Newham Local Plan

Evidence Base:
Town Centres Update

June 2019

Introduction

This document updates and extends the data contained within Evidence Base: Town Centres v2 (July 2015). This update does not alter the policies or spatial allocations/designations contained within the Newham Local Plan (2018), but will assist in the application of town centre-related policies.

Context

Local Plan policy INF5 defines town centres boundaries across the Borough and sets out to strategically manage them as part of a hierarchy and infrastructure network, seeking qualitative improvements that reflect their current and projected roles (as per policies S2-6) in providing access to shopping, services, employment (INF5, J1) and community facilities (INF8).

Integral to achieving Local Plan town centre visions is the management of cumulative impacts through the application of policy SP9 which seeks to:

- Secure a robust retail core by ensuring that within Primary Shopping Frontages (PSF, as shown on the Policies Map 2018) at least **70%** of units are in A1 use.
- Secure a high quality leisure offer by ensuring that at least **67%** of town centre leisure uses are D2, A4 or A3 and that betting shops, amusement arcades and takeaways (A5) account for no more than 33%.

The AMR: Town Centres Bulletin 2012/13 to 2018/19 provides further quantitative and qualitative data on the Borough's town and local centres.

Methodology

The data contained within this document was derived from town centre surveys undertaken from September to October 2018. It reflects the boundaries of town centres as adopted through the Local Plan in December 2018. Note that the data for Stratford does not reflect the area that falls under the planning control of the London Legacy Development Corporation (LLDC).

It should also be noted that the Use Classes assigned through the survey work are indicative of the observations on the day of survey and should not be taken as a confirmation of lawful use. Additionally, the data may have been superseded by further changes of use since the time of survey.

Nevertheless, the survey data provides the most accurate snapshot of the mix of uses within Newham's town centres, being more robust, detailed and up-to-date than information held by other databases such as Experian / GOAD.

Note that percentages may not sum due to rounding.

Definitions

Primary Shopping Frontage: defined within the Local Plan (2018) as 'likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods.' See boundaries on Policies Map 2018.

Unit: a frontage, as defined in relation to street naming and numbering.

Use: the observed primary Use Class of the business surveyed; note that this may take up more than one unit (as defined above), and will not reflect ancillary uses.

'Quality' leisure use: as defined by policy SP9 3a.ii, floorspace within Use Classes D2, A4 and A3.

'Subject to control' leisure use: as defined by policy SP9 3a.ii, hot food takeaways (A5 Use Class), betting shops (Sui Generis Use Class) and amusement arcades (Sui Generis Use Class) that require careful monitoring due to their potential cumulative impact.

'Other' leisure uses: uses that fall outside of the above definitions which are generally less representative of Newham's current town centre offer (e.g. theatres and night clubs).

Stratford

Robustness of the Retail Core:

Total number of units in PSF	89
Total number of units in PSF that are vacant	9
Total number of units in PSF in A1 Use Class	68
Percentage of A1 uses in PSF	**76%**

Stratford Shopping Centre comprises the PSF for Stratford Town Centre and presents a healthy retail core in spite of strong competition from Stratford City (Westfield). This in part is due to the different, complementary offer. The percentage of A1 uses in the PSF is currently above the requirement of policy SP9. Two larger shops in the PSF (totalling 5 units) are currently vacant.

Quality Leisure Benchmark:

Leisure Use		Number of uses	Percentage
Subject to control	Takeaways (A5)	7	13%
	Arcades (SG)	2	4%
	Betting Shops (SG)	5	9%
	Subtotal	**14**	**26%**
Quality	D2	2	4%
	A3	23	43%
	A4	11	21%
	Subtotal	**36**	**68%**
Other identified	Theatres (SG)	2	4%
	Night Clubs (SG)	1	2%
	Subtotal	3	**6%**
TOTAL		53	100%

As a Metropolitan Town Centre, Stratford provides a greater variety of leisure uses compared to Newham's other town centres, such as theatres (Theatre Royal, and Stratford Circus Arts Centre) a night club (Jhankaar Dance Club), as well as a variety of food and drink destinations, including some innovative temporary mixed offers such as Pitch and Roof East (counted here as primarily A4 uses). While policy defines quality leisure as those falling within A3, A4 and D2 Use Classes, it is recognised that other uses offer significant value – in this case the theatres provide an arts and cultural offer that is complementary to the typical evening and night time economy.

Whilst betting shops and hot food takeaway businesses continue to have a significant presence in terms of *area concentration* (as defined by policy SP9), such uses remain below the town centre requirement of policy SP9 3aii. The overall quality of the leisure offer meets policy SP9 criteria.

East Ham

Robustness of the Retail Core:

Total number of units in PSF	107
Total number of units in PSF that are vacant	1
Total number of units in PSF in A1 Use Class	75
Percentage of A1 uses in PSF	**70%**

East Ham PSF is currently meeting policy SP9 targets of 70% of the units in A1 use. However, every small change counts and it will be important to maintain this level to ensure that a robust retail core remains. The vacancy rate in the PSF is low, with only one unit not in active use.

Quality Leisure Benchmark:

Leisure Use		Number of uses	Percentage
Subject to control	Takeaways (A5)	22	42%
	Arcades (SG)	2	4%
	Betting Shops (SG)	6	11%
	Subtotal	**30**	**57%**
Quality	D2	2	4%
	A3	18	36%
	A4	3	6%
	Subtotal	**23**	**43%**
Other	**Subtotal**	**0**	**0%**
TOTAL		53	100%

In spite of being the second largest centre in the Borough after Stratford, entertainment facilities in the centre are weak. The percentage of quality leisure is well below policy targets, whilst those uses subject to control dominate and remain in high concentration. Quality leisure uses should be encouraged to further bolster East Ham's status as a Major Centre, not least to enhance its night-time/ evening economy offer.

Canning Town

Robustness of the Retail Core:

Total number of units in PSF	27
Total number of units in PSF that are vacant	12
Total number of units in PSF in A1 Use Class	8
Percentage of A1 uses in PSF	**30%**

Canning Town's PSF has been transformed by the Rathbone Market redevelopment (completed in phases in 2012/13, 2015/16 and 2016/17) that delivered a new market square and redefined shopping frontages. As the transformation of the PSF was comprehensive and relatively recent, vacancy rates continue to be high. Further supporting retail uses will be important to achieving a robust retail core as defined by policy SP9.

Quality Leisure Benchmark:

Leisure Use		Number of uses	Percentage
Subject to control	Takeaways (A5)	3	12%
	Arcades (SG)	0	0%
	Betting Shops (SG)	4	15%
	Subtotal	**7**	**29%**
Quality	D2	1	4%
	A3	16	62%
	A4	2	8%
	Subtotal	**19**	**73%**
Other	**Subtotal**	0	0%
TOTAL		26	100%

Canning Town is demonstrating a healthy mix of leisure uses as defined by policy SP9. However, with only 26 leisure uses, the overall leisure offer is more limited than Newham's other town centres, reflective of its historic expanse and ongoing transformative development. Quality leisure uses should be encouraged to enhance the available offer.

Forest Gate

<u>Robustness of the Retail Core:</u>

Total number of units in PSF	39
Total number of units in PSF that are vacant	14
Total number of units in PSF in A1 Use Class	27
Percentage of A1 uses in PSF	**69%**

Forest Gate PSF benefits from a robust retail core, falling only marginally below SP9 targets in terms of the percentage ratio of A1 units. However, every small change counts and it will be important to maintain this level. While vacancy levels were high at the time of the survey, this is as a result of land hoarding at 39A to 49A Woodgrange Road (12 units) in support of redevelopment which will deliver a new town centre frontage (16/02395/FUL) including floorspace for a medium-sized food store (in line with Policy S6 requirement for Forest Gate) and a smaller retail unit.

<u>Quality Leisure Benchmark:</u>

Leisure Use		Number of uses	Percentage
Subject to control	Takeaways (A5)	16	36%
	Arcades (SG)	0	0%
	Betting Shops (SG)	7	16%
	Subtotal	**23**	**52%**
Quality	D2	0	0%
	A3	18	41%
	A4	3	7%
	Subtotal	**21**	**48%**
Other	**Subtotal**	**0**	**0%**
TOTAL		44	100%

The mix of leisure uses within Forest Gate Town Centre falls below the policy benchmark of policy SP9, with ‘subject to control’ uses comprising over half of all leisure uses within the centre. A3 units form the largest single leisure use within the centre, helping to counterbalance the number of takeaways by providing alternative eating/drinking destinations.

Green Street

Robustness of the Retail Core:

Total number of units in PSF	196
Total number of units in PSF that are vacant	9
Total number of units in PSF in A1 Use Class	172
Percentage of A1 uses in PSF	**88%**

Green Street PSF comfortably exceeds policy SP9 expectations in terms of the robustness of its retail core, with well over 70% of units falling into an A1 use class. Vacancy rates within the PSF also remain low, reflective of the strength of the centre as a major destination for ethnic food and non-food shopping.

Quality Leisure Benchmark:

Leisure Use		Number of uses	Percentage
Subject to control	Takeaways (A5)	10	24%
	Arcades (SG)	1	2%
	Betting Shops (SG)	8	19%
	Subtotal	**19**	**45%**
Quality	D2	1	2%
	A3	21	50%
	A4	1	2%
	Subtotal	**23**	**55%**
Other	**Subtotal**	**0**	**0%**
TOTAL		42	100%

The mix of leisure uses within Green Street falls below the policy expectations of policy SP9, with ‘subject to control’ uses exceeding a third of leisure uses within the centre. Restaurants and Cafes (A3 uses) make up the majority of quality leisure; however, there remains scope to improve the quality, quantity and mix of the leisure offer to better relate to the size of the town centre.

East Beckton

Robustness of the Retail Core:

Total number of units in PSF	17
Total number of units in PSF that are vacant	1
Total number of units in PSF in A1 Use Class	9
Percentage of A1 uses in PSF	**53%**

Beckton East PSF is defined by the Mary Rose Mall which is dominated by the ASDA Superstore and a small parade of shops, therefore the typology results in a disproportionate effect on ratios. Whilst policy SP9 targets are not met, as previous surveys have indicated, the town centre is performing well with very little change in operators and no long-term vacancies. The only vacancy identified at the time of the 2018 survey was that of the former police centre, released by the Mayor's Office for Policing as part of an overhaul of the wider policing estate.

Quality Leisure Benchmark:

Leisure Use		Number of uses	Percentage
Subject to control	Takeaways (A5)	0	0%
	Arcades (SG)	0	0%
	Betting Shops (SG)	1	20%
	Subtotal	**1**	**20%**
Quality	D2	1	20%
	A3	1	20%
	A4	2	40%
	Subtotal	**4**	**80%**
Other	**Subtotal**	**0**	**0%**
TOTAL		5	100%

As with the PSF, the wider East Beckton town centre is characterised primarily by several large floorplate, single-use buildings (Premier Inn, the Beckton Globe, St Marks Church) reflecting its past as an out-of-centre retail park. Again, the small number of units has a disproportionate effect on ratios for leisure. While the quantity and diversity of leisure offer in the town centre is low, the mix meets the benchmark of policy SP9. Careful attention will need to be paid to the effects of increasing leisure uses in the out-of-centre retail parks of the wider Beckton area that would cumulatively detract from establishing East Beckton town centre as the leisure destination for the area.