



**LONDON BOROUGH OF NEWHAM
TOWN CENTRE & RETAIL STUDY**

MARCH 2010

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1. INTRODUCTION

- 1.1 GVA Grimley is 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. Our work draws on three surveys focusing on retail and town centre issues in Newham and the wider sub-region.

Survey Work

- 1.3 The decision was made between GVA Grimley and the client team to draw on robust household telephone surveys as the key evidence base data source (Methodology: Appendix 16). This accords with Best Practice as published by the Government. Telephone Surveys capture the shopping habits of households across a wide catchment area with the outer boundary defined to reflect the likely catchments of the Newham centres at the current time for 'main' shopping trips. The results also enable a deep understanding of the role of other centres within and outside Newham which function and compete alongside retail and town centre offer in Newham, i.e. trade leakage. In-centre surveys were not commissioned as part of this study, but could provide additional information in respect of more detailed 'centre' issues and a greater analysis of catchments and the inflow of expenditure.

2007 Telephone Survey

- 1.4 The 2007 Canning Town household survey was originally commissioned for the 'Canning Town Retail Study and Vision' prepared by GVA. The survey area comprised 12 Zones covering the full extent of Newham's administrative area (illustrated on Plan 2), and achieved the target of 1,500 interviews. The survey provides detailed information on shopping patterns and is still considered relevant – despite the economic downturn – on the basis that they represent shopping destination choices and there has been little change in the retail environment in Newham since 2007; the results are also not directly linked to

quantums of retail expenditure. These survey results have been used to underpin the convenience and comparison goods economic projections, as well as providing some further information on leisure destinations and behaviour.

2009 Telephone Survey

- 1.5 The 2009 Newham household survey (Plan 3) was undertaken by NEMS Market Research in September 2009. The overall objective was to add value to the commission and build on the results of the 2007 Telephone Survey, ensuring more targeted data collection on local independent shops and ethnic retailing, as well further insight into leisure destinations and behaviour and usage of the six main centres: Stratford, East Ham, Green Street, Forest Gate, Canning Town and East Beckton.
- 1.6 The survey achieved 1,000 interviews across 10 Zones which were broken down further into 'sub-Zones' to ensure more localised data and catchment area analysis in respect of independent shops and ethnic retailing. In order to ensure the household survey was sufficiently representative of the ethnic mix of residents across the Borough, an ethnicity quota was applied reflecting the 2009 ethnic profile data provided by the Council. This was largely achieved, ensuring a robust sample representative of the catchment population. The breakdown of ethnic shopper by preferred shopping destination (relating to the six main centres) is attached in Appendix 14.
- 1.7 The 2009 Household Survey sought to gain an insight into the function and usage of independent and ethnic retailers in the Borough. Respondents were asked if they spend money in local independent shops and ethnic retailers, and if so where do they go. For local independent food shopping, respondents were questioned about specific destinations for bread, meat, fish, dairy products and fruit and vegetables, and were able to provide up to three responses. The full set of results were merged to provide an aggregate understanding of shopping patterns for such goods which were then used to analysis shopping patterns and catchment areas across the Borough.
- 1.8 Respondents were also able to provide up to three responses for local independent comparison goods shopping, ethnic food shopping and ethnic non-food shopping. Again, the results were merged to provide comparable aggregate market shares.

2009 Business Survey

- 1.9 The 2009 Business Survey was undertaken by NEMS in late 2009. A hybrid survey approach was adopted involving a telephone survey carried out by NEMS together with self-completion questionnaires handed out by the Town Centre Managers (TCM) in Stratford, East Ham, Canning Town, Forest Gate and Green Street; with measures taken to avoid duplication. In total, 311 businesses across the six main centres were surveyed, including those from a wide range of retail, leisure and service outlets and including a mix of multiple, independent and ethnic retailers.

- 1.10 Whilst there are no thresholds in terms of sample size to ensure robustness, the intention to achieve a representative sample across the centre from different types of business was achieved. There were some difficulties achieving the sample given busy retail businesses, and the process could be followed up with further work to achieve a larger sample if specific issues were highlighted as particularly important, including that of consultation and engagement. Methods could include town centre forums or business group discussions, for example.

Supplementary Analysis

- 1.11 In addition, we draw on up-to-date town centre health checks and review out-of-centre and competing retail provision to establish the overall health of centres and the extent to which the current retail provision across the Borough satisfies the level and nature of consumer demand and where there are key deficiencies/imbbalances.
- 1.12 We have also reviewed shopping frontage designations, centre boundaries, and the potential for growth and change. Drawing together the evidence, 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. Overall, we are comfortable with our approach having written the PPS4 accompanying Good Practice Guidance on Retail Need, Impact and the Sequential Approach (2009), and our evidence has been tested and cross examined at many planning inquiries.

Sub-Areas

- 1.13 In order to provide a more detailed analysis of shopping and leisure patterns at various stages throughout the Study, we have divided the 2007 Survey Area into the following Sub-Areas (See Plan 10):
- North West: Zones 6 and 8
 - North East: Zones 9 and 10
 - South East: Zones 3, 4, 5 and 11
 - South West: Zones 1, 2, 7 and 12
- 1.14 This enables a better understanding of travel patterns throughout the Borough, and the effectiveness of defined centres in meeting local needs. There is no basis for this division other than it effectively splits the survey area into more manageable Sub-Areas for the purpose of analysis; and it should be noted that they do not represent or reflect areas drawn by the local authority for other projects/studies.

Newham Composition

- 1.15 A further means of discussing the Borough - including both the current physical geography and future recommendations for planned growth - include reference to the Arc of Opportunity and Urban Newham; terms referenced by the Council for some years. The Arc of Opportunity can be identified as the primary focus for the Borough's transformation; extending along the Lea Valley from Stratford through West Ham, Canning Town (north/south), the Royal Docks District and into Beckton (east/west). This is broadly illustrated on Plan 12 identified as 'Growth Areas' in the key and referred to as the Arc of Opportunity throughout this report. Urban Newham covers the remainder of the Borough; that which is already built up with a strong network of centres, communities and existing infrastructure. The main strategic growth in the Borough is set to take place in the Arc of Opportunity.

Structure

- Section 2 sets out our review of national, strategic and local planning policies relevant to retail and leisure planning in the Borough;
- In Section 3, we review the composition, role and function of current shopping provision in the town, district and local centres, and out-of-centre provision across the Borough;
- Section 4 analyses in detail shopping patterns across the Borough for comparison, bulky and convenience goods; and focuses in more detail on the flow of shoppers between Sub Areas. We also set out key competing pipeline schemes in neighbouring authorities that might influence change in the future;
- Section 5 considers the extent of significant future change already planned for East London and the implications of this on the strategy for town centres moving forward;
- Section 6 sets out the quantitative economic projections and considers the potential and requirement for new retail development in the Borough up to 2025;
- Section 7 sets out our review of leisure provision within and outside the Borough, drawing conclusions in respect of qualitative and quantitative need for enhanced facilities;
- Section 8 draws the analysis together and sets out our conclusions and recommendations in respect of the wider sub-regional context, the key policy considerations, the challenges arising from growth and regeneration, the current health and composition of the network of centres, the role of independent and ethnic retailers and the need for future floorspace.

2. POLICY FRAMEWORK

2.1 This section sets out the key points of relevance from the national, regional and local policy framework, focusing specifically on town centre strategy policy formulation and the management of growth and change.

PPS4: Planning for Sustainable Economic Growth, December 2009

2.2 The central message of PPS4 is the need for a more proactive approach to securing new investment in centres, and achieving more sustainable patterns of development. The Government's key objective for town centres is to promote their vitality and viability by:

- Focussing new economic growth and development of main town centre uses in existing centres and remedying deficiencies in provision in areas with poor access to facilities;
- Allowing competition between retailers and enhanced consumer choice through the provision of innovative and efficient shopping, leisure, tourism and local services in town centres which allow genuine choice to meet the needs of the entire community (particularly socially excluded groups).

2.3 The statement advises that local planning authorities (LPAs) should plan positively for growth and development by assessing the need for further main town centre uses and ensure there is capacity to accommodate them (taking account of the role of centres in the hierarchy); and to identify any deficiencies in the provision of local convenience shopping and other facilities which serve people's day-to-day needs. In assessing need for retail and leisure development LPAs should take account of both quantitative and qualitative need, giving additional weight to the latter in deprived areas.

2.4 In assessing quantitative need for retail and leisure development LPAs should have regard to relevant market information and economic data, including a realistic assessment of population and future growth, forecast expenditure and forecast improvements in retail sales density. In assessing qualitative need LPAs should assess whether provision and distribution of shopping, leisure and local services allows genuine choice to meet the needs of the whole community (particularly those in deprived areas), in light of the objective to promote vitality and viability of town centres and the application of the sequential approach. LPAs should also take into account the degree to which shops may be overtrading and whether there is need to increase competition and retail mix.

2.5 PPS4 states that, in planning for centres, regional and local planning authorities should set out a strategy for the management and growth of centres over the plan period, setting flexible policies allowing centres to respond to changing economic circumstances. LPAs should define the network and hierarchy of

centres that is resilient to anticipated future economic changes to meet the needs of their catchments. Choices should be made about which centres will accommodate any identified need for growth in town centre uses, considering their expansion where necessary and the need to avoid an over concentration of growth in centres.

- 2.6 Identified deficiencies in the network of centres should also be addressed, giving consideration to the appropriateness of designating new centres; reclassifying existing centres; planning for extensions; or scope for consolidation. The need for any new, expanded or redeveloped out-of-centre regional or sub-regional shopping centre, or any significant change in the role or function of centres should be considered at the regional level.
- 2.7 In addition to defining the extent of the primary shopping area for their centres, LPAs are encouraged to distinguish between primary and secondary frontages (defined in Annex B). Having regard to the need to encourage diversification of uses in town centres as a whole, PPS4 states that primary frontages should contain a high proportion of retail uses, while secondary frontages provide greater opportunities for a diversity of uses. Where frontages are identified, the appropriate local development documents should include policies that make clear which uses will be permitted in such locations.
- 2.8 PPS4 encourages LPAs to proactively plan to promote competitive town centre environments and provide consumer choice by:
- supporting a diverse range of uses (including complementary evening and night-time uses) which appeal to a wide range of age and social groups;
 - planning for a strong retail mix so that the range and quality of the comparison and convenience retail offer meets the requirements of the local catchment area, recognising that smaller shops can significantly enhance the character and vibrancy of the area;
 - supporting shops, services and other important small scale economic uses in local centres and villages;
 - identifying sites in the centre, or failing that on the edge of the centre, capable of accommodating larger format developments where a need for such development has been identified;
 - retaining and enhancing existing markets and, where appropriate, re-introducing or creating new ones, ensuring that markets remain attractive and competitive by investing in their improvement;
 - taking measures to conserve, where appropriate, and enhance the established character and diversity of their town centres.
- 2.9 LPAs should identify an appropriate range of sites to accommodate at least the first five years identified need. Sites for main town centre uses should be identified through a sequential approach to site selection giving preference to locations in appropriate existing centres in the first instance, followed by

edge-of-centre locations and out-of-centre sites, with preference given to those that are more accessible or have a higher likelihood of forming links with an existing centre.

- 2.10 The impact of proposed locations for development on existing centres will also need to be assessed by the LPA, taking into account impact considerations set out in Policy EC16 which include impact on town centre vitality and viability; in-centre trade/turnover; investment in centres; delivery of development on allocated sites; and any locally important impacts on centres identified by the LPA.
- 2.11 In the determination of planning applications for main town centre uses that are not in a centre and not in accordance with an up to date development plan, PPS4 requires applicants to demonstrate compliance with the sequential approach and impact assessment taking into account the impact considerations set out in Policy EC16. Assessments of impact should focus on the first 5 years after the implementation of a proposal and should be proportionate to the scale, nature and detail of the proposed development.
- 2.12 Policy EC17.1 directs LPAs to refuse planning permission where an applicant fails to demonstrate compliance with the sequential approach or the proposal is likely to lead to a significant impact. Judgements about the extent and significance of any impacts should be informed by the development plan (where this is up to date) or recent local assessments of the health of town centres and any other published local information e.g. a town centre or retail strategy.

Good Practice Guide: Need, Impact and the Sequential Approach, December 2009

- 2.13 The Good Practice Guide is a government document published alongside PPS4. It does not constitute a statement of Government policy, but forms guidance to support the interpretation of town centre policies set out in PPS4.
- 2.14 Of most relevance to this Study is the advice directed towards assisting LPAs in adopting a more proactive approach to planning for town centres, and particularly the role of evidence in the plan making process to identify the need for new development and inform the preparation of proactive town centre strategies. Central to PPS4 Policy EC1 the guidance sets out alternative approaches to assessing and identifying quantitative and qualitative needs for retail and other town centre uses. Building on the assessment of needs, the practice guidance explains how LPAs can plan positively and promote new retail-led and other town centre uses through their LDFs; setting out the 'tools' needed to prepare effective town centre strategies, including how to identify appropriate locations, and how to assess the effects of alternative policy options and specific proposals.
- 2.15 Having identified and evaluated the various policy options, LPAs should develop a clear vision and strategy for the network of centres, and strategies for individual centres where appropriate. In terms of the LDF, this is likely to include clear guidance on the appropriate scale and form of new development

involving main town centre uses; allocation of sites to meet identified need; identification of the extent of key development opportunities; a clear statement of the approach to be taken to bringing forward development and the LPAs attitude to other competing developments.

- 2.16 It is added that strategies for individual centres can be prepared at any time but they should be incorporated into the LDF at the earliest opportunity. This is likely to be important where key site allocations are involved, either through strategic allocations in the Core Strategy, or through sites allocated in an Area Action Plan or other document. Promoting town centre strategies through the LDF process ensures that the evidence base which underpins the strategy will be properly tested. A strategy which has been progressed through the LDF process, and been subject to effective public and stakeholder consultation and tested through independent examination will ensure that proposals must be determined in accordance with the plan unless material considerations indicate otherwise.
- 2.17 When preparing their LDF's, LPAs should identify what they regard as the Primary Shopping Area (PSA) to provide clarity to applicants about the policy status of different sites. In defining the PSA, it may be appropriate to take into account the anticipated future role of the centre, and in particular the scope for growth and expansion. In centres where major expansion is planned, it may be appropriate to indicate where the PSA is likely to be extended to, having regard to the potential for achieving effectively integrated new development.
- 2.18 LPAs should also identify an appropriate 'town centre boundary' within which they should seek to locate other main town centre uses. It may also be appropriate to define other areas within the town centre but outside the PSA where specific uses are encouraged e.g. specialist retail, offices bars/restaurants etc. In addition to defining the PSA and town centre boundary, where LPAs identify a need for new development to accommodate main town centre uses, they should allocate sites which are suitable, viable and likely to be available within a reasonable timescale to accommodate such needs.

The London Plan (consolidated with alterations since 2004)

- 2.19 The London Plan is the spatial development strategy for Greater London setting out an integrated social, economic and environmental framework for future development over the next 15-20 years. It seeks to promote London as a World City and to maintain and enhance the competitiveness of business, including encouraging services, tourism, culture and the arts. It promotes urban regeneration particularly in areas requiring physical improvement, the enhancement of employment opportunities and seeks to maximise housing provision and to facilitate the development of efficient transport systems.
- 2.20 The Plan adopts a policy of 'structured choice', which concentrates the supply of retail and leisure facilities and services in the most accessible places and spreads them between central London, town centres and development areas such as the Thames Gateway. Policy 3D.1 states that London Boroughs should enhance access to goods and services and strengthen the wider role of their town centres to:

- encourage retail, leisure and other related uses in town centres and discourage them outside the town centres;
- improve access to town centres by public transport, cycling and walking;
- enhance the quality of retail and other consumer services in town centres;
- designate core areas primarily for shopping uses and secondary areas for shopping and other uses; and
- Undertake regular town centre health-checks.

2.21 London has a complex network of town centres and five broad types have been identified; international, Metropolitan, major, district and local and neighbourhood.

- **International Centres:** London has two such centres, Knightsbridge and the West End. International Centres are defined as major concentrations of globally attractive, specialist or comparison shopping.
- **Metropolitan Centres:** There are 11 Metropolitan centres but none within the London Borough of Newham at present. Metropolitan centres are mainly located in the suburbs; serve wide catchment areas covering several Boroughs; and offer a high level and range of comparison shopping.
- **Major Centres:** There are 35 major centres, including Stratford and East Ham in Newham. These centres are characteristically important shopping and service centres with a Borough-wide catchment. Their attractiveness for retailing is derived from a mix of both comparison and convenience shopping.
- **District Centres:** London has 146 district centres. These include Green Street, Forest Gate, East Beckton and Canning Town in Newham. District Centres have traditionally provided convenience goods and services for more local communities to meet their day-to-day needs. Developing the capacity of district centres for convenience shopping is critical to ensure access to goods and services at the local level, particularly for people without access to cars.
- **Local and Neighbourhood Centres:** It is recognised that there are over 1,200 local and neighbourhood centres in London which provide services for local communities and are of cumulative strategic significance. Newham has 15 designated local centres.

2.22 In accordance with national planning policy guidance, Policy 3D.2 states that DPD policies should assess retail capacity and need. Where need for additional development is established, capacity to accommodate such development should be identified within the UDP following a sequential approach. The Policy goes on to state that the scale of development should relate to the size and role of the centre and its catchment. Policy 3D.3 states that Boroughs should work with retailers and others to prevent the loss of retail facilities that provide essential convenience and specialist shopping.

- 2.23 The London Borough of Newham lies in the North East sub-region as defined in the London Plan. The strategic priorities for North East London include the following:
- Enhance the attractiveness of town centres and manage their restructuring where necessary, including the comprehensive development of Stratford as a new commercial, retail and residential area of London, making the most of its European links and its pivotal role connecting the growth areas;
 - Ensure that the substantial expansion of population expected in North East London is accommodated in sustainable communities, taking into account their needs for social and community infrastructure and capacity building, access to employment and services, exemplary approaches to waste, energy and water use, management and provision.
- 2.24 The London Plan highlights that the London 2012 Olympic and Paralympic Games present a unique opportunity to secure and accelerate the delivery of many elements of the Mayor's strategies. The Games will leave a physical legacy that includes new permanent sports facilities, new housing and many hectares of new green space.
- 2.25 In the context of major change and new development, the London Plan states that development associated with the Games should be focussed on the Stratford and Lower Lea Valley Opportunity Area and parts of the Upper Lea Valley Opportunity Area (Para 5.73). The Stratford and Lower Lea Valley Opportunity Area will accommodate some of the most important strategic regeneration initiatives for London and represents an urban renewal challenge of global significance. It will include:
- The 2012 Olympic and Paralympic site and its legacy;
 - The development of a new Metropolitan centre focussed on Stratford town centre and railway lands; and
 - A rich mix of industry, housing and open space in the Lower Lea Valley.
- 2.26 Situated in close proximity to the development hubs in the Lower Lea Valley, the Royal Docks is recognised by the Plan as a further major Opportunity Area. The vision for this area anticipates substantial intensification and concentration of development to become a model of high-density, well-connected and mixed development.
- 2.27 The London Plan sets out the significant level of housing within the defined Opportunity Areas, identifying potential to deliver a minimum target of 46,000 new homes, including a Metropolitan retail, leisure and business centre focussed on Stratford town centre, with at least 4,500 homes to suit a range of requirements.

Proposals for the Mayor's London Plan (April 2009)

- 2.28 The Greater London Authority (GLA) are in the process of reviewing the London Plan, and published an 'Initial Proposals' document in April 2009. This document is intended to form the basis for initial consultation with the London Assembly and the GLA Group. It will form a part of the preparatory work informing the new draft London Plan, which is due to be published in late 2011.
- 2.29 Within this document the Mayor sets out six key objectives for London. These are ensuring:
- A city that meets the challenges of economic and population growth;
 - An internationally competitive and successful city;
 - A city of diverse, strong, secure and accessible neighbourhoods;
 - A city that delights the eye;
 - A city that becomes a world leader in improving the environment; and
 - A city where it is easy, safe and convenient for everyone to access jobs, opportunities and facilities.

Retail and Town Centres

- 2.30 In reviewing the London Plan, the Mayor proposes to update the existing network of town centres to coordinate development, with new emphasis on their role as the key locations for new commercial development outside the Central Activities Zone. Furthermore a review of the current town centre classifications will be undertaken, along with an indication for future growth in each centre. In this process it is intended to identify those centres where a change in role is expected over the life of the Plan, and the roles of others in the regeneration process or in accommodating and managing strategic clusters of night time economy activity. The Mayor also proposes to resist inappropriate out-of-centre development.
- 2.31 In support of retail, town centres and town centre development the Mayor proposes the following measures:
- to set out the broad quantum of retail floorspace that London will require over the period to 2031;
 - to support the improvement and upgrading of London's rich network of town centres;
 - provide a framework to support people's access to the goods and services they need; and
 - to support a successful and diverse retail sector across London from international retail destinations to district and more local shopping centres.

2.32 In October 2009 the Mayor published his draft replacement London Plan for public consultation, which on the whole is consistent with the April 2009 version in terms of pushing for growth and change and regeneration in Newham. There is, however, an increasingly clear emphasis on the Olympics and the Legacy proposals. Of note is Policy 2.4: 'The 2012 Games and Their Legacy'; which states that the Mayor's priorities for the Olympic Park and the surrounding areas will be set out in his Olympic Legacy Strategic Planning Guidance (OLSPG). The policy refers also to LDF preparation and planning decisions, stating that the Mayor will, and Boroughs should 'reflect and give maximum planning weight to the Olympic Legacy Strategic Planning Guidance when considering planning applications within and outside the Olympic Park'.

GLA Floorspace Needs in London

2.33 This sub-section briefly reviews and comments on the town centre and floorspace needs assessment undertaken by the Greater London Authority (GLA). We highlight the key baseline assumptions and findings in relation to the London Borough of Newham, specifically in terms of turnover and capacity for new floorspace. We also explain why, in the context of PPS4, this Newham focused Retail Study is required to inform policy formulation and the decision making process at the local level.

2.34 The GLA published their report on Consumer Expenditure and Comparison Goods Floorspace Need in London (March 2009). This was carried out by Experian in 2008 and updates previous work on comparison goods retailing in London, carried out in 2004. The 2008 study produces comparison goods capacity forecasts for Newham through to 2026 (Table 2.1). From a discussion with Experian it is evident that "The figures relate to assumptions about population growth within the Borough and subsequent increases in the level of comparison goods expenditure available".

2.35 There is no further information or transparency in respect of the methodology or assumptions incorporated, although Experian have informed us that "the requirements will potentially fall again after 2021 as Westfield Stratford and other pipeline developments within the local area will satisfy the growing levels of comparison good expenditure". Given Stratford City is due to open in 2011 this seems a lengthy time period to allow for such levels of expenditure to be absorbed; the capacity forecasts do not appear to sit comfortably with realistic timescales of implementation.

Table 2.1: GLA Comparison Goods Floorspace Capacity Forecasts (sq m gross)

	2011 (sq m gross)	2016 (sq m gross)	2021 (sq m gross)	2026 (sq m gross)
London Borough of Newham	27,160	59,112	107,307	50,505

Source: GLA, March 2009

2.36 The Experian analysis, like the previous work, provides useful baseline data indicating population change and comparison goods expenditure and growth projections on a London-wide base, and for

individual sub-regions and smaller areas. The study is also helpful in understanding the scale and implications of major schemes in the pipeline. Significantly, however, the work focuses solely on quantitative considerations and has little regard to the issue of quality. There is also little consideration at a local level of how old and obsolete space can be recycled to accommodate modern retailer formats that are able to meet shopper/retailer needs.

- 2.37 In contrast, this Study takes into consideration the trading performance of retail destinations through the results of the 2007 Survey. Unlike the Experian gravity model, the baseline evidence and assumptions underpinning this Study are based to a large extent on our detailed and fully informed assessments of the quality, role and function of the main retail provision in the Borough. Our manual model has been specifically developed to ensure quantitative, qualitative and accessibility considerations can all be taken into account when reviewing the implications of new development in the future; and has enabled a full understanding of the performance of more localised retail floorspace, rather than merely the larger more dominant centres.
- 2.38 This detailed approach was not possible for the GLA study, given the strategic level it had to work at. While Experian's sensitivity analysis does highlight a range of possible requirements across London at a strategic level, it does not provide the detailed evidence needed by local planning authorities for the preparation of LDF policies, or to guide specific allocations of new comparison or convenience goods floorspace development. In particular, the GLA Study is not able to review the retail hierarchy at the lower levels, i.e. the district and local centres, and can certainly not advise in respect of boundaries and frontages. This study has consequently been commissioned to ensure a more robust and sound qualitative and quantitative assessment at a more localised level, which have been used to inform our eventual recommendations set out in Section 8.

London Borough of Newham UDP (June 2001)

- 2.39 The Newham UDP was adopted in June 2001 and will eventually be replaced by the Council's Local Development Framework (LDF). In September 2007 certain policies and proposals in the UDP were deleted, however most were saved and continue to inform planning decision making in the Borough until the LDF is adopted.
- 2.40 The Council's objectives for shopping and town centres, as set out in the adopted UDP, are to:
- give preference to the location of major new retail and leisure developments in town centres in line with the sequential test in PPG6;
 - encourage an improved range of modern shopping facilities for Newham residents, workers and visitors focused on town centres;
 - regenerate town centres in the Borough through the strengthening of the retail function, particularly leisure uses and comprehensive environmental improvement;

- encourage new shopping and related uses to meet the needs arising from new development;
- consolidate retail uses in the Borough's shopping centres and allow change from retail use elsewhere where demand and need no longer exist; and
- encourage shopping development that meets the needs of Newham's population in terms of public transport accessibility, access for disabled people and people with mobility difficulties, and consumer facilities such as toilets, baby changing areas and play areas.

2.41 The UDP designates Stratford and East Ham as the 'Major Centres' in the Borough with Green Street, Forest Gate, Canning Town and East Beckton defined as 'District Centres'. In addition to the town centres there are seventeen defined 'Local Centres' which generally comprise important shopping parades providing key shops and services to a more local catchment population. Outside these defined areas, the plan acknowledges a significant number of smaller parades and individual shops which also make an important contribution to the hierarchy, however there is no specific policy allocating such facilities.

2.42 The UDP defines boundaries for each of the major, district and local centres. Primary shopping frontages are also defined for each of the town centres (Major and District) which represent the core retail areas in those centre and there is a general presumption against the loss of retail facilities to other uses within these areas. Secondary shopping frontages have been defined in all town centres with the exception of East Beckton. Within secondary shopping frontages, complementary uses (including Use Classes A2 and A3) may be allowed however retail uses should continue to be the dominant use in such areas and comprise at least 50% of the frontage in individual parades.

2.43 The UDP also identifies the contribution provided by street markets in the Borough's main centres such as East Ham, Stratford, Green Street and Canning Town. Policy SH16 states that although new street markets will not normally be permitted in the main centres, exceptions to this policy may be made if the proposed market is of a specialist nature and would not duplicate facilities already provided at markets in the area.

2.44 Chapter 8 in the UDP deals specifically with leisure and indoor recreation in the Borough. It sets out the Council's objectives to provide an extensive range of new leisure developments in the Borough over the plan period. In seeking this vision the Council set a range of objectives for leisure and indoor recreation, which included the need to:

- prevent the loss of existing leisure facilities and to seek a wide range of new and improved leisure facilities which will tackle the current leisure, sports and recreation deficiencies, and meet the increasing demand for leisure activity;
- promote arts, culture and entertainment developments/activities in town centre locations and in appropriate Major Opportunity Zones;

- encourage the development of new museums to attract interest and visitors to the Borough;
- promote Newham's town centres as the preferred locations for new leisure/entertainment developments, through the application of the sequential test; and
- promote accessibility to and the efficient use of all leisure facilities.

2.45 Areas such as Stratford, Canning Town, East Ham and parts of the Royal Docks are identified in the UDP as being deficient in leisure facilities. The Council's Leisure Development Strategy (1998-2001) identified future leisure demands and the UDP therefore encourages commercial leisure development (such as tennis centres, tenpin bowling, cinemas and fitness centres) to locate within town centres and identified Major Opportunity Zones, which are well served by public transport.

Canning Town & Custom House SPD (July 2008)

2.46 The Canning Town and Custom House SPD was adopted on 17th July 2008 and provides detailed guidance to inform future development in the area. The regeneration of Canning Town and Custom House is a strategic priority for the London Borough of Newham, the London Thames Gateway Development Corporation (LTGDC), Mayor of London and the London Development Agency (LDA). The adopted SPD identifies the strategic aspirations to inform the regeneration of the area, guidance to support planning applications as well as developers, land owners and local residents. It will also ensure sites coming forward for development fit together coherently and contribute to the regeneration objectives for the area.

2.47 The SPD is divided into two sections: the first part sets out general development principles and standards to deliver regeneration objectives; and the second provides area specific guidance for identified sites. The latter involves several sites within Canning Town district centre including Rathbone Market and Barking Road (Areas 1a-1c), which are considered suitable for mixed-use development with retail, residential, office and food and drink uses. To the south of Area 1, Area 7 is proposed for a mixed use scheme creating a new civic heart for the area with a range of uses including retail and leisure. This site will play a key role in attracting people from the Canning Town station and transport interchange through to the existing district centre and Area 1.

2.48 Towards the edge of the centre Areas 10a and 10b are considered suitable for high quality flagship development comprising employment (B1/B2 uses), retail, leisure and cultural uses with ancillary residential development. Other sites are identified for a mix of high and lower density residential development, new school facilities, open space, commercial office and community facilities. The SPD and major strategic growth around Canning Town/Custom House is considered further in Section 5.

Forest Gate SPD (Adopted January 2010)

- 2.49 The regeneration of Forest Gate is a key regeneration priority for Newham and the Council has prepared an SPD for the centre which, following consultation between October and November 2009, has been revised and was approved by Cabinet in January 2010. The SPD sets out the Council's aspirations and principles to help shape future development in Forest Gate.
- 2.50 The challenges include protecting the qualities that give Forest Gate its special character; managing the private and public sector investment that is needed to bring about change; improving the role of Forest Gate as a retail centre; and ensuring that community facilities are provided to meet local needs. Development Principle 4 supports the provision of a mix of uses to help create a vibrant town centre such as ensuring retail and community service needs are met, capturing and retaining expenditure within the local economy, improving night-time vitality and viability and increasing the feeling of community safety.
- 2.51 The redevelopment of the centre should make provision for a new medium size supermarket and small shop units that will allow for a good balance of independent and high street retailers. Developers will also be required to produce a business relocation strategy as part of proposals to relocate existing businesses where feasible. The report identifies redevelopment sites and enhancement areas, setting out the key principles and planning policy parameters / potential to upgrade existing provision for each area that will be necessary to meet the overarching objectives.

Newham Local Development Framework

- 2.52 The Core Strategy is the key planning policy document that will set out the overall vision and planning strategy in Newham over the next 10-15 years. The Core Strategy will address the key issues and challenges facing the Borough in the future and highlights the priority areas that need to be addressed. This retail study will contribute to the Council's LDF evidence base and will be instrumental in guiding the review of retail and town centre policies. Under the LDF, the Council is preparing Area Action Plans for Stratford, the Lower Lea Valley and the Royal Docks to provide more detailed guidance on the Council's aspirations for these areas. This study will also contribute to the technical evidence base to underpin these documents.
- 2.53 Consultation on the Issues and Options took place in early 2008, which in terms of town centres, identifies Stratford and the existing centres at East Ham, Forest Gate, Canning Town, Green Street and Beckton as Primary Opportunity Zones for promotion through the LDF process.

Summary

- The regional and local policy position for Newham is set in the context of substantial population growth and future change. There is already major development underway in preparation for the 2012 Olympic and Paralympic Games which will be retained as part of the Olympic Legacy post-2012. Alongside the Olympics, there is the anticipated evolution of Stratford into a cohesive Metropolitan Centre; the substantial urban renewal of the Lower Lea Valley and Royal Docks supported by the London Plan; and local priorities for major regeneration in the Canning Town and Forest Gate areas.
- The Government's key objectives, published in PPS4, require regional planning bodies and LPAs to proactively plan for the network and hierarchy of centres to be resilient to future economic changes and to meet the needs of their catchments. Drawing on a sound evidence base, LPAs should identify the need for new floorspace and where necessary identify sites to accommodate identified need focussing on existing centres and areas of deprivation. Effective centre strategies should be prepared to bring forward new investment whilst maintaining and enhancing the vitality and viability of the existing network of centres.
- The adopted Newham UDP defines the existing hierarchy of centres and policy objectives for shopping and town centres across Newham. These policies do not take account of the substantial level of growth planned for the Borough, but do remain broadly consistent with the over-riding objectives of PPS4 to protect and enhance town centres. The Council's LDF will replace the UDP as the relevant policy framework to effectively manage the level of anticipated growth and change over the plan period. The purpose of this Study is to provide the Council with the evidence base to inform appropriate policy recommendations for Newham to take forward through their LDF in order to meet the policy requirements of PPS4, the sub-regional objectives set out in the London Plan, and localised growth opportunities.

3. RETAIL HIERARCHY

- 3.1 This section sets out the role and function of current shopping provision in the town, district and local centres across the Borough. We draw on up-to-date detailed healthchecks for the six main centres and the results of the 2009 Household and Business Surveys. Detailed SWOT analyses drawing on these findings are attached in Appendix 5 with development opportunity schedules (See also Plan 13 which maps where the main town centre development opportunity sites are). We also set out our health checks of the 15 smaller centres and out of centre retail provision across the Borough. Boundary plans for each centre in the retail hierarchy are attached in Appendix 15.
- 3.2 Table 3.1 provides an overview of the six larger centres in terms of retail floorspace, the total number of shop units and rank position in the national rankings published by Javelin. The location of the centres, together with neighbouring centres outside the Borough, is shown on Plan 4, and we have also included plans showing the extent of each centre's comparison goods catchment / area of influence in the survey area in Appendix 3.

Table 3.1: Profile of the Town and District Centres

Centre	Position in Hierarchy	Total No. Units	Total Floorspace (sq m gross)	Javelin Rank	
				2009	2008
Stratford	Town Centre	197	62,412	304	335
East Ham	Town Centre	285	56,708	304	310
East Beckton*	District Centre	33	36,674	230	187
Canning Town	District Centre	113	22,620	1,256	1,626
Forest Gate	District Centre	234	35,085	1,012	1,448
Green Street	District Centre	340	50,228	1,111	1,448

Source: Experian Goad (2008/9) / GVA Grimley Audits (2009) / Javelin Retail Rankings (2009) *includes Beckton Retail Park

- 3.3 It is evident that the size and rank of centres is broadly consistent with their designated position in the retail hierarchy. Stratford and East Ham, being the larger centres have a higher retail rank. Both score an equal rank of 304 which represents an improvement on their previous ranks in 2008. Canning Town, Forest Gate and Green Street are smaller in terms of floorspace but this is spread over a high number of units (generally smaller format suitable for independent retailers) consistent with their status in the retail hierarchy. In contrast East Beckton has a similar floorspace to Forest Gate but this is distributed over fewer, larger units, characteristic of its retail warehouse function.

Stratford

- 3.4 Our detailed analysis of Stratford town centre highlighted a number of strengths and weaknesses and clear opportunities and threats arising from future development on the Stratford rail lands: Stratford City due to open in 2011. Stratford has a good representation of low to mid market comparison goods retailers throughout the Stratford shopping centre, however it is clear that the main purpose for visiting Stratford is for food shopping (60%). The key anchors are the Morrisons and Sainsbury's foodstores although the Morrisons is located some distance from the heart of the shopping area and Sainsbury's is old, small and sub-standard.
- 3.5 The importance of smaller, independent food retailers and the market in Stratford is evident from the results of the 2009 survey although we conclude that the general convenience goods provision (in terms of number of units) is below national average levels and there is room for a qualitative improvement to foodstore provision in Stratford town centre. Stratford also performs a strong role for non-food independent retailers and ethnic food and non-food retailers demonstrating its importance as one of two higher order centres in the Borough at the current time but also its role meeting the needs of local residents for both food and non-food and ethnic goods.
- 3.6 Our assessment also highlights the excellent accessibility of Stratford with the highest PTAL rating available (6B) as well as the overall general health of the centre with the number of vacant units below national average and evidence that prime retail rents have increased year on year and commercial yields have fallen considerably until the recent widespread economic downturn, which, in any event, is consistent with national trends. The cultural quarter performs a key addition to the overall town centre offer with a cinema, theatre, performing arts centre and bars/restaurants although whilst it is established it remains relatively small with no significant pull for those living further afield (aside from the cinema).
- 3.7 Overall, the comparison and convenience role of the town centre is adequate although the number and mix of units does not compare favourably with the national average. The number of service businesses is significantly higher than the national average which may eventually undermine the centres retail function. Stratford is set to experience significant change following the opening of Stratford City which is an overriding benefit for the Borough. Stratford City will finally provide retail units of the size required by modern multiple retailers which are not available elsewhere in the Borough at the current time; a drawback that has prevented the higher order centres from attracting key anchors in the past.
- 3.8 The key issue moving forwards is the importance of linkages and integration between Stratford City and the existing town centre and the importance of a complementary role for Stratford town centre as set out in the GVA Grimley 'Stratford Town Centre: The Future' study (2008). The underlying objective is to ensure the local catchment population retain their local shopping offer.

East Ham

- 3.9 East Ham is the second largest centre in the Borough after Stratford, and the number of national multiples represented is on a par. There is no higher order or department store offer, but East Ham does have a reasonable range of value driven multiple retailers including Primark which has recently been granted planning consent to further extend their store, and which is currently being implemented. The importance of the Primark investment cannot be underestimated and once complete will form the key anchor retailer and significant attractor for the centre. This is a good example of where site assembly has successfully provided one new unit of a scale attractive to a key anchor multiple retailer which will have significant positive effects for the centre; i.e. enabling a popular retailer to add further to footfall in the town centre.
- 3.10 The convenience shopping role is strong and the main purpose of visit for over 74% of East Ham shoppers, reflected in the total number of units being above the national average. East Ham is also the strongest centre in the Borough for those undertaking trips to local independent food and non-food retailers – drawing people from across the Borough. In respect of ethnic retailing, East Ham is the second most cited centre after Green Street, again demonstrating the importance of this function to the health and attraction of the town centre.
- 3.11 The importance of the localised catchment and the convenience shopping role is evident, with 44% walking to the centre; over 82% visiting at least once a week; and 37% of users liking the centre because it's close to home or work. Nevertheless, the independent and ethnic shop usage analysis demonstrates the extent of a wider catchment area from across the Borough highlighting the importance of this 'differentiated' retail offer. The health check also identified a below average number of vacant units, recent rent rises (prior to the recession), falling yields, a high accessibility PTAL rating, good retailer commitment and aspirations to expand, and one or two clear development site opportunities with which to facilitate future enhancement.
- 3.12 Nevertheless, there are some clear weaknesses in the centre. Whilst food shopping appears to be a strong attractor for the centre, including the range of small independent and ethnic retailers as well as the market, the key anchor foodstores are small and outdated and there is a clear qualitative need for improvement to continue to underpin this role in the future. East Ham is the centre most vulnerable to change at Stratford City and it will be increasingly important to facilitate improvement and pro-actively manage change, whilst retaining and enhancing the value driven multiple comparison retailers; the much improved and extended Primark will assist in this objective. Daytime and evening entertainment facilities are particularly weak, crime levels and perceptions are a continuing problem for the centre, the quality of the environment could be improved in places, and a number of businesses have stated that they would consider relocation to Stratford in the future. Starbucks recently left the centre due to poor trading levels, and have confirmed that they are not currently looking for premises in the vicinity at the current time.

Green Street

- 3.13 The key message arising from the detailed health check is the overriding strength of the independent food sector and the importance of ethnic food and non-food businesses to the function of the centre. Green Street is the most cited centre in the Borough for these types of goods, and draws visitors from across the Borough as a consequence of the mix and choice of such uses. It is less popular for independent non-food shops, being only the fifth most cited centre although with a similar quotation rate to Canning Town and Forest Gate, but lower than East Ham and Stratford. The predominant role of the centre is for food shopping, with over 80% citing this type of trip as their main purpose for visiting Green Street. The Tesco and Iceland foodstores complement the mix of smaller independent retailers and the market.
- 3.14 The number of comparison retailers is above the national average, although consistent with its role as a District Centre this generally comprises independent retailers with a strong representation of clothing, footwear, jewellery, watches, silver and accessories, predominantly within the ethnic retail sector. Other indicators demonstrate a strong frequency of visit (77% visiting at least once a week); increasing but still below average vacancy rate; a strong PTAL accessibility rating of 5; and business commitment to the centre with over 80% having traded there for over 10 years. There are also clear signs of future investment and improvement through plans for Queens Market in the south of the centre, and consent for a new shopping mall in the north of the centre (although we understand this will shortly lapse).
- 3.15 There are clear areas for improvement. Green Street has a small selection of national multiple retailers including Peacocks, Superdrug and Boots, which complement the retail offer. The objective should be to retain these and improve the provision if the opportunity arises through site assembly and merging units, for example. The range of retail services is in line with the national average, but this is very much skewed to health and beauty outlets/hairdressers; and the mix of daytime and evening leisure uses that provide an attraction to a diverse mix is particularly limited. Perceptions of crime/safety could be improved, and there is a risk of diluting the focus of the centre through further growth in a north/south direction.

Forest Gate

- 3.16 An SPD has already been produced for Forest Gate (see Section 2), setting out a vision for the redevelopment and enhancement of the District Centre seeking a more vibrant hub both during the day and into the evenings. The key finding from our detailed health check is the localised and tight catchment area with little influence further a-field in the Borough. Like other centres in Newham, the main purpose for visiting the centre for 70% of people is food shopping, confirming the local nature of retailing in Forest Gate. The number of convenience units is significantly above the national average and includes Tesco, Somerfield, Costcutter and One Stop, as well as a number of local independent businesses. Nevertheless, the multiple retailers are very small catering primarily for everyday 'top up' shopping trips and the independent food retailers are used only by those living in Core Zone 8A (2009 Survey).

- 3.17 Non-food independent retailers in Forest Gate are the fourth most cited in the Borough, although the catchment is constrained to Core Zone 8A (2009 Survey). Ethnic food retailers have a stronger influence and combined are the third most cited in the Borough with a marginally wider catchment area from Zone 8A; and ethnic non-food retailers have a negligible influence being only the fifth most cited centre with a low response rate (5.4%). The mix of retail services is reasonably good; vacancy rates are below average with no specific problem areas; and around 60% of people visit at least twice a week. The centre will see the introduction of a new Crossrail Station programmed to commence in 2017 with associated upgrades to Forest Gate Station; and a number of development opportunity sites have been identified with which to facilitate future investment – notably an improved foodstore offer.
- 3.18 Consistent with its role as a District Centre, the comparison goods offer in terms of national multiples is reasonably weak, although the small number should be protected and enhanced to assist in the attraction and footfall in the centre. The total number of comparison units is significantly below the national average and the objective should be to improve this proportion relative to other uses. There is an over-concentration of fast food take-aways which should be restricted in policy and a particularly low representation of daytime and family friendly eating/drinking destinations. The quality of the environment is reasonable although there is some scope for improvement in places; it is evident that around 76% of users said they disliked the physical environment. There is some indication of existing businesses wishing to relocate, although some did state that they would relocate to alternative premises in Forest Gate.

Canning Town

- 3.19 Canning Town is undergoing a period of significant change, being implemented through the SPD document and proposals for major retail development and change, which includes the current redevelopment of Rathbone Market. Site assembly for Rathbone Market development has consequently over-emphasised the number of vacant units and should be treated with caution as a health check indicator at the current time. Overall, the District Centre is predominantly used for food shopping, with over 90% visiting for this purpose. Convenience retailing comprises small and outdated Somerfield and Iceland stores, a newly opened local Nisa convenience store, and a number of smaller independent businesses. Canning Town is the fourth most cited centre in the Borough for local independent food shopping.
- 3.20 The comparison sector is particularly weak and considerably below the national average, although this is consistent with its current role as a District Centre. Nevertheless, it is the third most cited centre in the Borough for independent comparison retailers after Stratford and East Ham, within a tight catchment reflecting the localised function of the centre. This is further confirmed by evidence demonstrating that over 70% walking to the centre, over 70% liking the centre because it's close to home and over 70% visiting at least 2-3 times a week. Canning Town has a reasonable range of retail services, excellent accessibility, and there are clear intentions from businesses to continue trading, expand or refurbish their premises. Shoppers stated they would visit more often if there was a better range of shops, more multiple retailers and a larger foodstore.

- 3.21 Canning Town does not provide a strong ethnic food or non-food offer, with few people citing the centre for such shopping purposes. There is also a weak daytime and evening eating/drinking offer. In terms of the overall environment, this is poor in places and there are general difficulties in respect of integration and linkages given the significant scale of the adjacent road network. The small Manor Road Retail Park is within the designated town centre boundary but separated from the primary shopping area by the main road network, flyover and roundabout; retailers here include Carpetright, Wickes and a vacant MFI unit.
- 3.22 Clearly, there are significant changes planned for Canning Town which will restructure the centre resulting in a shift of activity. This should be monitored moving forwards, particularly the eastern end of Barking Road furthest from new development coming forwards.

East Beckton

- 3.23 East Beckton District Centre is focused on the Asda food superstore and the Mary Rose Mall – a small parade of shops. The town centre boundary covers a wider area which also incorporates a Lidl foodstore and a range of other uses including a healthcentre, sports club, a library and other associated community uses. The composition of the centre does not form a traditional town centre, and there is a significant concentration of out-of-centre bulky goods food and non-food retailers in the wider area. For this reason, the role of East Beckton is distorted in the survey results by retailing dispersed throughout the 'Beckton' area which is referred to generally in the survey responses. For this reason, when analysing the survey results, the Beckton area must include East Beckton District Centre, Gallions Reach, Beckton Gateway Retail Park, Beckton Triangle Retail Park and Beckton Retail Park (The Junction), as well as the Tesco and Sainsbury's out of centre food superstores.
- 3.24 Specific to East Beckton District Centre, however, it is evident that there is a reasonable range of retail service businesses including an optician, hairdresser, dry cleaners, building society and a travel agent; and there is a low vacancy rate. The District Centre boundary is drawn particularly wide, beyond the area of retail concentration; and it is the least cited centre in the Borough for independent food and non food, and ethnic food and non-food shopping. East Beckton has a lower PTAL accessibility rating than elsewhere (3), and over 75% arrive by car. The centre benefits from a DLR station, although it is evident from our survey analysis that there is a low usage for shopping arrival purposes. Overall, East Beckton bears little resemblance to a traditional town centre/high street, and the offer is limited to retail with the absence of a good environment and few associated facilities (eating/drinking), for example.

Car Travel

- 3.25 The 2009 Survey asked respondents how they travelled to their centre of choice, focusing on the six main town centres. Table 3.2 below identifies the percentage of those choosing car travel to access each of the centres and the consequent importance of parking to the performance of the centre. The reliance of visitors in East Beckton by car is clear, as are the more localised 'walk-in' catchment areas of Canning Town and Forest Gate. This reflects East Beckton's role as a 'car borne' shopping destination

characteristic of an out-of-centre shopping destination, with a lower PTAL rating and few alternative means of transport.

- 3.26 More detail about the role of car accessibility/parking can be derived from the 2009 Survey. When asked what respondents like about their preferred centre, for example, 13.4% of those using East Beckton stated 'convenient car access'. This compares to only 7.4% for Stratford, 1.9% for East Ham, 2.7% for Green Street, 4.1% for Canning Town, and 8.5% for Forest Gate. Respondents also stated 'cheap parking', with most responses relating to East Beckton (8.6%), following by Canning Town (3.1%), Stratford (2.7%), East Ham and Green Street (both 1.4%) and Forest Gate (0%).
- 3.27 The most problematic centre for parking and congestion appears to be Green Street, with 9.6% stating they'd visit more often if there was 'easier/more parking', and 3.6% if congestion was reduced (Q.18, 2009 Survey). These figures are noticeably higher than other centres, and could be explored further through parking/transport reviews.
- 3.28 These figures provide an indication of the role of parking in each of the centres, although further strategy/masterplanning work relating to each centre should consider the importance of parking in greater detail through the evidence collation stage.

Table 3.2: Shoppers Arriving by Car (%)

Stratford	27.5%
East Ham	20.8%
Green Street	27.0%
Forest Gate	16.8%
Canning Town	15.4%
East Beckton	76.4%

Source: 2009 Survey

Local Centre Provision

- 3.29 There are also 15 designated Local Centres in Newham. The Council's adopted UDP (June 2001) defines 17 local centres, but since the adoption of the plan two of these centres - Stratford Road and Walter Hurford Parade - have been redeveloped for other uses and no longer exist. Table 3.3 presents the 15 remaining local centres in terms of their current retail composition. The location of the local centres is illustrated on Plan 4. It is evident that the designated local centres vary significantly in scale and composition from Abbey Arms which comprises 68 units, to North Woolwich which has just seven units.

Table 3.3: Local Centres Retail Composition by Unit Count

Local Centre	Number of Units				Total
	Comparison	Convenience	Service	Vacant	
Abbey Arms	19	9	34	6	68
Greengate	10	5	21	0	36
Boleyn	11	6	12	1	30
Plaistow Road	2	9	8	1	20
Freemasons Road	2	5	9	2	18
East Ham High St North	6	2	8	0	16
Manor Park	5	2	4	3	14
East Ham High St South	4	3	5	1	13
Terrace Road	2	3	5	1	11
Church Street	1	1	6	2	10
Plaistow High Street	1	4	4	0	9
Cundy Road	0	3	2	3	8
Vicarage Lane E15	1	2	5	0	8
Vicarage Lane E6	1	3	3	0	7
North Woolwich	3	3	0	1	7

Source: LB Newham, 2008

Abbey Arms Local Centre

- 3.30 Abbey Arms is the largest local centre in the Borough, situated in the South-West Sub-Area and to the north-east of Canning Town. Units are generally converted residential properties although these vary in scale and quality. The main retail area is focussed around the busy road junction between Barking Road, Balaam Street and New Barn Street, although there is some evidence of sprawl outside the current centre boundary.
- 3.31 Drawing on the Council's 2008 survey, the centre comprises 68 units which offer a good mix of retail and service uses. There are two multiple convenience retailers Iceland and Costcutter, alongside seven other independent convenience goods operators. The level of comparison goods provision is considered high compared to a typical local centre and includes retailers selling clothes, jewellery, telecommunications and small household items.
- 3.32 Services make up 50% of all units and include the main key services such as a post office, bank, dry cleaners, pharmacy and hairdressers. There are also several fast-food takeaway outlets within the centre as well as beyond the centre boundary, particularly south along Barking Road. These uses can be undesirable, particularly when concentrated in one area, and this should be monitored. There has been some sprawling of shop units towards the south of Barking Road, as highlighted above, these are predominantly fast-food takeaways and restaurants and are not presently considered worthy of including

within the centre boundary. We do not recommend making any changes to the current town centre boundary.

Greengate Local Centre

- 3.33 Greengate is located in the centre of the Borough, broadly where the South-West and South-East Sub-Areas meet. Greengate local centre is focussed around the major road junction where Greengate Street and Prince Regent Lane intersect with Barking Road; it is known locally as 'Prince Regents Lane'. Greengate is the second largest local centre in the Borough (36 units), after Abbey Arms (68 units) which is situated further south on Barking Road and within walking distance of Greengate.
- 3.34 The centre has a reasonable mix of retail and service provision although service uses dominate (58%), particularly fast-food takeaways which represent 38% of all service units. Other services include several hair and beauty salons, betting shops, dry cleaners and cafes. There is no post office or any banks within the historic local centre boundary, however there are several additional units outside the boundary which contribute to the local shopping provision, including a Halifax bank.
- 3.35 It is evident that over time there has been some gradual expansion of units situated on Barking Road and south along Prince Regent Lane. For instance, five shop units have filled the gap between the current centre boundary at 530 Barking Road and Sussex Street (520 Barking Road). These units include three comparison retailers (a chemist, a glazer and a card shop); a single convenience store and an insurance brokers. There is no visible distinction between units in the entire row of shops that are defined within the local centre boundary and those that are not. Sussex Street marks a clear physical break-point and the Council may wish to consider extending the local centre boundary to this point to include the additional five units mentioned above.
- 3.36 There is also a collection of units on the north side of Barking Road (507 – 517 Barking Road) which include a Halifax, a William Hill betting shop, a solicitors and a hair salon. These units are positioned on the crossroads at the core of the centre and there is an opportunity to extend the boundary north to encompass these units to reinforce this core area.
- 3.37 There is a Costcutter convenience store situated on the corner of Barking Road and Cave Road which is outside the centre's defined boundary. The unit is physically segregated from the centre by Cave Road. Costcutter is a key multiple convenience store operator and it is possible that other shops will seek to accumulate adjacent to the store. In order to resist this we consider it sensible for the unit to remain outside the local centre boundary at the present time.

Boleyn Local Centre

- 3.38 Boleyn is located in the South-East Sub-Area in the heart of Urban Newham. The centre is situated to the south of Green Street and directly adjacent to the West Ham United Football Club. The centre is approximately 0.5 miles west of East Ham town centre. Shops and services are distributed in a linear

pattern and predominantly occupy the ground floor of traditional Georgian terraces on the south side of Barking Road. In contrast, on the north side of Barking Road units are accommodated within a low-rise precinct with residential uses above. There is some provision of on-street parking outside shops on either side of Barking Road.

- 3.39 According to the Council's survey in 2008, Boleyn comprises a total of 30 units. There are six convenience units including two convenience stores, a grocer, two off licenses and a newsagent. The number of comparison units is reasonably high, with 11 comparison goods retailers offering a range of goods such as clothing, flowers, pharmaceuticals, home furnishings, sports equipment, telecommunications and small household items. Since the Council's survey was undertaken a new Tesco Express store has opened replacing the Harry Ormes furniture shop. This has uplifted the overall convenience goods offer in the centre and provided a key anchor.
- 3.40 The service offer includes a dry cleaner, optician, beauty salon, video rental, bookmaker and several cafes. Fast-food takeaways account for 58% of all service uses, and the Council may wish to consider restricting the provision of additional A5 uses in the centre in the future. In addition to the uses outlined above, there are several other valuable uses located beyond the defined centre boundary. These include a large Barclays bank, a post office, a chemist, a bookshop, a news agent and a dry cleaner amongst others. There is an opportunity for these units which extend west along Barking Road up to Selsdon Road (north side) and 764 Barking Road (south side opposite the junction with Selsdon Road), to be included within the local centre boundary to safeguard these uses and restrict any potential accumulation of A5 uses in this core area.

Plaistow Road Local Centre

- 3.41 Plaistow Road is situated in the North-West Sub-Area, on the boarder of Urban Newham and the Arc of Opportunity. The centre is within walking distance of the shops and services at Church Street local centre, located further north on Plaistow New Road. Plaistow Road comprises a small selection of unit shops situated along Plaistow Road and Stephens Road, set back from the main road (Plaistow new Road).
- 3.42 There are twenty units in the centre in total, including a Nisa convenience store alongside three smaller local convenience stores, an oriental cash & carry and a local butcher. The remaining convenience units comprise two newsagents and an off licence which contribute to a reasonable mix of convenience retail goods on offer. The comparison shopping offer is limited to a single clothes store and a glass/mirror retailer. There is a lack of key services available and an over-provision of café/fast-food takeaways, particularly on Plaistow Road.
- 3.43 The centre is clearly defined and whilst there are some additional units within the vicinity of the local centre, these are sporadically distributed along Plaistow New Road and are physically detached from the local centre by Holbrook Road and interjecting dwellings. These units therefore do not warrant inclusion within the town centre boundary at this time.

Freemasons Road Local Centre

- 3.44 Freemasons Road is situated in the Royal Docks within the South-West Sub-Area. The centre is within walking distance of the Custom House DLR station located on Victoria Dock Road, which is also the site of a proposed Crossrail station. The surrounding uses are generally low-rise residential although there is a local health centre, hotel and the Excel exhibition centre within the vicinity. The local centre comprises two low-rise precincts of shop units with residential uses above within a generally pleasant and good quality environment.
- 3.45 Drawing on the Council's survey undertaken in 2008 there are 18 units in total across the centre, which offer a range of local retail goods and services. There is a Nisa convenience store which is supplemented by a bakery, grocer, newsagents and an off licence. Comparison shops are limited to a chemist and a general store selling small household items. Key local services include a post office, dry cleaner and a hair salon. There are also two fast-food takeaways and a café. The future of Freemasons Road is discussed in more detail in the following section in the context of the Custom House and Canning Town SPD.

East Ham High Street North Local Centre

- 3.46 East Ham High Street North is located in the North-East Sub-Area approximately halfway between East Ham town centre and Manor Park local centre. The adopted UDP defines the local centre boundary which encompasses 16 units situated either side of High Street North adjacent to the entrance of Plashet Cemetery. In reality however, there is no physical segregation between units sprawling out of East Ham town centre which effectively merge with designated shops in the local centre.
- 3.47 There are no vacant units within the existing centre boundary and a reasonable range of local comparison and services uses including a Halifax bank. There are just two convenience retail units (a convenience store and a bakery) which is considered limited although there is other local convenience goods provision within the vicinity. There are just two fast-food takeaways within the local centre boundary which is considered reasonable, however these uses should generally be resisted within the centre boundary. Given the significant sprawl of retail units on High Street North there appears no sensible boundary extension measure beyond that currently identified.
- 3.48 East Ham High Street North is a good example of the importance of retaining and controlling town centre boundaries and the spread of town centres uses beyond. This Local Centre is top-up and convenience in nature and has not necessarily been undermined by the spread of very similar uses over a large area of the High Street. Nevertheless, the centre has lost the consolidation of uses and an 'identity' which is now irreversible, a position which is a considerable risk to the larger centres which require and rely on a concentration of primary retail activity without the dilution of the centre through unplanned growth.

Manor Park Local Centre

- 3.49 Manor Park is located in the far north east of the Borough, within the North-East Sub-Area. The centre as defined by the current UDP is situated at the junction of Station Road and Romford Road at the very northern end of High Street North. However, there has been substantial growth in the number of shops and services in the area, particularly along the eastern arm of Romford Road. The centre is well-served by public transport: Manor Park railway station (accessible from Station Road), and Woodgrange Park Station (situated further south along Romford Road), are both within walking distance of the local centre.
- 3.50 According to the Council's survey in 2008, Manor Park comprises a total of 14 units although just two of these units are within the convenience goods category (a grocer and an off licence). There are five comparison goods retailers selling clothing, computers, home furnishings, home appliances and telecommunications. Service uses include a café, shipping services, estate agents and a hair salon. The remaining three units are vacant. However, as highlighted above there are a substantial number of additional shops and services extending in each direction from the intersection at the top of High Street North.
- 3.51 Manor Park Station is a proposed Crossrail station, and whilst we do not envisage any significant growth of Manor Park as a consequence the new station, Crossrail will bring benefits in terms of investment and general pedestrian footfall. Taking into account the level of established retail uses around the crossroads and on Station Road, the Council should consider the benefits of extending the existing boundary to incorporate a wider area to support a retail focus around the improved transport node. Additional uses which have gradually sprawled further east along Romford Road should remain outside the centre boundary to help consolidate a retail focus around the existing centre, the strategic road junction and the new Crossrail station. Future change in respect of the boundary should be developed in conjunction with Crossrail proposals and plans for change at Manor Park.

East Ham High Street South Local Centre

- 3.52 East Ham High Street South is situated within walking distance of East Ham town centre in the South-East Sub-Area. Central Park is situated to the north of the centre which offers pleasant surrounds. High Street South is anchored by a Co-op located towards the north of the High Street which is the main convenience retail offer alongside a Euro Foods store and a local grocer. The comparison shopping offer is limited to a chemist, mobile phone shop and two vehicle accessories outlets although there is some additional provision outside the centre boundary. There is reasonable provision of key local services such as dry cleaners, launderette, estate agent, hairdresser and there is also a post office outside the centre boundary.
- 3.53 Based on the value of additional provision outside the centre boundary, particularly the post office, there is an opportunity for the local centre boundary to be extended to include these units.

Terrace Road Local Centre

- 3.54 Terrace Road is a small local centre in the North-West Sub-Area, within Urban Newham and just to the east of the boundary of the Arc of Opportunity. Terrace Road comprises a small selection of shops (11 units in total) facing onto Terrace Road between Pelly Road and Stopford Road. The units comprise a reasonable mix of uses including three convenience stores (grocer, minimarket and newsagent); two comparison retail units (chemist and telecommunications); and service units including a post office, estate agents and fast-food takeaways. There is a single vacant unit and the majority of occupied shop units are of a reasonable quality suggesting that the centre is performing well.
- 3.55 The centre boundary is clearly defined by the local roads, the railway line to the south and dense residential uses in the surrounds, which together offer limited scope for expansion.

Church Street Local Centre

- 3.56 Church Street is situated in the North-West Sub-Area and within walking distance of Stratford town centre via West Ham Lane. Shops are arranged within a small precinct set back from the main road behind a small surface level car park and a public square. There are ten units in total although service uses dominate (60%) ranging from a bookmaker, beauty salon, recruitment office, solicitors and a small restaurant. There is a single convenience store which occupies the largest unit in the precinct; and the only comparison retail provision is a pharmacy. There are two vacant units.
- 3.57 There is an additional cluster of units (1-11 Church Street) fronting onto Church Street and the public square which includes an off licence, dry cleaners, two fast-food takeaways, a public house and a vets. These units front onto the small public square and effectively encompass the square and parking provision between them and the precinct. There is a clear opportunity for these units to be incorporated within the centre boundary and scope to restrict further fast-food takeaways from concentrating in this area.

Plaistow High Street Local Centre

- 3.58 Plaistow High Street is located in the North-East Sub-Area within the existing built up Urban Newham. Plaistow Underground Station, which is served by the District and Hammersmith underground lines, is located further west along High Street and within walking distance of the local centre.
- 3.59 The main shop units are set within a linear shopping precinct beneath a residential tower block fronting onto High Street (A112). There are nine units in total; four are occupied by convenience goods retailers including a Londis convenience store, a butcher, baker and newsagent. There is also a general store offering a limited range of small household items. Services on offer include a barbers, launderette, bookmakers and fast-food takeaway. There are no vacant units.
- 3.60 There are some additional small scale shop units adjacent to the precinct, within residential conversions fronting onto The Broadway. These include a European food store and a pharmacy. Whilst they are in close proximity to the centre, there is clear, physical segregation between the concentration of units in

the precinct and these additional shops which do not justify their inclusion within the local centre boundary at this time.

Cundy Road Local Centre

- 3.61 Cundy Road is a small local centre in the South West Sub-Area, within Urban Newham, but very close to the boundary of the Arc of Opportunity. To the south of Cundy Road, moving into the Arc of Opportunity is Victoria Dock Road, the Prince Regent DLR station, ExCel London (exhibition space) and Victoria Dock – all within a short walking distance. Over the next few years, this area is to become strategically significant in Newham and the South East; ExCel is likely to become the premier exhibition space in London following the likely closure of Earls Court and Olympia; and the Custom House Crossrail Station will link with Prince Regent DLR, and will form the only rail connection with services to City Airport.
- 3.62 Nevertheless, Cundy Road is a small shopping parade within a residential area comprising blocks of flats, and is not visible from the DLR station or ExCel. The eight shop units are located on the ground floor of a block of flats. The Council's survey in 2008 identified three convenience stores (including two grocers and a newsagent) and two service outlets (both fast-food takeaways / cafes). The remaining three units are vacant.
- 3.63 Given physical constraints, the deteriorating quality of the built form, and the location of the centre it is unlikely to provide a retail offer for those travelling to City Airport or visiting ExCel. The shops currently serve the immediately adjoining residents and a tight walk-in catchment area, supplemented by the larger Freemasons Road Local Centre a short walk along Victoria Dock Road.
- 3.64 In its current form it certainly does not meet the qualitative benchmark set at ExCel and there is little physical opportunity, both in terms of the built environment and linkages, to change or develop the centre to meet such a requirement. In any event, the policy position here should be to meet the needs of the local residential community, rather than transforming the centre to meet the needs of day-trippers/visitors to this part of the Borough. That role is identified for Freemasons Road Local Centre, discussed further in the following section.

Vicarage Lane E15 Local Centre

- 3.65 Vicarage Lane is located less than half a mile from Stratford town centre and the shops along Romford Road in the North-West Sub-Area. Vicarage Lane is a linear development of shops fronting onto the main road (B164) serving the local residential area in this part of Urban Newham.
- 3.66 Within the defined local centre boundary there are eight retail units including: a convenience store, newsagent, chemist, dry cleaner, hairdresser, estate agent, café and a fast-food takeaway. However, there are several additional shops and services situated on Vicarage Lane which are not currently incorporated within the centre's designation. For instance, there are units situated further north along Vicarage Lane (east side) between the centre as defined and north of Vicarage Road. These include a minimart, a pound shop, a food and wine convenience store and two fast-food takeaways. The

concentration of these units is clearly defined and there is an obvious break point where the units reach up to a large residential block on Vicarage Lane.

- 3.67 On the west side of Vicarage Lane between White Road and Shirley Road there are six unit shops including an off licence, pound shop, tailors, launderette, fast-food takeaway and a single vacant unit. These shops are directly adjacent to the new NHS Health Centre, which opened in September 2009, and is considered an important local facility. Again this collection of shops is clearly bound, to the north by White Road and the health centre and to the south by Shirley Road and adjacent residential housing blocks.
- 3.68 The combination of these shop units and those to the east side of Vicarage Lane, including the existing centre could help create a more visibly consolidated local shopping facility, supported by the Health Centre anchor. There is an opportunity to extend the local centre boundary to focus on this area, to encourage key local retail shops and services, and restrict less desirable uses e.g. fast-food takeaways. There has been some further sprawling of shops and services further south along Vicarage Lane (east side) however, it is not considered appropriate at this time to suggest an extension of the local centre boundary in this direction.

Vicarage Lane E6 Local Centre

- 3.69 Vicarage Lane is situated in the South-East Sub-Area towards the southern fringe of Urban Newham. The centre is within walking distance of additional shopping provision at East Ham High Street South local centre, situated to the west of Vicarage Road. Vicarage Lane is a small precinct nestled within a residential estate. There are seven units in total, anchored by an Express Local Supermarket which occupies the largest unit. The remaining retail/service offer includes a bakery, florist, off licence, dry cleaner, fast-food takeaway and an internet/computing outlet. There are no vacant units. There are some additional units directly opposite the main precinct however these are sporadically distributed within a short row of terraced houses and are either vacant units or fast-food takeaways. Based on the type of use and sporadic distribution, these units should not be included within the local centre boundary.

North Woolwich Local Centre

- 3.70 North Woolwich is situated the furthest south in the Borough, in the heart of the Royal Docks and the Arc of Opportunity and within the South-East Sub-Area. The centre is somewhat isolated although it is served by the DLR via King George V station which is within walking distance of the centre at the end of Pier Road. The immediate surroundings are predominantly residential and dominated by high rise residential towers, with high concentrations of deprivation. Shop units on Woodman Parade are situated directly beneath a dated, high-rise apartment block. The residential tower extends over the shops and masks the frontages creating a physically unwelcoming environment. There are seven retail units within this small parade, and just one is currently vacant. The remaining units include a greengrocer, bakery, off licence, chemist, charity shop and general pound shop.

- 3.71 Adjacent to Woodman Parade and outside the local centre boundary there are some additional shops and services incorporated within a more low-rise residential block development designed around a central square called Pier Parade. Costcutter occupy the largest unit on the corner of Pier Parade and Pier Road. There is also a dry cleaner and the North Woolwich library and Docklands Local Service Centre also occupy units on the square. There are what appear to be three vacant units although according to the Council these are all currently leased and either in or soon to be in operation. The area, like Woodman Parade, is rundown and physically uninviting. As part of the same residential block, there is a further cluster of shops fronting directly onto on Pier Road. These shops include a post office, newsagents, bookmakers, a café and a fast-food takeaway.
- 3.72 The Royal Docks has seen significant new private residential development in recent years, however many of these developments are poorly integrated with North Woolwich and we understand that residents choose to avoid Pier Parade and the King George V DLR station. The Council are currently working towards a strategy to enhance the appearance and safety of the area in order to create a more welcoming local centre and capture more local spend. This would also represent a timely opportunity to expand the historic local centre boundary to encompass units in Pier Parade and on Pier Road where the public realm improvements are being focussed. This would grant the Council greater powers over future uses in the local centre to ensure that they are appropriate to meet the needs of existing and future local residents.

Protected Local Shopping Parades

- 3.73 PPS4 defines City, Town, District and Local Centres; and sets out the following definition of a Local Centre:

“...include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food take-away and laundrette.” (Annex B: Definitions)

- 3.74 PPS4 adds that ‘small parades of shops of purely neighbourhood significance are not regarded as centres for the purposes of this policy statement’ (on the basis they are not designated or protected in policy. Whether a small centre is defined as a ‘Local Centre’ is therefore dependent on the scale of provision and the extent of the catchment area; this is perhaps a ‘grey’ area given it depends on the interpretation of a small catchment or a catchment of only neighbourhood significance. The scale and catchment combined can, however, provide a useful and broad indicator of the most appropriate definition for a concentration of shops.
- 3.75 It should also be noted that London is very different than many other parts of the UK, and some London Boroughs, although not Newham, do have ‘Protected Local Shopping Parade’ designations to acknowledge and protect the large number of shops serving dense urban communities outside of

- designated 'town centres'. They may justify policy protection to ensure their continued role in meeting important local retail and service needs.
- 3.76 London Borough of Southwark, for example, has a specific policy to protect shopping frontages that fall outside of their retail hierarchy of town, district and local centres. Saved UDP Policy 1.9 in the Southwark Plan controls changes of use from A1 Use Class within protected shopping frontages (subject to a range of criteria) on the basis that the 'continued viability of these shopping areas is important as they provide local services people expect within easy distance of their homes, therefore increasing amenity and reducing the need to travel. They add that In some areas 'there is pressure to convert retail premises to food and drink uses and this needs to be managed in order to ensure a mix of services is maintained'.
- 3.77 Based on location, catchment area and scale there are some Local Centres within the existing retail hierarchy that may justify a Protected Local Shopping Parade designation rather than Local Centre. It would only seem logical to change a designation, however, if it required a different policy wording to the defined Local Centres within the Borough, i.e. a blanket approach preventing any change of use within a Parade from A1. It may also lead to the requirement for a wider review and further Shopping Parade designations throughout Newham, but this would require further and more extensive survey work. This specific assessment concludes that the units from Abbey Arms to Terrace Road (Table 4.12 above) perform a Local Centre role, i.e. are of a sufficient scale and include a mix of units serving a small catchment, with potential in many to extend the boundaries.
- 3.78 Church Street has only 10 Units, although there is a greater cluster with potential to extend and will therefore perform a strengthened role as a Local Centre moving forwards. Plaistow High Street and Cundy Road are suited to a Protected Local Shopping Parade designation; they have a small but important mix of uses serving the immediate neighbourhood and are both close to stronger Local Centres serving small catchments – Greengate/Terrace Road and Freemasons Road respectively. Adjoining Plaistow High Street we have also identified a small cluster of units that could also be identified as a Local Shopping Parade.
- 3.79 Vicarage Lane E15 has only 8 units, but there is potential to expand to incorporate a number of other useful retail and service businesses as well as the new NHS Health Centre. As such, we conclude this should remain a Local Centre. Vicarage Lane E6 performs a neighbourhood role serving adjoining residential uses, there is a small number of units in a precinct format and no current clearly identified opportunities for growth/expansion; as such we conclude this could justify a Local Shopping Parade designation.
- 3.80 North Woolwich Local Centre is small in scale, relatively uninviting, and with a number of sporadic uses in the vicinity. We would normally recommend a Local Shopping Parade designation, but this is targeted for investment, growth and change over the LDF period, and for this reason we recommend this retains a Local Centre designation, although should be one to monitor depending on where growth and change

occurs. In the future there may be a refurbished or new Local Centre with a number of surrounding Local Shopping Parades consistent with the policy objectives for regeneration.

- 3.81 Plan 6 provides a map of the Borough plotting all A1 shop units selling food, produced as part of the Food Mapping Study undertaken by the London Borough of Newham. The concentrations of retail activity around the designated retail hierarchy is clear, although there are a number of units sporadically positioned around the Borough that are likely to provide key facilities in meeting local needs, perhaps individual stand alone units or within small Local Shopping Parades. This mapping exercise is referred to later in this report when discussing 'gaps in provision' in each respective Sub Area.

2009 Survey: Independent and Ethnic Retailing

- 3.82 The 2009 household survey included questions on the role of local independent retailers in the Borough and highlighted that 54.3% of residents within the survey area currently spend money in small independent local shops. Whilst the majority indicated that they spend money in the larger centres, particularly Green Street and East Ham, the survey also identified certain local centres and undesignated clusters of shops which are also popular in terms of their small local independent shopping provision. The survey also highlighted the role of shops at this level in terms of ethnic retailing.
- 3.83 We should raise caution that the response rates are very small and at best provide an indication of those destinations that are most popular / perceived, aside from the six main centres in the Borough, for these types of goods. The figures do, however, correspond with our qualitative reviews of the Local Centres in terms of their offer and scale, and do assist when drawing conclusions on their role, and when recommending new or revised designations.

Leytonstone Road / Maryland

- 3.84 The shops around Maryland station and extending north on Leytonstone Road were identified as the most popular destination for small local independent shops (outside of the six main centres) for non-food shopping (4.2%) and the second highest for food shopping (3.7%). At the local level, the area is also amongst the most cited for ethnic food (2.5%) and ethnic non-food shopping (2.4%). This indicates that the small local independent and ethnic shops in this area are generally performing a stronger overall role than those in existing designated local centres.

Manor Park Local Centre

- 3.85 Manor Park is the most cited destination for small independent food shopping (3.8%), but is weaker in terms of its independent non-food retailers (0.9%). Similarly the centre is amongst the most cited for ethnic food shopping (along with Leytonstone Road / Maryland) (2.5%) but less popular in term of ethnic non-food retailing (1%); although this is still the third highest of centres cited at the local level.

Abbey Arms Local Centre

- 3.86 Abbey Arms is the third most cited destination for small local independent food shopping (2.6%), after Leytonstone Road / Maryland and Manor Park local centre; and the second most cited location for non-food (3.2%) after Leytonstone Road / Maryland. The survey did not identify a particularly prominent role in terms of ethnic retailing.

Plaistow High Street Local Centre

- 3.87 Plaistow High Street is the fourth most cited destination for small local independent food shopping (along with Greengate) (1.6%); and the third most cited location for local independent non-food shopping (1.4%). The 2009 survey also identifies an ethnic retailing role in the centre as it was cited by 1.1% and 0.8% of respondents who spend money on ethnic food and non-food items in the Borough respectively.

North Woolwich Local Centre

- 3.88 The 2009 survey highlights a particular role for North Woolwich in terms of ethnic food retailing at the local centre level, cited by 1.1% of respondents (the same as Plaistow High Street) for this purpose. For non-food ethnic retailing it was cited by 0.9% of respondents which is higher than Plaistow High Street. The survey did not identify a particularly prominent role in terms of small local independent shopping, and the response rate may be a consequence of the very cut off and separate catchment area compared to the rest of Newham.

Greengate Local Centre (including shops along Prince Regent Lane)

- 3.89 Greengate Local Centre was the fourth most cited destination (alongside Plaistow High Street) for small local independent shops (outside of the six main centres) for food shopping (1.6%) and the fifth most cited for non-food shopping (0.5%). The area is the third most cited for ethnic food retailing (1.5%) after Leytonstone Road / Maryland and Manor Park. It is also amongst the most cited for non-food ethnic retailing (1.2%) suggesting an overall important ethnic retailing function.

Markets

- 3.90 There are a number of mixed food/non-food markets across the Borough which perform crucial roles in the health and attractiveness of the centres. The 2009 Survey did not include specific questions on markets and their usage, but we were able to identify the popularity of markets across the Borough through the questions on 'small local independent shops and markets'.
- 3.91 Respondents were asked (Question 2) which small local independent shops and markets do you visit for food and non-food items, and the response list, in conjunction with the Council, included the different markets if they were referenced. This enabled a broad understanding of the perceptions of markets as part of the overall retail offer in each centre, although given the different number of shopping destinations

in a centre it is not possible to use these figures as an exact market share. We set out below the different markets on offer in the main centres, and the broad findings from the 2009 Survey results.

- 3.92 In **Stratford** there are three components to the market offer involving indoor market provision along the West Mall in the Stratford Shopping Centre (operated by the Council) and within the In-Shops facility situated in the North Mall. In-Shops is a privately-operated market hall and one of several similar facilities across the UK which focuses on providing local businesses with quality retail space with minimal investment and maximum business support. Outside the Shopping Mall there is a further Council-operated outdoor market along The Broadway.
- 3.93 The 2009 survey of local independent shopping patterns distinguished between different shopping locations in the centre, including the markets. The survey results indicate that just over half of those shopping in Stratford's small local independent shops visit the markets for food, whilst others shop for food items in other local independent stores elsewhere in the centre. In contrast, just 23% visit Stratford's markets for non-food shopping which is much lower than other local independent stores in the centre (76%). Overall, the market stalls in the West Mall are most popular for food shopping whilst the In-Shops market hall is most popular for non-food items.
- 3.94 In **East Ham**, the East Ham Market Hall is situated adjacent to the Sainsbury's and set back from the main high street. The market is operated by Land Management Limited which, like In-Shops in Stratford, provides space and support to local businesses. The results of the 2009 survey indicate that of those who visit local independent food retailers in East Ham, 25% visit the Market Hall for their food items, 56% use shops on the High Street, and 19% use those on Barking Road. Of those who visit local independent non-food retailers, 16% use the Market Hall for non-food items, less than use the destination for food items. Perceptions of the market as a key attractor are not strong.
- 3.95 Rathbone Market is the traditional market in **Canning Town**, however the market is presently not operating to its full capacity as the site is subject to redevelopment proposals and is predominantly vacant. There are some units which have continued to trade and the 2009 household survey indicates that almost half of those that visit local independent food shops in Canning Town (44%) use the market. Only 26% visit the market's independent shops for non-food shopping, compared to 74% who shop at other independent stores elsewhere in the centre. The site is currently still subject to planning and there is no clear timescale as to when redevelopment to provide a new market facility will commence.
- 3.96 Queens Market is the main market facility in **Green Street** and is a popular attraction that draws visitors from a wide catchment which extends beyond the Borough boundary. The results of the 2009 household survey indicate of those visiting Green Street for local independent food retailers, over half choose to shop in Queens Market (54%), whilst 46% visit shops elsewhere in the District Centre. The market's independent retailers attract fewer visitors in terms of non-food shopping (27%). Perceptions of the market for food shopping are strong, whilst for non-food shopping they're weaker.

3.97 Like Rathbone Market in Canning Town, Queens Market has been identified by the Council for regeneration although this is still subject to planning at the present time and there is no clear timetable as to when a new market facility will be delivered. Taking into account the key role of the market in the centre, the regeneration of the area will be phased in order to allow retailers to continue trading throughout. There are no market facilities currently operating in Forest Gate or East Beckton.

Retail Warehousing

3.98 We have identified approximately 43,160 sq m net of occupied retail floorspace in the Borough (See Plan 5). The main retail warehouse provision is concentrated in and around the Beckton area in the south-east of the Borough, although there is also additional provision within the Manor Road Retail Park within Canning Town town centre boundary. A summary of the retail parks is provided below and a more detailed floorspace breakdown of individual units is attached in Appendix 11, Table 17.

- **Beckton Retail Park (c.6,831 sq m net)** – Furniture Land, Topps Tiles, Poundstretcher, Dreams, Litanica, Carpets for Less and Matalan.
- **Gallions Reach (c.12,878 sq m net)** – HMV, River Island, Clarks, Clinton Cards, Boots, Orange, Game, Smyths Toys, American Golf Discount Store, Thomson, TK Maxx, H Samuel, Suits You, New Look, Sports Direct, Burton / Dorothy Perkins, Evans / Wallis, Miss Selfridge / Top Shop / Top Man, WH Smith, Superdrug, Next and the Carphone Warehouse.
- **Beckton Gateway Retail Park (c.10,569 sq m net)** – B&Q, Pets at Home, Allied Carpets, Comet and Staples.
- **Beckton Triangle Retail Park (c.10,658 sq m net)** – PC World, Maplin Electronics, Boots, Next Clearance, JD Sport, Land of Leather, ScS, Argos Extra, Currys and DFS.
- **Manor Road Retail Park, Canning Town (c.2,225 sq m net)** – Carpetright and Wickes.

3.99 We have identified 11,953 sq m net of vacant retail warehouse floorspace in the Borough, the majority of which is located at Beckton Retail Park (c.7,448 sq m net). We understand from the Council that discussions are underway in respect of the letting of some of this floorspace. Elsewhere, there is 1,532 sq m net vacant floorspace at Gallions Reach and 2,973 sq m net vacant floorspace at Manor Road.

3.100 There are two out-of-centre foodstores in the Borough, both of which are again located in the Beckton area in the south-east of the Borough. Sainsbury's at Claps Gate Lane opened in 1993 and has a floorspace of 6,410 sq m net. The store is in close proximity to the major interchange between the A13, the North Circular (A406) and the A1020. The store is directly accessible off the A1020. Further south along the A1020, there is a Tesco Extra foodstore located at Gallions Reach. The store opened in 2002 and comprises 8,204 sq m net.

Neighbouring Centres

3.101 The influence of major higher order competing centres is discussed in detail in the following Section (Section 4), although there are a number of nearby neighbouring smaller centres located in adjoining authorities (See Plan 4). As already discussed, no authority is a 'closed' system and will always experience inflows and outflows of expenditure, particularly in respect of major foodstore operators and higher order centres selling a greater mix and quality of goods. At the more local level – in respect of small local independent shops – our analysis has identified that this relationship is almost negligible, and few Borough residents travel beyond the borough boundary to neighbouring smaller centres to purchase such goods. Main food and higher order comparison shopping patterns are discussed further in Section 4 and 6.

Summary

- Overall existing centres in the Borough are performing reasonably well and are considered vital and viable. Detailed town centre healthchecks for each of the six main centres are provided in Appendix 4. Stratford and East Ham are the largest centres in the Borough, with Stratford set to experience significant growth and East Ham the most vulnerable to change in the future. Stratford City will finally provide the larger format units required by modern national multiples that have not previously been available elsewhere in the Borough. In the context of Stratford City it is crucial for both Stratford and East Ham Town Centre to retain a 'differentiated' retail offer building on the already strong role of the markets and the local independent and ethnic retail provision – particularly strong in East Ham.
- Canning Town is set to experience substantial change both through the redevelopment of Rathbone Market and major retail development to the south of the centre as part of the Canning Town and Custom House SPD (discussed in Section 5). This is likely to substantially improve the retail offer, although the impact on the centre in terms of the shift in activity should be carefully considered with proactive measures in place to mitigate against any negative impacts. Green Street performs the strongest role in the Borough in terms of independent and ethnic retailing activity and there are two clear opportunities for development and change at Queens Market and a 'shopping mall' site to the north. The centre is already elongated and any further growth could dilute the shopping heart leading to a risk of decline in the future.
- Forest Gate has a high level of convenience and services uses and a less prominent comparison shopping role. The centre is the subject of an SPD which aims to manage the delivery of new developments and long-term improvements that will further enhance the centre's overall vitality and viability. The centre has a tight catchment area and despite a predominant convenience goods shopping role, the foodstore offer is qualitatively deficient.
- East Beckton and the wider 'Beckton Area' has a strong convenience and comparison shopping provision which draws for a wide catchment area, although much of this is car-borne trade. The

concentration of large-format stores occupied by higher-order retailers in this area, alongside complementary leisure facilities, has the effect of attracting shoppers from across the Borough given deficiencies in higher order comparison retailing elsewhere. Stratford City and potentially Canning Town will help address this imbalance in the future.

- East Beckton District Centre does not perform a traditional 'town centre' role and the boundary is drawn wider than the identified concentration of retailing. This combination of circumstances in the East Beckton/Gallions Reach Sub-Area needs monitoring and proactive planning to manage it to better strategic effect.
- There is a large network of Local Centres across the Borough, and we consider the need for additional designations moving forwards and set out our recommendations for boundary changes later in this report. Some may justify Protected Local Shopping Parade designations, notably Cundy Road, Plaistow High Street and Vicarage Lane E6.

4. SHOPPING PATTERNS

- 4.1 This section draws on the 2007 Survey results, and builds on our qualitative review of the retail hierarchy, to identify the shopping patterns of Borough residents for their main comparison goods shopping, and main food and top up food shopping by Sub Area. This analysis identifies the main competition outside the Borough, and enables us to investigate the relationship, role and performance of each of the six main centres, together with out-of-centre retail warehousing in Beckton.
- 4.2 We have also undertaken qualitative work to establish major developments and pipeline proposals in identified competing centres that may have an influence on shopping patterns in Newham. The findings will feed into our conclusions of the ability of existing retail provision to meet the needs of their catchments, and will also inform our key recommendations for future growth, investment and change throughout the Borough. This assessment complements the quantitative/economic analysis set out later in this report and will assist in strategic recommendations for each Sub Area of the Borough.

Comparison Goods

- 4.3 Shopping patterns derived from the 2007 household survey enable us to calculate the amount of comparison goods expenditure that each competing centre draws from the survey area. To establish the baseline in 2010, we have used the most up to date 2008 price base spend per capita figures published by Experian Business Strategies and population projections provided by the Council. We have also updated the input assumptions with regards to expenditure growth and deductions for Special Forms of Trading (SFT). Table 4.1 below and Plan 1 demonstrate the total expenditure flowing to the identified competing centres (Appendix 2).
- 4.4 The survey highlights that Beckton draws the highest proportion of trade (23.3%) from the survey area, totalling £157.5m. On closer analysis it is evident that Beckton has a strong influence on comparison shopping patterns in all Zones across the survey area illustrated by the centre's catchment area plan (included in Appendix 3). There is no defined 'Beckton' centre and we consider it highly unlikely that this level of trade is drawn solely to East Beckton district centre. We therefore define 'Beckton' as including East Beckton district centre, Gallions Reach, Beckton Gateway Retail Park, Beckton Triangle Retail Park and Beckton Retail Park (The Junction). Gallions Reach provides the strongest retail offer out of these destinations.
- 4.5 It is evident that East Ham is also attracting a large proportion of comparison goods expenditure from the survey area totalling £73.6m equating to a 10.9% market share; marginally higher than Stratford. The centre has a clearly defined core catchment area comprising Zones 3, 4, 5 and 10 although its overall influence extends across all Zones with the exception of Zone 11 (Appendix 3). This is likely a result of expenditure in this zone being drawn to Barking.
- 4.6 Stratford has a clear core catchment area comprising Zones 6, 8, 9 and 12 (Appendix 3), and its influence extends across all other Zones, although again with the exception of Zone 11. Stratford has

an overall market share of 9.8% attracting £66m comparison goods expenditure from the survey area. This market share is greater than Ilford which draws £60m of comparison goods expenditure from the survey area (8.8% market share), particularly from Zones 9, 10 and 11 which are in closest proximity to the centre. However, as Ilford is located outside the survey area it is unlikely that we have captured the centre's full turnover which, based on the centre's regional status as a Metropolitan Centre, is likely to be greater than Stratford's.

Table 4.1: Study Area Comparison Goods Trade Draw: Key Competing Centres

Centre	Borough	London Plan Classification**	Comparison Goods Trade Draw from Survey Area (£000)	% of Total Available Comparison Goods Expenditure (%)
Beckton*	Newham	District	£157,480	23.3%
East Ham	Newham	Major	£73,556	10.9%
Stratford	Newham	Major	£65,963	9.8%
Ilford	Redbridge	Metropolitan	£59,548	8.8%
London West End	Westminster	International	£50,110	7.4%
Barking	Barking & Dagenham	Major	£37,295	5.5%
Lakeside	Thurrock	-	£28,228	4.2%
Romford	Havering	Metropolitan	£16,382	2.4%
Green Street	Newham	District	£9,963	1.5%
Canary Wharf / Isle of Dogs	Tower Hamlets	Major	£9,009	1.3%
Forest Gate	Newham	District	£4,073	0.6%
Canning Town	Newham	District	£2,542	0.4%
Wood Green	Haringey	Metropolitan	£649	0.1%
Sub total	-	-	£514,796	76.2%
Other destinations	-	-	£161,105	23.8%

Source: GVA Household Survey, 2007 *Incl. retail parks **Draft replacement London Plan (Oct 2009)

- 4.7 Other centres which are attracting a reasonable amount of trade include: London (West End) which draws £50.1m (7.4%); and Barking which attracts £38m of comparison goods spend equating to 5.5% market share (the majority of which is drawn from Zone 11 situated outside Newham's Borough boundary). Given the scale of retail offer in the West End, its central London location and its designation as London's only 'International Centre', it is clear why it has such an influence on shopping patterns in the area, particularly given the accessibility via the Jubilee underground line.
- 4.8 Similarly, Lakeside has a 4.2% market share although the centre's overall influence across the survey area is diluted with no strong draw from any one zone. This would appear to reflect its role as an occasional/luxury shopping destination rather than one which meets day-to-day comparison shopping needs. The catchment area for each of these centres is illustrated in Appendix 3.
- 4.9 Romford is less influential across the survey area with a market share of 2.4%, although this is not unexpected considering its location outside the survey area and beyond Ilford. Notwithstanding this, Romford has a greater market share than Green Street (1.5%), Forest Gate (0.6%) and Canning Town (0.4%) which are all situated within the survey area. This reflects the more limited comparison retail function of Newham's district centres and the draw of larger Metropolitan centres outside the survey area. Canary Wharf has a 1.3% market share, largely drawing trade from Zone 12 which is outside the survey area. Wood Green draws £0.6m which equates to a market share of less than 1% and is therefore not considered particularly influential on the defined survey area.
- 4.10 Collectively, the main centres identified above attract 76.2% of total available comparison goods expenditure from within the survey area. The remaining 23.8% is likely to be directed towards smaller local shopping facilities, other town and shopping centres (such as Bluewater, Leytonstone, Leyton, Walthamstow and Lewisham) and the network of retail warehouse provision both within the study area and beyond.

Bulky Goods

- 4.11 The 2007 Survey asked a number of comparison goods questions in order to investigate where respondents are shopping for different types of goods. The questionnaire asked specific individual questions relating to DIY and Decorating goods; Furniture, Furnishings and Floor Coverings; and Domestic Appliances such as washing machines, fridges, cookers and kettles. We have already set out in Section 3 that the only bulky goods retail warehouse provision is located at Beckton, with a small three unit scheme in Canning Town Centre.
- 4.12 Residents are overwhelmingly choosing to visit Beckton for their bulky goods shopping; including 48.9% of residents for DIY and Decorating supplies; 21.9% for Furniture and Floor Coverings; and 36.3% for Domestic Appliances. The Canning Town offer is limited to Carpetright and Wickes, and achieves only a 0.4% market share for Furniture and Floor Coverings; and a 2% market share for DIY and Decorating Goods (2.3% Zone 1; 5.4% Zone 2 and 9.5% Zone 7).

- 4.13 Outside these retail parks, a number of other destinations have an influence on bulky goods shopping patterns. For DIY and Decorating supplies, 6.7% are using Barking, 4.7% Stratford, 4.7% East Ham, 3.4% Leyton, 3.0% Ilford, 2.3% Leytonstone and 1.5% London West End. For Furniture and Floor Coverings, 7.9% are using Lakeside, 6.8% Ilford, 6.8% East Ham, 6.4% Stratford, 5.1% London West End, and 4.9% Barking. For Domestic Appliances, 10.8% are using East Ham, 10.8% Stratford, 8.5% Barking, 4.2% Ilford, 3.5% London West End, 1.6% Leyton, and 1.5% Forest Gate.
- 4.14 Although residents in the Survey Area are travelling to some destinations outside the Borough, the most popular bulky goods destination in the wider catchment is Beckton which has a significantly higher market share than any other location.

Convenience Goods

- 4.15 Within Newham, we calculate that the six main town centres and out-of-centre retailing account for 53% of total available convenience goods expenditure in the Borough (Table 4.2). A more detailed analysis by Sub Area demonstrates the strength of the North West (Stratford) and the South East (Beckton, East Ham, Green Street) Sub Areas in terms of market share/trade retention, compared to the North East (Forest Gate) and South West (Canning Town). Notably, Forest Gate town centre only retains 3.6% of available convenience goods expenditure within that Sub Area, and Canning Town only retains 1.9% of convenience goods expenditure within the South West Sub Area.

Table 4.2: Convenience Goods Market Share by Borough and Sub Area

(2010)	2007 Survey Area	North West	North East	South West	South East
Total Available Spend (£m)	£544.6m	£112.6m	£120.3m	£132.6m	£179.1m
Convenience Goods Trade Draw (£m)	£288.1m	£45.8m	£4.3m	£2.5m	£102.7m
Market Share (%)	53%	40.7%	3.6%	1.9%	57.3%

Source: Household Telephone Survey, 2007

North West Sub Area

- 4.16 We have reviewed shopping patterns in Zones 6 and 8 – those comprising the North West Sub Area – for main food and top-up food shopping, summarised below in Table 4.3. Zone 8 residents are primarily choosing to shop in foodstores in Stratford, although there is some leakage to Bromley-by-Bow, Leyton and Leytonstone. The level of leakage to these stores is greater than identified leakage to other stores within Newham beyond the North West Sub Area. Few people are travelling to Beckton for their main

food shopping from this Zone, and Stratford is the over-whelming destination of choice for top up food shopping, although there is some leakage to the large Asda in Leyton.

- 4.17 Zone 6 is located more centrally in the Borough and shopping patterns are therefore more diverse – this is expected given the geographical location. For main food shopping, residents are choosing foodstores in Stratford and Green Street, although there is a strong level of leakage from this Sub-Area to foodstores in Beckton (Asda, East Beckton; Tesco, Gallions Reach; and Sainsbury's, Claps Gate) a considerable distance for people to travel for their food shopping. Top up food shopping is more localised and residents are choosing to remain in this Sub Area for this type of grocery shopping.

Table 4.3: North-West sub-area Convenience Shopping Patterns

Foodstore / Centre	Zone 6 (%)		Zone 8 (%)	
	Main Food	Top-up	Main Food	Top-up
Within the north-west sub-area				
Morrisons, The Grove, Stratford	8.2%	10.5%	35.2%	30.0%
Sainsbury's, The Mall, Stratford	13.3%	10.5%	13.3%	13.3%
Stratford	-	4.7%	2.9%	14.4%
Within Newham				
Plaistow / Abbey Arms Local Centre	2.0%	21.0%	-	-
Shops in Green Street District Centre	11.2%	11.7%	1.0%	2.2%
Asda, Beckton / Beckton	11.2%	1.2%	1.9%	-
Tesco, Gallions Reach, Beckton	8.2%	-	1.9%	-
Sainsbury's, Claps Gate, Beckton	6.1%	1.2%	-	-
Outside Newham				
Tesco, Hancock Road, Bromley-by-Bow	4.1%	-	5.7%	-
Tesco, High Road, Leytonstone	4.1%	2.3%	6.7%	2.2%
Asda, Marshall Lane, Leyton	1.0%	1.2%	10.5%	6.7%

Source: GVA Household Survey (2007)

North East Sub Area

- 4.18 Forest Gate (within Zone 9) is the main centre in the North East Sub Area, although Green Street is relatively close to the boundary of Zone 9. It is evident that Forest Gate has a very low influence on convenience goods shopping patterns, with Sub Area residents choosing to travel further a-field to gain access to a greater quality, mix and choice of offer.
- 4.19 In Zone 9, Forest Gate's local Zone, Forest Gate has an almost negligible market share for main food shopping, with residents instead leaving the Sub Area and travelling to the Tesco store in Green Street; Asda, Beckton; Morrisons, Stratford; Tesco, Barking and Asda, Leyton. Forest Gate performs better for top up food shopping, although there is still a considerable leakage of trade from the Sub Area to other parts of Newham and beyond. Forest Gate attracts no residents from Zone 10 who are instead choosing

to travel East Ham and Asda, Beckton within the Borough; and Tesco, Barking; Ilford; and Tesco Leytonstone beyond the Borough.

Table 4.4: North-East sub-area Convenience Shopping Patterns

Foodstore / Centre	Zone 9 (%)		Zone 10 (%)	
	Main Food	Top-up	Main Food	Top-up
Within the north-east sub-area				
Somerfield, Woodgrange Road, Forest Gate	5.1%	13.7%	-	-
Forest Gate	1.1%	10.5%	-	-
Tesco, Romford Road, Forest Gate	-	2.0%	-	1.0%
Within Newham				
Tesco, Green Street District Centre	16.9%	7.8%	2.5%	-
Green Street District Centre	1.1%	7.2%	-	1.0%
East Ham District Centre	2.8%	7.9%	12.7%	31.3%
Asda, Beckton / Beckton	7.9%	4.6%	11.8%	-
Tesco, Gallions Reach, Beckton	3.4%	-	4.2%	-
Morrisons, The Grove, Stratford	10.2%	9.2%	0.8%	3.0%
Sainsbury's, The Mall, Stratford	4.0%	2.6%	0.8%	-
Outside Newham				
Tesco, Highbridge Road, Barking	6.2%	1.3%	7.6%	2.0%
Ilford Town Centre	1.1%	2.0%	21.1%	18.1%
Asda, Marshall Lane, Leyton	2.8%	2.6%	-	-
Tesco, High Road, Leytonstone	12.4%	2.0%	5.9%	3.0%

Source: GVA Household Survey (2007)

South East Sub Area

- 4.20 The South East Sub Area includes East Ham (boundary of Zone 3 and 4), Green Street (Zone 3) and Beckton (Zone 4); and Barking, outside the Borough, is located in Zone 11. Clearly, within Zone 3 and 4, the majority of convenience goods expenditure is being retained in the Sub Area, although foodstores in Beckton are the most dominant and influential. Tesco, Green Street and Sainsbury's, East Ham are also popular destinations, but to a lesser extent than Beckton; and some people from Zone 3 and 4 are also travelling to the Tesco store in Barking for their main food shopping.
- 4.21 In Zone 5 the destinations of choice are more balanced with Sainsbury's, East Ham and Tesco, Green Street having a reasonable level of market share. Beckton is less dominant, although the Asda does have a 9% market share in the Sub Area; and the Tesco store in Barking is popular with those living in Zone 5, achieving a 16.4% market share. Zone 11 is outside the Borough, and is the Zone in which Barking is located. Unsurprisingly, therefore, the Tesco, Asda and other stores in Barking are the primary destinations of choice for main food and top up food shopping trips.

Table 4.5: South-east sub-area Convenience Shopping Patterns

Foodstore / Centre	Zone 3 (%)		Zone 4 (%)		Zone 5 (%)		Zone 11 (%)	
	Main Food	Top Up	Main Food	Top Up	Main Food	Top Up	Main Food	Top Up
Within the south-east sub-area								
Asda, Beckton / Beckton	19.7%	5.3%	48.3%	49.1%	9.0%	1.1%	1.0%	-
Tesco, Gallions Reach, Beckton	8.2%	2.6%	18.6%	5.0%	5.5%	1.1%	5.8%	1.2%
Sainsbury's, Claps Gate, Beckton	2.7%	0.9%	4.1%	0.8%	1.8%	-	1.0%	-
Tesco, Green Street	15.0%	5.3%	0.7%	0.8%	11.8%	8.9%	-	-
Shops in Green Street	2.7%	9.6%	-	1.7%	2.7%	4.4%	-	-
Queens Market, Green Street	0.7%	-	-	-	0.9%	-	-	-
Sainsbury's, East Ham	17.7%	12.3%	3.4%	5.8%	20.9%	17.8%	-	-
Shops in East Ham	2.0%	21.9	-	9.2%	0.9%	22.2%	-	-
Outside Newham								
Tesco, Highbridge Road, Barking	4.8%	1.8%	4.8%	0.8%	16.4%	3.3%	17.5%	13.3%
Barking	0.7%	0.9%	-	-	-	-	16.5%	34.9%
Asda, Vicarage Field, Barking	-	-	-	-	0.9%	1.1%	12.6%	12.0%

Source: GVA Household Survey (2007)

South West Sub Area

- 4.22 The South West Sub Area comprises Zone 1, 2 and 7 inside the Borough boundary, and Zone 12 outside the Borough boundary. Canning Town is located in Zone 2. It is clear the very people, even in Core Zone 2, undertake their main food shopping trips in Canning Town – less than 10% in every Zone. The centre is more popular in the Sub Area for top up food shopping trips, but levels remain very low – only 19.8% market share in Zone 2, and 29% in Zone 7. Abbey Arms is very popular for Zone 7 residents undertaking top up food shopping.
- 4.23 It is evident, however, that although Sub Area residents aren't undertaking their food shopping in Canning Town, they are retaining the expenditure in the Borough. There is a significant level of leakage from the Sub Area, particularly Zones 1, 2 and 7, to the Asda and Tesco, Gallions Reach in Beckton, with the Sainsbury's at Claps Gate having a lesser influence.
- 4.24 Zone 12 is outside the Borough, and residents here are primarily choosing to shop at the Asda, Isle of Dogs; Tesco, Bromley-by-Bow; and Waitrose, Canary Wharf for their main food and top up food shopping. The Tesco store in Bromley-by-Bow currently has no influence in Zones 1, 2 and only a very small market share in Zone 7; however, the forthcoming proposals for Bromley-by-Bow and Canning Town will likely influence shopping patterns moving forwards and should be monitored.

Table 4.6: South-west sub-area Convenience Shopping Patterns

Foodstore / Centre	Zone 1 (%)		Zone 2 (%)		Zone 7 (%)		Zone 12 (%)	
	Main Food	Top Up	Main Food	Top Up	Main Food	Top Up	Main Food	Top Up
Within the south-west sub-area								
Somerfield, Canning Town	-	-	2.5%	2.3%	3.6%	4.8%	-	-
Iceland, Canning Town	-	5.3%	1.9%	5.3%	4.3%	11.3%	-	-
Canning Town	-	-	2.5%	12.2%	0.7%	12.9%	-	-
Plaistow / Abbey Arms	-	2.6%	-	-	3.6%	20.1%	-	0.8%
Costcutter, Pier Parade	-	7.9%	-	-	-	-	-	-
Within Newham								
Asda, Beckton / Beckton	34.0%	26.3%	32.9%	19.9%	29.0%	8.0%	0.7%	1.6%
Tesco, Gallions Reach, Beckton	28.0%	7.9%	25.3%	3.8%	13.8%	0.8%	1.3%	-
Sainsbury's, Claps Gate, Beckton	6.0%	-	7.0%	0.8%	4.3%	-	0.7%	-
Morrisons, The Grove, Stratford	-	-	1.3%	2.3%	4.3%	2.4%	0.7%	-
Shops in East Ham District Centre	4.0%	2.6%	0.6%	0.8%	0.7%	-	-	-
Outside Newham								
Asda, East Ferry Road, Isle of Dogs	2.0%	-	0.6%	-	1.5%	-	31.1%	13.4%
Tesco, Hancock Road, Bromley-by-Bow	-	-	-	-	1.5%	-	17.2%	5.5%
Tesco, Highbridge Road, Barking	4.0%	2.6%	1.9%	-	3.6%	0.8%	0.7%	-
Waitrose, Canary Wharf	6.0%	-	3.2%	0.8%	2.2%	-	7.9%	3.9%

Source: GVA Household Survey (2007)

Major Competing Retail Developments & Proposals

4.25 The 2007 Canning Town Study identified a small number of planned/proposed schemes outside Newham which we have updated to reflect changed circumstances and to highlight any new proposals which have emerged since the previous study. The main current competing planned/proposed schemes in the sub-region (outside of Newham) are as follows:

- **Wood Wharf (London Borough of Tower Hamlets)** – the Wood Wharf site extends to 6.8ha and lies in the north eastern corners of the Isle of Dogs just outside the study area. It is immediately to the east of Canary Wharf and to the west of Prestons Road. This high density development, granted outline planning consent in October 2008, will provide around 1,668 new residential units

along with 450,000 sq m office floorspace, retail, leisure and community uses, public open space and new transport infrastructure.

The specific uses include retail and restaurant floorspace (11,460 sq m), community and health facilities (7,600 sq m) and a hotel and the outline consent was underpinned by a requirement for smaller-scale and more localised shopping provision; i.e. smaller in scale and localised in nature with less opportunity to have a significant impact on shopping patterns or, therefore, Newham. The redevelopment will take place over the next 10 to 15 years in four development phases. Reserved matters applications for phase one will be submitted during 2009.

- **Tesco, Bromley-by-Bow (London Borough of Tower Hamlets)** – Tesco are proposing to redevelop their existing store on Hancock Road, just outside the Olympic site, as part of a wider mixed-use scheme. The proposals for the 11 acre site include a new 11,377 sq m gross Tesco Extra (7,000 sq m net sales area), 18 local retail units over 2,240 sq m and a further 2,862 sq m for A2/B1/D1/D2 uses, a hotel, primary school and community uses alongside two residential towers providing c.400 new homes. An outline application was submitted in December 2009, the proposals are likely to have implications on convenience goods shopping patterns on the western boundary of Newham.
- **Unity Square, Ilford (London Borough of Redbridge)** – the main development opportunity for Ilford involves a site south of the High Road, known as Unity Square, which has been identified for substantial mixed use development including some additional retail floorspace. This remains in the pre-planning application stage and therefore more specific floorspace and mix of uses is still unknown.

Summary

- According to the 2007 household survey, Newham's six main centres have a collective comparison goods market share of 46.4% across the survey area. This indicates that over half of available comparison goods expenditure within the survey area is currently being directed to other smaller centres in the Borough, out-of-centre retail warehousing and other centres both within and outside the Borough. Zones 1-10 broadly correspond to the Borough boundary, and the analysis demonstrates that the six main centres retain 51.7% of available comparison goods expenditure within the Borough.
- 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 smaller centres and out of centre provision both within and beyond the survey area.

- There are several schemes in the pipeline for key competing centres such as Ilford which have potential to influence shopping patterns within Newham. Similarly, proposals for Wood Wharf and the Tesco scheme in nearby Bromley-by-Bow are also identified as potential competing schemes that will require due consideration. Nevertheless, Newham benefits from the largest and strategically most significant commitment in the sub-region, which will open for trading in 2011: Stratford City.
- The analysis of convenience goods shopping patterns throughout the survey area provides a useful insight into the qualitative performance of foodstore provision by Sub Area. The North West and South East are the best performing areas with market shares of 40.7% and 57.3% respectively, confirming that foodstores in these areas are retaining reasonable levels of trade; however, the South West (Canning Town) and North East (Forest Gate) are performing poorly with only a 1.9% and 3.6% market share respectively.

5. MAJOR STRATEGIC CHANGE: NEWHAM

- 5.1 The preceding sections have examined the existing town centre and local shopping provision in the Borough. In this section we now consider future changes and the significant planned growth and development within the Borough and the wider East London area which is anticipated to take place over the plan period. We review the major retail proposals, significant housing development and transport infrastructure improvements; these will have strategic implications on future growth and change in the Borough and a full understanding is necessary in order to develop informed and sound conclusions and recommendations.

Major Retail Commitments & Proposals

- 5.2 We set out below the key planned/proposed schemes coming forward in the Borough. In addition there are several, smaller retail floorspace commitments that have the benefit of planning consent which are highlighted as part of the capacity analysis set out later in this report, and which are illustrated on Plan 11.

Stratford City

Current Consented Floorspace

- 5.3 Stratford City was originally granted planning consent in February 2005 for a comprehensive retail led, mixed use development substantially comprising offices, residential (4,830 new homes), retail (140,000 sq m A1, A2, A3) and commercial leisure uses. Subsequently, a revised outline planning permission was granted on 13 November 2007 to increase the residential component by 780 units (total 5,610 new homes) and the retail floorspace up to 144,000 sq m (GEA) within the Core Zone 1 Stratford City development area. It is also relevant that a further 8,500 sq m gross of A1/2/3 retail uses is consented in development zones 2-5 around the Stratford City site.
- 5.4 In 2008, Westfield submitted a further application to increase the quantum of retail floorspace within Stratford City Development Zone 1 by 14,826 sq m net (internal mezzanine levels), which we understand has now been approved. At the current time, Stratford City as a whole, throughout Stratford City Development Zones 1-5, has consent for **167,326 sq m (gross external area) of A1/2/3** retail floorspace, with an expected further application to be submitted in due course for around 4-5,000 sq m. We understand that this would primarily be for eating/drinking provision, although this is uncertain at the current time.
- 5.5 Incorporating a 65% net:gross ratio this GEA equates to 108,762 sq m net A1/2/3, with a general presumption that 15% is allocated for A3 eating/drinking (16,314 sq m net). It has also been confirmed that M&S and Waitrose have taken 6,379 sq m net for convenience goods floorspace, leaving **86,069 sq**

m net of A1 comparison goods floorspace (i.e.c.11,069 sq m net more than that tested in the original Supporting Stratford City Retail Impact Assessment (2003) – see below.

Stratford City Retail Impact Assessment (2003), GVA Grimley

- 5.6 The Stratford City Retail Study (GVA Grimley 2003) submitted with the application undertook a detailed Retail Impact Assessment reviewing the expected turnover of the scheme (75,000 sq m net comparison) and likely pattern of trade draw from the existing network of centres. This went through an extensive consultation process with Newham and the adjoining London Boroughs to test the sensitivity of the model and to agree the approach and findings from the Study. Appendix 7 incorporates the final impact table from the original submission Retail Study, which illustrates conclusions drawn in respect of the expenditure and percentage impact on each centre within the East London catchment area.
- 5.7 The strategic drive to deliver this development has been consistently supported in policy at both the local and regional level for some years, recognised as a potential opportunity in the 2001 UDP. As part of the application process, the 2003 Retail Study for the Stratford City application highlighted the strategic imbalance between provision of Metropolitan scale shopping facilities within London, and the strategic gap occupied by Stratford. Plan 7 illustrates this point. The Retail Study drew the following conclusions:

“Analysis of the London-wide context graphically illustrates the imbalance between the performance of the strong Metropolitan centres like Croydon, Kingston and Bromley, and the relative under-performance of Romford and Ilford. Against any relevant measure, Ilford as the principal Metropolitan Centre currently serving the inner East London area is not able to perform on a level comparable to the most successful Metropolitan centres. As a consequence, the strategic gap is currently filled by the West End and to a lesser extent, Lakeside.

Based on current shopping patterns, and the role performed by different centres within the existing retail hierarchy, we consider the majority of the new centre’s turnover is likely to be derived from those higher order centres which currently dominate the catchment – notably London’s West End. The scheme will also have the effect of reducing leakage of trade from this area to centres like Lakeside. By focusing on mid to upmarket comparison shopping and providing department and flagship stores not currently represented in the area, the impact on existing major and local centres is likely to be minimal.

We have carried out a detailed economic assessment of the impact of the Stratford proposals on existing centres. This takes into account know commitments for new development within other centres within the catchment, and indicates that in the context of the significant growth in comparison goods shopping expenditure within the wider Stratford catchment, the development would not have any material adverse impact on the vitality and viability of neighbouring centres by the design year of 2011.

The new retail quarter at Stratford provides the catalyst for the transformation of Stratford into a new Metropolitan centre. Our analysis demonstrates that the scale of additional comparison shopping floorspace proposed is fully consistent with the intended role of the centre.”
(Stratford City Retail Study, 2003)

- 5.8 Stratford is located in the North West of the Borough, and the survey area drawn for the Stratford City planning application retail work is different to that underpinning this Borough-Wide Retail Study (2010). Given Stratford’s location towards the edge of the Borough boundary the catchment area of Stratford City will clearly not be constrained to Newham and, as identified in the 2003 Retail Impact work, will attract shoppers from across East London and the wider South East region.
- 5.9 Nevertheless, based on the 2003 Retail Impact work (undertaken by GVA Grimley), we are able to indicate how Stratford City will influence future capacity in the London Borough of Newham moving forwards beyond 2011. Based on evidence, we have fed in the assumptions in respect of Stratford City trade draw into the baseline quantitative exercise for comparison goods to identify the resultant market share uplift in the Borough. This analysis is attached in Appendix 12, with ‘before’ and ‘after’ market share plans attached as Plan 8 and 9. Clearly, this will need to be monitored after opening.
- 5.10 The significant market share uplift inevitably has consequences for capacity forecasts and the ability of the Borough and Stratford to accommodate additional comparison goods floorspace over and above that being implemented in Stratford City (due to open 2011). This exercise and subsequent outcomes are discussed in more detail in Section 6, and updates similar work undertaken as part of the Stratford City Planning Application (2003) which is discussed in more detail below (Supplementary Report on Retail Issues (2004)).

Stratford City Supplementary Report on Retail Issues (2004), GVA Grimley

- 5.11 As part of the ongoing consultation and decision making process in relation to the Stratford City outline planning application representations were made by Land Securities towards the end of 2003; the owners of the existing Stratford Shopping Centre. The comments sought to address the implications for the existing centre of Stratford, relating to the current potential for additional shopping floorspace within the existing retail core, and longer term potential once the new retail quarter becomes established. The Supplemental Report examined the capacity to accommodate further comparison shopping floorspace in Stratford over and above the new retail quarter.
- 5.12 At that time there were no proposals or indeed planning application for the redevelopment of the existing Stratford Shopping Centre, and consequently no firm information on the scale of additional comparison floorspace proposed. Equally, there was no certain indication of the phasing of the development, or the earliest date by which new development could be delivered. However, on the information available at that time a broad figure of 50,000 sq m gross (35,000 sq m net) comparison was deemed as likely to come forward, potentially in a series of phases, the earliest of which could in theory be open and trading

at 2009. It should be noted that this assessment was based on a Stratford City scheme incorporating 75,000 sq m net A1 comparison retail.

5.13 We understood at the time that commercial advisors for Stratford City and Stratford Town Centre were comfortable in attracting the level of retailer requirements to fill both schemes, with Stratford City being the mid to up-market retail quarter and the existing centre providing a significantly enhanced mid market/value comparison retail offer, supplementing its more localised convenience and service function and cultural quarter. In this context, the quantitative exercise involved the following key work elements:

- We took the baseline position modelled for the Stratford RIA (2003), adopting 2009 as the opening date for the new retail quarter and taken the increase in market shares resulting from the Stratford City proposals as the basis for examining the timescale within which additional significant comparison shopping development will be supportable within the existing centre of Stratford based on forecast expenditure growth alone. By leaving the market share unchanged (but including Stratford City), this approach identified the scope for 'organic' growth at Stratford, without any further shift in shopping patterns.
- Reflecting the conclusion of the commercial analysis of likely occupier demand, and complementary nature of the two proposals, we also examined the impact of the combined schemes coming forward within a similar timescale, by examining the potential for a more significant uplift in market shares as a consequence of the greater attraction of two schemes.

5.14 The following conclusions were drawn:

“the updated capacity analysis indicates that if the combined scale of additional comparison shopping proposed within Stratford City and the redevelopment of the existing centre were to be developed and opened for trading by 2011, this scale of floorspace would be supportable based on forecast expenditure growth and on a relatively modest additional uplift in market share. This is likely to be fully achievable on the basis of the combined attractions of the new retail quarter and the development of Stratford Shopping Centre and complementary functions of each.

In essence the consequence of both developments proceeding within the same timescale, and being substantially completed and open for trading by 2011 (as opposed to a phased development over the medium term) is a marginally higher level of impact on existing neighbouring centres at 2011. However, even on the worst case assumptions employed in our analysis, such levels of impact will still be more than offset by growth up to 2011 and beyond and therefore would not undermine the vitality and viability of any nearby centres.

A significant turnover potential has been identified in each centre to support growth in comparison goods floorspace by 2011, above the level necessary to ensure

existing floorspace achieves growth of 1.5% per annum in real terms. This does not, however, represent a ceiling on each centre to increase their market share and achieve a greater turnover potential through continued investment. Surplus growth will enable the aspirations for town centres to be achieved following the implementation of Stratford City and the redevelopment of Stratford town centre. Furthermore, these figures are highly conservative, discounting significant residential development in East London which will have the effect of increasing the turnover potential of town centre's still further."

*Source: Stratford City Supplemental Report on Retail Issues (2004)
Stratford City Planning Application*

- 5.15 Clearly, a Land Securities scheme/town centre redevelopment won't come forward by 2011, but this detailed analysis provides the comfort that there is capacity for additional floorspace and redevelopment in the town centre without harming the wider network of centres in the Sub Region. Time has passed since the assessment, but little has changed in terms of major retail development of such a scale to change comparison goods shopping patterns in the area and the principles and reasoning behind the overall conclusions remain unchanged. The combined attractions and complementary functions would contribute to a market share uplift, claw back of trade sufficient to support both Stratford City and Stratford Town Centre.
- 5.16 It is therefore logical to conclude that these findings remain relevant today. Nevertheless, we do test this again in an up-to-date assessment set out in Section 6, although it is not the scope of this Brief to test the impact of a new scheme in Stratford Town Centre. Similar to key work element one within the Supplementary Report on Retail Issues (discussed above) we take the baseline position and – based on the evidence – incorporate the ring-fenced increase in market share within the London Borough of Newham as well as the increase in trade inflow to Stratford City. We use this as the basis for examining the timescales within which additional significant comparison shopping development will be supported within the existing centre of Stratford. This is based on forecast expenditure growth alone; i.e. without assuming a further increase in market share. Like the previous assessment, this approach identifies the scope for 'organic growth' at Stratford, without any further shift in shopping patterns. The reality and implications are discussed as part of the assessment.

Stratford Town Centre, The Future (2008)

- 5.17 In 2008, GVA Grimley were instructed by the London Borough of Newham to carry out an independent assessment of Stratford Town Centre and its potential future role in light of major retail/leisure development at Stratford City. The conclusion to this piece of work stated that the objective is the creation of one single Metropolitan Centre and a complementary offer with Stratford City and the Town Centre supporting each other. A number of retail sectors were put forward, including the need to continue to provide local shopping facilities for the surrounding population and continued support for In-

Shops, a drive for value driven comparison retailers, an improved convenience goods offer, and a growing daytime and evening eating/drinking offer, building on the already popular Cultural Quarter (Gerry Raffles Square).

- 5.18 The requirement to ensure the future health of Stratford Town Centre is a comprehensive strategy to consider the commercial and physical composition of retail and leisure uses to meet the full cross section of existing and potential shoppers. The report concluded that the priority should be a strategy driven by the overall objective to create a cohesive town centre with strong linkages, connectivity, pedestrian circuits, and the creation of one retail destination driven by a sense of place/identity. In order to achieve these objectives the Council has recently commissioned the production of a Masterplan.

Silvertown Quays

- 5.19 A resolution to grant outline planning permission (subject to S106) was given by the London Borough of Newham in February 2005 for this major regeneration project on the River Thames. Covering approximately 24ha of land, the proposals involve up to 5,000 residential units, leisure floorspace (including a 16,550 sq m aquarium), 12,100 sq m office floorspace, a hotel (8,000 sq m) community facilities (5,350 sq m), 5,350 sq m of A3 retail floorspace and 3,550 sq m new retail development. The scheme will also involve enhanced pedestrian walkways and a new pedestrian bridge across the North Woolwich Road to the DLR station and Thames Barrier Park. The consent will lapse in April without the submission of a reserved matters application and it's becoming increasingly unlikely that the scheme will come forward under the existing Development Agreement. It will, however, continue to be promoted by the Council as a key area of regeneration and change with similar objectives to those comprising the current planning consent.

Canning Town/Custom House

- 5.20 The Supplementary Planning Document (SPD) for the regeneration of Canning Town and Custom House demonstrates this strategic priority for the London Borough of Newham, London Thames Gateway Development Corporation, Mayor of London and the London Development Agency. The SPD forms part of the planning policy framework which is within the LDF, and covers an area of approximately 120ha with a population of over 11,000 people. The residents of the area come from an ethnically diverse background, and have a younger age profile and households of a greater size than either the Newham or UK average. Deprivation is high, with much of the area falling within the 2% most deprived areas within England and Wales.
- 5.21 The SPD states that Canning Town and Custom House will be redeveloped to act as focal points for retail, commercial and community facilities; although both are envisaged to perform different roles. At Canning Town, the redeveloped centre will act as a focus for the whole regeneration area comprising retail (including an anchor foodstore), offices, health, library/educational, food and drink and residential.

- Rathbone Market will be redeveloped and a new public space and environmental enhancements are proposed also, including investment in the historic buildings on Barking Road.
- 5.22 Development Area 1 focuses on the designated town centre area and Rathbone Market, and the SPD recognises that redevelopment of the site is key to providing a sustainable commercial future for the wider Barking Road area with opportunities to improve connections between residential communities to the north of the site and to Canning Town Station. Development Area 7 is the major strategic site of change for Canning Town town centre. It is a residential area which is in the process of being decanted and cleared for redevelopment, recognised as being a prime location opposite Canning Town station and just south of the town centre. The mixed use scheme will be focused on a new civic heart around two public squares, underpinned by enhanced linkages through to Development Area 1 and the newly developed Rathbone Market. Development as per the SPD will result in significant change for Canning Town and the focus of retail activity.
- 5.23 Further south, the development of a new 'Custom House' Crossrail station and interchange will act as a catalyst for the regeneration of the Custom House 'retail area'. This is currently not a defined town centre, but does lie in close proximity to Freemasons Road Local Centre directly opposite. Rather than the larger scale retail development at Canning Town, this area will be a focus for community uses alongside a mix of housing, offices, food, drink and shops that serve both the local population and surrounding areas, such as the adjacent EXCEL centre and Royal Docks developments.
- 5.24 The key here for the future of the town centre network is the relationship of the Crossrail and DLR Stations, the EXCEL Centre, and surrounding proposed uses at Custom House with Freemasons Road Local Centre and the adjoining residential areas. This is addressed in SPD Site Areas 6 and 19, with 19 covering the existing Freemasons Road Local Centre, and 6 covering a larger area to the east on the opposite side of Freemasons Road. The overall vision is to capture spin-off trade generated by the EXCEL centre and its growing local resident catchment population.
- 5.25 The intention is a mixed-use (retail, offices, small business workspace, community uses and food and drink) redevelopment within Area 19 (Custom House) which will secure the role of the area as a local centre and destination with the creation of a boulevard and public square. Buildings fronting the main boulevard will be 6 storeys high with residential uses to the east in Area 6 (East of Freemasons Road) at a lower density (2-4 storeys). The proposed Crossrail station will be located south of this area (19 and 6); and integration of activity at the EXCEL centre and the station with Custom House is encouraged through promoting new crossings, the positioning of Crossrail and route-finding. We understand that a Development Brief was commissioned to consider the impact and integration of the Crossrail proposals, which is a vital consideration for the development of this area.
- 5.26 The Canning Town and Custom House SPD will have far reaching implications for retail and town centre activity in the south west part of the Borough, both for Canning Town District Centre and Freemasons Road Local Centre. This is considered further in our conclusions and key recommendations.

Canning Town and Custom House – Retail Strategy & Vision, 2007, GVA Grimley

- 5.27 GVA Grimley Ltd were commissioned by London Thames Gateway Development Corporation (LTGDC), together with the London Borough of Newham (LBN) and the London Development Agency (LDA) to carry out a Retail Capacity and Visioning Study for Canning Town and Custom House. Section 10 sets out the economic assessment, analysing the scope for Canning Town to claw back the required number of people to make a retail scheme in the centre viable. The assessment used the results of the 2007 Survey to identify where people were currently shopping and where the proposed scheme would obtain its trade.
- 5.28 The scheme tested comprised c.25,000 sq m net of comparison goods floorspace with a turnover in the region of £112.5m based on a value driven scheme trading at around £4,500 per sq m net. Consistent with our view now, the Study drew comparisons with a number of comparable London 'Major Centres' in similar contexts and identified the level of floorspace required in order to achieve the necessary critical mass of retailing to claw back shoppers from both the wider survey area and the core catchment to achieve the regeneration and hierarchical uplift aims. This level comprised 25,000 sq m net of comparison floorspace and 10,000 sq m gross (6,500 sq m net of which 4,225 sq m net would be convenience) of convenience goods floorspace.
- 5.29 The comparison goods element of the scheme turnover and pattern of trade draw is attached in Table 1 and 2, Appendix 8 and demonstrates that the largest proportion of turnover will be derived from Zones 2 (41%), 6 (12%) and 7 (21%). It is envisaged that the scheme will obtain 97% of its turnover from those living in the Borough with a 3% inflow level. In this context, given the smaller scale and mid-value retail operators envisaged, the scheme is clearly not aspiring to trade at the Stratford City level and will instead perform a smaller town centre role, meeting the needs of a more localised catchment area comprised almost entirely of Borough residents.
- 5.30 Table 3, Appendix 8, summarises the impact that this scheme will have on other centres in the Borough in the context that Canning Town has an almost negligible comparison goods trade retention level within the South West Sub Area. The Study identified that at present, 44.6% of Zone 2 trade, 29.4% of Zone 6 trade and 33.4% of Zone 7 trade, is currently leaking from Canning Town's core catchment area to Beckton retail warehouse provision.
- 5.31 Based on current shopping patterns, accessibility and the type of retailing on offer it is evident that the greatest impact will fall upon Beckton (retail warehousing), London's West End and Canary Wharf. A more minimal impact is expected to fall on Ilford, Green Street (£1m/8.5%), East Ham (£5.6m/5.8%). The 2007 Study adds that despite trade diversion, town centre turnover in all town centres will continue to grow as they benefit from continued growth in available comparison goods expenditure. In every case, the turnover of each town centre will exceed its level of trade draw in a short timescale (within 5 years) following the implementation of the Canning Town development proposals. Despite a slowdown

in the economy, published growth rates still lead to a reasonably strong growth in available comparison goods expenditure.

- 5.32 The Study also reviewed convenience goods as part of the assessment and again identified significant leakage of trade from the core catchment to competing provision elsewhere in the Borough; primarily the out of centre Tesco Extra at Gallions Reach and the Asda store at East Beckton District Centre. The Study concludes that to achieve the necessary uplift in market share and clawback shoppers and spend to the centre it will need a key anchor foodstore to underpin the retail scheme in the centre. It therefore tested the quantitative implications of a 10,000 sq m gross (6,500 sq m net) foodstore being incorporated into Canning Town. Incorporating a 65/35 convenience/comparison split this equates to a foodstore with a convenience goods floorspace of 4,225 sq m net.
- 5.33 The convenience goods element of the scheme turnover and pattern of trade draw is attached in Table 4 and 5, Appendix 8 and demonstrates that the largest proportion of trade will be derived from Zones 2 (29%), 4 (10%), 7 (27%) and 12 (10%). It is envisaged as part of the exercise that the scheme will obtain 100% of trade from within the Survey Area – including Zone 12 adjoining the Borough boundary to the west of Canning Town.
- 5.34 Table 6, Appendix 8, summarises the impact that this scheme will have on other centres in the Borough in the context that such a scale of foodstore will considerably enhance the town centre's convenience goods market share which is currently less than 10% in each core catchment Zone. Based on the scale of provision, proximity and leakage of convenience goods trade from the South West Sub Area to Beckton, the assessment concludes that the greatest levels of impact will fall on the large Tesco at Gallions Reach (24.1%), Sainsbury's, Claps Gate (18.3%), and the Asda, East Beckton (12.6%). There will be some lower levels of impact on foodstores in Stratford, East Ham and other local stores.
- 5.35 Overall, the study estimates that the trade diversion and impact of a new foodstore in Canning Town would be acceptable on the other foodstores in the study area. The findings also commented that any impact will be short term, and soon mitigated by growth in convenience goods expenditure moving forwards following the opening of the store. This study incorporates these floorspace levels into the up-to-date quantitative assessment, setting out an up-to-date position with which to base policy and development control decisions upon. This is discussed in greater detail in Section 6.

Population Growth Areas

- 5.36 Table 5.1 below sets out the growth areas by Zone and number of units planned over the remainder of the plan period between 2010 and 2025; informed by the Council's housing trajectory.

Table 5.1: Newham Residential Growth Areas

AREA	ZONE(s)	Number of Dwellings 2010-2025*
Stratford and West Ham	8 & 6	11,363
Royal Docks	1	8,612
Custom House & Canning Town	2 & 7	8,204
Beckton	1	3,255
Forest Gate	9	276
Plaistow	6	121
Manor Park	10	119
Green Street	3 & 5	176
TOTAL	-	32,126

Source: LB Newham *figures are not fixed and may be subject to marginal variation

5.37 There are already several approved development schemes and proposals within and bordering on the Newham catchment area that comprise a significant quantum of new residential development that will contribute towards meeting the housing delivery targets and population growth projections. The main schemes are as follows:

- **Olympic Legacy site** – the Olympics site is in the Lower Lea Valley and covers approximately 246 hectares spanning four London Boroughs (Newham, Hackney, Tower Hamlets and Waltham Forest). The site boundary is illustrated on Plan 12. The Legacy Masterplan Framework (LMF) aims to ensure that the Olympic Games are capitalised upon as a catalyst for major regeneration of the area, and includes the creation of sustainable communities and associated local centre provision to serve the needs of new residential areas. Work is already underway in setting the thresholds for development, and a planning application for the LMF development is expected to be submitted during 2010. This is likely to have implications for the retail hierarchy in Newham.
- **Ballymore / Pura Foods Development Site** - this site lies outside of the study area, but will have an impact on the Borough, particularly Canning Town, as it will provide a new local development context. The developers' aim is to transform this under-utilised land at an important gateway to the Lower Lea Valley. The proposal is for major new high density residential development which would be new to the area in terms of design and intensity of uses and will therefore provide a benchmark for future proposals and development in the area. Planning consent was granted in 2009 for the construction of up to 1,837 dwellings along with an element of non-residential floorspace (retail, food and drink, healthcare, leisure, culture, office). A new fixed pedestrian and bicycle bridge to Canning Town Station is also been included in the scheme.
- **London & Quadrant Housing Association sites** - LB Newham has agreed a PFI scheme with LQHA for new housing development on a number of sites, as set out in the SPG Masterplan. There are some eight sites in total, providing a range of mixed tenure homes and flats. The larger

schemes with permission include 59 mixed tenure homes on Crediton Road; 34 flats and 3 houses at Ford Park Road; and 31 mixed tenure homes in a 2-3 storey block on Vandome Close.

- **Landmark site** – a planning brief prepared by LB Newham seeks the mixed-use development of the 3.08ha land known as Landmark Site A. The land is largely undeveloped aside from a watersports centre to the south east of the site. The brief seeks proposals for the site comprising approximately 700 new dwellings, commercial units and the retention or re-location of the existing watersports centre.
- **Mayflower / River Christian Centre proposals** – there are proposals for a c.30-storey high scheme comprising a mix of uses on the first 2 floors, underground parking and flats on the remaining upper floors. This would involve the redevelopment of the River Christian Centre and the proposed uses include a multi-purpose conference/worship centre with a 2000-seat auditorium; children’s centre; adult training and leisure college; PCT health centre; leisure centre and swimming pool; tropical indoor gardens; and roof terrace restaurants. However, the 2007 Framework states that the proposals represent an “extreme overdevelopment” of the site in terms of the quantum and mix of uses. The rationale behind the development has also partly been removed by the fact that the ‘activity’ bridge proposed as part of the SPG to span the A13 is unlikely to be pursued. EEA conclude that the church would benefit from partial retention and redevelopment, rather than comprehensive development, as it contributes to the historical, social and architectural character of the area.
- **Canning Town Area 3 proposals** – Countryside Homes have secured planning permission for the development of 649 homes in this area and a redevelopment of Keir Hardie Primary School, although it has been identified that a new primary school will not be needed to serve the increased population over the next 10-20 years.

Major Infrastructure Improvements

Crossrail

- 5.38 The new high frequency railway for London and the South East will pass through Newham along two eastern routes: one via Stratford and another through the Royal Docks (illustrated on Plan 12). From 2017 Crossrail will travel from Maidenhead and Heathrow in the west, through central London to Shenfield and Abbey Wood in the east. It will link Heathrow Airport, the West End, the City of London, Canary Wharf, the Royal Docks and Stratford.
- 5.39 Preliminary works have commenced and main construction is scheduled to start in 2010. Upon completion, there will be five new Crossrail stations in Newham (Stratford, Maryland, Forest Gate, Manor Park and Custom House) which will significantly improve transport choices for Newham residents to locations within and beyond the Borough boundary. It will also open up the untapped potential of the Royal Docks and enable the development of a significantly higher density and quality environment in the Royals and regeneration of Silvertown Dock with improved local shopping facilities.

- 5.40 The northern route includes four of the five Crossrail Stations in Newham, running along the northern boundary through the North West and North East Sub-Areas. The southern route has only one station in Newham, at Custom House, adjacent to the EXCEL centre and existing Custom House DLR station. Concerns have been raised that Crossrail might have negative as well as positive implications for the Borough; i.e. enabling ease of movement out of the Borough to central London for example, as well as improved arrival points in the Borough. This is perhaps dependent on the role of the centre served by the Crossrail stations and is considered later in this report.

Extension to DLR

- 5.41 The 6km DLR extension to Stratford International Station is currently under construction and set to open in 2010 in order to meet the growing demand for public transport in the area and provide a key connection for the London 2012 Olympic and Paralympic Games. Four new stations will be built in a north/south direction along the western boundary of the Borough; located at Stratford International, Stratford High Street, Abbey Road and Star Lane in addition to the conversion of the former North London Line stations at Canning Town, West Ham and Stratford High Street to DLR operation. The new route is illustrated on Plan 12.
- 5.42 We discuss key identified opportunities for growth around these proposed DLR stations in the final section when drawing our conclusions in respect of gaps in town centre designations and potential population growth areas.

Summary

- We have identified several substantial development schemes in the pipeline which we expect to influence future shopping patterns in the Borough and beyond. Most significantly, the delivery of Stratford City is expected to enhance the role and function of Stratford town centre and uplift its position to Metropolitan status, substantially enhancing trade retention and inflow to the Borough.
- The 2003/2004 planning application for Stratford City identified the acceptability of both Stratford City and the redevelopment of Stratford Town Centre (comprising an additional 50,000 sq m gross of comparison floorspace) in retail policy terms; i.e. need and impact. The GVA Grimley 2008 Study into the future of Stratford Town Centre emphasises the need to create one single Metropolitan Centre, the importance of diversity in offer/meeting the needs of the local catchment, and a complementary destination alongside Stratford City.
- The Canning Town and Custom House SPD will have substantial implications for regeneration in the South West of the Borough, linked strongly to the redevelopment of Rathbone Market, the EXCEL centre and Royal Docks ongoing development. Previous GVA Grimley studies have concluded the acceptability of a scheme in Canning Town comprising 25,000 sq m net of comparison floorspace and a 10,000 sq m gross foodstore (4,225 sq m net convenience). Whilst

Silvertown Quays may not come forward in the current envisaged format, we understand that development will continue to be encouraged and promoted by Newham as a policy priority.

- Significant planned housing development throughout the Borough, but primarily focused in the Arc of Opportunity, will lead to significant change and generate a need for additional retail facilities, primarily at the local level. Such housing and population growth has been taken into consideration in our quantitative retail floorspace forecasting set out in the following section. Further change will take place in the Borough as a consequence of infrastructure improvements which will drive investment and lead to more accessible locations. Again, these are focused in the Arc of Opportunity, although Crossrail will strengthen east/west linkages into and – equally as important – out of the Borough.

6. CAPACITY PROJECTIONS

- 6.1 In this section we estimate the current performance of the six main town and district centres in Newham (Stratford, East Ham, Canning Town, East Beckton, Forest Gate and Green Street) and out-of-centre retail provision in the Borough, as the basis for forecasting the need for further retail floorspace to the period 2025, incorporating interim years of 2015 and 2020. The capacity tables accompanying this assessment are attached in Appendix 10 and 11.
- 6.2 We have used a conventional and widely accepted step-by-step methodology, consistent with best practice, which draws upon the 2007 Survey of shopping patterns to model flows of available expenditure to each retail destination. To develop the baseline position, we have: -
- Calculated the total amount of convenience and comparison goods expenditure which is available within the postcode areas comprising the main centres' catchment areas;
 - Allocated the available expenditure to the convenience and comparison goods shopping destinations, on the basis of the household survey of shopping patterns, so as to provide estimates on current sales and forecasts of future sales;
 - Compared the total expenditure attracted to each shopping destination with current retail floorspace to assess sales densities in each shopping destination.
- 6.3 Building on the baseline position, we have explored the capacity for further convenience and comparison goods retail floorspace in centres across the Borough.

Data Inputs

Survey Area and Household Survey

- 6.4 In order to determine detailed factual information on shopping patterns in the Borough, we have used the 2007 Survey, originally commissioned for the 'Canning Town Retail Study and Vision' prepared by GVA. The survey area comprised 12 Zones covering the full extent of Newham's administrative area (Plan 2), and involved 1,500 interviews. The survey is still considered relevant on the basis that there has been no significant change in the retail environment in Newham since the time of the survey.
- 6.5 The survey results identify shopping habits of households for both convenience and comparison goods. Where necessary, the survey results have been re-based to remove certain responses, such as 'internet/mail order shopping', to ensure consistency with categories excluded in the expenditure projections. For convenience goods, the household survey included questions on main food and top-up food shopping. The results of the two types of food expenditure were then merged through the

application of a weight, which reflects the estimated proportion of expenditure accounted for by each type.

6.6 For food we use a 75%/25% top-up food weighting. This forms a composite pattern of convenience spending, expressed as a market share for each destination centre or foodstore, for each survey zone. The survey also includes seven questions on specific comparison goods types, which coincide with Experian Business Strategies definitions of comparison goods expenditure. The retail and needs modelling exercise uses the weighted averages of the household survey responses for each goods type based on the proportion of per capita on that goods type. This process establishes the pattern of spending for residents of each Zone in terms of the following types of goods: -

- Clothes and shoes;
- Furniture, floor coverings and household textiles;
- DIY and decorating goods;
- Domestic electrical appliances;
- TV, hi-fi, radio etc.,
- Personal, luxury goods and recreational goods.

Estimates of Population in the Survey Area

6.7 To establish the baseline at 2010, the Council provided population estimates for each Zone located within the Borough boundary (Zones 1-10) for the period between 2010 and 2020. Full details of the methodology adopted by the Council are provided in Appendix 9. To achieve the population projections for 2015 we have incorporated the half way point for growth between 2010 and 2020, i.e. an appropriate average with which to forecast over longer time periods. For the period 2020-2025 we have used the Experian population growth rate (%) for each Survey Zone for this same period. Given such long forecasting periods, this is an appropriate measure to provide an indication of longer term growth, but will need to be monitored and updated accordingly at regular intervals throughout the LDF period as recommended in PPS4.

6.8 Outside the Borough boundary (Zones 11 and 12) we have applied Experian population projections which are based on the 2001 Census and mid year estimates. They take account of the most recently available government population estimates and projections, as well as changing postal geography at the local authority level. They also take account of people and households that were not recorded in the 2001 Census and they are updated to allow for changes in the housing stock, as well as population changes due to births, deaths, migration and the ageing of the population.

6.9 Based on the above, the population of the survey area in 2010 is currently 341,918. It is forecast to grow to 378,394 by 2015, 416,002 by 2020 and 428,674 by 2025 (Table 1, Appendix 10 and 11). Overall,

population is forecast to grow by 25.4% between 2010 and 2025 across the entire survey area, reflecting the significant growth set to occur in the Borough through development and regeneration. There are clear variations in population growth consistent with where the greatest level of development will take place over the LDF period.

Available Expenditure in the Survey Area

- 6.10 The Experian E-Marketer System provides estimates of the per capita expenditure for convenience and comparison goods in 2008 prices. We have made deductions for special forms of trading which represents expenditure not available to spend in the shops, i.e. Internet and catalogue shopping. We have applied individual per capita expenditure figures across each survey zone to provide a more detailed understanding of available expenditure in different parts of the catchment area.
- 6.11 In terms of expenditure growth in the survey area, we have drawn on convenience and comparison goods growth rates provided by Experian Business Strategies. These indicate that more growth will take place on comparison goods as opposed to convenience goods; the scope to purchase more food is more limited than the scope to purchase non-food goods.
- 6.12 Taking into account of the current slowdown in the economy, Experian Business Strategies Retail Planner Briefing Note 7.1, published in August 2009, estimate a convenience goods growth rate of 1.0% per annum between 2010 and 2015. For the period post 2015 we have adopted the ultra-long term trend of 0.5% per annum for convenience goods. The 'ultra-long' term trend provides a robust basis for future projections for long term forecasts because it effectively evens out the economic cycles of growth and decline.
- 6.13 Forecasts become subject to increasing margins of error over time as it is more difficult to accurately forecast into the future, and an ultra-long term trend is deemed appropriate in these circumstances. For comparison goods, Experian estimate a comparison goods growth rate of 2.3% between 2010 and 2015. For the period post 2015, we use a stronger growth rate of 4.7% per annum, based on the ultra-long term trend for comparison goods between 1968 and 2008.
- 6.14 Table 2, Appendix 10, applies per capita expenditure within each zone to population forecasts, which indicates that total available convenience goods expenditure within the survey area is currently £544.6m. This is forecast to grow to £626.1m by 2015; to £705.9m by 2020; and to £743.3m by 2025, equating to an overall growth of £198.7m (36%) between 2010 and 2025. (Table 3, Appendix 10).
- 6.15 In terms of comparison goods, total available comparison goods expenditure within the survey area is currently £675.9m, and is forecast to grow to £825m by 2015; to £1.141b by 2020; and to £1.479b by 2025. This equates to an overall growth of £803m (119%) between 2010 and 2025. (Table 3, Appendix 11).

Sales Efficiency

- 6.16 It is also necessary to factor in changes in respect of sales efficiency rates. This represents the ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (such as rents, rates and service charges) by increasing their average sales densities. The application of a turnover 'efficiency' growth rate is a standard approach used in retail planning studies and the Government's Good Practice Guide on Need, Impact and Sequential Approach advocates taking account of "...expected improvements in store 'floorspace productivity' for both convenience and comparison floorspace, irrespective of location" (Planning for Town Centres: Practice Guidance on Need, Impact and the Sequential Approach).
- 6.17 As growth in expenditure falls [as it recently has] it is fair to assume that growth in turnover in existing shops will also fall. Evidently, in the current economic climate many retailers have struggled to increase or even maintain sales density levels and, together with other financial problems, this has led retailers into closure, such as Woolworths and Adams. With the expectation of weaker expenditure growth in the future than over the last 10 years, sales density growth is likely to be towards the bottom end of the range. Based on advice published by Experian we have adopted a sales efficiency growth for comparison goods of 0.75% in the period 2010 and 2015; 1.9% for the period from 2015 to 2025. For convenience goods we have factored in sales efficiency rates of 0.4% between 2010 and 2015 and 0.5% between 2015 and 2025.

Floorspace Data

- 6.18 The comparison and convenience floorspace data incorporated within in our model has been drawn from a range of data sources including the Institute of Grocery Distribution (IGD), the London Borough of Newham, the Trevor Woods Retail Warehouse database and Experian Goad. We have applied consistent net:gross ratio assumptions of 70:30% for comparison goods floorspace and 65:35% for convenience goods floorspace.
- 6.19 Our floorspace assumptions for the foodstores include where appropriate an adjustment to identify the proportion of purely convenience goods floorspace. Most superstores include a proportion of non-food floorspace; we have adjusted the net floorspace to identify the proportion of sales space allocated for convenience goods. This accords with the expenditure data and the expenditure assumptions used.

Convenience Goods Performance Analysis

- 6.20 Addressing each of the main town centres and out-of-centre destinations in Newham, we have reviewed shopping patterns and performance of existing convenience goods floorspace. Using the composite market shares derived from the 2007 Survey and baseline expenditure estimates, we have calculated the convenience goods turnover of the main convenience provision in the Borough.

Stratford Town Centre

- 6.21 In total, we estimate that the convenience stores in Stratford town centre currently have a turnover of £64.4m which is above expectations on the basis that the stores were all trading at company average levels (£40m). The results of the household survey reveal that the Morrisons store is performing well with a turnover of £38m compared to an estimated turnover of £25m based on company average sales. The Sainsbury's in the Stratford Shopping Centre is also performing well with a turnover of £20.6m; above our estimate based on company average sales (£11.5m).

East Ham Town Centre

- 6.22 We estimate that East Ham has a convenience goods turnover in the region of £43.8m which is a good performance, above company average levels (£31.7m). It is evident from the survey results that the Sainsbury's on Myrtle Road is drawing a high level of trade (particularly from Zones 3 and 5), and is turning over £25.3m. This is almost double our estimate based on company average sales (£11.9m). The Somerfield on High Street North (situated just outside the defined town centre boundary) is also trading above company average levels with a turnover of £4.7m, although the Lidl store is trading less well in comparison with a turnover of just £1.8m, compared to a company expectation of around £2.8m. Other convenience stores in the centre (including many independent operators), also account for a strong level of expenditure (£12m).

Canning Town District Centre

- 6.23 Canning Town has a total convenience goods turnover of £12.1m which is broadly in line with company average expectations. The survey results suggest that Somerfield is not performing well, although the Iceland is when compared to company average levels for foodstores of that size. The survey results indicate that the centre draws most trade from the immediate surrounding Zones, Zones 2 and 7, but has limited influence over a wider area. It is also evident from the survey results that the centre is significantly more popular in terms of top-up food shopping than it is for main food shopping, consistent with the limited, small-scale convenience goods provision on offer. There is also a considerable leakage of trade from the immediate catchment area to major foodstores in East Beckton, demonstrating that existing provision is not meeting local demand.

East Beckton District Centre & Stores in the Beckton Area

- 6.24 We have identified the convenience goods performance of the Asda in East Beckton which is currently turning over £45.8m. The Tesco at Gallions Reach has a turnover of £36.5m, which is also below company average; and the Sainsbury's is the weakest performing with a turnover of £11.2m. The 2007 survey indicates an additional £25.4m convenience goods expenditure from the survey area is being drawn to 'Beckton'; i.e. the respondents do not define a specific store and merely say 'Beckton' for their

response. We can only assume that this is being spent in the Asda, Tesco and/or Sainsbury's (and other smaller convenience stores in the area).

- 6.25 In total, convenience goods floorspace in Beckton – both town centre and out-of-centre – is turnover over around £119m per annum. Based on a total net sales floorspace of 15,260 sq m this equates to an average sales density of £7,794 per sq m net; and compares poorly to company average expectations which are in the region of £11,382 per sq m net (average of food operators).
- 6.26 Nevertheless, it is evident from the survey results and our analysis in Section 4, that foodstores in the Beckton area are drawing trade from a wide catchment area extending across much of the survey area. They have the strongest influence on food shopping patterns in the Borough by far. The greatest level of trade is drawn from Zone 4 (the Zone in which Beckton is located) and adjacent Zone 2 (i.e. the core catchment); but the centre also attracts a strong level of trade from every other survey zone, the lowest influence being in Zones 8 (Stratford), 11 and 12 (outside the Borough boundary).

Forest Gate District Centre

- 6.27 Forest Gate has a convenience goods turnover of £11.9m which is less than the expected turnover of foodstores based on company average sales (£16m). At the time of the survey (2007), the Somerfield on Woodgrange Road was the main multiple foodstore which, according to the survey, performs above company average expectations with a turnover of £4.5m. However, since the 2007 Survey Tesco have opened a new store (306 sq m) in the former Woolworths unit. To ensure completeness and an up-to-date position, we have factored the expected level of turnover (£3.9m) into the quantitative model assuming similar trade draw patterns to Somerfield. The quantitative analysis demonstrates a weak trade retention even in the core catchment for convenience goods; with the large majority of residents travelling elsewhere to meet their needs.

Green Street District Centre

- 6.28 Green Street has a total convenience goods turnover of £37.1m which is considerably higher than the estimated turnover of £26.1m, based on company average sales. The survey results indicate that the majority of this can be attributed to the Tesco Metro which is the main multiple foodstore operator in the centre and is currently turning over £28.2m, compared to a company average expectation of £12.9m. Other convenience stores in the centre (including the Iceland) have a combined turnover of £8.9m, broadly in line with expectations.
- 6.29 The survey also demonstrates that the centre has a reasonably defined catchment area. As we would expect it draws most trade from its location Zone (Zone 3); but it also attracts a reasonable level of trade from surrounding areas, in particular Zones 5, 6 and 9.

Convenience Goods Capacity Forecasts

- 6.30 We have examined the capacity for further convenience goods floorspace at the global level for the London Borough of Newham up to 2025 (incorporating the interim years of 2010, 2015 and 2020). It is important to note that capacity forecasts become increasingly open to margins of error over time and should be updated over the LDF period, as recommended in PPS4. Our analysis also forecasts need within each of the four Sub Areas to provide finer grain conclusions in respect of the performance of different areas, enabling us to combine these findings with our qualitative conclusions to recommend where the local authority should plan for new development in the future.
- 6.31 It should be noted from the outset that a low or negligible capacity forecast for a Sub-Area does not necessarily mean that there is no 'need' for additional floorspace. The forecasts are based on current market share and therefore reflect high or low trade retention levels as discussed in detail in Section 4. Where a centre or Sub-Area has a low market share the capacity to accommodate additional floorspace is likely to be conservative given the leakage of trade elsewhere. By drawing on our preceding detailed qualitative assessment we can draw our conclusions together to identify areas that require new development to meet local needs, and which will claw back expenditure to support new development.

Baseline Convenience Goods Capacity Forecasts

- 6.32 Table 6.1 sets out the capacity forecasts for convenience goods in the Borough and by Sub-Area, before commitments are taken into consideration. The figures are produced from the model incorporating population and expenditure assumptions, as well as the performance analysis and current market share positioning discussed in previous sections.

Table 6.1: Baseline Capacity Forecasts for Convenience Goods Floorspace (BEFORE commitments)

	2015 (sq m net)	2020 (sq m net)	2025 (sq m net)
Global Capacity	3,504	7,160	8,259
North-west (<i>Stratford</i>)	4,394	6,256	6,664
North-east (<i>Forest Gate</i>)	-345	-331	-300
South-west (<i>Canning Town</i>)	316	525	575
South-east (<i>East Ham, Green Street and Beckton</i>)	-861	709	1,320

Source: GVA Grimley Convenience Capacity Modelling, 2010

Note: Minus figures are incorporated to demonstrate the extent of over-provision

- 6.33 It is evident that there is capacity arising in global terms within the Borough based on population and expenditure growth moving forwards. By 2015, there is capacity for an additional 3,504 sq m net of convenience goods floorspace, i.e. broadly similar to the size of the current Asda store in East Beckton.

By virtue of growth in population and expenditure, this level is set to grow to a total of 8,259 sq m net by 2025; i.e. broadly similar to the combined size of the Tesco Extra, Gallions Reach and Sainsbury's, Claps Gate in Beckton.

- 6.34 The strongest levels of capacity are identified in the North West Sub-Area, based on the strong forecast growth in population and the current strong performance of the existing foodstores in Stratford Town Centre (40.7% market share). Capacity in the remaining three Sub-Areas is negligible. In the North East and South West this is primarily a consequence of a very low market share (3.6% and 1.9%) and a significant leakage of trade from their Core Catchment Areas. There is a clear justification to promote new development to claw-back trade, and this is discussed in more detail in later sections.
- 6.35 Negligible floorspace capacity in the South East is primarily a consequence of these foodstores combined under-trading at the current time. The model is effectively concluding that it will be some time before population and expenditure growth meets the trading requirements of existing stores and generates further growth over and above the existing provision to support new floorspace in this Sub Area.

Convenience Goods Capacity Forecasts with Commitments

- 6.36 It is necessary to take into account committed convenience goods development that has planning consent, but is not yet open for trading. These have been discussed and agreed with Newham, and are set out by Sub Area in Table 25, Appendix 10 and illustrated on Plan 11.
- 6.37 The convenience goods retail commitments have a combined convenience goods floorspace of 14,434 sq m net. Based on the relatively minor scale of the commitments outside Stratford, we have applied an average sales density of £5,000 per sq m net to the performance of this floorspace. It is likely to be small scale and local in nature. Stratford has consent for an M&S Simply Food (estimated 3,879 sq m net based on information provided by the Council) and a Waitrose foodstore (estimated 2,500 sq m net based on plans/typical store format). Given the absence of either retailer within the wider catchment area outside Newham, and taking into consideration the significant number of day trip visitors to Stratford City from beyond the Borough, we have assumed that these two stores will achieve a 70% inflow from beyond the Borough Survey Area.
- 6.38 In Stratford Developments Zones 2-5, there is consent for 8,500 sq m gross of A1/2/3 retail floorspace. We have factored in a 65% net:gross ratio, deducted 15% for A2/3 retail floorspace, and assumed a 50:50 split between convenience and comparison goods floorspace. We have therefore incorporated a convenience goods floorspace commitment of 2,348 sq m net into the model.
- 6.39 It should be noted that aside from the major consent for M&S and Waitrose in Stratford City, the remaining consents set out in Table 25 are not restricted to a specific goods category. Assumptions have been used, therefore, to calculate the proportion of each scheme dedicated to convenience goods

floorspace, but in practice more, or little or no floorspace might be used for convenience goods. We discuss this further below, but we emphasise here the importance of regular monitoring of commitments to identify implementation and retailer representation once opened. It is important the Council remain flexible to change in respect of forecasting capacity.

- 6.40 Table 6.2 demonstrates that following the implementation of commitments any residual expenditure will be absorbed, theoretically leaving no growth in expenditure to support further floorspace over the LDF period, even taking into account significant population growth throughout the Arc of Opportunity and some population increase in Urban Newham.

Table 6.2: Baseline Capacity Forecasts for Convenience Goods Floorspace (AFTER commitments)

	2015 (sq m net)	2020 (sq m net)	2025 (sq m net)
Global Capacity	-2,777	879	1,978
North-west (<i>Stratford</i>)	474	2,337	2,744
North-east (<i>Forest Gate</i>)	-715	-702	-670
South-west (<i>Canning Town</i>)	-1,523	-1,314	-1,265
South-east (<i>East Ham, Green Street and Beckton</i>)	-1,012	558	1,169

Source: GVA Grimley Convenience Capacity Modelling, 2009

- 6.41 This is, however, a theoretical exercise, based on current market share. Given the scale of proposed development being proposed in the Borough at the current time, it is fair to assume that Newham will achieve a strong uplift in the level of convenience goods market share. Section 4 has already identified current claims on expenditure from stores outside the Borough including Asda, Leyton; Asda, Isle of Dogs; Tesco, Leytonstone; Tesco, Barking; Ilford; Asda, Barking; and Waitrose, Canary Wharf. Strategic qualitative improvements in Stratford, Forest Gate and Canning Town will claw back some of this expenditure.
- 6.42 Our assessment identifies that at present, Newham has a convenience goods market share within the Survey Area of around 53%. We have run a further scenario incorporating a 15% uplift in market share within the Survey Area from 2015 onwards in order to demonstrate capacity arising once the quality and scale of foodstore provision throughout the Borough has improved substantially; and trade retention has therefore also improved.
- 6.43 It is evident from Table 6.3 below that a 15% uplift in market share would retain sufficient expenditure to enable the Borough to support additional convenience goods floorspace over and above identified commitments. By 2015 we estimate capacity for a further 6,411 sq m net, growing to 11,085 sq m net by 2020, and again to 12,854 sq m net by 2025. In addition to all commitments identified in Table 25, Appendix 10, therefore, the Borough is able to support further foodstore development in Canning Town,

Forest Gate and Stratford Town centre as envisaged in strategic policy formulation evolving at the current time.

Table 6.3: Baseline Capacity Forecasts for Convenience Goods Floorspace (AFTER commitments) and Incorporating a 15% Survey Area Market Share Uplift

	2015 (sq m net)	2020 (sq m net)	2025 (sq m net)
Global Capacity	6,411	11,085	12,854

- 6.44 Clearly this is an assumed market share uplift which could increase or decrease depending on the level and quality of additional floorspace proposed, although given the proposed developments coming forward in Newham, we consider this to be entirely achievable and supportable in policy terms. New foodstore developments in the main town centres will help achieve the required qualitative enhancements identified within our health check and shopping pattern reviews.
- 6.45 Clearly, this level of capacity arising (as identified in Table 6.3 above) should not put pressure on the local authority to allow out-of-centre proposals. Our assessment has identified sufficient sequential development sites to meet the needs arising even taking into account this market share uplift. In policy terms there is no need on the basis of our assessment to allocate sites beyond existing centres, or identified strategic growth areas.
- 6.46 Furthermore, proposals outside the Borough might also have implications on identified capacity, including Tesco redevelopment at Bromley-by-Bow, for example. Nevertheless, Newham should continue to facilitate the enhancement and investment in their centres to ensure competitive and vital and viable town centres in the future; and to retain and enhance market share in light of competing schemes coming forwards outside the Borough.

Comparison Goods

- 6.47 We have assessed each of the main comparison goods shopping destinations in the Borough by reviewing shopping patterns and the performance of existing comparison goods floorspace. Using the market shares derived from the 2007 Survey and the baseline expenditure estimates, we have calculated the comparison goods turnover of each of the main centres, including Stratford and East Ham and the four district centres: Forest Gate, Green Street, Canning Town and East Beckton.
- 6.48 In the case of Canning Town & East Beckton, it is possible that responses to the survey did not distinguish between the defined centres and nearby retail warehousing. We have therefore incorporated the various retail parks (Beckton Gateway, Beckton Triangle, The Junction and Gallions Reach) with East Beckton to provide us with an overall turnover generated in what we have defined the 'Beckton Area'. We have also assumed that the Manor Road Retail Park contributes towards the overall turnover

generated in Canning Town, although this is considerably smaller in scale than that represented in Beckton, and in any event is currently within the defined Primary Shopping Area. We have not identified any further out-of-centre retail warehousing in addition to those specified above.

Comparison Goods Performance Analysis

Stratford Town Centre

- 6.49 We have used the 2007 Survey to estimate the current market share of Stratford town centre (Table 4, Appendix 11). The survey results suggest that the centre draws the majority of its comparison goods trade from its location Zone (Zone 8), where it has a 33% market share. The centre also draws a reasonable level of trade from adjacent Zones 6, 9 and 12 highlighting a relatively defined core catchment area, although this does extend to some extent beyond the Borough given its location near to the north west boundary.
- 6.50 Based on these shopping patterns, we estimate Stratford town centre has a comparison goods turnover from the survey area of £66m (Table 5, Appendix 11). We have established the centre's existing comparison goods floorspace (15,634 sq m net) and based upon the level of turnover identified; we estimate that Stratford has a sales density of around £4,200 per sq m net. This is likely to be higher when the full extent of Stratford's catchment is taken into consideration, reaching higher trading levels of around £5-6,000 per sq m net; in line or above East Ham.

East Ham Town Centre

- 6.51 We have identified the main influence of East Ham extends into survey Zones 3 and 5. The centre is located on the border of Zones 3 and 4 although it achieves a greater market share in Zone 3 (24.6%) than Zone 4 (13.5%) because residents in Zone 4 are travelling to the Beckton area to fulfil their comparison shopping needs. East Ham has the highest market share in Zone 5 (35.8%), situated to the north of the centre, the opposite to Beckton. Overall the level of market share attracted to East Ham results in a comparison goods trade draw of £74m. This is forecast to increase to £84.3m by 2015, £110m by 2020 and £142.1m by 2025.
- 6.52 We estimate that East Ham has a total comparison goods floorspace of 13,559 sq m net. Based upon the current turnover of £74m this equates to a sales density of £5,425 per sq m. This is a reasonable level of trading relative to the comparison retail provision on offer and whilst it appears to be a stronger performance than Stratford, it should be remembered that Stratford is likely to attract more trade than East Ham from beyond the Borough boundary given its location.

Canning Town District Centre

- 6.53 Canning Town has an estimated turnover of just £2.5m which is the lowest of the district centres in the Borough. This identified level of trading equates to a low sales density of only £460 per sq m net which is a poor performance and reflects the more localised shopping facilities that are on offer, underpinned by convenience and service retailing.
- 6.54 The survey results suggest that the centre attracts a limited market share for comparison goods shopping from the survey area. The centre has the highest market share in Zone 7 (3.1%) situated to the north of its location Zone 2, where it has a 0.7% market share. The survey demonstrates that most residents in Zone 2 choose to travel further afield to the Beckton area, Stratford or East Ham for their comparison shopping needs, instead of Canning Town. This highlights a key deficiency in terms of comparison shopping provision for this part of the Borough.

East Beckton District Centre

- 6.55 As highlighted previously, it is considered likely that respondents to the household survey do not physically distinguish between the Asda and adjacent precinct within the defined district centre and nearby retail parks: The Junction, Beckton Triangle; Beckon Gateway and Gallions Reach. We have therefore assessed all components as one retail destination which generates a combined turnover of £157.4m. This is consistent with the Canning Town/Custom House Strategy Report (2007) and a finer grained analysis is not possible given the type of merged response (generalising 'Beckton') given to the Survey questionnaire.
- 6.56 The household survey shows that 'Beckton' as an area has a strong influence over the whole survey area particularly Zones 1, 2 and 4 where it has between 44-48% market share and Zone 7 where it has a market share of 32.4%. Zone 8, Stratford's location Zone, is the least influenced by Beckton with a 7.2% market share. We estimate that the Beckton area has a total comparison goods floorspace of 47,597 sq m net. Based upon the current turnover this equates to a sales density of £3,308 per sq m net, consistent with expectations for retail warehousing. Based on a constant market share, the current turnover is forecast to increase from £157.4m in 2010 to £190.8m by 2015, £262.1m by 2020 and £339.2m by 2025.

Forest Gate District Centre

- 6.57 Forest Gate has a current estimated turnover in the region of £4.1m. We estimate that the centre has a comparison retail floorspace of 6,720 sq m net which equates to a sales density of just £606 per sq m. This suggests a weak performance but it is reflective of the limited comparison shopping facilities on offer in the centre as identified in our qualitative assessment. The centre is instead more orientated towards convenience goods shopping and service requirements, although there is a comparison shopping role, with future intentions to enhance this category of goods in the centre. Forest Gate

currently has a low market share of only 2.3% in its location zone, Zone 9, and attracts only 1.5% of available expenditure from Zone 5. The survey demonstrates that the residents of Zone 9 are choosing to travel in the main to Beckton, Stratford or East Ham for their comparison shopping needs.

Green Street District Centre

- 6.58 We have estimated that the current turnover of Green Street is £9.9m. The centre has a comparison goods floorspace of 13,649 sq m net which equates to a low sales density of £730. Similar to Canning Town and Forest Gate, this reflects the centres more limited mainstream comparison shopping function. Located in the centre of the Borough, the centre has a relatively broad catchment area drawing from the majority of the Borough's Zones. However the market share in each of these Zones is limited with the highest market shares being 3.6% in location zone, Zone 3; and 3% in Zone 9.
- 6.59 Our qualitative assessment also indicates that this is largely driven by the strong ethnic retailing function. There is planning consent for a shopping mall to the north of the centre which has the potential to enhance the centre's comparison shopping offer, although this will shortly expire. Based on a constant market share we forecast and increase in expenditure from £9.9m in 2010 to £11.6m by 2015, £15.3m by 2020 and £19.7m by 2025.

Baseline Comparison Goods Capacity Forecasts

- 6.60 In assessing capacity for future comparison goods floorspace, we have presumed that the efficiency with which existing floorspace is being used will increase over time, and we have assumed an annual growth in existing sales per sq m of 1.5% between 2010 and 2015, increasing to 2% between 2015 and 2025 (based on growth following the recession). Drawing on our experience elsewhere we have assumed new floorspace should achieve sales of around £5,000 per sq m net, on average across the Borough. Table 6.4 below sets out our baseline projections for the Borough and each of the defined sub-areas, based on current market share. The subsequent Tables (6.5, 6.6, 6.7) build on the baseline position representing different scenarios.

Table 6.4: Baseline Capacity Forecasts for Comparison Goods Floorspace (BEFORE commitments) (Based on constant market share)

	2015 (sq m net)	2020 (sq m net)	2025 (sq m net)
Global Capacity	9,107	31,410	54,743
North-west (<i>Stratford</i>)	3,470	10,510	16,570
North-east (<i>Forest Gate</i>)	151	488	816
South-west (<i>Canning Town</i>)	74	254	439
South-east (<i>East Ham, Green Street and Beckton</i>)	5,412	20,157	36,918

Source: GVA Grimley Convenience Capacity Modelling, 2009

Comparison Goods Capacity Forecasts With Commitments

- 6.61 Like convenience goods it is also necessary to take into account existing claims on capacity and we have therefore identified commitments for comparison goods floorspace which are expected to come forward during the plan period set out in Table 23, Appendix 11. This exercise initially excludes Stratford City (Development Zone 1), which we review further below, given the wider regional significance and role it will perform.
- 6.62 Table 6.5 sets out residual capacity following the implementation of commitments, based on current market shares. This scenario excludes the implications of Stratford City. In reality, the committed schemes incorporated within Table 6.4, particularly in East Ham and Green Street, will enhance their localised market share and improve trade retention within the Borough; i.e. they will have a greater affect in meeting the qualitative need for comparison goods floorspace within their catchment areas. By virtue of growth in population and expenditure, there is identified capacity for additional comparison goods floorspace across the Borough over and above identified commitments by 2020.

Table 6.5: Baseline Capacity Forecasts for Comparison Goods Floorspace (AFTER commitments excluding Stratford City) (Based on constant market share)

	2015 (sq m net)	2020 (sq m net)	2025 (sq m net)
Global Capacity	-457	20,852	43,086
North-west (<i>Stratford</i>)	2,205	9,114	15,028
North-east (<i>Forest Gate</i>)	151	488	816
South-west (<i>Canning Town</i>)	-1,532	-1,519	-1,519
South-east (<i>East Ham, Green Street and Beckton</i>)	-1,280	12,769	28,760

Source: GVA Grimley Comparison Capacity Modelling, 2009

Note: Commitments incorporated within this scenario are set out in Table 23, Appendix 11

- 6.63 In terms of comparison goods there are clear imbalances in the network with the South East and North West Sub Areas performing better than the South West and North East. The shopping patterns analysis in Section 4 identifies clear qualitative deficiencies throughout the Borough, which has direct implications on capacity in the future – if market share were to remain constant.
- 6.64 There are opportunities for Sub Areas to enhance their provision and claw back trade being lost from their catchment areas; trade draw and claw back provides the required expenditure to support additional floorspace. The indicative negative capacity figures for Canning Town in Table 6.5, for example, should not be taken alone to inform policy choices. The most strategic and influential changes that will have significant and direct implications on shopping patterns and market share are Stratford City and Canning Town. We discuss these below.

Stratford City and Canning Town

- 6.65 This section reviews the forthcoming implications of Stratford City which is committed and currently being implemented. This stage of scenario testing is crucial in underpinning the forthcoming LDF plan making process, in order to build on the baseline position discussed above and plan for the next phase of change in the Borough. Major strategic change at Stratford City and Canning Town must be taken into consideration. Given the advanced stage of Stratford City we deal with this first below, followed by the implications for the Borough as a whole and also Canning Town more specifically.
- 6.66 Section 5 has discussed in detail the current consented scheme for Stratford City, together with details of the planning application Stratford City Retail Impact Assessment (2003) and the Supplementary Report on Retail Issues (2004). The findings of the studies, with which the consent was based upon, was first that the impact of Stratford City would be acceptable in the region, and second, there was sufficient additional capacity for a 50,000 sq m gross (32,500 sq m net) comparison scheme in the existing town centre (in addition to Stratford City) by virtue of organic expenditure growth in the longer term (to 2021). Taking into account a further likely marginal increase in market share (i.e. not relying entirely on organic expenditure growth), the Town Centre proposals were deemed supportable in a much shorter timescale, i.e. by 2011 in parallel with the Stratford City scheme opening.
- 6.67 Clearly, Stratford City is being implemented and will open in 2011, and the town centre scheme has not yet progressed. Timings have changed and we therefore update our quantitative assessment here to investigate comparison goods capacity arising following the opening of Stratford City, identifying the scope for 'organic' growth at Stratford without any further shift in shopping patterns. This study does not test the impact of a scheme in Stratford Town Centre, but does review the ability of the Borough to support additional comparison goods floorspace over and above Stratford City, based on an uplift in market share (arising from Stratford City) and a significant increase in 'inflow' to the Borough, or more specifically Stratford City.
- 6.68 This assessment is attached in Appendix 12. Table 1, Appendix 12 sets out the uplift in market share of Stratford throughout each survey zone as a consequence of Stratford City. This is based on a broad comparison with the two different survey areas and assumptions made in respect of trade draw in the 2003 planning application analysis. For example, translating and applying the 2003 assumptions to this assessment we expect that in Zone 1 (2007 Survey Area) Stratford City will increase its market share from 3.1% to 8.4%, and in Zone 8 (2007 Survey Area) – Stratford's location zone – the market share is expected to increase from 33.3% to 90.4%.
- 6.69 These market shares are converted to expenditure/trade draw in Table 2, Appendix 12, demonstrating that Stratford City and the Town Centre combined will increase its comparison goods trade from Zone 1-12 from £66m in 2010 to £267m in 2015. Drawing on evidence in the 2003 RIA an 'inflow' figure from beyond the Survey Area to Stratford City has been assumed equating £512.8m by 2015, rising to £577.7m by 2020 and £672m by 2025.

- 6.70 The total turnover of Stratford City and the Town Centre will therefore equate to around £779.9m by 2015, growing to £968.4m by 2020 and again to £1,177m by 2025. These figures are based upon, and therefore entirely consistent with, the Stratford City RIA and Supplementary Report submitted as part of the planning application; and has allowed existing retail floorspace to achieve real growth of 1.5% between 2010 and 2015, and 2% between 2015 and 2025. The commitments referred to earlier in this section have also been deducted from the global Borough wide capacity forecasts, leaving a residual expenditure of £115.1m in 2015, growing to £307.8m by 2020 and again to £523.5m by 2025. The resultant floorspace capacity is set out below in Table 6.6.
- 6.71 It should be noted that this scenario, set out in Table 6.6, is a Borough wide scenario, and takes into account the performance of each of the six main town centres as well as the existing retail warehouse provision. The identified commitments are incorporated and the positive impact of Stratford City in terms of claw-back is also included. The results demonstrate the capacity arising in the Borough having taken into account all of these key variables.

Table 6.6: Comparison Goods Borough Wide Capacity (AFTER commitments AND Stratford City)*

	2015	2020	2025
Residual Expenditure (£m)	£115.1m	£307.8m	£523.5m
Floorspace Capacity sq m net	19,191 sq m net	51,304 sq m net	87,244 sq m net
Floorspace Capacity sq m gross (Based on Net:Gross of 65%)	29,525 sq m gross	78,929 sq m gross	134,221 sq m gross

Source: GVA Grimley 2010 *includes claw-back and increased inflow into the area following Stratford City

- 6.72 Clearly, the market share uplift and increased levels of inflow lead to surplus levels of capacity for additional comparison goods floorspace in the Borough by virtue of growth in population and expenditure only, i.e. not relying on any further increase in market share above that generated by Stratford City.
- 6.73 There is sufficient surplus expenditure to support a Land Securities/Town Centre scheme of 50,000 sq m gross (additional) in the period 2015-2020 and given the stage of the Masterplan and proposals, the redevelopment of Stratford Town Centre is unlikely to come forward any sooner than around 2017. In practice it is inevitable that a larger scale of development of this type would have the potential to further increase market share and thus in capacity terms could be supportable within a shorter timescale.
- 6.74 Elsewhere in the Borough, within the South West Sub Area, the proposed regeneration of Canning Town, supported in policy through the SPD must also be considered. The 'Canning Town & Custom House Retail Strategy & Vision' (2007 GVA Grimley) tests the implementation of 25,000 sq m net of mid-value driven comparison goods floorspace. The detailed reasoning behind this is set out in Section 5. Our up-to-date capacity assessment in this report demonstrates that the Borough can support a further 51,304 sq m net of comparison goods floorspace (78,929 sq m gross) by 2020, with capacity growing

thereafter on average 7,000 sq m net per annum. Canning Town and Stratford Town Centre combined totals circa 57,500 sq m net of comparison goods floorspace.

- 6.75 It is evident therefore, that by 2021 there is sufficient capacity in the Borough to support both Canning Town and Stratford Town Centre comparison shopping schemes. It must be emphasised that this is based on current market share, incorporating improved trade retention and inflow levels achieved by Stratford City. As we have noted earlier, however, both schemes will achieve further claw back from beyond the Borough. Notably, Canning Town is expected to obtain over 20% of the scheme turnover through claw-back from Ilford, London, Lakeside, Romford, Barking and Canary Wharf. There is clear evidence to suggest therefore that both schemes would have the potential to further increase market share and thus in capacity terms could be supportable within a shorter timescale.
- 6.76 On the basis of our assessment and conclusions drawn in both the Stratford City and Canning Town Study we conclude that capacity for both schemes would arise sooner than 2021 without having a 'significant' detrimental impact on the network of centres. The Stratford Town Centre and Canning Town impact analysis both concluded that these schemes could be implemented in a 5 year timescale without having a serious detrimental impact on the network of centres. It should be noted that the cumulative impact of these schemes together have not been tested, although we 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 mitigating against impact as identified in both the Stratford and Canning Town Studies.
- 6.77 Based on the findings of the Stratford City (2003/2004) work and the Canning Town conclusions (2007) any short term impact of each individual scheme being delivered in advance of the full extent of capacity arising, is likely to be mitigated over a short time period based on continued growth in population and expenditure levels:

"Our updated capacity analysis indicates that if the combined scale of additional comparison shopping proposed within Stratford City and the redevelopment of the existing centre were to be developed and open for trading by 2011, this scale of floorspace would be supportable based on forecast expenditure growth and on a relatively modest additional uplift in market share. In essence, the consequence of both developments [Stratford City and Stratford Town Centre] proceeding within the same timescale, and being substantially completed and open for trading by 2011 (as opposed to a phased development over the medium term) is a marginally higher level of impact on existing neighbouring centres at 2011. However, even on the worst case assumptions employed in our analysis, such levels of impact will still be more than offset by growth up to 2011 and beyond and therefore would not undermine the vitality and viability of any nearby centres."

*Stratford City Supplementary Report on Retail Issues,
January 2004, GVA Grimley*

“Despite trade diversion, town centre turnover in all town centres will continue to grow as they benefit from continued strong forecasts in available comparison goods expenditure. [the assessment] sets out the trade draw from Zones 1-12 to each of the major shopping destinations in 2017, once they have benefited from 5 years of expenditure growth following the opening of the new retail floorspace in Canning Town. It is clear that in every case the turnover of each town centre will exceed its level of trade draw in 2012 following the implementation of the Canning Town development proposals.”

*Canning Town & Custom House Retail Strategy and Vision,
November 2007, GVA Grimley*

- 6.78 This assessment has identified capacity for all identified commitments, a new Stratford Town Centre scheme of around 32,500 sq m net comparison, and a Canning Town scheme of around 25,000 sq m net – by 2021 at the latest. The figures and previous analysis would suggest that – based on acceptable impact – both Stratford Town Centre and Canning Town could come forward at some point between 2015 and 2020, a realistic timescale of around 5-10 years for both to gain consent and be implemented. This conclusion is based on robust evidence and analysis, although we must note that the cumulative impact of both schemes on each individual centre in the Borough and wider East London area coming forward earlier has not been tested.
- 6.79 These schemes (Stratford Town Centre, Canning Town and other identified commitments) do, however, absorb capacity to around 2021, i.e. into the latter stage of the LDF period, and they will ensure significant improvements to retail facilities and trade retention within the North West and South West Sub Areas. There are currently no ‘major strategic’ proposals for significant comparison goods floorspace in the North East (Forest Gate) or the South East (East Ham, Green Street, Beckton), although Forest Gate and Green Street have their own aspirations (Green Street Shopping Mall has been factored in as a commitment and is therefore supportable in capacity terms).
- 6.80 There is no capacity for further comparison goods floorspace in the Borough, although there will be opportunities for claw-back, re-balancing the Borough’s shopping patterns, and qualitative arguments, particularly in support of the more localised proposals for Forest Gate. Beckton largely comprises out-of-centre retail warehousing which is not protected in retail policy terms. Nevertheless, the investment should be protected as a Borough asset moving forwards, particularly in light of the strong retail ‘bulky’ goods role in the Sub Region and regeneration proposals at Barking Riverside and the general absence of a ‘traditional’ centre in this part of the Borough. We set out our recommendations for further consideration in Section 8.
- 6.81 In accordance with PPS4 all planning applications [which are not in a centre and are not in accordance with an up to date development plan; or proposals in a centre, not in accordance with the development plan and which would substantially increase the attraction of that centre] for additional comparison goods

floorspace should be accompanied by a full Retail Assessment robustly considering the key policy tests of impact and the sequential approach. Applicants should be required to consider the ***cumulative impact*** of proposals and commitments coming forward in the Borough. We do conclude that given major opportunities in Stratford Town Centre and Canning Town, as well as the centres of East Ham, Green Street and Forest Gate, there is no 'need' to allocate further development opportunity sites elsewhere in the Borough over the LDF period. We do consider there is potential to enhance and support the retailing sector in 'Beckton' and this is discussed further in the final section.

Implication for Other Newham Centres

- 6.82 Both the Stratford City RIA (2003/2004) and the Canning Town & Custom House Strategy (2007) considered the implications of these new schemes on existing centres in Newham and the wider East London area, and we have noted above the broad acceptability in impact terms of both a Stratford Town Centre and Canning Town scheme. We added, however, that both schemes together in cumulative terms has not been considered previously. We go some way to broadly quantify this here.
- 6.83 Stratford City will inevitably lead to a diversion of trade from other centres, but as we have already noted in Section 5 the majority of the new centre's turnover is likely to be derived from higher order centres such as London's West End and Lakeside, with the impact on existing major and local centres likely to be minimal. Nevertheless, there will be some trade diversion from the larger centres in Newham.
- 6.84 The Stratford City Supplementary Report on Retail Issues (2004) considered the impact of Stratford City and a new 50,000 sq m gross scheme in Stratford Town Centre combined, together with other identified smaller scale commitments in the Sub Region. This inevitably identified some trade diversion from East Ham, Forest Gate, Green Street and Beckton; although the overall conclusion in Forest Gate was growth based on the commitment for the Green Street Bus Station site which would result in a £13.8m increase in turnover. The impact assessment estimated a £1m trade diversion from Green Street, £13.3m from East Ham, and £2.6m from Beckton.
- 6.85 The Canning Town & Custom House Visioning Study concluded levels of trade diversion arising from a 25,000 sq m net comparison goods scheme in Canning Town. This identified an estimated £54m trade diversion from Beckton, £1m trade diversion from Green Street, £5.5m from East Ham, and £4.3m from Stratford.
- 6.86 These Studies were produced at different times, are based on different price bases, and incorporate different assumptions in terms of forecast years and growth rates, for example. They can't therefore be directly compared, nor provide an 'exact' impact threshold, but they do give an indication of the broad levels of trade that may be diverted from these centres as a consequence of the scale of schemes discussed and tested:

- Cumulatively, Stratford City, Stratford Town Centre and Canning Town – together with other smaller commitments outside the Borough – are likely to divert trade in the region of £2m from Green Street; this is in the context that by 2020 our up-to-date assessment expects Green Street to achieve a turnover of around £15m. This is an impact of around 13%, although turnover is expected to continue growing.
- In East Ham a trade diversion of around £19m will occur, compared to a total town centre turnover of around £110m by 2020. This is an impact of c.17%.
- Beckton (retail warehousing) is expected to experience a trade diversion in the region of £56.6m compared to its turnover in 2020 of approximately £262m. This is an impact of around 22%.

6.87 Clearly, there will be some short term concerns for some centres, the most vulnerable considered to be East Ham. Whilst trade diversion should likely be offset by growth within a 5 year time period, such changes to shopping patterns would likely leave East Ham vulnerable to a fall in spending and lower levels of footfall. Given the vulnerabilities identified in the up-to-date Health Check this provides more evidence that a particularly pro-active and swift policy position is developed for the centre to maintain its vitality and viability, differentiated retail offer, and attraction in the face of major strategic retail growth in nearby locations. Provided East Ham becomes subject to a focused strategy with realistic implementation measures, there is no reason why the centre can't move forward in parallel with other centres which have clearer regeneration/development strategies in place. The recent investment by Primark cannot be underestimated as Primark represents a significant retail attractor at the current time.

Sensitivity Testing

6.88 As set out from the outset, this Section is based on a number of data inputs and assumptions related closely to local circumstances (population, spend per capita and commitments), the state of the economy (growth rates and sales efficiency rates), and shopping trends and preferences (E-Tailing). The quantitative model is likely to be most sensitive to population growth and the implementation of commitments – both within and outside the Borough – which subsequently change shopping patterns and market share. Clearly, moving forwards the Council will need to be aware of changing circumstances, and in accordance with recommendations in PPS4 and the Good Practice Guide seek to update capacity forecasts at no more than 5 year periods. In this way the Council can be flexible in planning for growth and change and respond to planning applications accordingly.

6.89 The key area for change in Newham will be changes in population growth and the implementation – or not – of commitments moving forwards as well as new planning applications receiving consent. Clearly, Stratford City will change shopping patterns and capacity forecasts in the Borough, East London and the wider South East region and will require monitoring and review once open for trading. The same is the case for Canning Town. This quantitative element of our assessment is a widely accepted methodology, in line with best practice and based on a robust Household Telephone Survey; but nevertheless, there will be changes that will require input moving forwards.

- 6.90 The 2007 Survey results are deemed to be a robust evidence base given no major changes in retail/town centre development since the results were published; and despite the downturn in the economy they continue to reflect shopping destination choices, and are not directly linked to quantum of retail expenditure.

Summary

- 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.
- 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 known 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 projects 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.
- 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. There are a number of opportunities in Newham to direct this growth to policy priority and town centre sites.
- In terms of comparison goods, the analysis has concluded 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 current market share. Both schemes do, however, have the potential to further increase market share and thus in capacity terms could be supportable within a shorter timescale.
- 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 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.

7. THE LEISURE SECTOR

7.1 In this section, we undertake a qualitative and quantitative review of existing commercial leisure provision within the Borough, enabling us to provide commentary and recommendations on the extent of the need for additional leisure floorspace. We draw on national trends (Appendix 1), detailed qualitative health checks and site visits, mapping and desk based gap analysis, a detailed analysis of the 2007 and 2009 Household Telephone Surveys, and a broad overview of the economic growth in leisure expenditure over the forthcoming LDF period.

Leisure Choices

Cinema

7.2 National trends in respect of cinemas are set out in Appendix 1. In summary, 2009 research identified that following a strong period of growth the cinema market had reached a plateau, and whilst impacted to some extent by the recession (with some closures) they are now experiencing a boom in admissions. Cinema choices derived from the 2009 Survey are illustrated in Table 7.1 and illustrates where residents in each Sub-Area are travelling for their cinema visits. In total, 47.3% of residents within the 2009 Survey Area visit cinemas as a leisure activity.

Table 7.1: Cinema Choices

Cinema	Total Survey Area	North West	North East	South East	South West
Stratford Picture House (North West Sub Area)	30.5%	66.5%	25.4%	19.0%	19.0%
Boleyn Cinema, Upton Park (South East Sub Area)	6.3%	0.0%	7.7%	8.8%	6.3%
Showcase Cinema, Jenkins Lane, (South East Sub Area)	26.0%	9.3%	12.8%	44.1%	37.7%
Cineworld, Ilford	16.9%	9.3%	33.3%	11.0%	5.2%
Vue, O2, Greenwich	8.0%	8.3%	4.6%	8.5%	12.9%
Cineworld, West India Quay	3.7%	2.8%	0.0%	3.1%	12.6%
Odeon, South Woodford	3.2%	2.8%	7.2%	1.2%	0.0%
Vue, Romford	1.3%	0.0%	1.4%	2.1%	1.2
West End	1.1%	0.0%	0.0%	2.0%	2.7%

Source: 2009 Survey

- 7.3 Appendix 13 illustrates the key cinema destinations for those living within the Borough, together with a 5-minute drive time area for each respective cinema. Clearly, some people will travel longer distances than 5 minutes to visit a cinema, but this is a good desk based indication of gaps in cinema provision to consider alongside our quantitative assessment later in this section. The two most popular cinema destinations for those living within the Borough include the Stratford Picture House (30.5%) and the Showcase cinema at Jenkins Lane, Beckton (26%).
- 7.4 Within Newham there are currently three cinemas. The Stratford Picture House, located on Salway Road/Gerry Raffles Square, opened in 1997 and is the only cinema in Stratford Town Centre. It has a rooftop terrace bar where works by local artists are displayed, and Pizza Express occupies part of the ground floor, providing an attractive frontage onto Salway Road. The cinema has four screens showing both independent and mainstream films. It is popular across the whole Borough with a strong market share in each of the four Sub-Areas (Table 7.1), and as you would expect it has the strongest market share in the North West (66.5%) – its location Sub-Area.
- 7.5 The Boleyn cinema is located on Barking Road in Boleyn, a defined Local Centre and approximately a 10 minute walk from Upton Park underground station. The cinema markets itself as an Asian cinema and does not show mainstream blockbusters, focusing on more specialist independent films. It is a small dated cinema and has three screens. Given the niche role and smaller scale of this cinema it has less of an influence in the Borough, but certainly performs a key role and is a popular destination of choice amongst those living within the North East, South East and South West Sub Areas.
- 7.6 Jenkins Lane Leisure Park is the largest out-of-centre ‘leisure destination’ within the Borough. It is located with the South East Sub-Area, a short distance from the A406 and A13 interchange and a 20 minute walk from Barking Railway Station. The Leisure Park is anchored by a 14 screen multiplex Showcase Cinema with adjacent eating/drinking destinations and The Hollywood Bowl. This is the largest, and currently only multiplex cinema in the Borough, achieving a 26% market share; i.e. less than the Stratford Picture House. This cinema has the strongest influence in the South East, its location Zone, but also in the South West which benefits from a direct DLR link. It is located on the Borough boundary and likely to achieve a large part of its catchment from beyond.
- 7.7 Outside Newham, the key competing cinema destinations include the Cineworld in Ilford, the Vue cinema at the O2 in Greenwich, the Cineworld on Hertsmer Road at West India Quay, and the Odeon in South Woodford. The Cineworld in Ilford opened in 2002, has 11 screens and is linked by a bridge to Esporta Health & Fitness Club with a number of ground floor restaurants located beneath the cinema. The Vue cinema at The O2 recently opened featuring ‘state-of-the-art technology’ and the biggest screen in London, which has 776 seats, 200 of which are premium with licensed bar and a ‘green room’. The cinema is surrounded by the bars and restaurants on offer at the O2 and has increased the competition for cinemas more recently.
- 7.8 These are the only two significantly competitive cinemas outside of the Borough (Table 7.1), and both have a market share within each of the Sub-Areas. Again, as you would expect, the Cineworld in Ilford

has its strongest market share in the North East Sub-Area, and the Vue Cinema in the South West Sub-Area. The 10 screen Cineworld Cinema at West India Quay opened in July 2000 and is within a short walking distance from West India Quay North Dock, and Canary Wharf and West India Quay 'Docklands Light Railway' Station. The Odeon Cinema in South Woodford has seven screens. They achieve their greatest market share in the South West (12.6%) and the North East (7.2%) respectively.

- 7.9 Based on this assessment, there are no clear areas of the Borough which have a strongly identifiable gap in access to a cinema. The most southerly area of the Borough has strong existing and future access to cinema provision via the DLR and Crossrail routes. Appendix 13 also illustrates the committed cinema as part of the Stratford City development. The forthcoming 12 Screen multiplex Vue Cinema will see a substantial addition to cinema provision in the Borough, and is set to open in 2011/2012.
- 7.10 To supplement our qualitative assessment and gap analysis we have undertaken a quantitative need assessment for new cinemas in Newham. In summary, the methodology compares population per screen UK average, with population per screen currently serving the Borough. Any shortfall highlights the need for new screens to bring Newham in line with the national average. The process also projects forward to 2015, 2020 and 2025 taking into consideration population forecasts and the consequent growth in the need for cinema screens as identified by Dodona Research 2009.
- 7.11 We have estimated the catchment area of each cinema and the proportion of trade that will come from the Borough. Taking into account the catchment overlap of cinemas, we believe that Newham is currently served by 12.7 cinema screens (Table 7.2).

Table 7.2: Number of Cinema Screens within 2007 Survey Area

Cinema	Borough	No. of Screens	Customer % Served by Borough	Screens serving Borough
Stratford Picture House	Newham	4	70%	2.8
Showcase Cinema, Jenkins Lane	Newham	14	50%	7.0
Boleyn Cinema, Upton Park	Newham	3	95%	2.9
Cineworld, Ilford	Redbridge	11	40%	4.4
Vue, O2, Greenwich	Greenwich	11	40%	4.4
Cineworld, West India Quay	Tower Hamlets	10	20%	2.0
Odeon, South Woodford	Redbridge	7	10%	0.7
Vue, Romford	Havering	16	3%	0.5

Source: Cinemagoing 18, Dodona Research, March 2009

- 7.12 Table 7.3 compares the population per screen UK average, with population per screen currently serving the Borough (Zones 1-10, 2007 Survey).

Table 7.3: Population per Screen

	Estimated Population	No. Screens	Population per Screen
UK (2010)	65.27	3,670	17,785
Newham (Zones 1-10) - 2010	0.286	12.7	22,609
UK (2015)	64.20	3,797	16,908
Newham (Zones 1-10) - 2015	0.319	12.7	25,217
UK (2020)	66.34	4,193	15,822
Newham (Zones 1-10) - 2020	0.351	12.7	27,747
UK (2025)	68.49	4,629	14,796
Newham (Zones 1-10) - 2025	0.361	12.7	28,538

Source: Cinemagoing 18, Dodona Research, March 2009 / Experian Micromarketer, December 2009

- 7.13 Table 7.4 quantifies the need for new cinema screens to bring the Borough in line with the UK average (11.75 screens by 2025). We have already highlighted above that Newham is set to benefit from an enhanced cinema offer as a consequence of the forthcoming 12 Screen Vue Cinema forming part of the Stratford City Development. Our quantitative analysis demonstrates that this new development will meet the identified need without the need to plan for further provision over the remainder of the LDF period. This is consistent with our qualitative assessment of cinema usage patterns and the desk-based gap analysis.

Table 7.4: Cinema Capacity

	2010	2015	2020	2025
UK population per screen	17,785	16,908	15,822	14,796
Newham Population	286,000	319,000	351,000	361,000
Number if Newham to match UK average	16.1	18.9	22.2	24.4
Existing Screens Serving Newham	12.7	12.7	12.7	12.7
Total number of screens needed 2010-2025	3.4	6.2	9.5	11.7

Source: Cinemagoing 18, Dodona Research, March 2009 / Experian Micromarketer, December 2009

Bingo

- 7.14 Research in respect of bingo usage and operators (Appendix 1) suggests that this type of leisure provision has struggled more than cinemas in the recession, and is partly blamed on legislative changes including the ban on smoking and the rise of online gambling. Within the 2009 Survey Area only 3.8% visit bingo destinations, compared to 47.3% for cinemas and 11.8% for tenpin bowling. Table 7.5 below illustrates the most popular bingo destinations for those undertaking such leisure trips.

Table 7.5: Bingo Choices

Bingo Destination	Total Survey Area	North West	North East	South East	South West
Gala, High Street, Stratford	42.9%	46.0%	59.3%	19.5%	40.0%
Gala, Barking Road, East Ham	28.4%	27.0%	0.0%	51.2%	44.7%
Mecca, Dagenham	6.2%	0.0%	0.0%	17.2%	10.7%

Source: 2009 Survey

- 7.15 There are only two national bingo halls in Newham, both run by Gala. We understand that the Mecca bingo hall in Beckton, near Claps Gate Lane has closed down. The two existing venues serve the east and west of the Borough, and given low and declining usage levels, together with the closure of Mecca, we do not consider there is a need to plan for additional provision.
- 7.16 Such operators are, however, commercially driven and if the sites are available and the market demand is there one to two additional bingo halls could be supported in the Borough provided they meet the policy requirements of PPS4 and ideally support and enhance the wider mix of uses within a town centre. It is evident from the analysis that there is a clearly identified gap in provision in the Canning Town catchment area in the south which could support a bingo venue provided the commercial demand exists.

Tenpin Bowling

- 7.17 Tenpin bowling has been established as a commercial leisure activity in the UK for over 40 years, and whilst there has been increased activity in refurbishing existing facilities there has also been the emergence of differing concepts. For example, the Bloomsbury Bowl Lanes offers a 50's American themed bowling venue with ancillary karaoke rooms, venue rooms for hire, and bars etc. Within the 2009 Survey Area, 11.8% of respondents visit tenpin bowling leisure destinations, and the venues of choice are set out in Table 7.6 below.

Table 7.6: Tenpin Bowling Choices

Tenpin Bowling Destinations	Total Survey Area	North West	North East	South East	South West
XS Superbowl, East Beckton	41.4%	25.0%	33.3%	54.3%	44.7%
Hollywood Bowl, Jenkins Lane NOW CLOSED	25.4%	25.0%	25.7%	29.3%	14.0%
Superbowl, Dagenham	7.6%	12.5%	7.6%	4.1%	10.1%
Hollywood Bowl, Surrey Quays	6.0%	25.0%	0.0%	0.0%	7.0%
Bollywood Bowl, Ilford	5.9%	12.5%	9.0%	2.4%	0.0%
The City Pavilion, Romford	4.6%	0.0%	7.6%	6.4%	0.0%

Source: 2009 Survey

- 7.18 The XS Superbowl at East Beckton is clearly the most popular tenpin bowling destination for residents living in the Borough (41.4%) with a pull from each Sub Area. This is closely followed by the Hollywood bowl at Jenkins Lane, although this has closed, leading us to assume that the XS Superbowl has picked up this diverted trade; both were previously located within the South West Sub-Area in close proximity. There is a clear gap in provision in the North and South West of the Borough, with residents travelling to the Beckton area or alternatively to Dagenham, Surrey Quays, Ilford, and to a lesser extent, Romford. Like bingo venues, the need for new tenpin bowling facilities is very much driven by commercial demand, but it is evident that the Borough could support additional facilities particularly in the north/south west area.

Private Gyms/Health Clubs

- 7.19 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.
- 7.20 Notably, 'The Gym' has recently opened its first location in the Blenheim Centre, Hounslow – a £220m mixed-use development comprising of retail, leisure, private and affordable key-worker housing and additional community facilities. We understand that membership inductions have been strong, with people taking advantage of good quality facilities which are open 24 hours a day, seven days a week following the lead of similar business models that have been launched with great success in the US and

continental Europe. Investors have stated that they will establish other gyms in other underinvested areas where local communities with low incomes will be able to use the facilities.

- 7.21 Sportcity / Fit4Free Group are from Holland and looking to introduce a similar budget membership concept to the UK and have stated that they'd be interested in Stratford and wider Newham if the sites were available – preferably, we understand, inside Shopping Centres. They are actively seeking to acquire sites at the current time. 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.

Pubs/Clubs

- 7.22 It is evident from the 2007 Survey that around 32% of residents in the Borough visit pubs and clubs. Taking the Borough as a whole, as set out in Table 7.7, London West End is clearly the most popular destination (21.8%), followed by Stratford (14.9%), East Ham (12.7%), Canary Wharf (6.7%) and Forest Gate (5.8%). It is clear that a strong level of trade is travelling to destinations beyond the Borough boundary and local facilities are not meeting the need of the Borough residents. It should be noted that in some cases respondents visit destinations further afield due to employment location.
- 7.23 The quality of representation is, however, set to improve through the implementation of Stratford City and the Olympic Legacy Masterplan Framework (LMF) and Canning Town in the North West and East Sub-Areas, and Forest Gate is aiming to improve daytime and evening facilities through the SPD and ongoing improvements to the environment and mix of uses.

Table 7.7: Pub/Club Choices

Destination	Total Survey Area	North West	North East	South East	South West
Stratford	14.9%	35.4%	10.5%	3.7%	6.8%
East Ham	12.7%	5.4%	8.7%	31.8%	4.8%
Forest Gate	5.8%	1.1%	16.4%	3.7%	0.7%
Plaistow	3.9%	9.8%	0.0%	2.9%	2.0%
East Beckton	2.9%	0.0%	1.0%	6.6%	4.9%
Canning Town	2.6%	1.1%	0.0%	1.3%	9.6%
Green Street	2.3%	0.0%	5.4%	2.2%	1.4%
London West End	21.8%	22.1%	17.0%	23.4%	25.9%
Canary Wharf	6.7%	6.5%	0.0%	9.7%	12.0%
Ilford	4.7%	1.1%	9.7%	4.2%	3.5%
Wanstead	3.1%	0.0%	10.9%	0.5%	0.0%
Barking	2.1%	1.1%	3.3%	2.6%	1.4%
Romford	2.1%	2.2%	0.0%	2.0%	4.8%

Source: 2007 Survey

- 7.24 Stratford is a popular destination in the North West Sub Area for bars/clubs with 35.4% of residents using the available facilities. The mix of uses are not, however, meeting the needs of the full residential population in this area with a number of people choosing instead to visit the West End (22.1%), Plaistow (9.8%), Canary Wharf (6.5%) and East Ham (5.4%). Stratford City will substantially increase the market share of Stratford for this activity with the Sub Area and the wider Borough.
- 7.25 The limited bar/club facilities in the North East of the Borough is emphasised by the leakage of trade to London West End (17%), Ilford (9.7%) and Wanstead (10.9%). Forest Gate does attract 16.4% of residents in the North East Sub-Area, but people are clearly travelling elsewhere in the Borough to Stratford, East Ham and Green Street primarily. Forest Gate and the North East Sub-Area has a qualitative need for improved evening drinking/entertainment destinations subject to the policy framework set out in Policy EC4.2 (PPS4, 2009).
- 7.26 In the South East Sub-Area East Ham is the most popular destination (31.8%) followed by East Beckton (6.6%) and Green Street (2.2%). This is a reasonably strong market share for East Ham, but reflects the weak provision in East Beckton and Green Street. Residents in this Sub-Area are also travelling beyond to London West End, Canary Wharf and Ilford, for example.
- 7.27 Within the South West Sub-Area, Canning Town is attracting only 9.6% of residents for this evening leisure activity, whilst the majority of people are travelling to the West End (25.9%), Canary Wharf (12%) and Stratford (6.8%). This is consistent with our qualitative health check which identifies limitations in the quality of the evening entertainment mix of uses. A further 4.8% are travelling from the Sub-Area to East Ham, whilst 4.9% are going to the Beckton area.
- 7.28 Our analysis has demonstrated a need for a qualitative improvement for additional bar/pub activity in most parts of the Borough, within the network of higher order town centres. There does, however, need to be a clear policy decision about the extent and location of such facilities in order to prevent anti-social behaviour to the detriment of a centre. It is unlikely that any of the centres in the Borough are able to accommodate such a scale of provision leading to such problems, but this should be given due consideration as recommended in PPS4, including the need to provide facilities appealing to a wide range of age and social groups. Stratford City is, for example, providing restaurants, bars and a cinema; i.e. a mix of uses that appeal to a mix of users.

Restaurants

- 7.29 The 2007 Survey identified that 48% of respondents who visit restaurants as an evening leisure activity. The range of responses is more balanced than for pubs/clubs, with London West End having a lesser influence and localised businesses serving local needs to a greater extent. The main competing restaurant destinations outside the Borough are similar to those identified within the pub/club category and include London West End, Ilford, Canary Wharf, Wanstead, Romford and Barking (Table 7.8).

Table 7.8: Restaurant Choices

Destination	Total Survey Area	North West	North East	South East	South West
Stratford	11.7%	26.5%	9.3%	4.0%	6.5%
East Ham	13.1%	5.7%	14.7%	24.4%	6.6%
East Beckton/Beckton	4.9%	1.6%	0.6%	9.1%	11.3%
Forest Gate	4.4%	1.7%	9.3%	3.7%	0.5%
Green Street	4.0%	3.3%	7.1%	2.5%	1.4%
Canning Town	2.1%	0.8%	0.0%	1.6%	7.4%
London West End	19.2%	18.3%	18.5%	18.0%	22.6%
Ilford	10.9%	9.1%	19.6%	6.3%	4.2%
Canary Wharf	5.6%	4.9%	1.7%	7.4%	10.6%
Wanstead	3.1%	1.7%	7.2%	1.7%	0.0%
Romford	2.3%	2.5%	1.3%	2.9%	3.2%
Barking	0.9%	0.0%	0.0%	2.9%	0.9%

Source: 2007 Survey

- 7.30 In the North West Sub Area, Stratford is the most popular destination (26.5%), followed by the West End (18.3%) and Ilford (9.1%). The choices made in the North East are more balanced, although again Forest Gate is not meeting localised needs with only 9.3% of residents using the centre compared to 14.7% using East Ham, 7.1% visiting Green Street, 18.5% travelling to the West End, 19.6% using Ilford, and 7.2% using Canary Wharf. In the South East, 24.4% are visiting East Ham, but only 9.1% are using Beckton and 2.5% are visiting Green Street. In the South West, Canning Town is attracting only 7.4% of residents from the Sub Area, with others choosing Beckton (11.3%), Stratford (6.5%), East Ham (6.6%), West End (22.6%), and Canary Wharf (10.6%).

Leisure Expenditure Projections

- 7.31 The following summarises the overall growth in leisure expenditure to demonstrate the extent of growth in this sector. We have taken the base position and projected available expenditure per capita leading up to 2025 based on the population projections for the 2007 study area, and assuming an ultra long term growth rate in available expenditure of 2.1% per annum for leisure goods derived from the ultra long term growth rate figure is derived from Experian Business Strategies Retail Planner Briefing Note 7.1 (August 2009). The Experian E-marketer Report calculates annual consumer leisure expenditure¹ per person on leisure and recreation goods and services in 2008, based upon the demographic profile of the catchment area (Table 7.9).

¹ Leisure expenditure includes recreation and sporting services, cultural services, games of chance (gambling) and bars/restaurants.

Table 7.9: Per Capita Leisure Goods Expenditure (Zone 1-10 2007 Survey)

2010 (£)	2015 (£)	2020 (£)	2025 (£)
1,676	1,860	2,063	2,289

Source: Experian Business Solutions, E-Marketer 2009

- 7.32 Applying the per capita goods expenditure to the total population of the survey area, demonstrates that there is currently £575m of available leisure expenditure, which is expected to rise to £990m by 2025 (Table 7.10). This equates to a strong 72% increase in available leisure expenditure.

Table 7.10: Total Leisure Expenditure (Zone 1-10 2007 Survey)

2010 (£000)	2015 (£000)	2020 (£000)	2025 (£000)
575,041	708,203	865,930	989,704

Source: Experian Business Solutions, E-Marketer 2009

Restaurant/Café Expenditure

- 7.33 Experian also estimate that people's average likely spend on leisure goods such as eating out increases by 2.1% each year. Currently the total spend available for restaurants/cafés in Newham is £379m, increasing to £467m in 2015, rising to £572m in 2020, and £653m in 2025 as identified in Table 7.11. This is a strong level of growth (73%) and we recommend that this is directed towards town centres first in accordance with national planning policy.

Table 7.11: Restaurant / Café Expenditure Forecasts – Total Study Area

2010 (£000)	2015 (£000)	2020 (£000)	2025 (£000)
378,791	467,030	571,541	653,188

Source: Experian Business Solutions, E-Marketer 2010

Summary

- 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.
- 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.

- 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.
- 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.
- 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.

8. CONCLUSIONS AND RECOMMENDATIONS

- 8.1 The main objective of this Study is to provide up-to-date evidence that will support and underpin the Council's Local Development Framework to the standard required by National Policy. The information contained within this report will also be at the Council's disposal to assist in the future determination of relevant planning applications.
- 8.2 This section brings together the analysis of previous sections and sets out our conclusions and key recommendations. First, we review the regional positioning of the Borough and hierarchy of centres and provide an overview of national, regional and local policy objectives. Second, we conclude our overall findings in respect of each of the four Sub-Areas, and set out Key Recommendations which will underpin policy formulation and development control decisions. This will enable the local authority to 'plan for growth and change' moving forwards.

Sub-Regional Context

- 8.3 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.
- 8.4 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.
- 8.5 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.
- 8.6 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.

Policy Framework

- 8.7 The regional and local policy position for Newham is set in the context of substantial population growth and future change. There is already major development underway in preparation for the 2012 Olympic and Paralympic Games which will be retained as part of the Olympic Legacy post-2012. Alongside the Olympics, there is the anticipated evolution of Stratford into a cohesive Metropolitan Centre; the substantial urban renewal of the Lower Lea Valley and Royal Docks supported by the London Plan; and local priorities for major regeneration in the Canning Town and Forest Gate areas.
- 8.8 The Government's key objectives, published in PPS4, require regional planning bodies and LPAs to proactively plan for the network and hierarchy of centres to be resilient to future economic changes and to meet the needs of their catchments. Drawing on a sound evidence base, LPAs should identify the need for new floorspace and where necessary identify sites to accommodate identified need focussing on existing centres and areas of deprivation. Effective centre strategies should be prepared to bring forward new investment whilst maintaining and enhancing the vitality and viability of the existing network of centres.
- 8.9 The adopted Newham UDP defines the existing hierarchy of centres and policy objectives for shopping and town centres across Newham. These policies are now out of date and do not take account of the substantial level of growth planned for the Borough. The Council's LDF will replace the UDP as the relevant policy framework to effectively manage the level of anticipated growth and change over the plan period. The purpose of this Study is to provide the Council with the evidence base to inform appropriate policy recommendations for Newham to take forward through their LDF in order to meet the policy requirements of PPS4, the sub-regional objectives set out in the London Plan, and localised growth opportunities.

Quantitative Capacity Forecasts

- 8.10 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.
- 8.11 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 known 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.

- 8.12 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.
- 8.13 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 against identified impact. Nevertheless, there will be short terms consequences with East Ham particularly vulnerable to trade diversion, further indicating a need for a swift and pro-active policy approach.
- 8.14 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.

Retailing Outside Defined Town Centres

- 8.15 Throughout Newham there is pressure to increase the representation of retail and service businesses outside designated town centre boundaries, either through incremental change of use in edge of town centre/high street locations, or through proposed 'mixed use' development incorporating retail on the ground floor. In accordance with PPS4, local authorities should seek to ensure inclusive communities, meeting the needs for services and facilities in local communities, particularly in deprived areas; and Newham is one of the most deprived authorities in the UK. PPS4 is, however, clear in that it continues to support town centres first and argues against the acceptability of out of centre development where it would undermine the role and performance of the network of centres.
- 8.16 In Newham, East Ham High Street North is a good example of unplanned retail/town centre growth outside of a designated boundary which has developed to such an extent it is now irreversible and must be incorporated as an accepted area of retail activity in the Borough. It is also very difficult to advise where the Local Centre boundary should now be drawn given that the mix of retail and service uses

throughout is similar and cannot be differentiated into different roles or areas. There are, for example, no anchors and all form smaller independent units. The extent of retailing is so vast stretching north/south its designation as one Local Centre would also seem inappropriate and contrary to the definitions set out in PPS4.

- 8.17 As we have already stated earlier in this report, this example does not appear to have undermined the health of the designated Local Centre (East Ham High Street North), which has instead been 'lost' within the wider retail area. It remains busy and well used by neighbouring communities throughout the full length of High Street North. Such healthy concentrations, outside of designated town centres therefore raises the question across the Borough about why such growth and change of use from residential to retail/service uses, for example, should not be supported. We advise, however, that moving forwards in accordance with PPS4 policy should be restrictive to such growth beyond designated town centre boundaries, particularly when considering change of use of individual units and incremental growth. The Council may also facilitate the change of use from shop and service ground floor units outside of town centre boundaries back to residential on high street locations if such an opportunity arises.
- 8.18 Growth in this way, at the localised level and outside town centres, can undermine the role of the defined Local Centres which are there to serve local needs. Their positioning and health could easily be eroded through the growth of competition in out of centre locations, leading to lower visitation rates and a decline in turnover/health and eventual departure of businesses. Continued incremental growth over medium to long term time periods will blur the boundaries of centres to the detriment of the retail hierarchy. We do acknowledge, however, that there are many important and crucial Shopping Parades that do perform important functions for local communities and should be recognised and protected.
- 8.19 If policy does not tackle this moving forwards the spread of retail and service uses could undermine the designated retail hierarchy creating a 'mass' of poor quality retailing throughout the Borough rather than maintaining and enhancing their vitality and viability as encouraged in PPS4:
- Proactively plan to promote competitive town centre environments, providing consumer choice;
 - Supporting a diverse range of uses which appeal to a wide range of age and social groups;
 - Planning for a strong retail mix, meeting the requirements of the local catchment area;
 - Supporting shops, services and other important small scale economic uses (including post offices, petrol stations, village halls and public houses) in local centres; and
 - Retaining and enhancing existing markets.
- 8.20 This Study underpins the evidence base for policy formulation and also is intended to inform decisions on planning applications. In particular, the conclusions and recommendations clearly set out the

appropriate retail hierarchy and any gaps in provision and where deficiencies should be remedied through planned new centres.

- 8.21 This is particularly relevant in the Arc of Opportunity, where recommendations for new Local Centres have been put forward consistent with significant strategic change and population growth envisaged over the forthcoming LDF period. Whilst planning applications for mixed use development with ground floor retail should be considered on their own merits and in accordance with the key development control policy tests set out in PPS4, we would emphasise the importance of considering the impact on existing, committed and planned new centres in the Borough. Any new foodstore proposal designed to meet 'local needs' outside of a designated District or Town Centre would cause particular concern if the floorspace was in excess of around 300 sq m net. Meeting the needs of new communities should be planned through the LDF in accordance with PPS4, and clearly any new proposals should be considered fully and in accordance with PPS4.
- 8.22 We have provided initial commentary on the potential of acknowledging Local Shopping Parades which perform important functions in meeting local needs. The Council may also wish to consider a more detailed review of Local Shopping Parades throughout the Borough with the intention to designate and protect through policy to facilitate their continued contribution to meeting local needs.

The Leisure Sector

- 8.23 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.
- 8.24 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.
- 8.25 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.
- 8.26 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.

- 8.27 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.
- 8.28 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.

Ethnic Retailing

- 8.29 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%).

North-West Sub-Area

- 8.30 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.
- 8.31 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.
- 8.32 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.
- 8.33 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.

- 8.34 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.
- 8.35 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.
- 8.36 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.
- 8.37 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.
- 8.38 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.

- 8.39 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, 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 from new and enhanced provision through DLR investment and a subsequent growth in localised population through new residential development.
- 8.40 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.
- 8.41 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.
- 8.42 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 West Sub-Area: Key Recommendations

Stratford

- NW1. Monitor the role and positioning of **Stratford** after opening in 2011. Generally allow an 18 month – 2 year settling down period in advance of a new Household Telephone Survey to understand how shopping patterns have changed in the Borough and wider sub-region; and the implications for Stratford Town Centre;
- NW2. The **future of Stratford Town Centre** should continue to be at the forefront of policy formulation. The **forthcoming Masterplan** should be driven by the overall objective to create a cohesive town centre with strong linkages, connectivity, pedestrian circuits, and the creation of one retail destination driven by a sense of place/identity;

- NW3. The future of Stratford Town Centre should be underpinned by the provision of **complementary uses** as set out in the report 'Stratford Town Centre: The Future' (GVA Grimley, December 2008). Such uses include, for example, independent and ethnic businesses, value driven comparison retailers, a stronger convenience goods offer, and daytime and evening economy/leisure uses;
- NW4. Changes to **shopping frontages** in Stratford, following Stratford City, should be reviewed following development and continued monitoring of the role, function and impact of the scheme, and the performance of different areas. We understand that boundary recommendations will be incorporated in the Masterplanning process;
- NW5. In respect of **comparison goods** we conclude that there is capacity to support a scheme in Stratford Town Centre, perhaps through the redevelopment of the Stratford Centre, in addition to Stratford City. We consider this should be encouraged and facilitated through the Masterplanning process. A quantitative update should be undertaken 18 months – 2 years following the opening of Stratford City to assess the levels of turnover, claw-back and future need, to ensure the policy position remains up-to-date and robust;
- NW6. Based on qualitative and quantitative factors, there is a current need for additional 'main food' **convenience goods** floorspace in the Sub-Area, i.e. larger foodstores focused in Stratford. Nevertheless, this need will be met by Stratford City and a strong uplift in convenience floorspace (**Waitrose/M&S** – c.6,379 sq m net food);
- NW7. Appendix 10 demonstrates that by 2015, following Stratford City, there is a deficiency in expenditure to support additional convenience goods floorspace. This is, however, based on current market shares, and new development will **stem the leakage** from this Sub-Area – particularly to Bromley-by-Bow, Leyton, Leytonstone, Gallions Reach and Claps Gate – and meet the qualitative need identified. The Council should monitor the role and performance of main food superstore provision in the Sub-Area following the opening of Stratford together with Waitrose and M&S;
- NW8. In the meantime, we consider there is a current opportunity to also redevelop **the Sainsbury's foodstore** in the town centre or improve the overall offer in the existing town centre in addition to commitments. The scale of such development should be carefully reviewed in terms of impact in accordance with PPS4 and other planning considerations;
- NW9. Within Newham, **larger foodstore development** in Stratford is most likely to **impact** upon Green Street and East Beckton District Centres. The Asda in East Beckton is some distance away and claw-back would assist in achieving more sustainable shopping patterns, but the impact of foodstore proposals on Green Street should be carefully reviewed. The network of small local centres within the Sub-Area are unlikely to be impacted upon given their localised small-scale 'top up' facilities, although this should be assessed in accordance with PPS4 during the application process;

- NW10. Policy and strategies should facilitate and encourage the **local independent** convenience floorspace in Stratford town centre to continue to meet the needs of existing local communities, through the market, in-shops or smaller units supplementary to the major foodstore operators;

Other

- NW11. The Council should consider allocating a Local Centre at **Maryland/Leytonstone Road** given current usage levels for independent and ethnic retailers, the gap in the retail hierarchy in this general location (in the north of the Sub-Area), the proposed Crossrail Station and the existing commitment for additional convenience goods floorspace;
- NW12. Aside from Maryland/Leytonstone Road, 'Urban Newham' is well provided for in terms of the **network of centres** and coverage and we don't recommend any new centres elsewhere within this Sub-Area;
- NW13. Retain Plaistow Road and Terrace Road as Local Centres. Extend Church Street and Vicarage Lane E15 to incorporate adjoining retail uses to enhance and consolidate the local 'town centre' offer. Consideration of re-designating Plaistow High Street as a 'Protected Local Shopping Parade'.
- NW14. The area of retailing on **High Street in Stratford** should be monitored following the shift in retail activity as a consequence of Stratford City. The introduction of a **new DLR station – 'Stratford High Street'** may justify a future policy framework to promote and encourage specific retailing uses to build on the new station and to invest in and promote this part of the town centre which will benefit from an increase in footfall;
- NW15. The Council should monitor and input into the **formulation of policy for the Olympic Park** area (within the Arc of Opportunity) and in particular the Legacy proposals incorporating the creation of sustainable communities and a corresponding network of local centres. Our general recommendation at this stage is for local level provision, i.e. not retail led but of a scale suitable to meet the needs of new local residential/employment communities;
- NW16. Monitor the need for further **local/district centres within the 'Arc of Opportunity'**, which might arise alongside residential/mixed use developments and/or the new DLR extension stations. Floorspace should be local in nature meeting the needs arising from development only. There is the potential for some provision at West Ham and Abbey Road given the new DLR Stations and associated enhanced activity levels/residential development. Given the dense built up urban areas there is a sufficient catchment to support some localised growth, although applications should consider policy tests set out in PPS4 particularly in relation to impact;
- NW17. Overall, Stratford is likely to rise to one of the major Metropolitan Centres in London serving the needs of major comparison goods higher end retailing. Whilst the Town Centre Strategy should focus specifically on complementary retail and town centre uses, future policy and strategy

formulation should facilitate as far as possible independent and ethnic retail provision in Stratford to also meet the needs of the existing local community, and to maintain diversity, character and consumer choice;

NW18. In terms of boundary designations, extend those for Church Street and Vicarage Lane E15; retain Plaistow Road, Terrace Road, and Plaistow High Street (See Section 3).

North-East Sub-Area

- 8.43 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.
- 8.44 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.
- 8.45 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 sized 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.
- 8.46 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.
- 8.47 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 [we have discussed 'controlling the spread of retail uses'

earlier in this section]; 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.

- 8.48 The future policy approach 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.
- 8.49 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.

North East Sub-Area: Key Recommendations

Forest Gate

- NE1. The SPD should build on the benefits of a **strong residential catchment** area serving the north of the Borough, with Forest Gate separated somewhat from catchment areas serving other centres in the network (Plan 4);
- NE2. The strategy should build on the currently **strong role of independent food and non-food retailers** in the centre, particularly in the immediate catchment area (Core Zone 8A) (fourth and third most popular centre in the Borough for such uses). The primary catchment for both is Core Zone 8A, and they have a negligible influence beyond;
- NE3. Promote the **inclusion of ethnic retailers** in Forest Gate, building on the already strong food sector and monitoring the weaker non-food sector. Ensure inclusion in the consultation process given the level of representation;
- NE4. Visitors to Forest Gate like the 'pleasant environment' and 'family friendly surroundings', but there is a particularly low representation of **cafes and daytime eating/drinking destinations**. Local shoppers would like to see a better variety of shops, a cleaner and safer environment, more family friendly places to eat and drink and more leisure facilities. This would considerably enhance the vitality of the centre, and flexibility within frontages should be reviewed accordingly, whilst protecting the overall A1 retail function;

- NE5. Promote an increase in **evening entertainment** destinations in Forest Gate, primarily in the form of restaurants, but consideration of pubs/wine bars if managed and located appropriately;
- NE6. There is an over-concentration of **betting shops**, although there is generally a market saturation point which should regulate further introduction of new businesses. Nevertheless, the Council should encourage change of use away from betting shops provided it does not result in the introduction of further A5 Uses.
- NE7. Specifically restrict the infiltration of further **fast-food take-aways** (Use Class A5) within the retail frontages. Such a policy will prevent against undesirable uses and a decline in the overall offer, and will facilitate and assist in the growth of more desirable Use Class A operators. There is already an over-concentration and continued growth in this sector is likely unless controlled through policy;
- NE8. The extent and strength of Forest Gate's catchment area for **food shopping** (both main and independent retailers) is significantly more limited than the other five larger centres in the Borough. Forest Gate should seek to **consolidate its catchment** and stem the flow of leakage from the Sub-Area through the introduction of new anchor foodstore;
- NE9. There are three small scale convenience goods retail commitments in the North East Sub-Area which we consider are unlikely to impact significantly in enhancing trade retention levels. Following these the assessment does not identify any **capacity** for additional convenience goods floorspace over the LDF period – based on current market share. This Sub-Area lies entirely with 'Urban Newham' and is not expected to experience significant population growth like elsewhere in the Borough;
- NE10. Nevertheless, we consider there is **a qualitative need for additional convenience goods floorspace** over the forthcoming LDF period, based on the identified levels of leakage from the Sub-Area, the qualitative deficiencies within the Sub-Area and in particular Forest Gate, and the introduction of two new Crossrail stations (Forest Gate and Manor Park). Such floorspace should be directed to Forest Gate District Centre, Manor Park Local Centre and East Ham High Street North and well integrated with existing frontages. Our assessment has identified considerable capacity following an uplift in market share following substantial qualitative improvements to the Borough offer;
- NE11. In terms of **comparison goods**, Forest Gate has one of the weakest performances in the Borough, only achieving a stronger turnover than Canning Town. Its core catchment, in which it has a low market share, is identified as Zone 8 (adjoining the Sub-Area boundary) and Zone 9; with Zone 10 residents travelling primarily to East Beckton and East Ham, as well as Ilford and Barking beyond the Borough. It is unlikely that Forest Gate could – or should – compete with such centres, but policy should aim to protect key attractors and multiple operators within designated frontages, in order to maintain and possibly enhance the overall attraction of the centre;

- NE12. We recommend that policy seeks to **consolidate** the comparison goods offer, extending it where possible through redevelopment, protect existing frontages from dilution, and promote and facilitate infill redevelopment/small-scale development opportunities where the physical opportunities arise, and as identified in the SPD. We do not recommend any immediate alteration to the **Primary Shopping Area or Town Centre Boundary** which together incorporate the key identified regeneration opportunities with which to enhance the vitality and viability of the centre. These should be facilitated and prioritised as sequential sites in the first instance being well integrated and adjoining the PSA, but the Council might consider favourably further well integrated edge-of-centre sites provided proposals comply with the key PPS4 policy tests and enhance the overall vitality and viability of the centre;
- NE13. There are no major opportunities to promote a larger scale scheme, and this Sub-Area is unlikely to meet the needs of major comparison retailing over the LDF period, particularly given its level in the hierarchy and the future influence of Stratford City nearby, as well as Ilford on the same Crossrail line. Nevertheless, such a function should be encouraged in order to maintain overall town centre market share. This is likely to be a challenge over the LDF period and the Council should be particularly pro-active in identifying and facilitating opportunities;

Other

- NE14. Based on the established 'Urban Newham' serving this Sub-Area and the absence of any major population growth areas, we **do not consider there is a need to identify any new centres**. There is an identified 'gap' in the hierarchy in the centre of the Sub-Area (based on 500metre walk-in distances), but this lies between Forest Gate and Green Street, is predominantly residential, and there are no physical opportunities to create a new centre. An enhancement to the retail offer within the existing centres in the Sub-Area should satisfactorily meet local needs, together with Green Street just south of the Sub-Area boundary;
- NE15. Policy should support **enhancement to the overall environment**, supporting and developing existing recommendations in the SPD. This issue is raised by both visitors and businesses;
- NE16. The Council should explore the **relationship between rental levels and performance** of retail floorspace in Forest Gate. Our analysis identified a relatively strong proportion of businesses that mentioned they might relocate from the centre, which is perhaps consistent with our findings in respect of weaker turnover performance, particularly in the non-food sector. Stratford already has a reasonable influence in Zone 9 and the impact of Stratford City should be monitored;
- NE17. Any future strategy should develop and facilitate opportunities arising from the new **Crossrail station at Forest Gate and Manor Park**, focusing in particular on opportunities for investment, enhancement of the surrounding area and the introduction of new retail/town centre/eating & drinking facilities;

- NE18. **Manor Park Local Centre** is one of few centres, aside from the six main centres, to be mentioned by respondents when asked about local independent shops and ethnic food and non-food retailers. It is clearly performing an important function, which is not surprising given its location to the far north of the Borough and absence of any provision beyond. This role should be promoted, protected and monitored, and the new Crossrail station will contribute positively to general activity levels;
- NE19. 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;
- NE20. The Council should be **pro-active** now in identifying physical/environmental opportunities for enhancement; Manor Park is likely to perform a strategic role for the far north east of the Borough, and a revised Local Centre boundary should be considered, incorporating the Crossrail Station or area around it. We recommend no change to the boundary for East Ham High Street North.

South-West Sub-Area

- 8.50 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 main 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.
- 8.51 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%.
- 8.52 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.
- 8.53 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.

- 8.54 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.
- 8.55 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).
- 8.56 Like Stratford in some ways, 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.
- 8.57 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.
- 8.58 The findings from our analysis supports the convenience and comparison development proposals in Canning Town in broad retail terms, although clearly there are many other planning considerations. 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.

- 8.59 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.
- 8.60 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 supports 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.
- 8.61 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.
- 8.62 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.
- 8.63 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 do 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.
- 8.64 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 West Sub-Area: Key Recommendations

Canning Town

- SW1. Policy should aim to claw back convenience goods expenditure and **achieve a greater retention of spend** and the creation of sustainable travel patterns. At present the foodstores in Canning Town are trading well, but there is significant leakage of trade to East Beckton, Claps Gate, Gallions Reach, Canary Wharf, Barking and the Isle of Dogs;
- SW2. The **food shopping needs** of the local community/core catchment are not being met by existing provision, and the significant growth in population will only exacerbate this issue. There is a strong qualitative need for a new foodstore in Canning Town, and we recommend the Council facilitates such an addition to the centre. Scenario testing has demonstrated the ability to support substantial new convenience goods floorspace in the Borough;
- SW3. A new foodstore in Canning Town would need to be of a **scale** and quality to compete effectively with the main food superstore competition in the surrounding sub-region, in order to provide a key attractor, create the critical mass, and change people's shopping patterns;
- SW4. The GVA Grimley (2007) Retail Strategy and Vision for Canning Town and Custom House tested a **6,000 sq m net foodstore in Canning Town District Centre**. The conclusions of that analysis are consistent with the findings from this study, and we conclude that Canning Town could support a foodstore of this scale without impacting upon the network of town centres in the Borough. Any application should carefully consider the retail policy position as required in PPS4;
- SW5. The Council should support the **retention of the existing foodstore offer** and support the qualitative improvement through refurbishment/redevelopment, for example. Any redevelopment should, however, be carefully considered in terms of scale and impact; i.e. we would question whether Canning Town could support two major foodstores. Any redevelopment should be integrated effectively with the Primary Shopping Area;
- SW6. Likewise, Canning Town has a **limited comparison goods offer**, particularly in the clothing/footwear sectors. The Sub-Area consequently experiences a significant leakage of trade, with the catchment population travelling to Beckton, Stratford, East Ham, Lakeside, and London West End primarily. We recommend the Council continues to support the SPD

- objectives (in Areas 1 and 7) which would claw back lost comparison goods trade to Canning Town;
- SW7. The **comparison goods** economic projections identify a deficiency in spend to support additional floorspace, but like convenience goods this is based on current market share and leakage of trade. We recommend the Council supports a new Stratford Town Centre scheme as well as the scale of comparison proposals tested in the 2007 GVA Grimley Canning Town Study.
- SW8. Recommend Policy Support for Area 7, but this should be driven by **substantial improvements to the linkages** with existing shopping frontages and redeveloped Rathbone Market in order to enhance the town centre, rather than divert trade and detract from it. Pedestrian circulation and linkages are crucial;
- SW9. The shopping frontages within the Primary Shopping Area to the east of the town centre on **Barking Road** (between Rathbone Market and Beckton Road) should be focused on in policy. These frontages are currently performing well, but lie outside the SPD site areas;
- SW10. The implementation of Area 7 will **pull and restructure the centre**, with possible detrimental impact to these existing frontages in the east of the centre, although we acknowledge that the redevelopment of Rathbone Market will underpin the current Barking Road High Street. The Council should be **proactive** now in ensuring the continued health of these frontages adjoining Rathbone Market, which are currently excluded from any policy framework or town centre strategy;
- SW11. Alongside Area 7, for example, the existing frontages on Barking Road could be a future focus of **complementary town centre uses** including eating/drinking, banks and financial services, and a more flexible mix of retail services. This would contribute to the overall attraction of the centre together with a newly developed Rathbone Market;
- SW12. The **town centre boundary** currently includes the **Manor Road Retail Park**, although this is somewhat separate from the core retail area, restricted from integration by Manor Road (A1011) and the A13. Given the policy direction of the SPD, and support for Area 7 and the redevelopment of Rathbone Market, we recommend the town centre boundary is re-drawn to exclude the retail park;
- SW13. Nevertheless, it does play an important role in the overall retail offer of Canning Town and we recommend policy support is provided through a **special policy designation**, recognising its role as an important retail area, but restricting the 'class of goods';
- SW14. Given competition at Beckton and acknowledging the current investment at Manor Road Retail Park, the Council should **encourage the qualitative enhancement/redevelopment** of these units to meet commercial requirements if proposals come forwards. The Class of Goods should be controlled, however, so as not to impact on the town centre and aspirations for growth, including a new foodstore, in Area 7;

- SW15. The town centre boundary should be re-drawn accordingly, incorporating those units on Barking Road and Rathbone Market only;
- SW16. It is premature to include **SPD Area 7** within a revised town centre boundary, but it should be included as **special policy allocation** to prioritise strategic retail/town centre growth, setting out development thresholds;
- SW17. Canning Town should be the focus of retail and town centre led development in the Sub-Area over the forthcoming LDF period. Canning Town and Stratford should be identified as the only two **major retail led growth areas** in the Borough, focused on their town centre status, and the evidence of this analysis supports this position over the LDF period;
- SW18. 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.

Other

- SW19. The redevelopment and enhancement of Freemasons Road should be supported in policy given the weak network of centres in this part of the Borough, and the envisaged growth in population and the number of visitors to EXCEL. Freemasons Road should form the focus of enhanced local shopping facilities, whilst Cundy Road could be re-classified to a Protected Local Shopping Frontage;
- SW20. Maintain North Woolwich as a Local Centre, but monitor change and growth in the catchment moving forwards. New development might introduce new Local Centres in this part of the Borough which is in need of improved local facilities; if such change does occur the retail hierarchy in this area should be reviewed;
- SW21. Abbey Arms is the largest Local Centre in the Borough and performs a strong role with a reliant catchment area. Newham should review the policy wording to protect the A1 shopping function given the growth in service uses, and a 50% representation from service businesses. We do not recommend any extension to the boundary as discussed in Section 3;
- SW22. In terms of boundaries, Freemasons Road should be redeveloped in accordance with the Canning Town and Custom House SPD; and Cundy Road should retain the existing boundary designation.
- SW23. The SW Sub-Area is set to experience significant population and employment growth throughout the Arc of Opportunity, but we do not recommend these areas are identified for retail/town centre led growth; i.e. **policy should not identify new centres** or thresholds for floorspace elsewhere in the Sub-Area;

- SW24. Nevertheless, **additional retail and town centre facilities** may be required within this Sub Area but outside of the existing network of centres. This will not form retail led development, however, and new retail facilities should only be required to serve the new communities and employment numbers;
- SW25. We recommend there is a case for **one to two new Local Centres** in the far south of the Borough to the west of North Woolwich, but this should only come forward as supporting floorspace. It is not possible to provide an indication of location at the current time, and they may never come forward. If it does, such development should be localised in nature serving the immediate residential/employment catchment for everyday and small-scale shopping/service requirements.

South-East Sub-Area

- 8.65 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.
- 8.66 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.
- 8.67 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.
- 8.68 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.
- 8.69 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 can be overcome; and we have been aspirational in identifying a large redevelopment site boundary which the Council should investigate with Sainsbury's further.
- 8.70 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. For reasons confirmed later in this section we do not recommend the further expansion of the town centre boundary.
- 8.71 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.
- 8.72 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.
- 8.73 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.
- 8.74 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 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.

- 8.75 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.
- 8.76 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.
- 8.77 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.

South East Sub-Area: Key Recommendations

East Ham

- SE1. Monitor the **impact of Stratford City** on East Ham – the most vulnerable centre in the Borough based on the scale of the centre and comparison goods offer. East Ham already faces strong competition from out of centre high street retail warehousing in Beckton, which achieves a stronger market share in Zone 4 and 11, and a similar market share in Zone 3. Stratford has a

limited influence in Zones 3, 4, 5 and 11 but Stratford City is likely to erode East Ham's market share further within this core catchment;

- SE2. Policy should protect Use Class A1 in the **primary shopping frontages** in East Ham, and should consolidate the centre rather than grow and elongate it any further. Given the structure of the centre, such growth is likely to dilute the centre's overall offer, critical mass and therefore attraction;
- SE3. The Council should encourage the representation of **value driven multiple comparison retailers** which will provide key attractors and help underpin the health of the centre; offering a differentiated offer to Stratford City. New Look has recently left and strategies should prevent any further departures. The Primark extension (under construction) will provide a considerable enhancement to the centre with associated footfall, acting as a strong anchor with a significant market positioning at the current time. This may generate renewed interest from similar retailers and should be encouraged;
- SE4. We recommend an **SPD** for East Ham, like that prepared for Forest Gate, to ensure a proactive approach to plan for the centre in light of Stratford City opening within the next two years. Some key concerns in respect of the health of the centre are arising already from the health check analysis and these should be addressed directly and swiftly;
- SE5. The policy approach to East Ham should build on the **strong role of independent retailers**, being the most popular centre in the Borough for non-food independent retailers and the joint top centre alongside Green Street for food independent retailers;
- SE6. The role of independent and ethnic retailers in East Ham is strong and should help underpin the **differentiated retail offer to Stratford City** in the future, whilst serving the needs of the strong ethnic demographics in this eastern part of the Borough. Policy formulation and strategies should promote the **inclusion of ethnic retailers** in East Ham given this is the second most popular centre for such uses in the Borough, and business involvement in the LDF consultation process should be encouraged;
- SE7. The Council should **encourage the qualitative enhancement of main foodstores** in East Ham in order to enhance the overall attraction and mix of retail offer alongside the already strong mix of independent and ethnic retailers. There is some leakage to nearby out-of-centre foodstores. Any proposals would need to consider the impact on Green Street in particular, and more importantly should be seamlessly integrated with the Primary Shopping Area to ensure linked trips;
- SE8. Policy should encourage new daytime and evening **eating and drinking destinations** to enhance the vitality of the centre. Primary shopping frontages should be protected for Use Class A1 retailers, but some level of flexibility should be allowed, whilst preventing a further increase in Use Class A5 fast food take-aways in the Primary Shopping Area;

- SE9. **Key strengths** in East Ham, that policy should build on, include the high PTAL rating, the role of independent and ethnic retailers, the role of convenience goods floorspace, the presence of the market, and the (vulnerable) mix of multiple retailers and independent retailers;
- SE10. The **key risks** which policy should address are the vulnerability of multiple comparison goods retailing; the qualitative deficiencies in major convenience goods foodstores; the role of Stratford City and Beckton as dominant retail centres; the weak daytime eating/drinking facilities; the weak evening economy; the high crime rate; and business interest in relocating to Stratford;
- SE11. Policy should continue to facilitate investment in the environment and the ease of pedestrian circulation around the centre. We have identified a strategic redevelopment site incorporating the market and Sainsbury's, and despite complex land ownership issues, the Council should aim to facilitate the comprehensive redevelopment to incorporate a new foodstore and market.

Green Street

- SE12. The role of **convenience goods**, both of multiple and independent retailers is a key strength in Green Street and should be encouraged over the forthcoming LDF period. Green Street is the most cited centre in the Borough for independent food retailers;
- SE13. Our assessment has identified some capacity for additional convenience goods floorspace within the Borough as well as some leakage beyond the Borough to Barking. Green Street should be amongst the priority locations to accommodate the need arising;
- SE14. The centre has a **strong convenience goods market share** in Core Zones 3 and 5, but also within Zones 6 and 9. If opportunities arise, new or redeveloped floorspace should be encouraged provided the proposals accord with PPS4 and are well integrated with the Primary Shopping Area to ensure linked trips to the benefit of the town centre;
- SE15. Green Street is by far the most **popular** destination in the Borough for **ethnic food and non-food products**, offering a vast range and mix of food and non-food retailers. The involvement of ethnic businesses in the LDF consultation process should be encouraged given the dominant role of this type of retailing in the centre. The catchment area stretches across the majority of the Survey Area (Plan 3) demonstrating the significance of influence;
- SE16. Green Street has experienced a **marginal increase in vacant units**, and this, together with the function of the centre, the core attractions, and the current composition we do not recommend the centre boundary is extended further;
- SE17. We recommend that proposals for the redevelopment of **Queens Market** to the south of the centre, and the commitment for the new shopping mall in the north of the Borough should continue to be encouraged. Together these will provide important key anchors at either end of the centre facilitating footfall throughout, although we understand the shopping mall consent is near to expiring and unlikely to come forward in the current form;

- SE18. **The new Mall** would enhance the currently weak comparison goods retail offer, and we recommend the role of the centre is monitored once implemented. The scale is relatively modest, and whilst it will effectively contribute to the offer of the district centre and will have some impact on shopping patterns, it is unlikely to result in a significant uplift in market share. Nevertheless, it will be a good addition to the mix of the retail offer, and likely improve one of the weaker elements in the centre;
- SE19. Policy should promote the range and mix of **daytime and evening eating and drinking destinations**. The current provision is particularly weak detracting from the overall visitor experience and stay times;
- SE20. Policy should control the further infiltration of **fast-food take-aways**; on the basis that there is already an over-concentration, and further growth will impact on the diversity in the centre to its detriment.

Beckton

- SE21. Revise the **boundary** for East Beckton district centre to focus only on the existing provision. This provides the Council with greater control over development proposals and will ensure applicants comply with the stringent tests set out in PPS4. This will protect the existing network of centres within the hierarchy. The aim to consolidate in the short term should run in parallel with delivering policy priorities elsewhere in the Borough, such as Stratford and Canning Town, for example;
- SE22. Together, however, the Beckton area [Sainsbury's, Claps Gate Lane; Tesco Extra, Gallions Reach, and Asda, East Beckton District Centre] has the **strongest level of convenience goods floorspace** and the strongest influence on convenience goods shopping patterns in the Borough. Combined, the foodstores draw a significant level of expenditure from throughout the Borough. We recommend the Council acknowledges retailing in the Beckton area [including the three major foodstores and retail warehousing at Beckton Retail Park; Gallions Reach, Beckton; Gateway Retail Park, Beckton; and the Triangle Retail Park] as an important contributor to the overall Borough retail offer and should **aim to develop a robust and complementary policy position moving forwards**;
- SE23. The Sub-Area catchment is somewhat constrained by industrial land to the east, and the river and industrial land to the south and whilst the **performance of each store** is strong, it is on average below expected company average levels. We do not consider there is a need for additional convenience goods floorspace in the Beckton area, and any out-of-centre proposals and an increase in 'critical mass' would impact on the performance of nearby town centres, notably East Beckton, East Ham and Green Street;
- SE24. Positioned in Urban Newham with no major population growth areas or major transport improvements/new stations, and given the apparent over-provision of floorspace at the current time, there is an **absence of key drivers for change or growth** in respect of convenience

goods. Our assessment has consequently identified no need for additional convenience goods floorspace in this Sub-Area, however, we do consider there is the potential to redevelop some of this existing retail/car parking space to achieve more modern and efficient formats rather than additional retail floorspace. We recommend this is brought forward through a planned policy framework forming part of the LDF;

- SE25. The Beckton area is the most dominant retail location for **comparison goods** in the Borough at the current time, achieving a strong market share in most Zones. This is likely to change somewhat following the opening of Stratford City and later, Canning Town, and we recommend that there is no further growth in 'high street' out-of-centre retailing in Beckton until the effects of Stratford City are understood or an appropriate strategy is in place to define the future of retailing in Beckton;
- SE26. Stratford City is the key priority for growth and change in the Borough and should be protected as such. **Overdevelopment** at Beckton in its current form could lead to performance challenges in the future as Stratford substantially extends its area of influence, potentially leading to closures and vacant warehouses at Beckton in the short to medium term;
- SE27. Given significant enhancements to retailing elsewhere in the Borough and some identified weaknesses in terms of ageing retail space and vacancies in Beckton, we consider this 'area' should form the focus of a strategic review through the formulation of a **Masterplan**. In particular, it should consider how Beckton can contribute to the wider Borough network of retail facilities and assist trade retention in the Borough whilst not moving towards continued unplanned growth in retail warehousing activity;
- SE28. The area attracts a strong shopper inflow from the Borough and beyond and we recommend it should be acknowledged as a key investment and asset in the Borough. Only at the 'Masterplanning' stage do we recommend the position and potential **evolution of 'centres'** be considered.

Other

- SE29. The hierarchy analysis demonstrates clear gaps (based on 500 metre walk-in distances) to the east and west of East Beckton within the Sub-Area. Nevertheless, both of these are low density with the eastern area being predominantly industrial in nature, and **do not justify the creation of new centres**;
- SE30. There is no requirement to identify any new centres in the Sub-Area to meet new needs arising given the absence of large scale strategic population growth areas, and no opportunities arising from infrastructure enhancements;
- SE31. There are no retail/town centre commitments in the Sub-Area of a scale or mix that would justify the designation of a new centre, and no major transport enhancements;

- SE32. The local centres of Boleyn, Greengate, East Ham High Street South, and Vicarage Lane were not cited in the results of the survey work, demonstrating their limited offer and small catchment areas. The mix of uses in these four centres should be **audited and monitored** annually in order to fully understand their function and health, and to assist in planning to meet the needs of the local catchments in the future;
- SE33. Greengate, Boleyn and East Ham High Street South are all designated Local Centres which should be extended to incorporate some adjacent and important retail / service businesses (See Section 3). Vicarage Lane E6 lies within the catchment of East Ham High Street South and is small in scale with no opportunity for growth; as such Newham could consider a re-classification to a Protected Local Shopping Parade.

Monitoring

- 8.78 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.