can contribute to establishing or reinvigorating a sense of 'place' in local areas — helping to create a sense of ownership, an opportunity to interact and giving people an additional reason to visit. This is an important point for CallisonRTKL; 'We don't start a project by deciding how much retail we need. It's also about looking at leisure, hospitality, community spaces, residential, workplace and everything that goes into making a vibrant place.' Assessing what a community needs, whether through talking to people in the street, canvassing local businesses or using market research and branding methods to 'curate place', is essential to establish what sort of place people want, require, and

will want to use. Satisfying a variety of needs informs the overall vibrancy and success of the place creating a diversity of purpose which can feed off each other.

Nick Strachan, director at Leslie Jones Architecture sums it up: '[It's about] finding a solution that is relevant to the location and community. Making the effort to conduct research and gain insight forms a better understanding of the locale and how people want to spend their time and what they need. It is essential in ensuring authenticity of place and creating a suitable provision of mixed uses, including correctly scaled retail, that will allow the destination to thrive in the longer term.' ●



Quadrant Arcade, Piccadilly: winner of the retail category of the New London Awards 2019

Flexibility



Peckham Levels © Tim Crocker

As brick and mortar retail destinations continue to adapt to new trends and consumer demands, flexibility is a crucial consideration across the board for long term success. For retailers to fine tune their offer to meet customer demand, they require the flexibility to adapt their service and product offerings. In the same way, new and regenerated retail spaces need to factor flexibility into the physical spaces they require. This demand for a different kind of retail space poses interesting implications for the future.

Arguably, the wider industry struggles to facilitate the flexibility it needs the most, with most leasing structures failing to accommodate the models of tenure and agility of fit-out retailers increasingly demand. Matthew McMillan, development director at Boxpark is all too aware of the industry's demand for fast, flexible spaces, 'Boxpark Wembley was conceived, designed and delivered in twelve months so it can be more responsive.' Boxpark achieves speed of delivery and flexibility by keeping spatial provisions and the materiality of its units simple, while focusing on providing sophisticated experiential elements, such as lighting and audio visual installations. With these configurations, spaces can also be reinvented quickly to meet changing demands. The Boxpark scheme in Shoreditch opened in 2011 with a purely A1 retail use class offering. Two years later, A3 restaurant use was added into the mix, and in their subsequent developments in Croydon and Wembley they have

further increased the scope of uses to include A1 through A5, in addition to D1 and D2 uses.⁴ In future developments they are looking to broaden the scope of their role within the city by potentially developing additional uses and operations within the model. The changing shape of the Shoreditch scheme over time demonstrates how good structures can be adapted with imaginative design, if flexibility is woven into the brief at early stages.

Significantly, the rise of temporary use has been growing within the sector in recent years. Retailers increasingly find that temporary leases offer a useful way to experiment and nurture new businesses, and a regularly evolving offer can add excitement and curiosity. Increasingly, 'temporary' is becoming the new normal with online retail marketplaces such as Appear Here acting as facilitators between space, users and landlords in major cities globally. Carl Turner, founding director at Carl Turner Architects, set up Pop Brixton as a hub for local retail, food, drink and workspace. For him, the project challenges what he calls 'stuck space' — units which are held for long periods by the same occupier. 'This limits opportunities for young entrepreneurs as the space becomes literally stuck in one use or ownership.'

Flexible use of space shouldn't be limited to retail and leisure offers alone, argues Greg Jones, director at Child Graddon Lewis. He suggests that alternative

uses such as libraries, health facilities, civic amenities, residential and workspace bring activity because people still want convenience: ‘The way that we operate in town centres isn’t entirely about a leisure pursuit that you’re going out of your way for.’ Rather it is about co-location of uses and developing or adapting an environment that suits. Julian King, national head of retail at Rider Levett Bucknall agrees: ‘The blend between community space and commercial space is essential and is being helped by a lot of forward-thinking local authorities.’

Looking to the future, retail spaces will need to continue to adapt to different uses. New and retrofitted retail space must be designed with adaptability in mind, and leasing and planning structures must accommodate those changes. London’s vacant retail space requires fresh thinking from landlords, a relaxation of the grip on long leases and a broader vision about use and asset management — above all, good leadership is required. ●



© John Sturrock

Coal Drops Yard, encompassing a broader vision for the future of retail destinations

Leadership



Chiltern Street © Agnese Sanvito

It is easier to create and deliver a robust vision for a place, to regenerate and evolve it, when there is consistent ownership. London boasts a number of landed estates where space, uses and the public realm can more easily be curated, enhanced and adapted. Long term custodians such as The Portman Estate, Cadogan and The Crown Estate count major shopping streets and retail led centres as important to ensuring that the tenants and communities within the estates' stewardship are able to thrive and grow. As these estates demonstrate; with consistent ownership comes the opportunity for cohesive vision.

Among The Portman Estate's 110 acres, including frontages on Oxford Street and Baker Street, are a number of smaller streets such as Chiltern Street, conceived to provide space for independent retailers and artisanal makers. For more than a decade it has embarked on a strategy to enhance this offer and strengthen the sense of place at The Portman Estate. Simon Loomes, strategic project director, outlines the approach: a combination of curating the mix, introducing more food and beverage to extend dwell, while improving the streetscape, removing clutter, changing lighting and widening pavements. 'We take care to maintain the street's DNA with each new addition,' he concludes.

Hugh Seaborn, Cadogan's chief executive says it is important to be 'fleet of foot', curating the retail offer accordingly. Cadogan's own community engagement exercises have resulted in providing leases to a butcher and bakery, as well as a number of independent and artisanal retailers, creating a high street fit for Chelsea's clientele. For Preston Benson, founder of the Really Local Group, listening to the needs and desires of the local community is at the core of a successful strategy to bring a new lease of vibrancy to high streets and town centres. An approach evidenced at their most recent community-led scheme, Catford Mews. The redevelopment will be home to a new cultural venue in a part of Catford's town centre which had previously suffered high vacancy rates; 'We see the on-going shake-up of the retail industry as an opportunity to try a different approach and to see what happens when you listen to the community.'

At Battersea Power Station, where a new residential and retail district is being created on the site of a decommissioned industrial district, Sam Cotton, head of retail leasing, considers the Great Estates in London as an inspiration for his work at Battersea. He argues, 'You can control pricing, you can control lease structure, and you can help with fit-out costs... What we've tried to do is incubate, create a village with a

very low barrier of entry to the incoming brands so they're largely independent — nobody has more than five existing stores in operation.'

Where singular ownership structures are not in place, funded bodies such as BIDs, as well as town centre management and local authorities have an important role to play. There needs to be a dialogue between businesses and local authorities, a collective vision and leadership. Ed Watson, consultant at Arup, previously worked in the public sector. He suggests, 'A local authority who is cash-strapped but owns property in a high street might want to think creatively about how having low or zero rents for some units with flexible leases to allow for pop-ups, might deliver more value across the town centre in the long term, rather than little or no income from, for example, a vacant unit or a charity shop.'

It is apparent that the landlord's role is broadening, investing in marketing and events and creating a customer base to support its tenants' business growth. Increasingly, uses are seen as 'content' and assessed on the basis of what contributes experiential value to the environment rather than just numbers on a balance sheet. Such visions are far easier to execute in cases of single ownership. Without cohesive or visionary ownership structures, many retail destinations struggle to communicate a connected vision of a place. ●



Pavilion Road, consistent in ownership and vision



Retail will continue to evolve, as evidenced by the different relationships Generation X and millennials have already developed with the sector. Research by Colliers International found that the younger generation is more loyal to town and city centres.⁵ They are also prepared to pay more for ethical and environmentally-friendly goods than older generations. For example, the rise of veganism is not something to be underestimated as is the growing awareness of the environmental impact of consumerism. In Sweden, the ReTuna shopping mall was set up in 2015, selling only recycled products. Similarly, Ikea has begun trialling leasing services for its furniture.

In line with environmental concerns, retailers are coming under pressure to reduce packaging, to recycle and repair products for a secondary lease of life. A number of leading supermarkets have announced trials of plastic free aisles, product refilling stations and packaging-free produce. This will no doubt affect what stores and retail looks like moving forward as environmental concerns move higher up the agenda.

Online shopping offers convenience, but the same demand for immediacy applies to physical stores too. London's mainline train stations are ever-becoming havens for quick, convenient purchases. Nick McGough, associate partner and head of retail at Weston Williamson + Partners is working to design spaces

which can facilitate a broader food and beverage and public realm offer in transport hubs, as evidenced through current work at Fenchurch Street station.

Humans have a natural instinct for interaction and connection. Lara Marrero, global retail leader and principal at Gensler explains that 'Customers expect a seamless journey across every channel—from physical to digital and social... physical stores which emphasise engagement over transaction are vital to that equation.' It makes the argument for experiential retail more compelling—something to do and share with others. The idea isn't new, Nike Town and Apple have been offering more than just a location to buy their products for many years. The next generation of experiential retail will no doubt push the boundaries further, continuing to expand the parameters of retail. Illustrating this diversification is streetwear brand Vans' Waterloo flagship, 'House of Vans': a café, cinema and events space in the former Old Vic Tunnels. Similarly, there is much anticipation around Microsoft's new store at Oxford Circus which includes an intriguingly titled 'exploratorium'.

These recent retail offers to London highlight that it is not only incumbent on retailers to offer these experiences, but to also link with the wider public realm, enabling retail spaces to be a fulcrum between places where people can easily interact and socialise.

Customer experience is changing with the use of technology, helping to build brand loyalty and communities around destinations. From sophisticated apps that alert to special offers to something as simple as WhatsApp groups for organising leagues at free table tennis tables. And this is just the tip of the iceberg — facial recognition, AI and augmented reality will all play a big part in shaping the culture and experience of retail. ●



© Chris Payne

Experiential retail interior by Gensler for Harman, Munich

Part 2: Industry insight

The role of retail placemaking

by Beverley Churchill, Churchill Husband

A good crisis should never be wasted— So much has been said about the high street being killed off by e-commerce, it is worth stating a simple point at the outset: there are more similarities than there are differences between online and offline shopping. They have the consumer and the product in common. That consumer is spending the same time and care buying that product, using the same hard-earned cash. Regardless of channel, brands must make a connection to make a sale, and the deeper that connection, the higher the chances they'll repeat the experience.

The likes of Amazon Go's checkout-free convenience stores have been making huge innovations in frictionless consumption, but we believe that often a bit of friction can go a long way. Chatting to a sales associate who shares your passions is a pleasure and receiving real-life recommendations from an expert is always reassuring. So instead of removing them from the equation and replacing them with invisible processes, technology should be in service to, and enhance, those human interactions, creating tailored shopping experiences, with on-the-spot offers, dynamic pricing and value-added services.

Brick and mortar retail is not facing extinction, but it should be evolving to stave off the threat of it. The high street is certainly 'over-stored' but what is going on right now is natural selection. It is a valuable opportunity to move the needle, and one which smart brands are seizing.

There is no room for laziness and complacency, for poor design, bad merchandising and disengaged staff. The stores that remain must be better— more sustainable, more exciting, more curated, more welcoming. They must innovate to remain relevant.

Sportswear is one of the sectors at the forefront of this sort of retail innovation. The biggest operators in the field were among the first to realise that an integrated approach to their physical stores, that supported the healthy lifestyles they sought to sustain, would be a draw to their customers. So in flagships from Lululemon, Nike and Adidas, a sense of wellbeing is augmented through architecture and design, as well as added elements including health food cafes, sports clinics and classes, lectures and product personalisation. They stretch beyond the walls of their stores too, with run and exercise clubs that meet there but take in the surrounding areas— and the apps that continue the brand experience well after you have left.

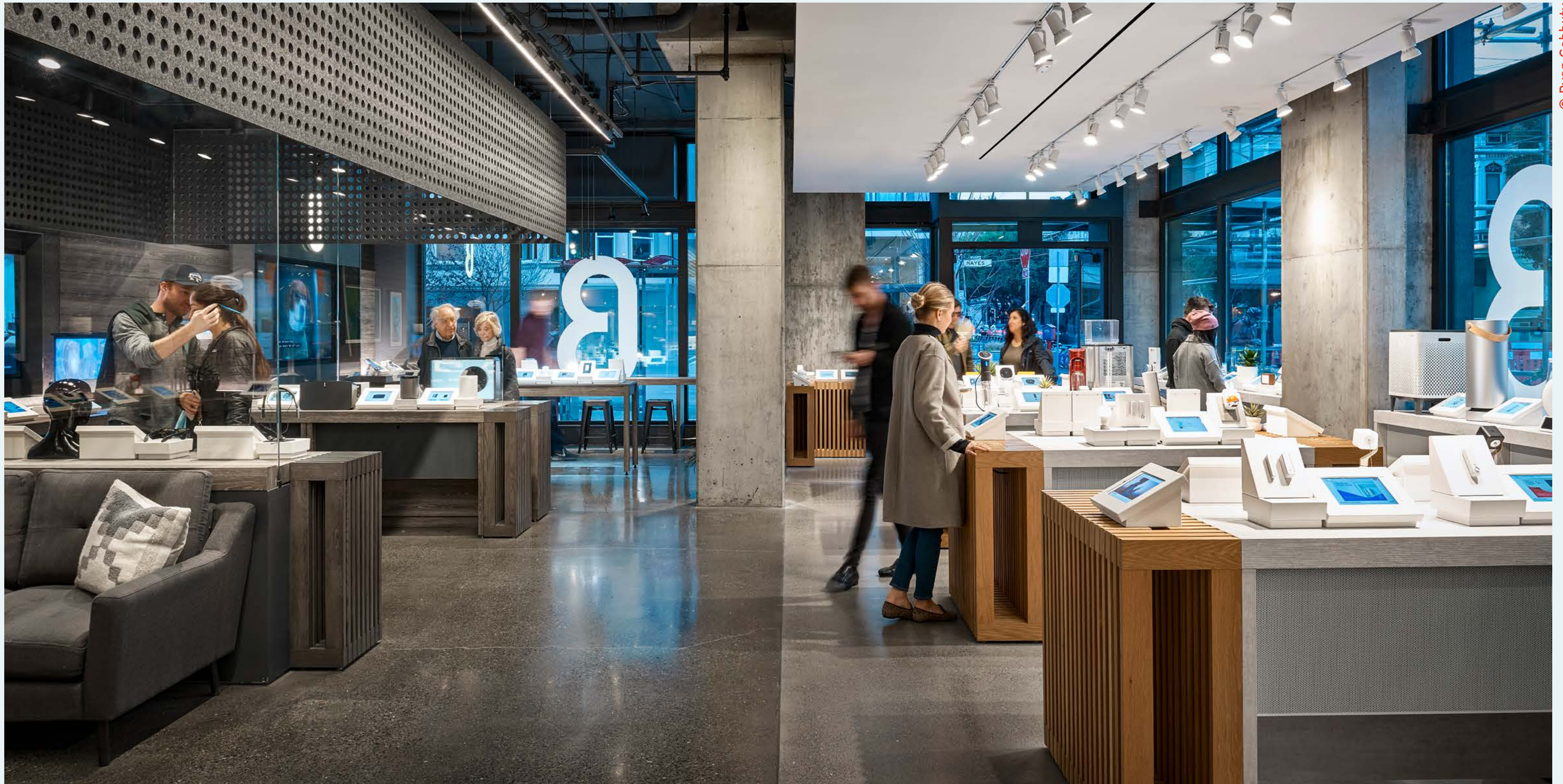
The sheer size of these operations allows for testing of major new retail initiatives, but in-store innovation can work on a smaller scale too. On a macro level, Alibaba has plans to bring its computing technology to six million mom-and-pop stores in China, using a free platform to help them boost sales and optimise product procurement, in return for using their storefronts as delivery centres and sharing their data on customers' shopping habits.

On a more creative level, Texas' Neighborhood Goods is a retail space that draws on the concept of co-working and relies on social media for marketing, billing itself as a 'new type of department store'. A community hub with a bar, restaurant, co-working and events space, it features up to 15 monthly pop-up store-within-stores from cult or pure-play e-commerce brands, both local start-ups and established companies, as well as in-store lectures, product launch events and live podcast recordings. Story, which was last year bought by Macy's, is another innovator in the retail space. A 2,000 sqm store in New York's West Chelsea, it gets a complete makeover with a new design, product assortment and marketing message every four-to-eight weeks, often sponsored by big brands from Disney to Harry's, to the tune of up to \$1m per cycle. This model is now being trialled within Macy's stores in major US cities.

Both of these concepts have a central idea at their heart: that some brands will fail and others will fly, and to allow for this, landlords must be flexible and their spaces agile. For the customer, the excitement is not just in what is happening now, but how it might be transformed next. This idea of dramatic retail theatre — in a space where the 'scenery' can be shifted on a whim or at the push of a button — is a smart and shareable one in a social media age.

For the bravest, the rewards are huge. What do all the unicorn brands killing it right now — Glossier, Drunk Elephant, Away, Allbirds — have in common? They have a unique point of view, they make the customer part of their world. Of course, that can all be done online, but empathy is easier face to face. By considering the customer journey, both physical and digital, as a whole, these disruptors are showing the dinosaurs how it is done, and they must be prepared to learn from them or face extinction. Using their deep, data-driven understanding of the fan base, these digital-first brands tailor their showrooms to their customers' needs, offering acquisition, entertainment and inspiration in equal parts. Discovery online can be such a tricky business — will it fit, will it look like it does in the picture, will I bother to send it back if it is not quite right — but in a shop it can, and should, be a joy.

As painful as this transition might be, our view is that one should never waste a good crisis. This is retail's 'burning platform' — a moment that should be used as a catalyst for change. A time for everyone — from the founders of digital retail start-ups to CEOs of high street brands and leaders of property companies — to re-evaluate and recalibrate their activities and take a leap of faith to the next level. What is certain is that some good, if not great, things can come of this for the consumer in all of us. ●



Retail interior by Gensler for Harman, Munich

Part 3: Viewpoints

Part 3: Viewpoints



Cadogan: the historic estate shaping a 21st century Chelsea
by Hugh Seaborn, Cadogan



Pop Brixton and Peckham Levels: retail in the local context
by Carl Turner, Carl Turner Architects



Chiltern Street, Portman Estate
by Simon Loomes, The Portman Estate



Retail environments for transport hubs
by Nick McGough, Weston Williamson + Partners



Catford Mews: for and by the community
by Preston Benson, Really Local Group



Coal Drops Yard: a new destination
by Anthea Harries, Argent



Any time, any place: the future of retail architecture
by Lara Marrero, Gensler

*Cadogan: the historic estate
shaping a 21st century Chelsea*

by Hugh Seaborn, Cadogan

Pavilion Road © Agnese Sanvito



Duke of York Square, Chelsea, proving that successful neighbourhoods are more than the sum of their parts

People seek identity and an emotional resonance with the places in which they live, shop and socialise. Changing consumer spending habits have led to a rapid change in retail and we have adapted by strengthening our responsiveness to shopper preferences and working more closely with retail partners. Successful neighbourhoods are much more than the sum of their parts; from the architecture and public realm, to culture, unique events, curation of retail, great food and drink — together, this contributes to a thriving community that creates vitality through its rounded experience.

Cadogan is here for the long term, seeking to protect and enhance Chelsea’s rich heritage and identity. To do that, we invest significantly in the environment and work closely with the local community — from the bohemian King’s Road and sleek Sloane Street, to the creation of Duke of York Square and, more recently, the thriving artisans on Pavilion Road.

This long term view means that we do not select stores on a purely financial basis, but on how they enhance the existing offer to generate footfall and benefit Chelsea for the future. Consumers are seeking a more engaging, memorable and social shopping experience, so food and drink is an increasingly important footfall driver and ‘glue’ for retail.

One of our recent developments is the creation of the gourmet food haven on Pavilion Road, tucked away behind Sloane Street. Following a local consultation, a ‘village heart’ featuring independent artisans has been established — including a cheesemonger, butcher, ice-cream shop, fishmonger, baker, greengrocer, wine merchant and three new restaurants. Pavilion Road is an excellent example of physical retail thriving through specialist knowledge and creativity. Its artisans take the everyday and make it exceptional, offering expertise which makes shopping a true pleasure and has a significant impact on the vitality of the surrounding neighbourhood.

Plans are afoot to further energise the world-famous King’s Road. From its aristocratic origins as King Charles II’s private road, the Road is an intrinsic part of Britain’s cultural and social history. It has always been at the forefront of fashion trends — from Mods to Punks, Sloanes and New Romantics — and at the epicentre of London’s art, fashion and music scene. Today, it has an abundance of independent shops, galleries and restaurants. We plan to ensure it remains an inspiring and essential part of London’s rich character — the King’s Road must balance its iconic heritage with an openness to creativity and innovation.

Although we are only one of the Road's landowners, it felt vital to lead on a central vision. In light of the wider retail headwinds, it is timely to revive the Road's fame for pioneering trends and its position at the forefront of the last significant retail revolution. It is a particularly pertinent time, as the V&A stages the first international retrospective for Mary Quant in nearly 50 years. Quant was an iconic character central to the King's Road, who revolutionised retail with immense global impact. Our focus is increasingly on creating immersive experiences, a strong sense of community and celebrating creativity — all values that resonate with the '60's retail pioneers.

We are already seeing a shift in the brands coming here, with some great British independents and wellbeing concepts — recent new lettings include the retail flagship for immersive indoor cycling brand Peloton and US phenomenon Soul Cycle, alongside sustainable British businesses Rixo London, The Cotton Story and The Fashion School.

The Duke of York Restaurant will open in Summer 2019 and will be a new landmark for the King's Road with its innovative architecture and public roof terrace opposite the Saatchi Gallery — while at the Sloane Square end of King's Road the first Costes hotel outside Paris is under development to open in 2020, including a chic rooftop restaurant.

The evolution of online shopping is undoubtedly influencing the brick and mortar environment — but done well, the physical environment is unbeatable in terms of building brand loyalty and engagement. A flagship is the place a brand can showcase all aspects of its personality. It is not just about range and scale, but about creating a space where it can engage at all levels.

No matter how brilliant a store, it is more powerful as part of the 'whole', when positioned in the right environment and complementary to its adjacencies — relying not just on standalone experiences and events, but connected through VIP programmes, events and marketing platforms to a wider neighbourhood destination.

For us as a landlord, the key to attracting and retaining the best possible retailers is to help them to showcase their retail proposition in a way that cannot be matched online; by facilitating experiences beyond pure retail that can capture and extend customer dwell-time. ●



At Pavilion Road, Chelsea, stores are selected on how they enhance the existing offer, generate footfall and benefit the area for the future

Pop Brixton and Peckham Levels: retail in the local context

by Carl Turner, Carl Turner Architects

Pop Brixton © Agnese Sanvito



Pop Brixton was set up to transform an empty site for two years, now extended to five years

Who would have thought a few years ago that seemingly lowly parts of south London like Brixton and Peckham could be at the forefront of seismic changes in retailing, principally down to a social enterprise ethos from the local community. The seeds were also sown at the time of a downturn in high street retailing largely blamed on the rise of internet shopping and prior to that it was retail parks and superstores.

Pop Brixton was set up on the back of an open competition run by Lambeth Council to transform an empty site in Brixton for two years, which has now been extended to five years. The ambition was to test the capacity for a mix of new spaces in Brixton, to create a destination and to define the thin line of ‘affordability’, with the space prioritised for local businesses.

In some respect, we have created a shopping mall for independent businesses, but this simple analysis misses the complex organic ecosystem that makes Pop Brixton different. About one third of the site is retail or food and beverage uses, with two thirds workspaces, consisting of 120 and 240 sq ft individual studios, co-working space and some community uses such as an event space, a poly-tunnel and a digital radio station. It is the community ethos that makes Pop Brixton stand out, and the fantastic work that

the social enterprises and charities are doing behind the scenes. All the traders also ‘give back’ via a time donation system to support local people.

At Pop Brixton we have learned that small is beautiful. Restaurants, street vendors and retailers can work from a footprint of 50 to 70 sq ft, but they work best when grouped together to create choice, with shared indoor and outdoor seating surrounded by plants.

A curated selection of tenants provides a varied offer and where possible we limit competition both within the campus and in the wider Brixton area. This is not typical of the ubiquitous high street although this is seen more since the advent of BIDs. A program of events allied to daily social media posts is essential to drive footfall to the site and keep people coming back. The revenue from incoming revellers helps support the lower rents paid by local social enterprises. Generally, it’s about working with tenants be they renting a studio or a food space and agreeing what their business model will allow them to pay for rent and working with that; this creates a complex matrix across the site.

One of the key ideas to come from this project is the idea of challenging ‘stuck’ space. This is what happens in traditional high streets where businesses move in and sometimes stay for generations. This limits opportunities for young entrepreneurs as

the space becomes literally stuck in one use or ownership. We are promoting the idea of a stepping stone economy, or a pipeline of space. This manifests as a collection of small spaces with low rents, easy terms and short leases (all seen as problematic in the wider retail environment). This creates an environment to experiment and sometimes fail, all part of life and all part of becoming successful. As businesses or organisations grow and move through the spaces, opportunities are created at the bottom of the food chain.

Trading in a semi outdoor environment can be challenging, with seasonal dips in trade. Conversely, with an all indoor environment at Peckham Levels (Pop's big brother in a converted Peckham multi-story car park), trading has been more challenging during the warmer summer months as people prefer to head outdoors for activity and entertainment. It is important to provide choice, people want to be inspired, entertained and to have places to socialise while they shop eat and drink. This is how to reinvigorate high street retail. A collective effort is necessary and identifying who takes leadership within town centres is the real challenge.

Change is a scary thing for many people, therefore places need to evolve incrementally. A strategy of complementing not competing with local offerings requires an understanding of what makes a place tick and why people are moving into an area. At Pop Brixton we encourage new businesses to buy local and to employ local people where possible. The local currency, Brixton pound, is another way in which attempts have been made to keep spending local and this is accepted at Pop Brixton.

Gentrification is a word thrown around too easily. These conversations are complex and multi-layered and often involve very territorial approaches to space. This is why a gentle and thoughtful approach to regeneration is necessary. ●



© Tim Crocker

Shopfront at Peckham Levels

Chiltern Street, Portman Estate

by Simon Loomes, The Portman Estate

Chiltern Street © Agnese Sanvito





Chiltern Street, where a big part of the strategy was to improve the sense of place and identity

The Portman Estate is a forward-thinking property business with an enduring heritage. We promote and protect the long term success of our retail streets in Marylebone as part of London's West End offer.

The Estate comprises 110 acres, including frontages to Oxford Street, Baker Street and Edgware Road. It is, however, our smaller scale shops, restaurants and bars that create the Estate's character, many of which are located on our three independent retail streets: New Quebec Street, Seymour Place and Chiltern Street.

Chiltern Street is one of the area's most exciting locations. In 2007, The Portman Estate first started planning the transformation process by regaining direct control of the properties on the southern stretch of the road. By 2009, all the retail frontages had been brought back under the Estate's ownership and direct management. From there a long term and more curatorial approach began.

Chiltern Street is much loved, and our strategy was to retain the level of quality independent retail, whilst improving the offer over time and always maintaining a good mix of occupiers.

A big part of the strategy was to improve the sense of place and identity. The Fire Brigade had left the 1870s fire station, and around six years ago we worked with André Balazs and Harry Handelsmen to re-imagine the

fire station site as a boutique hotel and restaurant: the Chiltern Firehouse. Inspired by other successful West End retail environments in Carnaby Street and Mount Street, we re-paved and widened the pavements using York Stone, renewed the lighting and de-cluttered the street furniture. We wanted a simple space with clear views and subtle lighting, which immediately created a more attractive and pleasant experience for residents, businesses and visitors.

We have actively sought out new food operators — either on or close to Chiltern Street, such as Yeotown Kitchen and Jikoni, to increase dwell time in the area. Shopping needs food and beverage to succeed. We have also been mindful of keeping the public house uses to ensure Marylebone still has a broad offering of meeting places. Clarette is a great example of this, turning an underused pub into a new and vibrant offering which complements the local area perfectly.

The connecting streets of Blandford and Dorset Street have in turn benefited from the revitalisation of Chiltern Street. Ten years ago, everything was occupied but there was a lack of vibrancy. Now, interesting and innovative operators like Dashing Tweeds and A.O.K. Kitchen are choosing these side streets as their base. The area is now the natural link between Baker Street and Marylebone High Street and is patronised by both workers and residents alike.

Chiltern Street genuinely still has a unique feel which makes it a desirable destination. We take care to maintain the street's DNA with each new addition. In the last 18 months we have welcomed a number of new fashion brands to the street including Sophie Hulme, Casely Hayford and Sabah.

We have created a very specific desirable destination on and around Chiltern Street, and that's down to the fantastic retail and food and beverage providers who reside here. A decade on, we still have the same ethos and strategy when curating a retail space. We are constantly looking forward — continuing to evolve and improve the offering of The Portman Estate for future generations to enjoy. ●



© Agnese Sanvito

The Portman Estate started planning the transformation process by regaining direct control of the properties on the southern stretch of the road.



The Portman Estate take care to maintain the street's DNA with each new addition

Retail environments for transport hubs

by Nick McGough, Weston Williamson + Partners

Waterloo Station © Agnese Sanvito



At Waterloo Station, there is an understanding that the retail offer must be relevant to customer journeys and mission

As we contemplate how our high streets must reinvent themselves in light of the rise of online and the shift toward the experiential, it is perhaps not a coincidence that we are seeing the shopping centre break free from its internalised focus and look much more urban. The UK's two most successful examples (both by Westfield) bookend London at Shepherd's Bush to the West and Stratford to the East. This shift to the use of sheltered streets and squares, public art, close links with public transport and prioritising a carefully curated retail offer can also be seen in more recent airport developments. Heathrow Terminal 2 opened in 2014, three years after Westfield Stratford City and whilst similarities between airport terminals and shopping centres are often drawn, less common is the comparison with railway stations.

Perhaps the most challenging aspect of reinventing many high streets is that of fragmented ownership obstructing the development of a coherent vision. Here train stations, airports and shopping centres have a distinct advantage. However, while airports have followed the lead of shopping centres in carefully constructing their offer, London's stations have only relatively recently embraced a transformation in retail thinking with the result in recent years that station retail has consistently outperformed the high street.

Key to the success of transforming the retail offer at stations is articulating an overarching strategy, providing a coherent retail vision which makes the most of what is often heritage station architecture. St Pancras International was perhaps the turning point for retail at London stations and our current work for HS1 at the station builds on this legacy.

In developing new station retail schemes, an understanding of the station user is fundamental in ensuring the retail offer is absolutely relevant to customer segment, journeys and mission. This differs from that in shopping centres in a number of ways. In stations convenience is key, queuing must be minimised and communication must be clear and direct. Visibility of information screens, platforms and exits for passengers provides reassurance which gives comfort and encourages spending, especially in food and beverage (F&B) outlets. Known brands are a shortcut to understanding an offer and typically the F&B offer is controlled by a small number of key players.

Future passenger flows also need to be understood in order to maximise strategic opportunities, whilst curating the tenant mix and controlling the retail fit-out are key to delivering on these opportunities.

This is particularly relevant at Paddington Station, currently one of London's top performing stations for retail, experiencing sales growth of 10.7 per cent over the Christmas period in 2018. Here the Weston Williamson + Partners designed Crossrail station will change the flow of passengers and therefore drive huge potential additional retail footfall. Working for Network Rail, we have been developing proposals for new retail schemes alongside a station-wide retail tenant design guide which will ensure the future fit-out of units at the station adhere to principles of visual hierarchy, transparency, visibility and consistency; decluttering shopfronts, controlling branding and providing visual harmony which ultimately creates a more pleasant environment for all station users and a more successful retail environment.

With the right retail offer, stations also have the potential to become a local amenity and a destination in their own right. At Fenchurch Street Station we are developing designs for the operator c2c which seek to do exactly this. Through celebrating the station's historic frontage, opening up its triple height windows to flood the concourse with natural light and create new visual connections with the recently remodelled station square, a new F&B focused offer will provide local workers with somewhere to spend time (and money) whether or not they are catching a train.

So what do these trends tell us about the future of station retail? We see the offer expanding from pure 'retail' to the broader possibilities of 'commercial'. The convenience of getting to and away from stations makes them an ideal place for meetings, mobile working and co-working, embracing emerging work trends. Stations could also form part of the health, fitness, wellness and mental wellbeing regime of customers: gyms, health centres, therapies, based on the convenience of undertaking many of these activities before or after work. This could position stations at the centre of emerging trends in healthy living and new modes of work and play, ideas we are currently exploring with Network Rail for Charing Cross.

Looking further into the future, our IF Lab (Innovation and Foresight Laboratory) has undertaken work for various clients. One such project involved the proposal of the world's first mixed-reality shopless shopping centre, a scheme for LCR to provide a ribbon of floor-to-ceiling digital hoardings which would activate the levels under the former Eurostar terminal at Waterloo for two years whilst the retail units behind are constructed and fitted out.

Whatever the future may hold for the sector, the rise in convenience shopping looks set to continue and means stations, with their guaranteed footfall, are perfectly placed to capitalise on shifting attitudes toward retail and leisure. ●



Waterloo Station: London's stations have only recently embraced a transformation in retail thinking, now consistently outperforming the high street

Catford Mews: for and by the community

by Preston Benson, Really Local Group



Catford Mews: soon-to-be destination for the local community in Catford, Lewisham

For decades, the high street has evolved with the developer/investor's interests in mind. Retail units, often an afterthought in mixed use schemes, were 'auctioned off' to those occupiers with the strongest perceived covenant or to those willing to pay the highest headline rent. In many instances, these decisions were taken in boardrooms far away from the communities and people who would be affected by them.

In many instances, this 'top down approach' has led to identikit high streets filled with standard chains. Without customisation, a bland and boring experience is often the result. When they occur, many retail developments displace existing neighbourhood businesses and networks. Even worse, perhaps due to a location bias, retail investment hasn't been evenly spread across the country, let alone London.

We see the ongoing shake-up of the retail industry as an opportunity to try a different approach. Our aim is to see what happens when you truly listen to the community and launch a venue which is for, and by, the community.

At our first venue, Catford Mews, we have transformed a 19,000 sqm former Poundland in Catford into a three screen cinema, with a bar/cafe, food hall and live music venue. Catford Mews will serve the community like nothing else in the area, thanks to efforts made

to build on the cultural foundation on which Catford rests. From project inception, we have taken a 'bottom up approach' and worked alongside local organisations, community groups and individuals resulting in a venue that is truly bespoke but also reflects the needs and aspirations of the local population.

At Catford Mews, everything we do is local. In addition to programming film and music in a way that reflects Catford, it was equally important that the food hall empowered truly local vendors. We have eschewed the overpriced independent brands with no real connection to the communities in which they operate for a selection of businesses from and known by the community.

Multifunctional retail spaces are the future. People want to be able to do everything in one place, and this does not mean being overwhelmed by choice but rather being able to enjoy a number of offerings which all complement each other. We believe people are tired of taking long journeys into and around central London for their needs, and by providing these locally, we can not only instil a sense of pride but also serve as a catalyst for wider regeneration. We don't believe that 'at home' streaming services and online food platforms are the death knell of the high street, but rather it is possible to succeed with a customised, curated and complementary selection of entertainment, food and refreshments.

We hope to find that our success results from the celebration of diversity, the local community and the cultural foundation which exists in Catford. Retail succeeds mainly either due to a product being unique, or due to being a familiar necessity — Catford Mews aims to be a combination of both and will serve as a model for Really Local Group's future sites across Greater London and, eventually, the country. ●



© Chris Hancock

Catford Mews will be a bespoke venue, reflecting the needs and aspirations of the local population

Coal Drops Yard: a new destination
by Anthea Harries, Argent



Coal Drops Yard © Agnese Sanvito



Coal Drops Yard: from pop-up retail, to events and public commissions, there is something new and arresting for every visit

Coal Drops Yard is the former repository for London’s coal — the place that literally kept the capital moving. We have embraced this historic momentum, creating a forward-thinking and dynamic reinvention of group retail for King’s Cross.

A sensitive restoration and transformation of two long Victorian warehouses with attached train viaducts, Coal Drops Yard is a two-level, open space with a wide central yard, topped with a flagship third level where the gabled end of each building meets in a dramatic flourish. This ‘kissing roof’ rises to meet the sky above the fifty shops, bars and restaurants of King’s Cross’ new shopping hub.

We were in the unique position of having the freedom to envision an entirely new type of new shopping destination, whilst still preserving the character and texture of heritage. We have always said, we did not build or launch Coal Drops Yard — we reopened it. This is a mall reimagined for a thoroughly modern shopper, and a thoroughly modern age. These have been our guiding principles:

Keep it credible and curated — The curation of our tenants was led by a customer’s mindset, not the brand’s marketing; our decision-making informed by personality, not price point. Who works, lives, plays in and visits King’s Cross and what do they want from a retail experience? We know they are design literate,

cultured, driven by discovery and secure in their own tastes. So at Coal Drops Yard, Tom Dixon’s office and store sits at the entrance, while Paul Smith, Fred Perry and Margaret Howell’s shops are across the yard. The renowned Hart brothers have made Coal Drops Yard their home with their Michelin-starred Soho stalwart Barrafinna as well as new concepts Parrillan and The Drop. Those brands, those stellar reputations, bring with them their followers — and those fans have been thrilled to uncover their new, independent neighbours including LPOL, Beija, and Bonds King’s Cross. That interplay is key to the Coal Drops Yard experience.

Showcase, don’t show off — Heatherwick Studio’s architecture is spectacular, but it is not the star of the show, it is the set — the tenants take centre stage. The reshaping of the building was conceived to allow brands to showcase themselves in their best possible, most innovative and engaging light — atmospheric spaces that have character but still allow them to create their own distinctive offering. We approached the visual identity for the launch in the same way, working with Droga5 to create a visually arresting and instantly recognisable framework that allowed us to hero tenants and the offer within its shapes and colours.

Hero discovery and design — From the pop-up retail, to the events, to the public commissions, there is something new and arresting for the shopper every

time they visit — and the programming of all of this has been done by a team hand-selected for their creative credentials. From our soon-to-open flagship Samsung store and their extensive enlivenment programme of workshops, talks and installations, to our ongoing partnership with the London Design Festival, to Cos’ art-first approach to their store and Studio Mieke Meijer and Martin Parr’s work for the public spaces, we baked culture and newness into our strategy from the start.

Champion public spaces — King’s Cross has some amazing public spaces — fountains, expanses of green between buildings, moving playgrounds, canal-side tiered seating, covered spaces for markets and festivals. Coal Drops Yard is another shape within this patchwork. ‘Our interest is making an amazing place,’ Heatherwick said in an interview with Dezeen. ‘Church used to be a place where people come together... with the decline in other public gathering points, we need places to come to for human interaction.’ ●



Coal Drops Yard: a sensitive restoration and transformation of two long Victorian warehouses



‘At Coal Drops Yard, Heatherwick Studio’s architecture is spectacular, but it is not the star of the show, it is the set’ — Anthea Harries

Any time, any place: the future of retail architecture

by Lara Marrero, Gensler

© Chris Payne



Gensler's work for Taobao in China demonstrates lessons for retail architecture in London

‘Reports of my death have been greatly exaggerated,’ Mark Twain once said to a reporter who was running down a rumour. That quote could easily refer to the state of today’s retail industry. Despite the news of bankruptcies and store closures, retail is very much alive.

Successful brands have realised that the purpose of place has changed. Customers expect a seamless journey across every channel — from physical, to digital, and social. And physical stores, which emphasise engagement over transaction, are vital to that equation. According to IHL Group, for every company closing a store, 2.7 companies are opening one, and 77 per cent of Gen Z prefer physical over online stores, according to Accenture. While retail as we once knew it may no longer be the same, the industry is as vital as it has ever been.

Technology delivers transaction, placemaking delivers experience — Retailers are aware of the sea change in customer behaviour and expectations brought about by e-commerce behemoths like Alibaba and Amazon. Successful brands have refocused on creating and deepening connections between buyers and brands in the real world. Success isn’t only about having an online ordering platform. It is being able to deliver an engaging, authentic brand experience no matter where the customer is.

The fact is, retailers no longer dictate the what, when, where, and how of shopping. Now, the power is almost completely in the hands of consumers, and time is their most valuable commodity. Embracing the ‘I want what I want, when I want it’ mindset is critical to retail success. Technology has set a precedent for immediacy and set a new standard for efficiency. In an era when consumers can get an Uber in minutes and Amazon Prime Now delivers in hours, they expect that their desired size, colour, and model will be available immediately, 24/7.

Consumers’ desire for engagement means that there’s been a renewed focus on service in the physical retail environment. They want to interact with humans over screens. Retailers must think of employees as consultants who add value to the larger brand experience, providing expertise and customising their experiences.

Quality of service is critical to overall brand success and failing to deliver negates even the most exceptional physical space.

From ‘grab and go’ to ‘play and stay’ — When it comes to retail, there is no one-size-fits-all approach. It used to be ‘if you build it they will come’. Now, it’s ‘how do you build it so they will keep coming back?’ If you don’t provide a positive experience, consumers won’t show up. The future of retail will encourage customers

to ‘play and stay’ rather than ‘grab and go’. Core to this will be programming and dayparting — expanding the times of the day that retailers are open and the services and events they offer — to engage with different audiences and give them a reason to go to a physical environment. Place must be fit for purpose.

Typically, retailers measure the return on investment (ROI) of their operational and financial commitment based on traditional metrics like year-on-year sales and dollars per transaction. But since the goal of brand engagement is bigger than product sales, those metrics alone are not enough.

Quantitative and qualitative measures are now on equal footing. Key Performance Indicators (KPIs) should reflect brand engagement like awareness, media impressions, entertainment and social interaction, dwell time, and online sales lifts. These new metrics are critical to understanding how consumers spend their time.

As important to retailers embracing what customers want is honouring what they don’t. Digital is not going to solve retail. Technology must always be in service to the customer. Take Gen Z, which is on track to become the largest generation of consumers by 2020, according to Forbes. Inundated with technology, Gen Z doesn’t want digital-driven spaces; they want tactile spaces where they can see, touch, and

feel things. Technology that gets in the way—like big flashing screens or extraneous apps—can be perceived as gimmicky, a death knell to brand trust and authenticity.

Retailers of the future could take a cue from these digital natives. In an age of Snapchat, pop-ups, and driverless cars, it’s no longer enough to be a retail store. The future is seamless, personal, and engaging. To stand out, brands must provide something unexpected and fresh that keeps people coming back, again and again. ●



For Gensler, when it comes to retail architecture, there is no one-size-fits-all approach

Summary and next steps

Summary

As evidenced through this research, changing consumer patterns, innovations in how retail space is used, and new technological developments are pressing the retail sector to re-evaluate existing business models. To welcome this change, a move towards taking a more ground-up rather than a top down approach to designing and curating retail space is required. There is a need for a greater understanding of the purpose of a place for all the people who use it, looking beyond financial returns to the overall social value. To this end, property needs to relinquish its grip on the traditional forms of transaction to something that is more flexible, agile and hands on. It is through the implementation of progressive thinking around placemaking, flexibility, leadership and culture that London's retail environments will be well placed to create vibrant and sustainable retail places fit for the future.

- Retail environments should enhance the public offering of a place, nurturing this through a layering of uses, design and quality of built environment.
- Looking to the future, retail spaces will need to continue to adapt to different uses. New and retrofitted retail space must be designed with adaptability in mind, and leasing and planning structures must accommodate those changes.
- The landlord's role is broadening and requires fresh thinking; investing in marketing and events and creating a customer base to support tenants' business growth.
- The next generation of experiential retail will no doubt push the boundaries further, continuing to expand the parameters of retail.
- To welcome this change, a move towards taking a more ground-up rather than a top down approach to designing and curating retail space is required.
- Successful retail streets require curation.

Next steps

Responding to this research — If you would like to comment on this research, please send an initial 100 word response to emma.filippides@newlondonarchitecture.org

International reflections — We are interested to gather examples of retail cultures and environments globally. If you would like to submit an example, please send to emma.filippides@newlondonarchitecture.org and/or share on social media:

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Notes and further reading

Notes

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Acknowledgements and profiles

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KING'S CROSS

At 67 acres, King's Cross is the most significant development in central London. An extraordinary piece of city is taking shape; with a new postcode, N1C. With six tube lines, two mainline stations, Eurostar and direct links to London's main airports, it's the best connected part of London.

The location, connections, canalside setting, rich industrial heritage, eclectic cultural scene and thriving community come together to make King's Cross a diverse and exciting destination, set around tree-lined streets and outstanding public spaces.

King's Cross is being developed by the King's Cross Central Limited Partnership, which brings together Argent King's Cross Limited Partnership and AustralianSuper, Australia's biggest superannuation/pension fund.

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