

Town Centre and Retail Study

Executive Summary

London Borough of Newham

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1. EXECUTIVE SUMMARY

Background / Key Study Outputs

- 1.1 GVA Grimley was instructed by the London Borough of Newham to undertake a Town Centre and Retail Study to inform policy and development control decisions. The Borough is set to undergo an unprecedented level of regeneration, with major changes in the next 15-20 years including development in and around the Olympic Park and Stratford City, the Lower Lea Valley, Canning Town and the Royal Docks as well as major transport improvements such as Crossrail and further extensions to the DLR. Newham has a young and growing population, and is also one of the most ethnically-diverse London Boroughs. This Study is required to plan for and meet future need in the Borough, taking on board the diversity and growth envisaged.
- 1.2 The Council is currently in the process of preparing its Local Development Framework (LDF) which will set out the objectives to meet the Borough's future economic, environmental and social needs through the spatial planning system. The purpose of this Study is to produce up-to-date evidence to support the realisation of these aims and will therefore inform ongoing work on the LDF, Supplementary Planning Documents (SPDs) and individual management plans for each town centre. This information will also be at the Council's disposal to assist in the determination of relevant planning applications.
- 1.3 Our work draws on three surveys focusing on retail and town centre issues in Newham and the wider sub-region; two Household Telephone Surveys and one Business Telephone Survey. Supplementary analysis included up-to-date town centre health checks of the six main Town and District Centres, and fifteen Local Centres, as well as out of centre retail provision. The report reviewed shopping frontage designations, centre boundaries, the potential for growth and change, the role of the leisure sector and need for growth and diversity, and the role of smaller local independent and ethnic businesses across the Borough's retail network.

We have prepared an overarching retail strategy for the Council to take forward over the forthcoming LDF period, identifying in particular how to meet the need arising as a consequence of regeneration and development. To assist in our analysis, the Borough was divided into four Sub-Areas: North West, North East, South East and South West; with an acknowledged position in respect of 'Urban Newham' and the 'Arc of Opportunity'. The main report illustrates these boundaries within the Plans and Appendices, and whilst the Sub Areas assist in the finer grain analysis, they do not represent or reflect areas drawn by the local authority for other projects/studies.

Sub-Regional Context

- 1.4 According to the 2007 household survey, Newham's six main centres (including Beckton retail warehousing) have a collective comparison goods market share of 46.4% across the survey area.

Zones 1-10 broadly correspond to the Borough boundary, and the analysis demonstrates that the six main centres retain only 51.7% of available comparison goods expenditure within the Borough; reflecting significant levels of leakage.

- 1.5 The 2007 Survey identified Ilford, London West End, Barking, Lakeside, Romford, Canary Wharf/Isle of Dogs and Wood Green as the main competing centres in the wider sub-region. These centres collectively capture circa £201.2m available comparison goods expenditure in the survey area (Zones 1-12), equating to a combined market share of 29.8%. The remaining 23.8% is accounted for by other centres and out of centre comparison provision both within and beyond the survey area.
- 1.6 There are some comparison led schemes in the pipeline for key competing centres such as Ilford which have potential to influence shopping patterns within Newham; although we consider these to be limited in number and not of a significant concern in terms of scale. The Tesco proposals in Bromley-by-Bow are of a considerable scale, although the impact should be considered in respect of the net uplift in floorspace arising from the demolition from the existing store. Nevertheless, the scale and potential attraction of the store from a wide area will be significant. It will become increasingly important for Newham to facilitate foodstore development proposals to retain expenditure and meet localised needs.
- 1.7 There are some smaller scale concerns in terms of competing retail schemes; although Newham benefits from the largest and strategically most significant commitment in the sub-region, which will open for trading in 2011: Stratford City. Major regeneration proposals are also being facilitated in Canning Town and Forest Gate.

Quantitative Capacity Forecasts

- 1.8 Overall, the population of the Survey Area is forecast to grow by 25.4%, with more focused growth in Zones 1 (98%), 2 (70%) and 8 (92%). Convenience goods expenditure is forecast to grow by 36% and comparison goods expenditure is forecast to grow by 119% to the period 2025.
- 1.9 In terms of convenience goods, our analysis has demonstrated negligible capacity for additional convenience goods floorspace to the period 2015 following the implementation of all know commitments. This is, however, based on a low market share and following substantial qualitative improvements to foodstore provision, Newham will certainly enhance trade retention. Assuming a 15% increase in market share our global analysis concludes sufficient surplus expenditure to support an additional 6,411 sq m net by 2015, growing to 11,085 sq m net by 2020, and again to 12,854 sq m net by 2025.
- 1.10 In terms of comparison goods, the analysis has identified the level of surplus expenditure following the opening of Stratford City. This scenario should inform policy formulation given its current implementation and realistic timescales opening in 2011. We conclude that following Stratford City there is sufficient surplus to support both Canning Town (25,000 sq m net comparison) and Stratford Town Centre (32,500 sq m net comparison) by around 2021 based on market share as a consequence of Stratford City alone.

Both schemes do, however, have the potential to further increase market share and thus in capacity terms could be supportable within a shorter timescale.

- 1.11 No assessment has yet been undertaken to test the cumulative impact of Stratford City, Stratford Town Centre, Canning Town and Forest Gate, for example. We do acknowledge the strong position in respect of the significant growth in capacity over the LDF period, the potential for market share increase, and the continued growth in population and expenditure which is likely to mitigate – to some extent – against identified impact. Nevertheless, there will be short term consequences with East Ham particularly vulnerable to trade diversion, further indicating a need for a swift and pro-active policy approach.
- 1.12 Given the number of sequentially preferable strategic growth areas and town centre sites we do not recommend the Council allocates out-of-centre sites to accommodate identified growth, and increases its control over out of centre growth. There are a number of opportunities in Newham to direct this growth to policy priority and town centre sites. Overall the strategy recommended from the analysis is to ‘re-balance’ the network, with strategic growth prioritised at Canning Town and within the existing town centre at Stratford.

Ethnic Retailing

- 1.13 The 2009 Survey enabled us to probe the role and usage of ethnic food and non-food retailers represented in the Borough. Respondents were asked if they undertake this type of shopping, and if so where do they shop; it became apparent that the six main centres – Stratford, East Ham, Forest Gate, Canning Town, East Beckton and Green Street – were the key town centres in the Borough used for such shopping requirements. A few smaller scale locations were also identified within the survey results. In respect of the six main centres we draw the following conclusions:
- **Stratford:** Performs a strong role for non-food and food ethnic retailing; the third most cited for non-food (16.8%) and the 4th most cited for food goods (6.7%). The catchment area is reasonably strong with some influence outside the core location zones (7A and 7B). The ethnic analysis demonstrates that the most dominant ethnic groups using the centre include White (56.3%), Black African (9.8%), Black Caribbean (7.4%), Indian (5.6%) and Pakistani (5.3%);
 - **East Ham:** Of those who shop for ethnic food goods, 25.5% do so in East Ham; the second most cited centre in the Borough after Green Street. The non-food ethnic role is stronger, with 30.2% of those undertaking such shopping in East Ham – second again to Green Street. The centre has a strong catchment area for such goods, primarily throughout the eastern and southern parts of the Borough. The ethnic analysis demonstrates that the most dominant ethnic groups using the centre include White (32.1%), Indian (23.9%), and Pakistani (10.8%);
 - **Canning Town:** A weak ethnic goods retailing representation for both food and non-food – only 3.8% use the centre for ethnic food; and only 1% do so for ethnic non-food shopping; the weakest centre in the Borough. The most dominant ethnic group using the centre are White (55.2%);

- **Forest Gate:** Ethnic food retailers perform a reasonably strong role in Forest Gate, being the third most cited centre in the Borough for this purpose (13.9%), after Green Street and East Ham. The same is not the case for ethnic non-food goods, with a limited response of only 5.4%. The ethnic analysis demonstrates that the most dominant ethnic groups using the centre for such goods include White (43.7%), Indian (21.1%) and Pakistani (8.5%);
- **Green Street:** The role of ethnic food and non-food retailing is crucial to the performance of Green Street, being by far the most dominant centre in the Borough for such goods (40.3% - food / 34.6% - non-food). The ethnic analysis demonstrates that the most dominant ethnic groups using the centre for such goods include Pakistani (23.7%), Indian (17.1%), Bangladeshi (15.6%), White (13.6%), and Black African (7.8%);
- **East Beckton:** Particularly weak ethnic food and non-food mix, with amongst the lowest response rates in the Borough, alongside Canning Town. The ethnic analysis demonstrates that the most dominant ethnic groups using the centre for such goods include White (50.4%), Indian (14%), and Black African (10.8%).

The Leisure Sector

- 1.14 Our leisure assessment has identified that there is a good spread of cinema provision in the Borough and adjoining catchment area, and the Stratford City 12 Screen Cinema will meet the quantitative need for additional screens over the LDF period. We do not consider there is a need to plan for additional cinema provision.
- 1.15 Private gyms and health clubs have not yet taken up space in the London Borough of Newham, and following discussions with contacts/agents for such leisure operators it is clear that the local demographics/catchments have not met with requirements. Stratford City will certainly attract a private health club and we understand that negotiations are ongoing with a number of operators. Through our discussions it also became apparent, however, that a number of new, lower cost gym models are being introduced to the UK from America and Holland. Stratford City will attract a higher end private gym, but there appears to be further opportunities in Stratford (perhaps the town centre) as well as elsewhere in the Borough for new budget concepts currently expanding in the UK.
- 1.16 Both bingo venues and tenpin bowling facilities are driven primarily by commercial demand. Newham has two bingo halls serving the east and west of the Borough, but there is a gap in provision in the southern part of the Borough. There is now only one tenpin bowling facility in Newham which is the dominant destination in the catchment area; there is no provision in the north of the Borough or beyond highlighting a potential gap in provision.
- 1.17 Evening entertainment, eating and drinking provision throughout the Borough is relatively weak, highlighted by a reasonably significant leakage of trade to destinations outside the Borough, including the West End, Ilford, Canary Wharf, Wanstead, Romford and Barking. Stratford and East Ham are the

most popular destinations for these activities in the Borough; and Stratford City will considerably enhance the offer serving more localised needs and generating an inflow into the Borough. Elsewhere, the main larger centres in the Borough should aim to improve their leisure offer in these categories.

- 1.18 This broad conclusion for enhancement and improvement in the mix of leisure uses is supported by forecast growth in the levels of expenditure over the LDF period. Total leisure expenditure available to support new facilities is expected to increase by around 72% to the period 2025.
- 1.19 Any policy and development control decision to enhance evening entertainment uses should be underpinned by a focus on diversity and complementary uses which appeal to a wide range of age and social groups (PPS4 policy compliant) including, for example, cinemas, restaurants, public houses, bars, nightclubs and cafes. A focus on bars and nightclubs can lead to anti-social behaviour and a focus on mix of family friends activities is generally the preferred option, particularly in smaller town centres.

North-West Sub-Area

- 1.20 The North West Sub-Area includes Zone 6 and 8 (Plan 2). The main centre is Stratford, defined as a Major Centre; and there are five local centres within the Sub-Area also: Church Street, Plaistow High Street, Plaistow Road, Terrace Road and Vicarage Lane E15.
- 1.21 The Sub-Area falls part within the Arc of Opportunity and part within Urban Newham. In terms of major change, the Sub-Area is set to benefit from major retail growth at Stratford City, major population growth as part of the Olympic Legacy and the associated creation of 'sustainable communities', two new Crossrail stations at Stratford and Maryland, and three new DLR extension stations at Stratford High Street, West Ham and Abbey Road.
- 1.22 Our analysis has identified that the North West Sub Area, primarily focused on Stratford has a comparison goods market share of 10% and a convenience goods market share of 12%. Stratford City is currently being implemented and will substantially enhance market share leading to a growth in surplus expenditure to support additional floorspace over and above Stratford City as set out above. The Stratford Masterplan is currently focusing on the future role of Stratford as one single Metropolitan Centre, and our assessment indicates that the town centre can support up to 32,500 sq m net of additional comparison goods floorspace, and a foodstore element through the redevelopment of the dated Sainsbury's (capacity of 2,744 sq m net to 2025). We understand the Masterplan will include future boundary recommendations.
- 1.23 The findings of this up-to-date assessment endorses previous conclusions drawn in respect of the future of Stratford Town Centre in respect of ensuring a complementary retail scheme, differentiated to that offered at Stratford City; and perhaps more importantly ensuring a diverse range of town centre uses to meet the needs of the whole community – both residents and visitors.

- 1.24 Future uses should consider encouraging those local independent and ethnic food and non-food operators who currently perform an important local role and a more diverse leisure sector, both in the eating/drinking categories and perhaps also in commercial leisure terms. Our assessment has identified 'no frills' gym operators currently looking to secure sites in underinvested areas, including local communities with low incomes. The new Crossrail Station at Stratford will be an undoubted benefit to the centre given the scale and quality of the town centre offer, assisting visitors and arrivals.
- 1.25 Stratford City and the redevelopment of Stratford Town Centre will inevitably lead to a natural shift in retail activity away from the High Street. Nevertheless, Stratford High Street is set to benefit from the introduction of a new DLR station – 'Stratford High Street' – with associated benefits in respect of arrivals, departures and a general increase in activity/footfall in this part of the town centre. Such investment justifies a future policy framework to promote this part of the town centre, as part of the overall master-planning.
- 1.26 The North West Sub Area also incorporates the Olympics site, and perhaps more importantly the Olympics Legacy proposals. Although not finalised or published at the current time, we understand the proposals for the legacy framework will include the creation of new communities around new local shopping facilities. Clearly, the new population in this area will form the key catchments for new centres, but we recommend the Council monitors the evolution of proposals and inputs at the appropriate opportunity.
- 1.27 There is a network of existing smaller centres. Although small, we recommend Church Street remains a Local Centre given the opportunity to expand the centre to incorporate adjoining uses; and Plaistow Road is a larger centre of 20 units and performs a strong Local Centre role and should continue to do so. Given the mix of uses, we recommend Terrace Road retains a Local Centre designation. Vicarage Lane E15 is small, but again has the opportunity to expand to incorporate important adjoining retail and other uses, most notably the new NHS Health Centre which provides a key community facility; we recommend it retains its Local Centre designation.
- 1.28 Plaistow High Street could, however, perform the role of a smaller Local Shopping Parade; it has a small but important mix of uses serving the needs of the immediate neighbourhood, and is close to larger Local Centres. Maryland / Leytonstone Road does not currently have a 'town centre' designation, but clearly performs a small scale and important local shopping destination – both for small independent and ethnic retailers. We recommend a Local Centre designation which should give wider consideration to the proposed Crossrail Station and commitment for additional convenience goods floorspace.
- 1.29 Aside from new Crossrail Stations at Stratford and Maryland a new DLR Station at Stratford High Street, both West Ham and Abbey Road are due to benefit also from new DLR Stations. The proposed DLR station at West Ham has been referenced in Section 5 of the main report, but is not currently designated as a centre within the Borough. Nevertheless, we understand from the Council that the area around the existing tube and railway station already has a good range of local shopping facilities, and could benefit
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from new and enhanced provision through DLR investment and a subsequent growth in localised population through new residential development.

- 1.30 The general area around West Ham is likely to benefit from an increase in activity and pedestrian footfall and the potential for an enhanced offer. Nevertheless, given the network of centres, the mix of uses should remain very much 'local' in scale and offer to contribute to the network rather than compete and impact upon it. West Ham's catchment (500m radius) in particular overlaps with Church Street and Plaistow Road, although given dense urban areas – and potential for population growth – there is some room for localised growth in local shopping facilities. Likewise, the role and relationship between Abbey Road and the new DLR station should be explored further.
- 1.31 Aside from new DLR stations, the existing Plaistow Tube Station offers little to the adjoining neighbouring community other than the access/exit point via London Underground. There is a clear lack of local retail/shopping facilities acting as a focus for the community, despite some dispersed retail provision nearby. Improved local shopping facilities could benefit the area through providing a focus for the local neighbouring community, but given the surrounding network of District and Local centres this would more likely be of a Local Centre scale rather than District Centre level. This might include a small convenience store and a small number of retail/service units.
- 1.32 Application submissions surrounding the issues discussed above must carefully consider the key provisions set out in PPS4, particularly in relation to impact/scale and our conclusions in respect of meeting localised needs.

North-East Sub-Area

- 1.33 The North East Sub-Area includes Zone 9 and 10 (Plan 2). The main centre is Forest Gate District Centre, and there are two local centres: East Ham High Street North and Manor Park. The North East Sub-Area lies entirely within Urban Newham. It is not identified for any major strategic retail or population growth, but is set to benefit from two new Crossrail Stations at Forest Gate and Manor Park.
- 1.34 The North East Sub Area, and Forest Gate in particular, performs poorly in respect of convenience and comparison goods trade retention, and we consider there are considerable threats to the centre's future performance in a 'do nothing' scenario.
- 1.35 As a district centre, Forest Gate is not envisaged to perform a strong comparison shopping role to compete with Stratford and East Ham, for example, but there is clear evidence that the centre is not even meeting the needs of the local catchment area. Market share/trade retention is low, and leakage levels are high. The Council should continue to facilitate development opportunities in Forest Gate, particularly in respect of a new small/medium anchor foodstore, but other uses are expressly wished for by local people including daytime and evening 'family orientated' eating and drinking destinations and an enhanced comparison goods retail offer. The influence of Wanstead for leisure uses is particularly apparent.

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- 1.36 A pro-active approach to planning for change in Forest Gate is becoming increasingly necessary given the future introduction of the new Crossrail Station providing quick and easy access to both Stratford and Ilford – both only two stops away. The focus should be on bringing forward identified development sites, and enhancing the quality of the environment, which in turn will assist in the introduction of an improved range of retail and leisure operators. The 'local' top up role will become increasingly important, particularly as Crossrail will provide instant access to higher order comparison goods shopping destinations. Forest Gate will be unable to compete, and should aim to retain its role as a District Centre providing useful businesses to meet the needs of a strong local shopping catchment who don't want to make the journey elsewhere by rail.
- 1.37 East Ham High Street North and Manor Park are both designated Local Centre which have extended considerably beyond the defined town centre boundaries. In general, it will be important to control the spread of retail uses beyond defined centres, but in the North East Sub Area we recommend a targeted policy approach to Manor Park related to the introduction of the new Crossrail Station. At the current time the retail offer extends towards the refurbished station but does not meet it, and elsewhere retail businesses stretch a significant distance on most routes.
- 1.38 The future policy approach for Manor Park should define a suitable boundary to incorporate the Crossrail Station and an appropriate retail area, creating a 'new' Local Centre with sufficiently robust policy measures to maintain the vitality and viability of the centre. This could take the form of an SPD/Masterplanning exercise; or the Council may wish to define a boundary as part of the LDF with an associated policy approach/measures in place.
- 1.39 Unlike Forest Gate, the Crossrail Station is likely to benefit the smaller centre through increased activity levels without the need to compete with higher order centres. A Crossrail Station at Manor Park could have a further detrimental impact on Forest Gate, however, given its equidistant position between Ilford and Forest Gate. People choosing to travel by rail for their shopping requirements are more likely to choose Ilford which offers a greater choice and range of town centre facilities and activities, rather than travelling a similar distance westwards to Forest Gate.

South-West Sub-Area

- 1.40 The South West Sub-Area includes Zones 1, 2, 7 and 12 (Plan 2), with Zone 12 falling outside of the Borough boundary. Canning Town is the major centre in the area, currently designated as a District Centre. There are also four local centres including Abbey Arms, Cundy Road, Freemasons Road and North Woolwich.
- 1.41 The Sub-Area falls largely within the Arc of Opportunity but partly within Urban Newham and is subject to significant change and growth over the LDF period. Aside from Zone 8 (Stratford City), Zone 1 and 2 are set to experience the highest levels of population growth in the Borough (98% and 70% respectively). Furthermore, Zone 7 to the north will experience a population growth of 11%, and Zone 12, 22%.

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- 1.42 The Sub-Area is set to experience major mixed use development at Silvertown Quays (Zone 1) and Canning Town (Zone 2); and accommodate other major population growth areas including, the Pura Foods development site, London & Quadrant Housing Association sites, Landmark Site A, the Mayflower/River Christian Centre and Canning Town Area 3.
- 1.43 The Sub-Area will benefit from enhanced accessibility and infrastructure improvements including a new Crossrail Station at Custom House, close to Cundy Road and Freemasons Road local centres; and two new DLR stations at Star Lane and Canning Town. There are already three commitments for a medium scale of convenience floorspace (c.1,300/1,400 sq m net) within Zone 1.
- 1.44 The South West Sub Area will experience significant change over the LDF period given its location within the Arc of Opportunity and extent of regeneration opportunities. Canning Town is currently a designated District Centre, the largest centre in this Sub Area. Our assessment has identified the capacity to support a major comparison and convenience retail scheme which is likely to uplift the centre to a Major Centre designation in the future. This designation should be monitored and changed if deemed appropriate following implementation.
- 1.45 The Sub Area, primarily focused on Canning Town, currently has an extremely low market share, with existing facilities unable to meet even localised needs; there is a substantial leakage of trade to other parts of the Borough and to retail destinations beyond – both for food and non-food goods. Our assessment endorses previous work undertaken in respect of Canning Town (2007) and identifies a significant qualitative and quantitative need to support new retail and town centre proposals in Canning Town. The up-to-date quantitative assessment identifies capacity following Stratford City for both the redevelopment of Stratford Town Centre (32,500 sq m net comparison) and a new development in Canning Town (25,000 sq m net comparison / 6,000 sq m net foodstore).
- 1.46 Like Stratford, the strategic growth area for retail identified in Canning Town will result in a shift in activity from the existing High Street. Clearly, the redevelopment of Rathbone Market will assist in anchoring this part of the centre, although the new proposals must be underpinned by enhanced linkages, connectivity, sight lines and integration. In particular, the shopping frontages to the east of Barking Road are not incorporated within the SPD as ‘opportunity sites’ and policy should therefore be more proactive in supporting this area which currently performs a good local shopping and service function. This part of town should be envisaged as performing a complementary role to new development coming forwards.
- 1.47 The importance of a new anchor foodstore is crucial for this part of the Borough, particularly given current trade flow to Beckton and enhanced trade draw following Stratford City and the possible redevelopment of Tesco, Bromley-by-Bow to form a food superstore. The South West Sub Area, and Canning Town in particular, needs to be proactive to ensure it meets the needs of the local catchment moving forwards as encouraged in PPS4.
- 1.48 The findings from our analysis support the convenience and comparison development proposals in Canning Town in broad retail terms, although clearly there are many other planning considerations.
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Furthermore, we have acknowledged earlier that no previous work has assessed the cumulative impact of all major strategic retail schemes on the network of centres, and applicants should be encouraged to undertake such an assessment to enable the Council to assess the application fully against the key provisions of PPS4 and to understand the implications for the network of centres in the Borough. Our assessment has broadly accepted the scale of proposals based on strong qualitative and quantitative indicators and we support them in retail terms as a policy priority over the LDF.

- 1.49 In advance of a planning consent, the strategic growth areas should remain outside of the town centre, but be allocated through a special policy allocation setting out the acceptable parameters for growth and change. The Council should enable themselves to maintain maximum control over the future of Canning Town, and such a policy position would not prejudice investment coming forwards on the basis that the special policy allocation would in effect be promoting such aspirations.
- 1.50 Freemasons Road and Cundy Road Local Centres are located within the SPD 'Canning Town and Custom House' area. Freemasons Road is envisaged to form a strategic part of the future regeneration and enhancement of the Custom House area, serving EXCEL and the new Custom House Crossrail Station. Proposals are ambitious involving redevelopment of certain areas and the creation of an enhanced 'centre' serving local residents and visitors to EXCEL from across the South East and UK. The findings from our analysis support this policy position over the LDF period given the weaker network of centres in this part of the Borough, as well as major regeneration and growth aspirations. Contrary to this position, Cundy Road performs an entirely neighbourhood function and is small in scale justifying its potential re-designation as a Protected Local Shopping Parade.
- 1.51 Abbey Arms is the largest Local Centre in the Borough and performs an important local retail and service centre function with a well defined and reliant catchment area. It should remain a Local Centre over the LDF period, and the Council should review the policy wording given the high proportion of service uses (50%). Whilst this is not problematic at the current time given its intended role, any further dilution of Use Class A1 might erode the vitality and viability of the centre. We do not recommend any extension to the boundary as discussed in Section 3.
- 1.52 North Woolwich is the smallest centre in the Borough, and relatively uninviting in respect of the general environment. It might justify a re-classification to a Protected Local Shopping Parade, but given the separate catchment in the far south of the Borough together with aspirations for investment, growth and change, we recommend it retains its Local Centre designation. This should be monitored, and depending on where growth and future change occurs a new centre designation could be considered, perhaps alongside newly developed and larger Local Centres serving the needs of the community in specific locations.
- 1.53 There is currently an absence of Local Centres within the southern part of the Sub Area, within the Arc of Opportunity, particularly around the Royal Docks area. In advance of major population growth, we not recommend the allocation of new centres; although we do acknowledge this might be required moving forwards. Such development would not, however, be 'retail led' and instead ancillary retail uses in the

form of a Local Centre might be required to meet the needs of new local communities. The major gap in such provision is clearly illustrated on Plan 12, lying to the west of North Woolwich.

- 1.54 The LDF could acknowledge the potential to support change in the form of one Local Centre, which should be assessed in the context of the scale of population and employment growth. The potential for strategic change could be acknowledged with caveats in policy. We emphasise that new retail development should be entirely local in nature, and not compete with the existing network of centres, particularly Canning Town and Freemasons Road. Nevertheless, PPS4 does emphasise the need to meet localised shopping requirements and there might therefore be a case for additional small scale comparison and convenience goods floorspace, which should be tested on its own merits.

South-East Sub-Area

- 1.55 The South East Sub-Area includes Zones 3, 4, 5 and 11 (Plan 2), with Zone 11 falling outside of the Borough boundary. There are three main centres located within the Sub-Area: East Ham Major Centre, and Green Street and East Beckton District Centres. There are also four local centres within the Sub-Area: East Ham High Street South, Boleyn, Vicarage Lane E6, and Greengate.
- 1.56 The Sub-Area falls entirely within Urban Newham and is not identified for major strategic retail or population growth. Based on current proposals, the Sub-Area will also not benefit from new rail/underground infrastructure like elsewhere in the Borough. In addition to the retail provision in these designated centres, the Borough's main retail warehouse provision and two out of centre foodstores (Tesco, Gallions Reach and Sainsbury's, Claps Gate Lane) are also located within this sub-area.
- 1.57 This Sub Area is performing relatively well in terms of trade draw from across the Survey Area, partly based on the representation of strong town and district centres, and major bulky goods comparison retailing in the Beckton Area.
- 1.58 Our assessment has identified East Ham as the most vulnerable to change in light of Stratford City and Canning Town coming forwards, and we recommend that applications for major strategic retail growth consider the cumulative impact of pipeline proposals and committed schemes. We recommend an SPD for East Ham, like that prepared for Forest Gate, and encourage a swift policy approach and direct actions arising. East Ham will be the only second tier centre in the Borough behind Stratford, and is at risk of decline in a 'do nothing' scenario. Fortunately, Primark has just implemented a strong investment, a huge commitment to the centre which should considerably assist footfall given its market positioning at the current time.
- 1.59 There are opportunities to substantially enhance the foodstore offer, the role of independent and ethnic retailers, as well as the market, and a need to ensure policy protection of the Primary Shopping Frontage to maintain and improve a reasonable range of multiple comparison retailers. The market/Sainsbury's site presents a strong redevelopment opportunity provided complex land ownership

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- can be overcome; and we have been aspirational in identifying a large redevelopment site boundary which the Council should investigate with Sainsbury's further.
- 1.60 Green Street performs the role of a District Centre and is particularly influential in terms of small independent food and non food retailing, as well as a strong and far-reaching catchment area for ethnic food and non food goods. Based on our assessment, we consider the policy priorities should be to facilitate the implementation of a new retail scheme on 'The Mall' site, which is due to expire, and the redevelopment of Queens Market – both of which will anchor the centre north and south. We do not recommend the further expansion of the town centre boundary.
- 1.61 Our analysis identified some concerns in respect of parking and traffic congestion, as well as a lack of other town centre uses particularly eating/drinking destinations. These could form key areas for consideration in respect of the overall strategy for Green Street. Green Street sits within Urban Newham in the centre of the Borough, and is unlikely to experience any direct impact from new transport routes nor strategic population growth areas. The centre benefits from a differentiated and strong retail offer, which should be protected over the LDF period, helping mitigate against any impact from Stratford or Canning Town, for example.
- 1.62 East Beckton District Centre does not have the physical composition of a traditional 'town centre', instead offering a larger Asda food superstore with a small number of ancillary retail units offering a range of service and other local retail businesses. Furthermore, the District Centre boundary is drawn considerably wider than the main concentration of retail activity. In the short term, therefore we recommend revising this boundary to consolidate the centre and protect against further pressure for retail development in advance of any wider comprehensive strategy moving forwards. The policy priority in the short to medium term should include those schemes in the pipeline, including Stratford City and Canning Town Centre, for example.
- 1.63 Beckton is also the key location in Newham and the wider Sub-Region for major out-of-centre comparison retailing, (at Gallions Reach, Beckton Retail Park, Gateway Retail Park, Beckton Triangle Retail Park) most of which is bulky, and is also the location of the two major out-of-centre food superstores in the Borough – Tesco (Gallions Reach) and Sainsbury's (Clapsgate Lane). Clearly, the policy priorities for Newham should remain focused on the existing centres and strategic growth areas/Arc of Opportunity elsewhere in the Borough. Nevertheless, as a whole, Beckton is a substantial investment forming a strong contributor to the retail offer in Newham, yet despite the scale of development there is no specific policy direction for this area of the Borough.
- 1.64 Such retailing in Beckton is however dispersed in nature and the shopper profile is largely car borne; it is difficult to define through survey work the differences or role of the different destinations and there is an apparent lack of a main/dominant centre in this part of the Borough. We understand there has been some developer interest to enhance their existing assets or add to the range of retailing on offer, which in current circumstances is not consistent with the town centres first approach set out in PPS4. Rather than deflecting pressures for growth and change, we recommend the Council acknowledges retailing in
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- the Beckton area as an important contributor to the overall Borough retail offer and should aim to develop a robust and complementary policy position moving forwards. A Masterplan would be an appropriate means to achieve this.
- 1.65 Whilst previous and ongoing priority growth and change strategies have focused on Stratford and Canning Town, as well as Forest Gate and the other centres, it will be necessary to consider the next phase of change and enhancement to the Borough retail and town centre network within the forthcoming LDF.
- 1.66 The issue of a future wider town centre role for the retail provision in Beckton in the Gallions Reach area is a possible consideration, although the position is clearly some way off this at the current time. Considerations moving forwards in assessing the future role and function, through the development of a Masterplan for example, should include how to diversify the offer to meet the requirements of the catchment population (e.g. financial services, eating/drinking etc), make more efficient use of the site, reduce car-borne access, and better integrate with new and existing neighbourhoods. Only at this stage and through a robust policy framework should the position and potential evolution of 'centres' be considered.
- 1.67 In respect of the smaller centres, we recommend Greengate and Boleyn retain their Local Centre designations, forming two of the largest Local Centres in the Borough; both of which should be extended linearly along Barking Road to incorporate important adjoining retail and town centre businesses. East Ham High Street South is somewhat smaller, but again we recommend it retains a Local Centre designation with a small extension to incorporate the Post Office and adjoining other retail businesses. This centre is important in serving a catchment which would otherwise not have immediate access to Local Centre facilities and its protection is therefore vital. Vicarage Lane E6 is located nearby and our analysis concludes it could be re-classified as a Protected Local Shopping Parade given its scale and proximity to East Ham High Street South.

Monitoring

- 1.68 We have recommended a number of monitoring requirements moving forwards to ensure the Council keep track of the extensive changes due to take place in the Borough. This will enable the most accurate and flexible approach to development control decision and policy formulation over the LDF period. These include monitoring completions and proposals both in the Borough and in adjoining boroughs; town centre health; and the change of shopping patterns arising from transformations to the retail and town centre offer, notably the opening of Stratford City.