

Retail and Leisure Study 2022

London Borough of Newham

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1. Introduction

- 1.1 Urban Shape have been instructed by the London Borough of Newham (LB Newham) to undertake a Retail and Leisure Study. The previous evidence base is now out-of-date in light of recent planning reform, continued economic fluctuations, and the fast paced evolution of the high street. It is timely to revisit and refresh the borough's retail and town centre strategy, and this up-to-date assessment forms a key part of the evidence base in support of the new Local Plan.
- 1.2 This study comes at a pivotal time for the high street, with the retail and leisure sector undergoing a period of unprecedented change. Since the publication of the previous Town Centre and Retail Study Update (2016), town centres have had to evolve to become more than simply a place to shop, presenting themselves as multi-purpose 'destinations'. For many this is work in progress. Key contributory factors to this evolution have included the continued rise of online shopping and home delivery dining, and ongoing economic uncertainty triggered by Brexit and now the Covid-19 global health pandemic. There is much optimism for the future of our high streets, but the need for a robust town centre strategy is more crucial now than ever.
- 1.3 This study provides Newham with an up-to-date and comprehensive understanding of the current health and performance of the retail and leisure offer within the existing network of town centres, sets out current and future needs for additional floorspace to the period 2038, and details robust strategic and detailed planning policy recommendations. The study meets the policy requirements of the NPPF and PPG in the preparation of the Council's development plan.
- 1.4 Our terms of reference are to:
- Establish the extent to which the current retail and leisure provision in the borough satisfies the level and nature of consumer demand within the catchment – both qualitatively and quantitatively;
 - Identify the scale and nature of additional convenience and comparison retail provision that may be appropriate across the borough to the period 2038, taking into consideration changes to population and forecast retail expenditure;
 - Assess the scope for new retail and leisure development and the potential to accommodate this within the borough through a recommended town centre strategy;
 - Assess the appropriateness of the existing development plan policy approach for retail and main town centre uses across the Borough in order to inform emerging policies for the new Local Plan.
- 1.5 In addition to on-site and desk-based research, this report is informed by a new and up-to-date Household Telephone Survey covering 1,200 households across 12 survey zones (Plan 1). Urban Shape designed the survey questionnaire in consultation with LB Newham and NEMS Market Research who undertook the interviewing and data processing in November/December 2021. The survey area is consistent with that used to inform the previous Retail and Leisure Studies undertaken in 2010 and 2016, enabling direct comparisons to be made and trends identified.



Report Structure

1.6 The Retail and Leisure Study is structured as follows:

- **Section 2** summarises the national and local planning policies relevant to retail and town centres across LB Newham, and discusses recent legislative changes to the planning system.
- **Section 3** considers the national context in terms of economic and sectoral trends.
- **Section 4** considers the wider sub-regional context, analysing shopping patterns and market share across LB Newham and the wider sub-region, and providing comparisons with previous evidence base studies in order to identify trends.
- **Section 5-10** provides detailed town centre health checks of the 6 higher order town centres in LB Newham, and the wider Beckton area which has a strong representation of retail parks:
 - Stratford Metropolitan Town Centre;
 - East Ham Major Town Centre;
 - Forest Gate District Centre;
 - Canning Town District Centre;
 - Green Street District Centre;
 - East Beckton District Centre and the wider Beckton area.
- **Section 11** considers the network of existing, emerging and planned local centres across the borough, including a broad overview of mix and composition, geographic spread, and the identification of gaps in provision across the borough;
- **Section 12** sets out the quantitative 'need' for additional convenience and comparison goods retail floorspace to the period 2038;
- **Section 13** provides a detailed review of commercial leisure floorspace and sets out future need for this town centre use;
- **Section 14** draws the analysis together and set outs our conclusions and recommendations in respect of the current health and composition of the borough's main town centres, the need and opportunities for further growth and/or change, and the robustness of retail and town centre policies.



2. Policy Framework and Legislative Change

2.1 In this section, we summarise the points of relevance from national and local planning policy, which provide the context and framework for the remainder of this study. Since September 2020, there have been sweeping amendments to planning legislation which have direct and significant implications for emerging development plans and detailed development management policies. This section notes the most recent publication of the NPPF, and outlines the relevant key changes to the Use Classes Order and Permitted Development Rights.

National Planning Policy Framework (July 2021)

2.2 The Government published the new version of the NPPF in July 2021, confirming in a statement that the intention is to 'place greater emphasis on beauty, place-making, the environment, sustainable development and underlines the importance of local design codes'. There is no change to retail and town centre policy guidance, which continues to ensure the vitality of town centres, placing them at the heart of their communities, and encouraging a positive approach to their growth, management and adaptation.

2.3 In order to be considered 'sound', Local Plans should be positively prepared, justified, deliverable and consistent with national policy. The NPPF is a material consideration in planning decisions.

2.4 Paragraph 53 and 54 of the newly published NPPF provides new guidance of the use of Article 4 Directions, in the context of newly introduced Permitted Development. Changes to planning legislation, and the reasoning behind these new NPPF paragraphs, is discussed in more detail later in this section, but we quote paragraph 53 and 54 of the NPPF as follows:

"53. The use of Article 4 directions to remove national permitted development rights should:

- where they relate to change from non-residential use to residential use, be limited to situations where an Article 4 direction is necessary to avoid wholly unacceptable adverse impacts (this could include the loss of the essential core of a primary shopping area which would seriously undermine its vitality and viability, but would be very unlikely to extend to the whole of a town centre)
- in other cases, be limited to situations where an Article 4 direction is necessary to protect local amenity or the well-being of the area (this could include the use of Article 4 directions to require planning permission for the demolition of local facilities)
- in all cases, be based on robust evidence, and apply to the smallest geographical area possible.

54. Similarly, planning conditions should not be used to restrict national permitted development rights unless there is clear justification to do so."

2.5 Section 7 seeks to ensure the vitality of town centres, emphasising that planning policies and decisions should support the role that town centres play at the heart of local communities, with a positive approach taken to their growth, management and adaptation.



- 2.6 Section 7 emphasises that planning policies are encouraged to seek a series of outcomes relating to the long-term vitality and viability of the hierarchy of town centres, the extent of primary shopping areas and the location of sufficient development opportunity sites. Local authorities are encouraged to define a network and hierarchy of town centres and to promote their long-term vitality and viability, facilitating them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries and reflecting their distinctive characters. The NPPF states that planning policies should also recognise the benefits of residential development and town centre living in ensuring the vitality of centres.
- 2.7 In respect of Development Management, paragraph 87-90 of the NPPF (as revised) clearly sets out policy requirements in respect of the sequential impact tests, concluding that where an application fails to satisfy the sequential test or is likely to have a significant adverse impact, it should be refused.
- 2.8 Section 5, 7 and 8 of the NPPF sets clear guidance as to how planning policy can and should positively support neighbourhoods across LB Newham. Priorities include promoting social interaction, including opportunities for meetings between people who might not otherwise come into contact with each other; enabling and supporting healthy lifestyles; and providing social, recreational and cultural facilities and services the community needs (such as local shops, meeting places, sports venues, open space, cultural buildings, public houses and places of worship) and other local services. New residential developments should be supported by the necessary infrastructure and facilities (Para.73).

Planning Practice Guidance (PPG) (2014)

- 2.9 In March 2014 the Department for Communities and Local Government (DCLG) launched online Planning Practice Guidance (PPG). Town centres and retail guidance was last updated in September 2020.
- 2.10 Although it does not constitute a statement of Government policy, it provides technical guidance on how to prepare a robust evidence base and how to assess the impact of proposals for main town centre uses. The web-based resource also provides guidance on how to assess and plan to meet the needs of main town centre uses in full through the production of a positive vision or strategy for town centres.
- 2.11 The guidance provides additional detail on applying the sequential and impact test, and whilst the NPPF has removed reference to shopping 'frontages', the PPG confirms that authorities may, where appropriate, wish to define primary and secondary retail frontages where their use can be justified in supporting the vitality and viability of particular centres. These frontage allocations would be in addition to Primary Shopping Areas.
- 2.12 The PPG confirms that the impact test only applies to proposals exceeding 2,500 square metres gross of floorspace, unless a different locally appropriate threshold is set by the local planning authority.

Development Plan

London Plan (March 2021)

- 2.13 In March 2021, the Mayor adopted the London Plan. It is a strategic spatial planning document setting the London wide context within which individual London Borough's must set their local



planning policies. The London Plan forms part of the Development Plan for the purposes of development control and planning decisions, and local policy frameworks must be 'in general conformity'.

i) Good Growth and Opportunity Areas

- 2.14 The concept of 'Good Growth' – growth that is socially and economically inclusive and environmentally sustainable – underpins the Plan and ensures a focus on sustainable development. In 'Planning for Good Growth', paragraph 1.0.10 confirms that planning for mixed-use developments in all parts of London will spread the success of London's economy and create stronger communities where everyone feels welcome.
- 2.16 Policy GG1 seeks to build strong and inclusive communities, stating that development must provide access to good quality services and amenities that accommodate, encourage and strengthen communities, increasing active participation and social integration, and addressing social isolation. The policy adds that development must also promote the crucial role of town centres, and plan for places that provide important opportunities for face-to-face contact and social interaction during the daytime, evening and night-time.
- 2.17 Policy GG2 of the London Plan states that in order to create successful, mixed-use places that make the best use of land, priorities for development should be Opportunity Areas, brownfield land, surplus public sector land, sites which are well-connected by existing or planned Tube and rail stations, sites within and on the edge of town centres, and small sites.
- 2.18 The London Plan identifies a total of 48 'Ongoing Opportunity Areas' (OA's) across Greater London (London Plan Policy SD1), including three which fall within LB Newham – Olympic Legacy (LLDC), Poplar Riverside and Royal Docks & Beckton Riverside. The London Plan states that the Opportunity Areas are identified as significant locations with development capacity to accommodate new housing, commercial development and infrastructure (of all types), linked to existing or potential improvements in public transport connectivity and capacity.
- 2.19 Poplar Riverside OA spans the LB Tower Hamlets and LB Newham boundary, stretching to include the Poplar Riverside Housing Zone in Tower Hamlets across the River Lea into LB Newham. Within LB Newham, the London Plan emphasises the opportunity to provide intensified employment uses and residential development; with required cross-boundary working to maximise investment of the Housing Zone funding and the development potential of upgrade to Canning Town station and the arrival of the Elizabeth line at Custom House.
- 2.20 The Royal Docks OA sits at the heart of the Thames Gateway presenting one of the largest regeneration opportunities in London. It benefits from the presence of important existing industry and attractors such as ExCEL and City Airport, and the new Elizabeth line station at Custom House. The planned intention is for the Royal Docks 'to become a vibrant new London quarter, creating a world-class business, industrial, cultural and residential district'. The London Plan notes that significant housing-led mixed-use development has already been completed or are underway, such as Royal Wharf, Barrier Park East, Gallions Quarter and Great Eastern Quays, with additional consented schemes at Advanced Business Parks and Silvertown Quay.
- 2.21 The London Plan emphasises that within the Royal Docks OA, the Planning Framework should set out how to manage the opportunities for mixed-use development at Canning Town/West Ham, and Thameside West where there is or will be excellent public transport connectivity. At Beckton



Riverside, de-commissioning of the gasholders together with a new DLR station provides an opportunity to deliver waterside residential-led mixed-use development. New residential development here will support the evolution of Gallions Shopping Centre, which has the potential to become a designated town centre.

ii) The role of town centres

- 2.22 Policy SD6 of the London Plan sets out the Mayor’s approach to promoting and enhancing the vitality and viability of London’s varied town centres. The policy emphasises that town centres will continue to be promoted and enhanced as ‘strong, resilient, accessible, inclusive hubs with a diverse range of uses including main town centre uses, night-time economy, civic, community, social and residential uses’. Town centres are identified as suitable locations for mixed-use and housing led intensification, and primary locations for commercial activity beyond the CAZ. Policy SD6 encourages the strengthening of the role of town centres, creating a sense of place and local identity in the capital.
- 2.23 Policy SD6 acknowledges that the adaptation and diversification of town centres should be supported in response to the challenges and opportunities presented by multi-channel shopping and changes in technology and consumer behaviour. Policy SD6 also places particular emphasis on promoting town and edge of centre sites for mixed-use or residential development, managing vibrant daytime, evening and night-time activities in town centres, and directing tourist infrastructure, attractions and hotels to town centre locations.

iii) Development principles

- 2.24 The London Plan takes a strong town centres first approach, confirmed under Policy SD7, which reflects the approach of the NPPF in requiring applications for development not within a defined centre to demonstrate compliance with the sequential and impact tests.
- 2.25 Policy SD7, ‘Town Centres’, states that when considering development proposals, boroughs should take a town centres first approach. Boroughs are directed to apply the sequential test to applications for main town centre uses, requiring them to be located in town centres. If no suitable town centre sites are available or expected to become available within a reasonable period, consideration should be given to sites on the edge of centres that are, or can be, well integrated with the existing centre, local walking and cycle networks, and public transport. Applications that fail the sequential test should be refused.
- 2.26 Policy SD7 requires an impact assessment on proposals for new, or extensions to existing, edge or out-of-centre development for retail, leisure and – going beyond advice set out in the NPPF – office uses that are not in accordance with the Development Plan. Applications that are likely to have a significant adverse impact should be refused.
- 2.27 Policy SD7 adds that boroughs should:
- realise the full potential of existing out-of-centre retail and leisure parks to deliver housing intensification through redevelopment;
 - assess the need for main town centre uses, forecasting future need;
 - allocate sites to meet need arising; review and define town centre boundaries and shopping frontages;



- identify centres that have scope to accommodate new commercial development and higher density housing as per growth potential indicators (Annex 1);
- identify sites suitable for intensification, which may include supermarket sites, surface car parks or edge of centre retail/leisure parks, town centre shopping frontages which are surplus to demand, and redevelopment of low-density town centre buildings which are not of heritage value; and
- support flexibility for temporary or ‘meanwhile’ uses of vacant properties.

2.28 Policy HC6 aims to support the night time economy by promoting, improving and diversifying the night-time economy. The policy also recognises adverse consequences and recommends local authorities address the cumulative impact of high concentrations of licensed premises on anti-social behaviour, noise pollution, health and wellbeing and other issues for residents and nearby uses, and seek ways to diversify and manage these areas. The policy recommends an integrated management approach.

iv) Town centre network

2.29 Policy SD8 of the London Plan sets out the approach to the management of the town centre network across Greater London, and is supported by a classification of each centre in the town centre hierarchy at Annex 1. The London hierarchy of centres is headed by two ‘International’ centres (West End, Knightsbridge) and 14 Metropolitan Centres, followed by ‘Major’ and ‘District’ Centres, and locations which fall within CAZ Retail Frontage. The London Plan highlights that the classification of International, Metropolitan and Major Town Centres can only be changed through the London Plan.

2.30 Policy SD8 states that International, Metropolitan and Major Centres should be the focus for higher-order comparison goods retailing; and district centres should focus on the ‘consolidation of a viable range of functions’, particularly convenience goods retailing, leisure, local employment and workspace. District centres should also ‘address the challenges of new forms of retailing and securing opportunities to realise their potential for higher density mixed-use residential development and improvements to their environment’.

2.31 The following centres in LB Newham are identified in the London Plan centre hierarchy (Annex 1):

- ‘Metropolitan’ centre – Stratford;
- ‘Major’ centres – East Ham;
- ‘District’ centres – Forest Gate, Green Street, East Beckton and Canning Town.

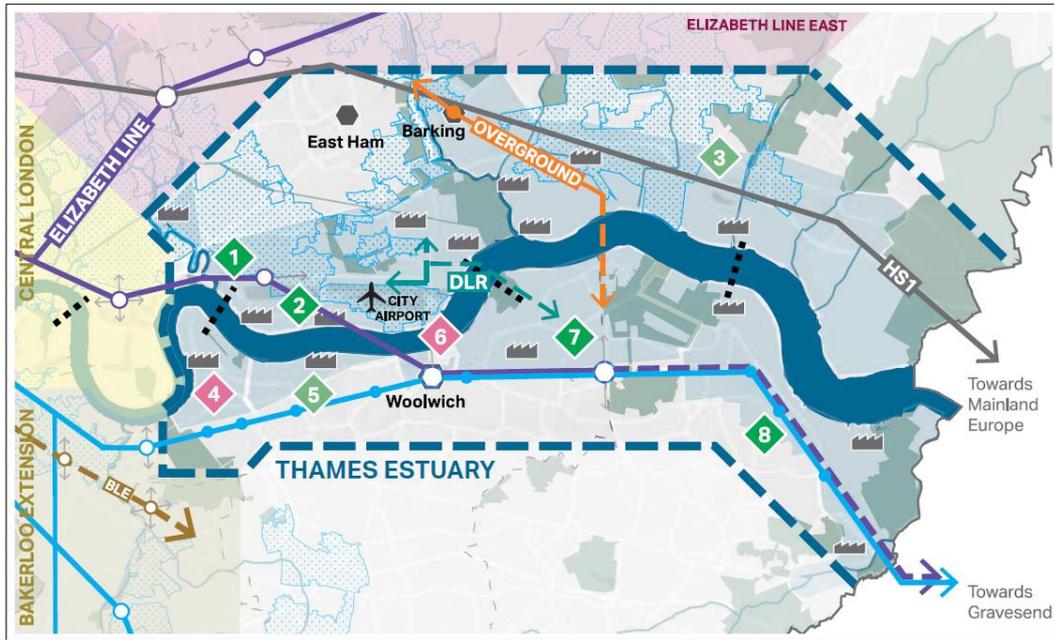
2.32 Stratford is identified as having the potential to step change upwards in the hierarchy to International Centre status.

v) Connectivity

2.34 The London Plan recognises that the corridor either side of the Thames Estuary represents the largest concentration of Opportunity Areas in the city. It continues to be a priority for regeneration and economic development, with potential for over 250,000 new homes and 200,000 new jobs. Figure 2.1 below illustrates the Thames Corridor Area.



Figure 2.1: The Thames Estuary

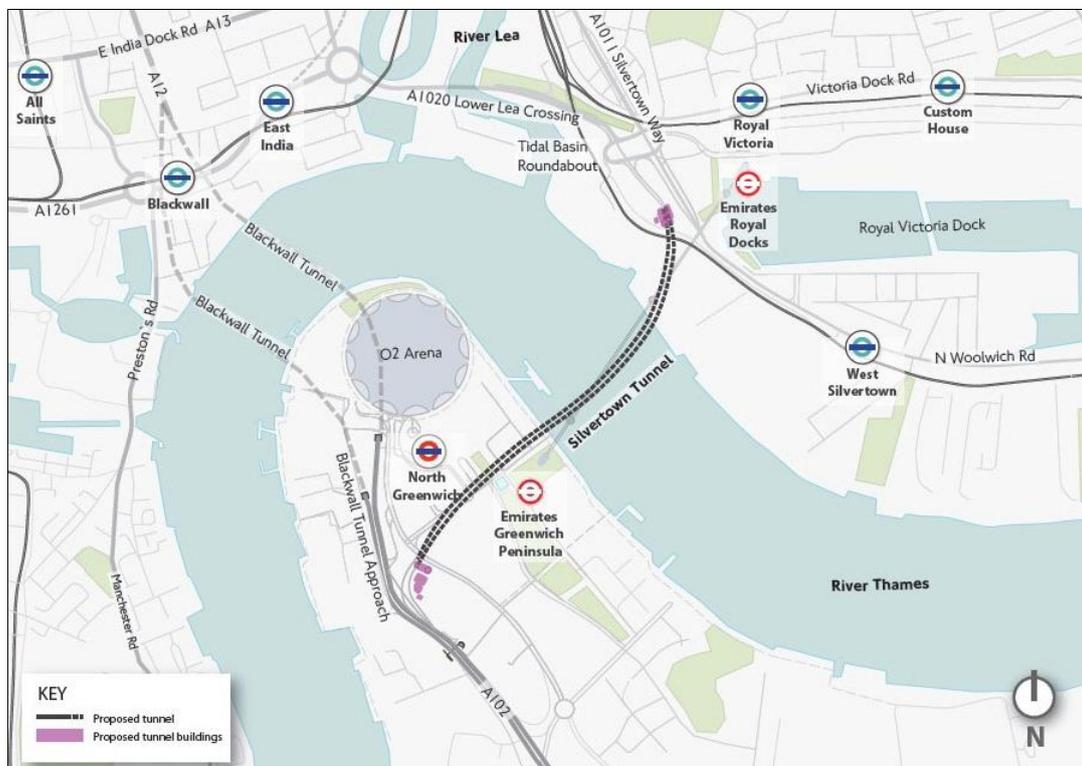


- 2.35 Development in a number of the Opportunity Areas in this corridor is coming forward at a fast pace, with significant development in the Isle of Dogs, Greenwich Peninsula and Woolwich. Others are about to benefit from new transport infrastructure, such as Barking Riverside with the extension of the Overground, and Thamesmead/Abbey Wood with the Elizabeth line. Others are dependent on the development of infrastructure schemes in order to unlock their full potential, such as Bexley Riverside.
- 2.36 The London Plan confirms that the Mayor will continue to work with Thames Estuary partners to support and promote investment in the area, both within and outside London, but the lack of river crossings in the area is holding back growth and development. The Mayor has therefore prioritised or is exploring a number of schemes which will help to unlock and/or connect growth areas. Within LB Newham, these include:
- Silvertown Tunnel (secured funding).
 - An extension of the DLR across the river from Gallions Reach to Thamesmead and beyond.
- 2.37 A number of the Mayor’s transport projects have identified funding packages, including the Elizabeth line, Northern line extension, Overground extension to Barking Riverside and Silvertown Tunnel, and will be delivered in the early years of the London Plan.
- 2.38 Construction of the Silvertown Tunnel (Fig.2.2 below) started in 2020 and is due to open in 2025. The tunnel under the Thames will link Silvertown to the Greenwich Peninsula in east London, helping to reduce chronic congestion at the Blackwall Tunnel and allow for better public transport links, including more cross-river bus journeys. The intention is also to include improvements for walking, cycling and the areas near the tunnel entrances as part of major regeneration on both



sides of the river. LB Newham Local Plan (2018) have allocated Strategic Site Allocations S08 and S09 for 'Silvertown Tunnel Safeguarding', and the site of the entrance to the tunnel.

Figure 2.2: The Silvertown Tunnel



- 2.39 Feasibility work for the DLR extension is ongoing, and funding not yet secured. The London Plan identifies a timescale to the period 2030 for implementation. If constructed, the extension would travel to Becton Riverside and Thamesmead, leaving the existing Beckton branch at Gallions Reach. TfL believes it would support the delivery of more than 25,000 new homes along the route.

Royal Docks and Beckton Riverside Opportunity Area Planning Framework

- 2.39 The Mayor of London consulted on the draft Royal Docks and Beckton Riverside Opportunity Area Planning Framework (OAPF). The consultation was open for 6 weeks between Monday 7 February and Monday 21 March 2022. The document endorses the existing and proposed retail and town centre hierarchy (see as set out in the LB Newham Local Plan (2018) – discussed below – including two existing District Centres, two existing Local Centres, one proposed new Major Centre, and four proposed new Local Centres (nine centres in total).
- 2.40 The Draft OAPF recognises that whilst existing centres are valuable resources for the communities they serve, they will be required to serve new residential and working populations as the OA grows in the future, and as new centres are emerging and/or being delivered as part of the network. Canning Town in particular will be a key centre acting as a gateway to the OA, capable of providing a range of functions, particularly convenience retailing, leisure, social infrastructure, local employment and workspace. The draft OAPF identifies an opportunity for Canning Town to offer a much more significant event based and night-time economy for residents.



2.41 The Draft OAPF is based on two growth scenarios across the Royal Docks and Beckton Riverside Area, identifying how many jobs and homes the area could accommodate up to 2041. The baseline aspires to 27,300 new homes and 37,400 new jobs; whilst scenario 2 assumes a new DLR extension to Thamesmead via Beckton Riverside, creating the opportunity for a total of 38,800 new homes and 55,600 new jobs to the period 2041.

LB Newham Local Plan, 2018

2.42 The adopted 2018 Local Plan sets out policies and proposals for future development and spatial planning requirements to 2033, combining the previous Core Strategy (2012) and Detailed Sites & Policies DPD (2016). The Local Plan emphasises the vital role the borough has in the continuing development of London as a World City; describing itself as a vibrant, dynamic and ambitious borough that seeks to continue to maximise the opportunities for transformation and regeneration catalysed through the 2012 Olympic and Paralympic Games. Overall, the Local Plan seeks to deliver 43,000 homes and 39,000 to 60,000 jobs between 2018 and 2033.

2.43 Spatial Policy S1 sets out the overall Spatial Strategy for the borough over the plan period:

Securing transformational change for the Borough and its residents with the overriding priority to build and reinforce communities and places that work and to ensure that growth contributes to achieving convergence and personal and community resilience, with new and existing communities, jobs, homes, services, spaces and facilities well integrated in connected, distinctive, successful, quality places;

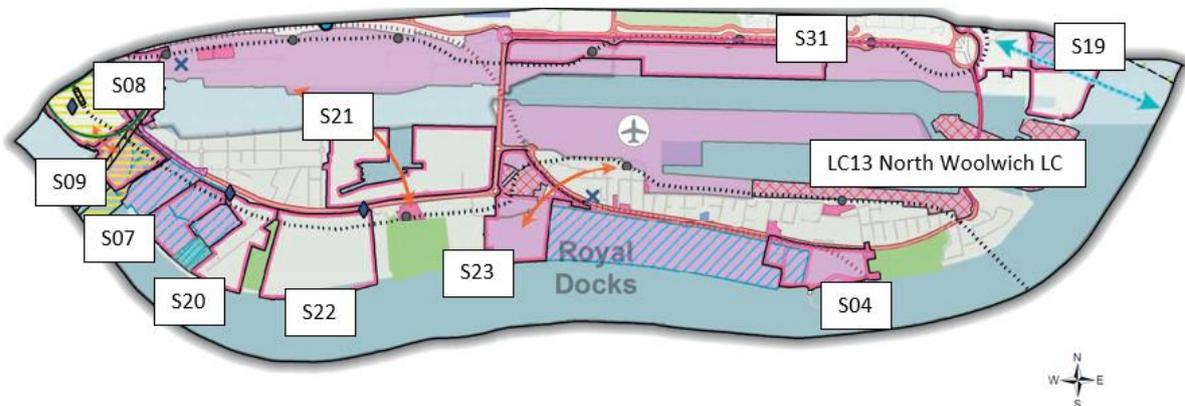
2.44 Policy S1 also confirms that the greatest opportunities for change will come forward within the “Arc of Opportunity” which will be the primary focus for new job creation, infrastructure development, new town and local centres, carefully located tall buildings at public transport nodes, and the vast majority of new housing on large sites in Beckton, the Royal Docks, Canning Town and Custom House, and West Ham and Stratford; and will reconnect residents with the rivers and docks. Urban Newham is earmarked for more incremental and smaller scale change in a ‘Web of Opportunity’ focused on Town and Local Centres and Crossrail station, but will benefit from new development in the Arc.

2.45 Policy S1 adds that ‘focused, vibrant, accessible and multi-functional town and local centres will be strengthened according to their particular character, assets and opportunities as vital hearts to local neighbourhoods, with a clear hierarchy evident in function and form, from the Metropolitan Centre of Stratford, through to Major Centres at East Ham, Beckton Riverside and Canning Town, and District Centres at Green Street, Forest Gate and East Beckton, and local centres at other key transport nodes’.

2.46 The Council has drawn up visions for each of the borough’s spatial policy areas, which includes each of the higher order centres, as set out within the Spatial Policies section of the Local Plan (Policies S2, S4, S5 and S6). Town centre specific policy is set out in this report within each respective town centre section (Section 5-10 of this report). Policy S3 focuses on the Royal Docks Spatial Policy Area (Fig.2.3), within which there is no higher order town centre. The Local Plan highlights that The Royal Docks will become a unique and high quality waterfront mixed use urban quarter, delivering at least 8,404 new additional homes.



Figure 2.3: Royal Docks Spatial Policy Area, Strategic Sites



2.47 Other relevant extracts from Policy S3, Royal Docks, include:

- The fragmented residential development will become consolidated into distinct but interconnected neighbourhoods.
- New neighbourhoods at West Silvertown, Silvertown, North Woolwich, Royal Victoria Dock and Albert Basin, will each offer a range of quality community and social infrastructure including new schools, health care facilities, community meeting places and local retail and services, with further connections to facilities on the ExCeL estate and at Custom House/Freemasons local centre, Canning Town, East Beckton, Beckton Riverside and Woolwich town centre.
- New street-based local centres will be developed at Thames Wharf (Strategic Site S08) and West Silvertown (Strategic Site S21 & S22) focused around North Woolwich Road and the DLR stations, and North Woolwich Local Centre (LC13) to the east of the Royal Docks Spatial Policy Area, will be enhanced in terms of the quality and diversity of offer. An additional small scale (Lyle Park) Local Centre (Strategic Site S20) around the West Silvertown DLR station complementing that at Minoco Wharf/Royal Wharf).

2.48 Policy SP6 seeks to create successful town and local centres, stating that they should be vibrant, vital and valued as components of local neighbourhoods and the borough as a whole. The points of particular relevance include the following:

- Diversifying uses, encouraging the location of services and flexible community spaces, ‘meanwhile’ uses, quality night-time economy, visitor and cultural attractions and facilities, and the creation of residential dwellings in such centres as appropriate to their size and function, to add to their activity levels;
- Maintaining a robust retail core whilst ensuring a variety of unit sizes, and in larger centres, markets to provide choice and meet local needs;
- Preventing non-retail uses (particularly hot food takeaways) from clustering excessively or reaching disproportionate levels within the centre and at or adjacent to (outside the boundaries) its gateways; and



- Managing the centres as part of a clearly defined network and hierarchy (in line with Policy INF5), encouraging consolidation of commercial uses within their boundaries, and responding to the visions for individual centres as set out in Spatial Policies S1-6.
- 2.49 Policy INF5 sets out the principals and strategy for the ‘Town Centre Hierarchy and Network’. The spatial strategy relating to each of the six main town centres is set out in each respective section of this report (Section 5-10). Below the six main town centres are the following policy objectives:
- The need to maintain existing Local Centres as listed below (Table 2.1) and designated on the Policies Map, recognising the particular regeneration and enhancement opportunities at North Woolwich, Manor Park and Freemasons Road (Custom House);
 - The need and opportunity to create new Local Centres reflecting accessible locations with high footfall, large scale development sites and gaps in the network at West Ham station [1], Plaistow station [2], Thames Wharf [3], West Silvertown / Silvertown [4/5], and Albert Basin (Gallions Reach DLR) [6], with further sites to be identified in Beckton Riverside at accessible locations;
 - The need to retain, and exceptionally create isolated shops together with small groups of shops which contribute to 400m accessibility benchmarks, but which are not in areas suitable for local centre scale growth, for retail use only, designating them as Local Shopping;
 - The need for Gallions Reach Shopping Park to become a Major Centre serving the eastern edge of Newham and wider growth area, through re-configuration of its floorspace as part of a wider masterplan; and
 - Town centre uses will be directed to the designated Town and Local Centres first as appropriate to their scale.
- 2.50 Policy INF5 adds that the requirement for impact assessments will apply to any out of centre retail or other town centre uses over 300 sq. m net (sales floorspace), and be required to consider quantitative and qualitative issues, including spatial impacts.
- 2.51 Within the Strategic Site Allocations, the Local Plan identifies six planned new Local Centres across the borough, including West Ham (S11), Plaistow (S29), Thames Wharf (S08), Albert Basin (S19), Silvertown (S21/22), and Lyle Park West (S20). These are discussed in more detail in Section 11 of this report.
- 2.52 Within the Royal Docks Spatial Policy Area, North Woolwich Local Centre (LC13) to the east, and within the Custom House/Canning Town Spatial Policy Area, Freemasons Road (Custom House) Local Centre (LC12) are both the subject of planned investment and expansion. North Woolwich Local Centre will be enhanced in terms of the quality and diversity of offer, whilst Freemasons Road will be expanded in the context of the connectivity with Crossrail Elizabeth Line, intensified residential, community, and commercial/ business space, enhanced accessibility, improved physical and functional links to ExCeL, and enhanced open spaces.
- 2.53 Within the Urban Newham Spatial Policy Area (S6), Manor Park Local Centre (LC1) will see most change around the new Crossrail station which will gradually redefine and reinvigorate Manor Park Local Centre, creating a more significant focus to the area for the local community.



- 2.54 The Local Plan makes numerous reference to the new Crossrail Line and associated land intensification around Crossrail Stations. Routes through LB Newham include a new station at Custom House as part of the Paddington to Abbey Wood line; whilst Stratford, Maryland, Forest Gate and Manor Park lie on the Liverpool Street to Shenfield line. All stations have completed upgrades, and services are expected to commence during 2022.

Legacy Corporation Local Plan (July 2020)

- 2.55 On 1 October 2012, the Legacy Corporation became the Local Planning Authority for its administrative area, a role that had previously been divided between the four Boroughs, the Olympic Delivery Authority and London Thames Gateway Development Corporation. It is now responsible for the determination of all applications for planning permission, comprising an area including LB Newham, LB Hackney, LB Waltham Forest and LB Tower Hamlets. LB Newham contains 65% of the LLDC area.
- 2.56 The LLDC Local Plan was adopted in July 2020. The document sets out the Legacy Corporation’s strategy for the future of its area and includes the policies that will be used to direct development and determine applications for planning permission. The overall ‘mission’ is “to use the once-in-a-lifetime opportunity of the London 2012 Games and the creation of Queen Elizabeth Olympic Park to develop a dynamic new heart for east London, creation opportunities for local people and driving innovation and growth in London and the UK”.
- 2.57 The 2036 ‘vision’ aspires for the Legacy Corporation area to have “become an established location for working, living, leisure and culture. Based upon locally distinctive urban districts, linked by green spaces and waterways, with Queen Elizabeth Olympic Park and its world-class sports venues and the Cultural and Education District as a centrepiece, the benefits of sustained investment and renewal radiate well beyond the area, blurring boundaries to create a new heart for east London”.
- 2.58 The vision reinforces the role of Stratford as a Metropolitan Town Centre (LB Newham) with an international role; whilst a wider network of new smaller town centres will include a District Centre at Bromley-by-Bow (LB Tower Hamlets), a Neighbourhood Centre at Hackney Wick (LB Hackney/LB Tower Hamlets), and Local Centres at Pudding Mill (LB Newham) and East Village (LB Newham). These will provide a focus for local shops, services and community activities, surrounded by thousands of well-designed new homes, to create a network of distinctive and mixed urban districts.
- 2.59 Stratford and East Village are existing centres; whereas Bromley-by-Bow, Hackney Wick and Pudding Mill do not yet exist as coherent centres but are planned for delivery through comprehensive redevelopment and regeneration interventions. Paragraph 4.21 confirms that the Centres will provide different functions; the Metropolitan Centre will provide for a range of London-wide retail and leisure requirements, including a focus on the night-time economy, whilst the District, Neighbourhood and Local Centres will provide a range of small-scale uses to meet the varied local day-to-day requirements arising from new neighbourhood housing and local employment.

Wider Borough Priorities

- 2.60 The retention and reinforcement of a sustainable network of Town and Local Centres across Newham, alongside wider regeneration and land intensification, forms a key part of the borough’s core priorities in respect of health, wellbeing, wealth-building and 15-minute neighbourhoods:



- The Council has adopted (January 2020) a Community Wealth Building (CWB) agenda underpinned by the principles of economic, social and environmental justice. Its aim is that the benefits of growth in the borough are shared locally, fairly and democratically, leading to long-term prosperity, wellbeing and fairness for all of Newham’s residents and a robust response to the Climate Emergency.
- Building on the CWB principles, the Towards a Better Newham Covid-19 Recovery and Reorientation Strategy (November 2020) sets out eight pillars of focus, supported by Action Plans, of which Pillar 5 (the 15min neighbourhood principle) is most relevant to development in town and local centres:

“Pillar 5 - The Council will enable every resident to live in an accessible and inclusive neighbourhood which will provide all their social, civic and economic essentials”
- In 2020, The Council published its Health and Wellbeing Strategy, Well Newham - 50 Steps to a Healthier Borough. The strategy builds on the CWB principles to put health at the heart of all policies, and sets a series of priorities including:
 - Support for young people,
 - Creating a healthier food environment,
 - Supporting active travel and improved air quality measures,
 - Supporting community cohesion
 - Maximising the social value of publicly owned buildings and land
- The Social Integration Strategy was published in 2020, and looks at ways of celebrating Newham’s diverse community by adopting a framework of social integration based on four inter-related key principles:
 - Relationships: that promote shared experiences, building networks and quality interactions between groups, building understanding and trust;
 - Participation: that encourages residents to be active in civil society through volunteering and democratic participation;
 - Equality: for residents by overcoming barriers and challenges to work, support with ESOL and other skills;
 - Evidence: to measure and evaluate the impact of social integration in Newham.

Legislative Change: Use Classes Order

- 2.61 In October 2018, the Government published a consultation into a series of proposed planning reforms designed to speed up and simplify the planning system; the focus of which was on supporting the high street and increasing the delivery of new homes. The consultation recognised the changing and evolving nature of high streets and town centres across the country, and invited responses on a variety of development management methods which Councils could use to promote greater flexibility.
- 2.61 Part 1 of the consultation included proposals in respect of new and amended Permitted Development (PD) rights and changes to use classes, including to support the regeneration of the high street and to extend existing buildings upwards to create new homes. The Government proposed new PD rights to allow existing premises in typical high street uses to change to a wider



range of uses, allowing more leisure and community uses such as gyms, libraries, health care and office use as well as homes.

2.62 With the rise of internet shopping, and the change in how people use the high street, the consultation highlighted that it was timely to consider how the operation of the Use Classes Order can support greater flexibility. It noted the need to support the modernisation of the high street and enable businesses to adapt to changes in consumer demands.

2.63 The Government published their response to the consultation in May 2019, which confirmed the intention to move away from a suggested single use class which would merge A1, A2 and A3. The government response paper stated that ‘more than half of the 276 responses agreed that changes to the A use classes would support the high street [and] there was considerable support to simplify the A1 use class to accommodate new and emerging retail models’. There was, however, concern that:

“...merging the A1, A2 and A3 use classes would enable change to restaurant use without any local consideration of the potential impacts from longer opening hours and increased noise and odours. It could lead to a proliferation and increased concentration of restaurants, including fast food restaurants, in an area with an impact on the health of local residents and local amenity. There was also a concern that it would limit the ability of local communities to shape their high streets as set out in local or neighbourhood plans.”

2.64 Rather than the far-reaching amendments proposed as part of the consultation paper, and in response to the consultation, the Government announced that it would only amend the A1 (shops) use class to ensure it captured current and future retail models and include clarification on the ability of (A) use classes to diversify and incorporate ancillary uses.

2.65 Shortly afterwards however, as a consequence of the Covid-19 pandemic, the Government decided to go further and introduce more wide-reaching reforms to the Use Classes – without further public consultation. This was a specific and swift response to the economic impact of Coronavirus on high streets and those premises in A1 and A3 in particular. In force from 1st September 2020, new planning regulations revoked parts A, B and D of the existing use classes order and introduced a new ‘commercial, business and service’ Use Class E, and a new ‘Local Community and Learning’ Use Class F. In relation to retail and main town centre uses, the changes are as follows:

- New Class E includes:
 - Shops (former A1)
 - Provision of financial and professional services (former A2)
 - Sale of food and drink consumption on premises, ‘cafes and restaurants’ (former A3)
 - Indoor sport, recreation, fitness (gyms) (former D2)
 - Provision of medical or health services (former D1)
 - Creche, day nursery or day centre (former D1)
 - Offices, research and development, light industrial (former B1a, b and c)



- Former A4 (drinking establishments, public houses/wine bars) and A5 (hot food takeaway) uses to become defined as Sui Generis.
- Former D2 cinemas, concert halls/live music venues, bingo halls and dance halls to become defined as Sui Generis.
- New Use Class F includes education, display of works of art, museums, public libraries, public halls or exhibition halls, public worship, law courts, halls and meeting places, outdoor sport and recreation, and indoor and outdoor swimming pools.

2.66 A series of more protected community uses have been moved into a new Class F, including isolated small shops in rural locations, public halls, the provision of education and libraries.

Legislative Change: Permitted Development

2.67 Following consultation in December 2020, the Government confirmed on 31 March 2021 that a new permitted development (PD) right to allow the change of use from any use, or mix of uses, from the Commercial, Business and Service use class (Class E) to residential use (Class C3) would be introduced under Class MA of the Town and Country Planning (General Permitted Development etc.) (England) Order 2021.

2.68 The government considers that the announced package of measures will help support the creation of much-needed homes while also giving high streets a new lease of life, enabling them to adapt and thrive – ‘transforming unused buildings and making the most of brownfield land’.

2.69 The new PD rights, which commenced on 1 August 2021, allow unused commercial buildings – or parts of buildings – to be granted permission for residential use via a fast track prior approval process. Councils are only able to assess prior approval applications on a narrow range of specific considerations including: flooding, noise from commercial premises, adequate light to habitable rooms and impact on a conservation area, for example. The PD rights include the following restrictions:

- a vacancy requirement that will ensure the building changing use has been vacant for a continuous period of 3 months before the date of the application to protect successful businesses in existing use.
- the building must have been in a commercial, business, or service use for at least two continuous years previously.
- a size limit of 1,500 square metres of floorspace applies, to avoid the loss of larger units. The permitted development right does not apply if more 1,500sqm of cumulative floorspace is to be converted. This is significantly more than the 150sqm permitted under Class M retail to residential at present, but a significant new restriction for office to residential change of use via permitted development.

Article 4 Directions

2.70 An article 4 direction is made by the local planning authority. It restricts the scope of permitted development rights either in relation to a particular area or site, or a particular type of development anywhere in the authority’s area. Where an article 4 direction is in effect, a planning



application may be required for development that would otherwise have been permitted development.

- 2.71 It is possible to introduce an Article 4 Direction to prevent permitted change of use from Use Class E to residential use. In a statement made by Robert Jenrick, Secretary of State for the Ministry of Housing, Communities and Local Government, on 1st July 2021 it was highlighted that “in very specific circumstances, local authorities can make Article 4 directions to suspend individual permitted development rights, when justified by robust evidence, [but added that it must be] used in a highly targeted way to protect the thriving core of historic high street areas, but does not unnecessarily restrict the ability to deliver much needed housing through national permitted development rights.
- 2.72 The statement confirmed the introduction of the new paragraph 53 and 54 of the National Planning Policy Framework (see above), and encourages Councils to ‘recognise the value to housing supply and increasing resident town centre footfall from supporting ‘flats above shops’; for example’. The Government consider this to be important to support mixed and flexible high streets, to deliver additional homes more easily, and to support jobs in the construction industry, while increasing demand for local high street services through new high street homes.
- 2.73 The statement encourages local authorities to carefully target any proposed Article 4 areas, focusing on the Primary Shopping Area supported by robust evidence to justify the Article 4 direction and the area it covers.

Summary

- The NPPF advocates a ‘town centres first’ approach, and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. The NPPF encourages LPA’s to recognise that town centres are the heart of their communities and to pursue policies which protect their health and vitality.
- The London Plan (2021) aims to build strong and inclusive communities, and emphasises that development must also promote the crucial role of town centres as places that provide important opportunities for face-to-face contact and social interaction during the daytime, evening and night-time. The London Plan encourages the strengthening of the role of town centres, and acknowledges that the adaptation and diversification of town centres should be supported in response to changes in technology and consumer behaviour.
- The London Plan also promotes higher density mixed-use or residential development in and on the edge of town centres – where suitable. Funding is secured for the Silvertown Tunnel, linking Silvertown to the Greenwich Peninsula, and is due to open in 2025; whilst the extension of the DLR to Beckton Riverside remains in the feasibility stage and funding is not yet secured. The scale of development in and around Beckton Riverside is dependent on the DLR extension.
- The Draft Royal Docks and Beckton Riverside Opportunity Area Planning Framework endorses the Local Plan, including two existing District Centres, two existing Local Centres, one proposed new Major Centre, and four proposed new Local Centres (nine centres in total). Elsewhere in the borough, all six main town centres fall within a Strategic Area for Regeneration, i.e. within the 20% most deprived areas in England.
- The London Plan endorses the application of the sequential and impact test, but – going beyond the NPPF – also requires an impact assessment on proposals for new, or extensions to existing,



edge or out-of-centre **office uses** [that are not in accordance with the Development Plan] – in addition to retail and leisure uses.

- The Local Plan promotes a new Major Centre at Gallions Reach, six new Local Centres across the west and south of the borough, and the enhancement/growth of three existing Local Centres, including North Woolwich Local Centre, Freemasons Road (Custom House) Local Centre and Manor Park Local Centre. The Local Plan sets an impact threshold of 300 sq m net.
- New Crossrail routes through LB Newham include a new station at Custom House as part of the Paddington to Abbey Wood line; whilst Stratford, Maryland, Forest Gate and Manor Park lie on the Liverpool Street to Shenfield line. All stations have completed upgrades, and services are expected to commence during 2022. The Local Plan endorses investment and land intensification around Crossrail Stations.
- The Legacy Corporation Local Plan supports and facilitates a new network of five town centres, including Stratford Metropolitan Centre; Pudding Mill and East Village also fall within LB Newham. The Bromley-by-Bow District Centre lies within LB Tower Hamlets, and Hackney Wick Neighbourhood spans the boundary of LB Hackney and LB Tower Hamlets. East Village is complete and open, whilst Pudding Mill remains in the planning stage.
- In force from 1st September 2020, new planning regulations revoked parts A and D of the existing use classes order and introduced a new 'commercial, business and service' Use Class E, incorporating former A1, A2 and A3 retail uses. Former A4 (drinking establishments, public houses/wine bars) and A5 (hot food takeaway) uses and D2 cinemas, concert halls/live music venues, bingo halls and dance halls are now defined as Sui Generis.



3. National Retail and Leisure Trends

- 3.1 Consumer and economic trends in the retail and leisure sector have important implications on the formulation of planning and spatial strategies and the future vitality and viability of each individual town centre across the UK.
- 3.2 Trends in recent years have been well documented. They closely follow global economic fluctuations, growth in on-line shopping/multi-channel retailing; changes in the property and space requirements of retail operators; evolution towards multi-dimensional town centres; the growth of the commercial leisure sector; and changes in the convenience goods sector with the growth of discount retailers and more varied food shopping habits. Sectoral analysis and published evidence confirm that town centres will need to continue to evolve and adapt to remain vital and viable locations.
- 3.3 As highlighted in the introduction, this study commenced at the end of 2021, as the country was emerging from the Covid-19 pandemic and various periods of 'lock-down'. In March 2020, lockdown shut our high streets overnight, with no timeline in place for re-opening. The longer term impact of Covid-19 on wider society and our town centres is still uncertain, but it is widely accepted that town and city centres will bounce back to varying degrees, and that Covid-19 has accelerated trends and challenges facing our high streets.

The Evolving Role of the Town Centre

- 3.4 Retail will continue to be an important footfall driver in town centres, and whilst high streets are evolving, the role of retail and retail operators should continue to form an important element to any town centre strategy moving forwards. Nevertheless, trends and the need to inject life into our high streets have introduced new, multi-dimensional elements to town centres which should be promoted and incorporated alongside retail into emerging town centre strategies. These can be summarised as follows:
- The development of an **'experience'** for visitors who are increasingly seeking to combine retail and leisure activities as part of a single 'going out' trip. Town centres must provide an attractive experience for visitors which the internet is unable to match. This might include specialist markets, independent cinemas, street food and seasonal events, for example.
 - Town centres acting as genuine **hubs for their communities**, and the need to create a vibrant social, commercial and cultural destination. Uses might include cultural space, co-working space, space for small and medium-sized enterprises (SME's), community facilities including libraries, education space, community halls/meeting venues, and health centres.
 - Larger scale **'destination' uses** including conference centres, hotels, offices, cultural and performance venues.
 - Growth in **town centre living** and residential space/student accommodation – delivering footfall in the evenings and at weekends as well as during the daytime. A town centre strategy will require consideration of noise, environmental health and licensing hours in order to consider residential amenity alongside a supported evening economy.
- 3.5 Uncertainty around the future of our town centres and observations around how they are evolving has been taking place for some years. In December 2018, the Government published 'The High



Street Report’, setting out the findings of the ‘High Streets Expert Panel’ which was established earlier in 2018. The Panel, Chaired by Sir John Timpson, sought to identify the key issues facing high streets and town centres, and advise on the best practical measures which the Government can take to help. In introducing the report, Sir John stated:

“Town centres are evolving, and retail will not return to the high streets that existed 10 or 20 years ago. A combination of internet shopping, the convenience of out of town retailing and an exceptional number of well-established retail formats reaching the end of their commercial life, has led to a marked increase in empty shops and a decline in footfall.

In completing this report, I have more hope for the future of our town centres than when we first started gathering evidence.”

- 3.6 He added that throughout their report, they use the term ‘town centre’ rather than ‘high street’ because their recommendations are not just about shops and shopping. The town centre of the future should attract local people to take part in a variety of activities – including dining, leisure and sport, culture and the arts, entertainment, medical services, and many more uses. They should also contain business premises, offices, and residential including affordable housing.
- 3.7 Instructed by ‘Key Cities Group’, consultants ‘Infusion’ were asked to ‘review the current state of play across our town and city centres’. The 2019 report starts by highlighting that over the course of the last decade, the British High Street has faced some of its biggest challenges in history. From a major economic downturn, through new retail methods and in conjunction with already-ongoing shifts in consumer spending and visiting patterns, some of the country’s most recognisable names have disappeared from our city centres. Many more major retailers were identified as facing huge difficulties and consequently undertaking seismic shifts in order to maintain their viability.
- 3.8 The report presents a strong position statement – ‘with the retail sector undergoing such major change, there is a very real threat to the existing model underpinning the vibrancy and sustainability of our city centres’. It emphasises that the retail sector has historically anchored much of our central area floor space, particularly at the visible and impactful ground floor level, and generated the bulk of footfall. With the convenience of newer methods of shopping likely to outweigh the convenience of central area shopping for the foreseeable future, it concludes that city centres can no longer rely on retail to be relevant.
- 3.9 The report states that central areas need to be diverse in the way their space is used to maintain their vibrancy, and activity in centres cannot be confined to daytimes. Ideally, town and city centres should not only be locations people shop in, but also eat in, drink in, work in and live in. The role of retail is still relevant and important, but the report concludes that ‘as well as town centres being a focal point for retail, they need to become areas in which people live, work and spend their leisure time’.

Economic Trends

- 3.10 Since the 2010 and 2016 Retail Studies were published, the UK’s 2016 decision to leave the European Union has become an influencing factor in forecasts of economic growth. The UK economy slowed during 2019, sliding to a 7 year low by the end of the year, household spending growth slowed to an 8 year low of 1.2% in 2019, income growth was disappointing, and retail sales



volumes grew by 3% - the weakest reading since 2014. The Experian 'Retail Planner Briefing Note 17 (February 2020) attributed this to the period being dominated by heightened Brexit uncertainty and a weaker global economy.

- 3.11 Experian note that the outcome of the December 2019 general election removed near-term political uncertainty and the risk of a no deal Brexit, empowering the government to push forward with spending pledges and EU withdrawal plans. In February 2020, Experian recorded that the latest indicators pointed to a pick-up in business confidence and investment intentions; whilst housing market surveys suggested activity was rebounding and consumer sentiment improving.
- 3.12 Nevertheless, and even before factoring in Covid-19, Experian forecast that GDP growth was set to remain on a slower growth trajectory of 1-1.5% over 2020 and 2021, well below the performance of earlier years. This is reflected in Section 12 when forecasting need for future retail floorspace across Newham, with outputs clearly demonstrating the direct consequent impacts on forecast expenditure growth rates for both convenience and comparison goods.

Covid-19

- 3.13 On Monday 23rd March 2020 the country introduced 'lockdown' measures and social distancing including the closure of all but essential shops and services. This had an immediate impact on town centres and town centre businesses unable to trade, with doors shut and no timeline in place for re-opening. In the Retail Planner Briefing Note 18, October 2020, Experian state:

“the outbreak of coronavirus (Covid-19) and measures to contain it has had a considerable impact on the UK and global economies. During the intensive stage of the lockdown, the economy suffered an unprecedented contraction, employment fell markedly and over 9 million employees were furloughed. Consumer demand suffered given social distancing and low confidence, leading to a big drop in social consumption, especially for recreation, leisure and travel.

In addition, investment fell markedly, as waning business confidence and deteriorating financial positions lead to the postponement and cancellation of projects. Exports have also been undermined by a fall in international demand for UK goods and services, as other countries enforce lockdown or social distancing measures to varying degrees. Supply side factors have reinforced this trend, such as the temporary closure of factories and businesses and disruptions to supply chains.”

- 3.14 In the October 2020 report, Experian forecast a 'near-term', 'central/medium' and 'long term' outlook. This Retail and Leisure Study incorporates forecasts based on the Experian 'central/medium' term outlook on the basis that an effective medical treatment (the vaccine) was in place by (around) mid-2021, enabling the recovery to regain momentum as confidence recovered. Research by Savills, GfK and Bank of England (graph below, Figure 3.1) currently supports this central trend based on the UK's swift vaccine roll-out.



Figure 3.1: Consumer Confidence Index, Impact of Covid and Vaccine Rollout



- 3.15 The vaccine roll-out has progressed swiftly and smoothly as expected under the ‘central/medium’ term scenario. As social distancing measures continue to unwind, social consumption is expected to continue to recover; and alongside this, some correction in the share of online spending is assumed, but it will nevertheless remain elevated compared to pre-Covid-19 projections.
- 3.16 Moving forwards, Experian explain that recovery over the coming years will be shaped by the course of the pandemic, the success of measures to contain it and the extent of potential scarring to the UK’s longer term economic potential. The unprecedented nature of these issues means all forecasts will be subject to greater than usual uncertainty, with the following key variables:
- The role and implementation of any social-distancing measures over the coming months;
 - How successful government measures are in mitigating the economic impact on households and businesses;
 - The rebound of household and business confidence levels;
 - Global backdrop including trade and supply chain impacts on industry.
- 3.17 Government finances have deteriorated markedly following exceptional measures taken to support the economy. Over the medium term, fiscal policy will likely be a constraint on growth as corrective measures such as spending cuts or tax rises may be required. It is expected that monetary policy will remain supportive over the medium term, with interest rates expected to remain at exceptionally low levels of the foreseeable future.

Online and Multi-Channel Retailing

- 3.18 Online spending has become a firmly established method of shopping. Evidence demonstrates the continued growth of this sector in terms of those that have internet access, those that use the internet every day, the methods and modes used to undertake such transactions, and the breadth of the population taking advantage of what is on offer, with the largest rise in the 65+ age group in recent years.



3.19 Recent data from the ONS confirms the extent to which online platforms now form part of the population's shopping habits. The most recent data available from the ONS on online usage is from August 2020, which identified that:

- In January to February 2020, 96% of households in Great Britain had internet access, up from 93% in 2019 and 57% in 2006 when comparable records began.
- Over 85% of adults use the Internet every day. Daily internet usage has more than doubled since 2008.
- In January to February 2020, 76% of adults in Great Britain used internet banking, increasing from 30% in 2007 and 73% in 2019.
- 78% use mobile phones/smartphones to access the Internet. In certain age groups this figure is substantially higher: in the 25-34 year old age group, the figure is 99%; for 16-24 year olds it is 98%; and for 35-44 year olds it is 96%.
- In January to February 2020, 87% of all adults shopped online within the last 12 months, up from 53% in 2008; those aged 65 years and over had the highest growth, rising from 16% to 65% over this period.
- In August 2020, 100% of adults in the 16-24 and 25-34 old age group shopped online; and over 96% of 35-54 age group shopped online. By contrast, only 67% of those over 65 years shop online - however this age group has shown the largest increase in online shopping uptake, increasing from 48% in 2018, and 16% in 2008.

3.20 When looking at the frequency of online shopping and the amount typically spent online, it can be seen that considerable amounts of spend are now being diverted online, which is spend lost from 'bricks and mortar' town centre stores. The ONS identifies that:

- Of those adults who purchased online in the last three months, adults aged 16-24 typically shopped online once or twice; however those in the 25-34, 35-44 and 45-54 age groups most typically shopped online at least ten times over a three month period. In the 35-44 age group, 48% shopped online more than ten times over the three month period.
- Across all age groups, shoppers typically spent between £100 and £499 online in the last three months. In the 35-44 year age group, 30% of adults spent over £1,000 online in the three month period.

3.21 Importantly for town centres, it has been evidenced that only 15% of online shoppers buy all of their fashion items online, with the remaining 85% using both online and physical stores. This highlights the importance of having a 'joined-up' town centre 'experience' to lure shoppers away from the internet and instead to visit the high street and to extend their dwell time through a range of retail and leisure attractions.

Covid-19 and Online Shopping

3.22 Experian report that there has been a marked increase in online shopping since the Covid-19 crisis broke, which has further accelerated the already strong growth trend seen over the past decade. The rising share of internet sales in total retail transactions is the key trend for SFT. Internet sales share of total retail surpassed 19% in 2019 before lurching up to over 30% in the second quarter of 2020, against less than 5% in 2008.



3.23 With lockdown measures related to Covid-19 relaxing since the second quarter of 2020, the share of internet sales in total retail transactions has eased from its peak (Fig.3.2 and 3.3 below). We expect this unwinding to continue in the coming months, however it is anticipated that some of the increase in the internet sales share seen during the pandemic will remain throughout the forecast period. Figure 3.2 and 3.3 below illustrates the small drop from the high peak of growth, but not to pre-Covid-19 levels, and will be followed by continued steady forecast growth.

Figure 3.2: Convenience Goods Internet Sales Growth Trends and Forecasts

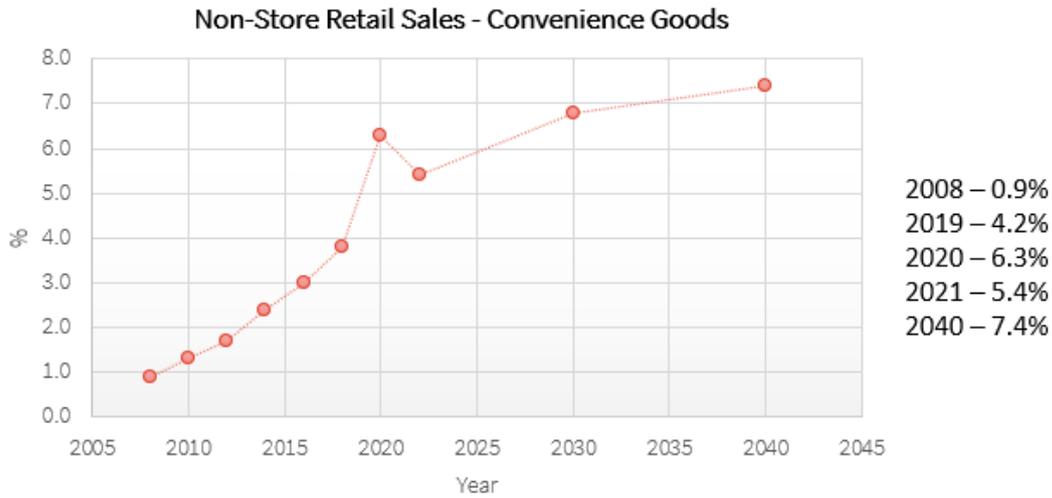
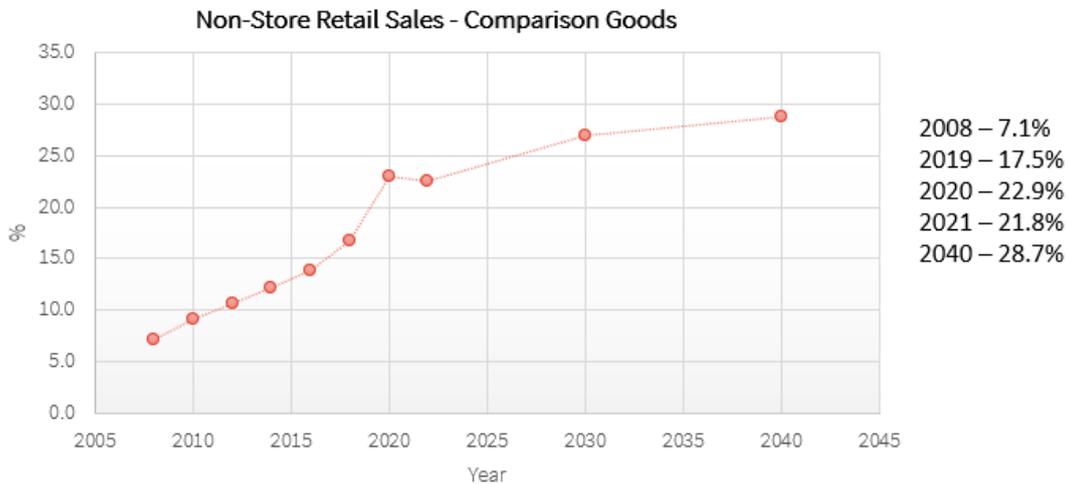


Figure 3.3: Comparison Goods Internet Sales Growth Trends and Forecasts



3.24 The ease of online purchasing has also continued to improve rapidly, with technological advances, particularly around smartphones and connectivity. Faster delivery times, including same day delivery, and easier returns processes have also encouraged the trend. Beyond 2021, Experian expect the SFT market share to continue to growth strongly in the mid-term.



Click and Collect

- 3.25 Research indicates that the click and collect market will grow by a further 46% by 2023. Click and collect allows a shopper to order and pay for a product online, and then have it delivered to the nearest physical retail store of that operator. This is an important opportunity for town centres, as it can act as a footfall generator in its own right. Research demonstrates that 39% of consumers make an additional purchase in that town centre when collecting an item from a store. In larger town centres, such as Stratford, this is relevant in most of the larger multiple retail businesses, and in smaller town centres this service is often provided by convenience stores servicing many businesses – Collect+ for example.
- 3.26 A challenge to the continued growth of click and collect is the rise of instant delivery and saver delivery services, as businesses aim to match efficient delivery options and consumer expectations. This includes same day delivery, one-hour delivery windows, and delivery passes whereby a consumer pays an annual subscription to guarantee same day, next day or timeslot delivery options. The impact of this on click and collect and associated opportunities for town centres will need to be monitored.

High Street Losses

- 3.27 The economic trends referred to above, combined with the continued growth in on-line sales have had a significant and permanent impact on consumer shopping and spending behaviour. In turn, this has created significant hurdles for traditional ‘bricks-and-mortar’ retailing and the high street.
- 3.28 These national trends have added to operator challenges already being experienced as a consequence of the retail property business model. Notably, operators face high costs of running retail outlets, including rents, business rates and high labour costs; they experience low profitability caused by high costs, slow growth in sales, squeezed profit margins and heavy price competition. They have been slow to respond and to prepare for the fast-paced changes being experienced on the high street, overlooking and disregarding the need to invest.
- 3.29 Operators have experienced a significant impact from the economic environment, the rise in online shopping and the property market, with many high profile high street casualties in recent years. Many operators will survive, but may instead look to rationalise their store portfolios. Since the previous study, the following operators have found themselves in administration and in many cases, closure:
- Beales (2020)
 - Top Shop / Top Man
 - LK Bennett (2020)
 - Oasis and Warehouse (2020)
 - Dorothy Perkins (2020)
 - Miss Selfridge (2020)
 - Burton (2020)
 - Jaeger (2019)
 - TM Lewin (2020)
 - Kath Kidston (2020)
 - Laura Ashley (2020)
 - Mothercare (2019)
 - Debenhams (2019)
 - Edinburgh Woollen Mill (2019)
 - HMV (2018)
 - House of Fraser (2018)
 - Poundworld (2018)
 - Maplin (2018)
 - Toys R Us (2018)
 - Store Twenty One (2017)
 - BHS (2016)
 - Brantano (2016)



- 3.30 The Covid-19 Grimsey Review (June 2020) references statistics published in the months just prior to the pandemic by CBRE, highlighting the stark downturn in the retail property market. The report quotes a 42% fall in retail property investment between 2014 and 2018; a 78% drop in shopping centre investment over the same period; and a 47% drop in the value of retail property assets changing hands between 2017 and 2018. The report adds that there were no new shopping centre openings in 2019, although some were extended, whilst a third of London shopping centres were subject to planning applications for at least some element of conversion to residential use.
- 3.31 It is predicted that the Covid-19 pandemic will drive a substantial amount of retail property into the hands of insolvency practitioners over the next few months.

Commercial Leisure Sector

- 3.32 In recent years, the commercial leisure sector has played an increasingly important role in the vitality and viability of town centres, as the nature of town centres continues to evolve. In many new town centre schemes, a cinema or family/casual dining has replaced retail as the ‘anchor’, driven by the growth of this sector and the need for town centres to generate a more varied visitor experience.
- 3.33 Leisure uses will continue to be important attractors in town centres, but the casual dining sector has now reached saturation and increased competition is leading to casualties. Analysts suggest that in addition to market saturation, the rise in food costs, staff costs, rents and business rates have all impacted on operators’ profits; as well as emerging on-line delivery companies such as Uber Eats, Deliveroo and Just Eat.
- 3.34 The consequences of Covid-19 and associated lockdown and social distancing, will have further far-reaching impacts on the leisure and casual dining sector, with on-line delivery companies becoming firmly established in people’s homes.

The Convenience Sector

- 3.35 The trends being experienced in the food retailing sector were establishing themselves to varying degrees at the time of the 2016 Retail Study update. Food superstores have experienced a substantial decline in market share, small format top-up stores gained market share, discount retailers – Aldi and Lidl – are achieving strong growth, and on-line spend is continuing to grow although not to the same extent as non-food shopping. Market growth is currently in the discount convenience store business, with strong growth for Lidl, Aldi and Iceland.

Banks and Financial

- 3.36 The numbers of bank branches in the UK have been in decline for the past thirty years, due to a variety of reasons including the desire by banks to cut costs; mergers within the industry; competitive pressures from new entrants in the banking sector; changes in the nature of retail banking transactions; and a growth in alternative means of accessing bank services, particularly driven by technological advances such as online and mobile banking.



- 3.37 According to research from CACI¹, customer visits to retail bank branches are forecast to drop by 36% between 2017 and 2022, with mobile transactions rising 121% in the same period. CACI estimate that the typical person will visit a retail bank branch just four times a year, down from seven in 2017.
- 3.38 Most banks have an alliance with the Post Office (whose own branch network has remained relatively stable in recent years), meaning that in most smaller centres there are still banking facilities available to those who are not able to use alternative means. However, the decline of bank branches has also served to free up large, often historic and listed commercial premises in central town centre locations, which are in some instances challenging to let.

Out-of-Centre Retailing

- 3.39 Out-of-centre retailing offers the benefits of lower rents, larger retail units and in most cases, free car parking. According to Verdict (national retail intelligence and trend analysts), out-of-town retailing is the only form of retailing – pre-Covid-19 – which saw store numbers increase consistently since 2000. The Department for Business, Innovation and Skills reported that the number of out-of-centre stores had increased by up to c.1,800 (25%) since 2000.
- 3.40 The recovery of market confidence which took place in the period since 2013 benefited out-of-town retailing. Vacancy rates fell, footfall increased, and many retailers were seeking expansion in existing – and some new – out-of-centre locations. Some traditional town centre retailers developed out-of-town store formats, including John Lewis which opened a number of ‘At Home’ stores in prominent out-of-centre locations, as well as other traditionally ‘high street’-focussed retailers such as, Next, Primark and H&M.
- 3.41 Before Covid-19, however, the sector was feeling the impact of a changing market, with a slow-down in new retail parks and a general evolution from mainstream retail to more mixed-use town centre/leisure parks, and a move towards a wider mix of uses including residential. Retail Parks have felt the impact of retail store closures in much the same way as high streets; when businesses close, they close in all locations.
- 3.42 The combined effects of Covid-19 and new, more flexible planning legislation, has brought retail parks back into favour. It is reported (Workman², January 2021) that in the five weeks to 2 January 2021, overall footfall at UK shopping destinations dropped 46% compared to the previous year; but with a drop of 50% on the high street and only 17% at retail parks.
- 3.43 The resilience of retail parks throughout the pandemic led to a ‘flurry’ of investor acquisitions at the end of 2020, with destinations meeting the needs of suburban home workers, enabling social-distancing, offering click and collect, and more spacious environments. The strong weighting to ‘essential’ items also meant many could continue trading during ‘lockdown’.

¹ Analytical research company, providing operator trend data.

² Workman is the largest, independent commercial property management & building consultancy firm in UK.



3.44 Workman state:

“retail parks are not just being snapped up with the intention of repurposing into last mile distribution centres or residential. Most have attracted investment due to their broad base of essential retailers, with a perceived lower risk of insolvency.”

- 3.45 The introduction of more flexible planning regulations, including a new combined commercial Use Class E and permitted development from Use Class E to residential, makes such destinations attractive investments. Where there are no historic planning conditions restricting the overall mix on site, owners have more flexibility in respect of operator line-up and the mix of acceptable uses, with strong opportunities for increased site intensification and place-shaping visions. Opportunities for high density development and mixed-use development (to include residential) at retail parks and also out-of-town foodstore locations is clearly set out in the London Plan (2021), as discussed in Section 2.

Summary

- The role of town centres as a focus for retail remains relevant in today’s market to draw in shoppers and footfall. Current thinking and research consistently repeats, however, the need to look beyond the role of retail in order to reinvent the high street, emphasising that the town centre of the future must add an extra dimension to the retail experience. Covid-19 and new planning legislation have and will continue to accelerate these trends. Away from the high street, the composition and role of out-of-centre retail and retail parks will almost certainly evolve towards more mixed uses spaces and places as a consequence of the same factors.
- It is apparent that these ‘extra layers/diversity of uses’ are in addition to the core retail role, but should be closely connected to ensure a joined-up experience within a comprehensive town centre strategy. Investment in a wider mix of land-uses and public realm/public space improvements will benefit a consolidated retail offer, leading to improved town centre footfall activity. Short-term investment projects alongside longer term investment for major projects can have far-reaching positive benefits to the performance of a town centre.



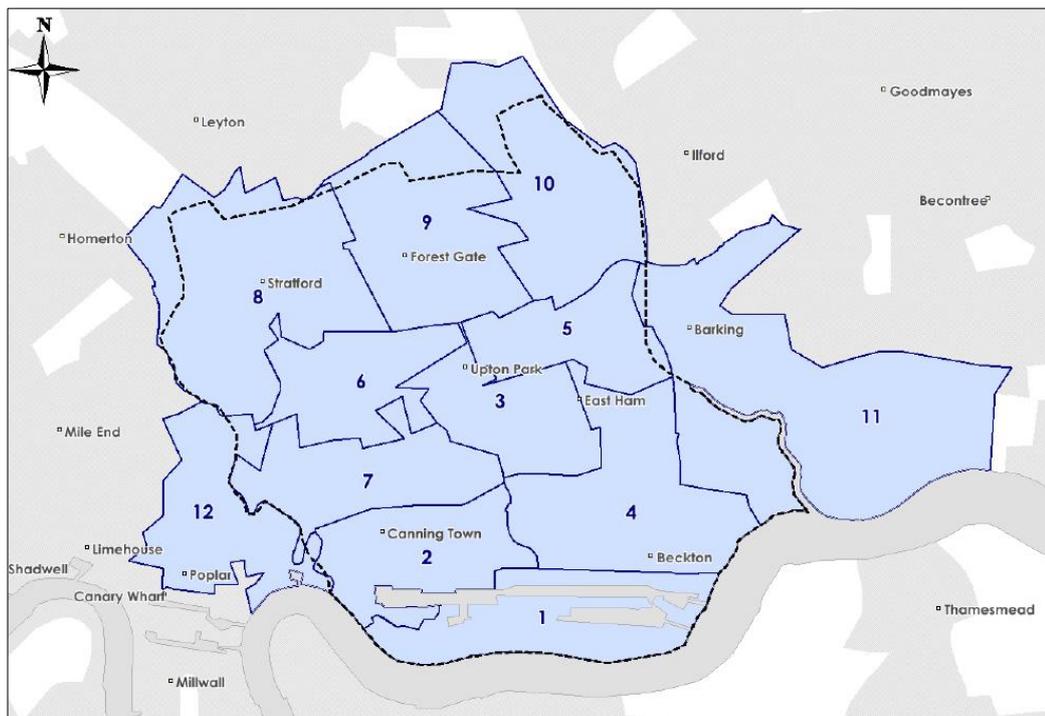
4. Sub-Regional Context

- 4.1 In this section, we set out the sub-regional context within which the town centres in LB Newham operate. Administrative areas are not ‘closed systems’ and it is natural to expect a degree of expenditure inflow from beyond the LB Newham borough boundary, and also expenditure leakage to the surrounding network of town centres and other shopping destinations outside the borough.
- 4.2 The analysis of catchment areas and trade flows form an important input to the baseline. It enables historic trend line market share data to be explored, leading to an understanding of whether the influence of a town centre in the sub-region has improved or declined over time. The data identifies catchment areas and opportunities to enhance trade draw in the future, highlighting key influences in the form of planning commitments and planned development which may enhance the market share of a shopping destination over the plan period.

Household Telephone Survey

- 4.3 A new household telephone interview survey was undertaken covering 1,200 households across 12 survey zones (Figure 4.1 below). Urban Shape designed the survey questionnaire in consultation with the Council and NEMS Market Research, who undertook the interviewing and data processing in December 2021. The survey area is shown below, and is consistent with that used for the 2010 and 2016 evidence base studies, enabling direct comparisons and longer term trends to be identified.
- 4.4 The findings explore where residents living within the survey area are travelling to for their spending on different types of goods including convenience, comparison and leisure uses; this might be within or beyond the LB Newham.

Figure 4.1: London Borough of Newham Household Telephone Survey Area (2021)





2021 Shopping Patterns / Trade Retention / Leakage

- 4.5 The up-to-date household telephone survey (2021) prepared to inform this new evidence base study enables us to understand the performance of the LB Newham town centres in the context of the town centre network across LB Newham and the wider sub-region. The data allows us to examine the influence of competing destinations and the associated flows of retail expenditure and levels of trade retention.
- 4.6 Shopping patterns derived from the Zone 1-12 household telephone survey enable us to calculate the amount of comparison goods expenditure that each competing centre/destination draws from the defined LB Newham survey area. As well as the strength of the retail offer, this indicator takes into consideration accessibility across the sub-region. The total expenditure travelling to these destinations is set out in Table 4.1 below; whilst the market share of each centre across each survey zone is set out in Table 5, Appendix 2.

Table 4.1: Study Area (Zone 1-12) Comparison Goods Expenditure Flows

	2022 Trade Draw from Survey Area £m	2022 Market Share %
Stratford Metropolitan Centre	£260.0m	30.3%
Beckton 'Area', including retail warehousing	£208.5m	24.3%
East Ham Major Centre	£53.4m	6.2%
Lakeside Shopping Centre	£29.6m	3.5%
Central London/West End	£23.3m	2.7%
Ilford Town Centre	£21.4m	2.5%
Barking Town Centre	£17.9m	2.1%
Surrey Quays Shopping Centre	£14.5m	1.7%
Asda Isle of Dogs	£12.1m	1.4%
Green Street District Centre	£10.8m	1.3%
Forest Gate District Centre	£10.4m	1.2%
Romford Town Centre	£9.6m	1.1%
Canning Town District Centre	£7.9m	0.9%
Woolwich Town Centre	£3.5m	0.4%
Bluewater Shopping Centre	£2.7m	0.3%
TOTAL	£685.6m	80.0%
TOTAL NEWHAM	£551.0m	64.3%
COMPETING DESTINATION	£134.6m	15.7%



- 4.7 The analysis of trade draw set out in Table 4.1 highlights the continued dominance of Stratford Metropolitan Centre, the ‘Beckton area’ and East Ham Major Centre. Green Street, Forest Gate and Canning Town continue to perform at the district centre level, with Canning Town having the least influence on shopping patterns in respect of comparison goods trade draw.
- 4.8 The retail composition of East Beckton is limited to a large Asda superstore and a number of small retail and service units within the adjoining precinct - the Mary Rose Mall (see Section 10). There is a significant concentration of out-of-centre bulky goods food and non-food retailers in the vicinity of East Beckton District Centre. 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 includes 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.
- 4.9 Table 4.2 below compares the 2022 market share of each town centre and shopping destination in 2010 and 2016 – the dates of the previous evidence base analysis. It is evident that each town centre in LB Newham, aside from East Ham, has marginally improved their market share since 2016; East Ham has experienced a decline of 2.9%. Beyond LB Newham, it is clear that all competing destinations have lost market share from the Zone 1-12 survey area since the period 2010 and 2016; i.e. Barking’s market share has fallen by 1.9% since 2016.
- 4.10 This is, overall, a positive indicator of health for the town centres in Newham, and also reflects the growing ‘shop local’ trend evidenced since the Covid-19 pandemic. People are more often using their closest town centre, whilst filling any gaps in product range by purchasing their higher order goods online. Table 4.2 demonstrates that Centra London, Ilford, Barking Romford and Lakeside have all lost market share from the Newham area, with residents in Zone 1-12 staying closer to their local town centres and increasing their online shopping trends.

Table 4.2: Study Area (Zone 1-12) Comparison Goods Expenditure Flows

	2010 Market Share %	2016 Market Share %	2022 Market Share %	% Difference 2010-2022	% Difference 2016-2022
Stratford Metropolitan Centre	9.8%	28.4%	30.30%	20.5%	1.9%
East Ham Major Centre	10.9%	9.1%	6.20%	-4.7%	-2.9%
Canning Town District Centre	0.4%	0.3%	0.90%	0.5%	0.6%
Green Street District Centre	1.5%	0.9%	1.30%	-0.2%	0.4%
Forest Gate District Centre	0.6%	0.9%	1.20%	0.6%	0.3%
Beckton 'Area'	23.3%	22.7%	24.30%	1.0%	1.6%
Barking Town Centre	5.5%	4.0%	2.10%	-3.4%	-1.9%
Central London/West End	7.4%	5.7%	2.70%	-4.7%	-3.0%
Ilford Town Centre	8.8%	6.4%	2.50%	-6.3%	-3.9%
Romford Town Centre	2.4%	1.7%	1.10%	-1.3%	-0.6%
Lakeside Shopping Centre	4.2%	4.7%	3.50%	-0.7%	-1.2%



- 4.11 In order to provide a more detailed analysis of shopping and leisure patterns at various stages throughout the Study, we have divided the 2022 Survey Area into the following Sub-Areas:
- Sub-Area A, Zones 6 and 8 – Stratford
 - Sub-Area B, Zone 3, 5 and 11 – East Ham/Green Street
 - Sub-Area C, Zone 1, 2, 7 and 12 – Canning Town/Royal Docks
 - Sub-Area D, Zone 9 and 10 – Forest Gate
 - Sub-Area E, Zone 4 - Beckton
- 4.12 This provides a ‘best match’ with the Local Plan Spatial Policy Areas, with the breakdown of the analysis throughout this report able to inform the conclusions and recommendations. The sub-areas enable a better understanding of travel patterns throughout the Borough, and the effectiveness of defined centres in meeting local needs.
- 4.13 The data enables us to understand the role and strength of the higher order town centres within each of their respective Sub-Areas. The analysis has calculated the comparison goods trade draw of each of the higher order town centres within each Sub-Area, as follows:
- Stratford has a trade draw/market share within Sub-Area A of 55.7%;
 - East Ham and Green Street have a trade draw/market share within Sub-Area B of 14.9%;
 - Canning Town has a trade draw/market share within Sub-Area C of 2.4%;
 - Forest Gate has a trade draw/market share within Sub-Area D of 5.2%;
 - The Beckton Area has a trade draw/market share within Sub-Area E of 48.8%.
- 4.14 Stratford and Beckton are capturing most of the Zone 1-12 comparison goods expenditure available, with some leaking to competing destinations beyond the survey area.

Summary

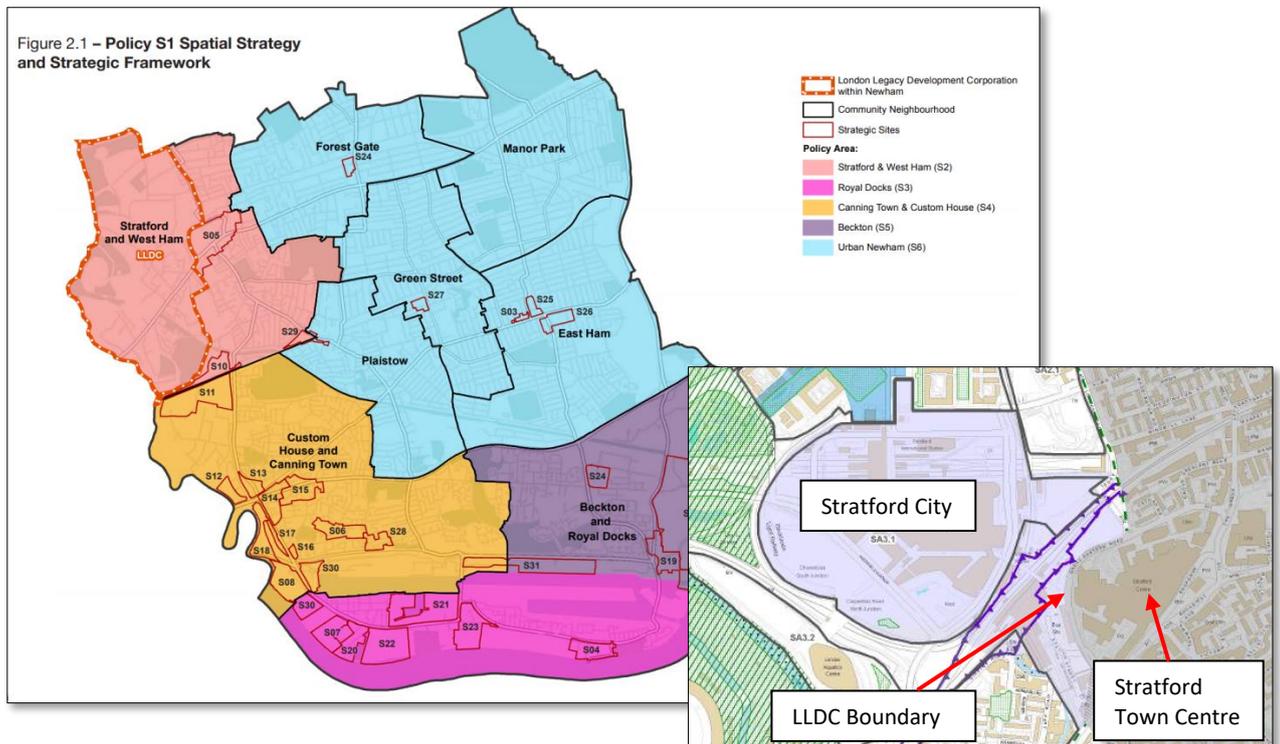
- There has been no major strategic change to the retail/town centre network since the 2016 evidence base, and nor since the opening of Westfield Stratford City. The analysis demonstrates the continued dominance of Stratford Metropolitan Centre and the ‘Beckton area’ as key shopping destinations within the borough, followed by East Ham Major Centre. Green Street, Forest Gate and Canning Town continue to perform at the district centre level, with Canning Town having the least influence on shopping patterns in respect of comparison goods trade draw.
- Each of the main town centres in LB Newham, aside from East Ham, has marginally improved their market share since 2016; East Ham has experienced a decline of 2.9%. It is clear that all competing destinations outside Newham have lost market share from the Zone 1-12 survey area since the period 2010 and 2016. This is, overall, a positive indicator of health for the town centres in Newham, and also reflects the growing ‘shop local’ trend evidenced since the Covid-19 pandemic.



5. Stratford

5.1 Stratford is defined as a Metropolitan Centre in the Local Plan and London Plan. The town centre encompasses both Westfield Stratford City and the traditional Stratford town centre, and is located within the north west part of the borough in the ‘Stratford & West Ham’ Local Plan spatial policy area (Fig.5.1). Stratford town centre currently falls within the London Borough of Newham whilst Stratford City sits within the LLDC policy area until the transfer of planning powers back to Newham – expected to take place in 2024. This administrative boundary split is illustrated in inset map, Figure 5.1.

Figure 5.1: Newham Spatial Policy Areas, Local Plan 2018



- 5.2 Figure 5.1 (inset map) illustrates the part of Stratford Metropolitan Centre that lies with the LLDC policy area – to the west of the railway lines; and also highlights the LLDC boundary lying between Stratford City and the more traditional Stratford Town Centre, running north/south.
- 5.3 The Metropolitan Centre is the largest town centre in the borough comprising over 500 units spread throughout Stratford City and the traditional Stratford Town Centre. Policy INF of the Local Plan confirms that Stratford will maintain its role and function as a higher order Metropolitan Centre and progress towards an International Centre role, ensuring it continues to meet a wide range of local, borough-wide and sub-regional needs in the scale, diversity, accessibility, and integration of its offer.
- 5.4 Stratford is one of London’s major transport interchanges, and has the highest public transport accessibility ranking available in London (PTAL 6b). The Metropolitan Centre is served by national rail, London Overground, Tube, DLR, Tram, and an extensive bus network. Stratford International provides



'Southeastern Highspeed' trains connecting Central and East London with Kent and interchanges along the route to Eurostar and onwards to Paris.

- 5.5 Local Plan Policy S2 sets out the strategic principles and spatial strategy for Stratford and West Ham, including the following relevant extracts:

"[to achieve] a distinctive, varied and thriving Metropolitan centre, together with secondary intensification and regeneration focused around Plaistow, Maryland and West Ham stations, providing investment and carefully managed development to drive delivery of new and rejuvenated communities and significant economic growth.

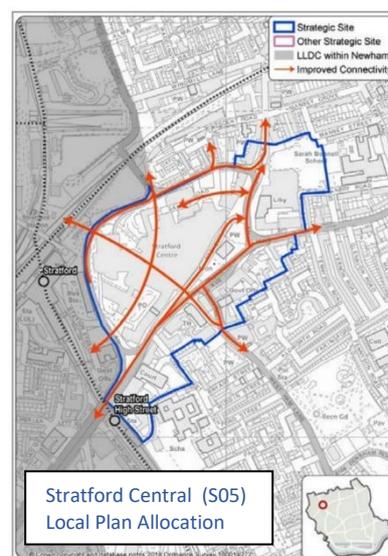
The regionally significant economic role of the area will be centred on Stratford, which will provide major employment and business opportunities derived from its international, regional and local connectivity, quality of environment and strategic retail growth (including a significant amount of higher order comparison goods), tourism and visitor economy including food, drink, arts and cultural, quality leisure and evening and night-time activity, and significant healthcare and education facilities (including higher and further education), together with the extensive service sector supporting these."

- 5.6 The vision based spatial strategy for Stratford is as follows:

"Stratford will maintain and extend its success as a town centre, becoming more integrated through physical linkages, improvements to legibility and parity of design and public realm quality with Stratford City and the International Quarter, with a significant reduction in the dominance of traffic and comfortable, convenient pedestrian and cycling movement, and with its Metropolitan status and unrivalled transport connectivity marked by careful distribution of the tallest buildings in the borough.

Variety and distinctiveness will be fostered by the range of uses in the centre; a mix of unit types and scales including market facilities; local, wider London and international customers, visitors and businesses; and re-valuation of its heritage and character assets notably the St Johns Conservation area and listed buildings and proximity to the Queen Elizabeth Olympic Park and local waterways." [Local Plan Policy S2]

- 5.7 There is one Local Plan 'Strategic Site Allocation' in Stratford: 'Stratford Central' (S05). The allocation covers the whole of Stratford town centre (excluding Westfield), with policy supporting the "renewal and reconfiguration of the existing retail offer, with scope for expansion of mainly comparison floorspace together with other town centre and residential uses and environmental quality, character and permeability improvements. Integration with Stratford City and the surrounding Olympic Legacy sites is key, ensuring that a complementary offer is maintained and investment opportunities are maximised, with parity of design quality and continuity of public realm. Indicative building heights of 20 plus storeys; stepping down to low (4-5 storey) and mid-rise (6 to 8) at the site margins".





- 5.8 The Local Plan vision for Stratford Central (Strategic Site allocation S05) is for it to be an integral part of a thriving Metropolitan Centre, which will be a hub for surrounding communities; a gateway to Newham; and a destination in its own right. The Local Plan supports a stronger connection between the existing town centre with finer grain retail, workspace and cultural assets, and Stratford City, with large scale new shopping and leisure facilities. This aims to create a vibrant place that will serve an international and regional community, building on strategic transport connections already in place, and retaining a distinctive East End character.
- 5.9 The London Plan identifies significant growth potential in Stratford, as outlined in Annex 1. First, the Metropolitan Centre is identified as having the potential to step change upwards in the network classification to an International Centre, defined as follows:
- “London’s globally renowned retail and leisure destinations, providing a broad range of high-order comparison and specialist shopping, integrated into environments of the highest architectural quality and interspersed with internationally-recognised leisure, culture, heritage and tourism destinations. These centres have excellent levels of public transport accessibility.”*
- 5.10 The London Plan identifies significant opportunity for development, recording it as having ‘high’ commercial *and* residential growth potential. High commercial growth potential includes town centres likely to experience strategically-significant levels of growth with strong demand and/or large-scale retail, leisure or office development in the pipeline and with existing or potential public transport capacity to accommodate it (typically PTAL 5-6). In respect of specific office guidelines, the London Plan records Stratford as having the future potential to become a ‘CAZ satellite’ should the demand for office floorspace exceed the capacity of the CAZ and the Northern Isle of Dogs (NIOD).
- 5.11 The London Plan confirms a night-time economy classification of NT2, i.e. having a strategic night-time function involving a broad mix of activity during the evening and at night including culture, leisure, entertainment, food and drink, health services and shopping. Stratford Metropolitan Centre night time economy (NT2) is recorded as being of regional or sub-regional significance.
- 5.12 Alongside growth and investment, the London Plan recognises the need to address inequalities in Stratford. The Metropolitan Centre is consequently identified as falling within a Strategic Area for Regeneration; i.e. where the impacts of inequality and causes of deprivation are particularly concentrated. Policy SD10 states that Boroughs should identify Strategic Areas for Regeneration in their Local Plans and develop policies that are based on a thorough understanding of the demographics of communities and their needs.
- 5.13 Policy 3.1 of the LLDC Local Plan (2020) seeks to promote Stratford Metropolitan Centre as a potential future International Centre, as identified in the London Plan. Measures include directing large-scale town centre uses to within the centre boundary; supporting growth in office floorspace, with the Metropolitan Centre boundary also forming the location for the potential Central Activities Zone reserve; supporting Stratford Waterfront as a new culture and education district and as a future location of town centre boundary extension; focussing higher order comparison retail floorspace in the centre; supporting and enhancing the range of cultural and night time economy uses; delivering new residential accommodation in appropriate locations throughout the centre; and ensuring development contributes to the development of new connections to the eastern part of the centre



(within the London Borough of Newham planning area) and the functionality of the Metropolitan Centre as a whole.

- 5.14 Policy 3.3 of the LLDC Local Plan seeks to improve connections around central Stratford, committing the Legacy Corporation to work with its partners to promote improved connectivity and public realm improvements. This includes a new pedestrian bridge from Jupp Road and facilitating new entrances and interventions at Stratford Regional Station. Proposals for new development along these key connections for enhancement should be orientated towards the street scene and maximise active frontages where possible. Key connections shall be improved to enhance accessibility and multi-functionality for all users.
- 5.15 There are five site allocations across 'Stratford Town Centre West' supporting a mix of town centre, retail, office and residential uses. Other key site allocations include Stratford Waterfront North for housing; Stratford Waterfront South for education, workspace, edge-of-centre retail, and residential; Greater Carpenters District for extensive mixed-use redevelopment; Bridgewater Road for residential uses; and Rick Roberts Way for residential and education uses. The LLDC Local Plan confirms that this area has capacity for approximately 11,000 homes up to 2036, and will continue to see substantial pressure for new development through the plan period.

Diversity of Uses / Retailer Representation: Traditional Town Centre

- 5.16 This section firstly assesses the performance of the historic part of Stratford Town Centre, the traditional town centre excluding Westfield. This enables an understanding of how this local shopping and service town centre is performing and meeting the needs of the local population alongside the adjacent, larger-scale, indoor Westfield shopping centre.
- 5.17 'The Stratford Centre' is the main shopping centre within the historic/traditional Stratford town centre. It is opposite Stratford railway station and bus station linking with the route through to Stratford station and Stratford City. The shopping centre opened in 1974 and has around 60 shop units offering a range of services from banks, clothing and fashion, food and drink, health and beauty, and technology. Although most of the shops close at night, the centre has a 24-hour access public highway that runs through the middle of the centre. To the east of the shopping centre, the main high street runs north/south encompassing The Grove, Broadway and High Street.
- 5.18 Based on the latest survey by Experian Goad, Stratford (traditional) Town Centre (Excluding Westfield) comprises 71,330 sq m gross of retail, leisure and service floorspace across 198 units. Table 5.1 and 5.2 below set out the diversity of uses in Stratford Town Centre compared to the national average in respect of town centre composition. The data demonstrates the strong representation of leisure services and financial and business services, and a low vacancy rate.
- 5.19 The proportion of convenience goods (8.3%) is marginally below the national average of 9.1%, comprising just 17 units in total. The town centre has four main foodstores represented including Sainsbury's, Lidl and Iceland in The Mall Shopping Centre. Sainsbury's (1,440 sq m gross) is open 6am-10pm and offers a bakery, ATM cash machine and hot food counter; Iceland (850 sq m gross) is open 9am-8pm most days; and Lidl (890 sq m gross) is open 7am-10pm and offers an in-store bakery.



Table 5.1: Stratford Traditional Town Centre Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance
Convenience	17	8.3	9.1	-0.8
Comparison	40	19.4	27.5	-8.1
Leisure Service	68	33.0	24.6	8.4
Retail Service	15	7.3	15.7	-8.4
Financial & Business Service	39	18.9	9.2	9.7
Vacant	27	13.1	13.9	-0.8
Total	206	100	100	-

Table 5.2: Stratford Traditional Town Centre Composition of Uses (Floorspace sq m gross)

	Floorspace	% of Total	UK Average (%)	Variance
Convenience	13,620	19.1	15.6	3.5
Comparison	13,060	18.3	31.6	-13.3
Leisure Service	23,890	33.5	25.7	7.8
Retail Service	2,540	3.6	7.2	-3.6
Financial and Business Service	8,650	12.1	7.0	5.1
Vacant	9,570	13.4	12.9	0.5
Total	71,330	100	100	-

- 5.20 Morrisons (5,140 sq m gross) is located on the opposite side of The Broadway on The Grove to the north of the town centre, and has a large in-store offer including clothing, hot food, fishmonger, bakery, butcher, ATM, dry cleaners, Timpson shoe repairs and key cutting, a barbers, and a Western Union International money transfer kiosk. Smaller and independent units are occupied by a baker, butcher, two health food shops, a tobacconist, two deli's, and two small convenience grocery stores.
- 5.21 The historic part of Stratford town centre has a low proportion of comparison goods businesses (19.4%) compared to the national average of 27.5%, and comprises 40 shop units in total. A strong selection of value drive multiple retailers anchor the centre and occupy the largest shop units, including Argos (1,260 sq m), Boots (540 sq m), Pep&Co (470 sq m), Poundstretcher (560 sq m), Poundland (480 sq m), Sport Direct (510 sq m), JD Sports (450 sq m), and Wilko (4,560 sq m). Other national multiples occupying smaller stores include Superdrug, The Perfume Shop, The Fragrance Shop, The Body Shop, H Samuel, Footlocker, WH Smith and Shoezone. Other businesses including bridal-wear, computer gaming, cards and gifts, jewellers, and mobile phone shops.
- 5.22 The Market is located inside the Stratford Shopping Centre, offering over 30 stalls and serving a diverse local community, with a smaller section of the market outside on the Broadway. The market sells a broad range of goods including fresh fruit and vegetables, flowers, fresh seafood, new clothing, sweets, music, mobile accessories, lingerie and nightwear. The market is open from 9am to 5pm Monday to Saturday. Whilst ethnic retail businesses add to the diversity and vibrancy in Stratford town centre, proportionally they are less dominant than other centres across Urban Newham including East Ham and Green Street.



- 5.23 The leisure services sector is the largest sector in the historic part of Stratford town centre, comprising 68 leisure uses; this is substantially higher (33%) than the national average (24.6%). The cultural quarter provides important destination attractors, including Stratford East Theatre (built 1884), the Picturehouse Cinema, the University of East London Stratford Campus, and The London Film Studios – an East London based independent production house and equipment hire company. The Picturehouse cinema opened in 1997 and has 4 cinema screens.

Figure 5.2: Stratford East Theatre, Cultural Quarter Stratford Town Centre



- 5.24 There are 6 hotels across Stratford Town Centre, including the Holiday Inn Express, Travelodge and Ibis Hotel chains. Other leisure uses include 7 traditional east end pubs, 5 bar/restaurants, 11 restaurants, 11 cafes, 18 fast food take-aways, 5 betting offices, and 3 bingo/amusement arcades. The bars and restaurants offer a range of British and International cuisine including Steakout Meat House, Pizza Express, Nando's, Chinese Overseas, and Best Meze and Grill. There are only two national multiple restaurant chain operators in Stratford town centre; Pizza Express and Nandos.
- 5.25 The number and proportion (7.3%) of retail service operators is significantly below the national average of 15.7%, perhaps surprising for a town centre servicing local shopping and service requirements. There are just 4 beauty salons, 5 hairdressers, 3 opticians and a Post Office, car repair depot, and satellite TV provider.
- 5.26 The proportion of financial and business services (18.9%) is, however, substantially higher than the national average, comprising 39 businesses. These comprise predominantly employment agencies (5) and estate agents (14), reflecting the substantial regeneration and level of development activity over recent years across the Metropolitan Centre, wider sub-area and including the Olympic Park. Other uses include representation from the major banks Barclays, Natwest, HSBC, Halifax, Santander and Lloyds; and a small number of accountants, pawnbrokers and solicitors.
- 5.27 The proportion of vacant units (13.1%) is broadly in line with the national average (13.9%), comprising 27 units in total. These are evenly scattered throughout the town centre, with no particular



concentrations; and eight are ‘under alteration’ following investment and plans to re-open. If these eight units are excluded, the vacancy rate in Stratford is below the national average.

Diversity of Uses: Town Centre Change 2010-2022

- 5.28 Table 5.3 below, compares the town centre composition by number of units since 2010. This focuses on the traditional town centre, excluding Westfield Stratford City. The figures and analysis highlights the substantial fall in comparison goods since 2010 from 30.5% to 19.4%, reflective of national trends, but highlighting a substantial shift in composition across the town centre. The loss of comparison businesses has been replaced to a small extent by service operators and to a greater extent by vacant units.
- 5.29 The above analysis has highlighted that eight vacant units are under alteration, being prepared for re-opening, and this figure must be monitored, but it does demonstrate that the composition of Stratford town centre is shifting and the loss of comparison businesses must be discouraged as far as is possible, and the introduction of new diverse footfall generating uses encouraged. Stratford Town Centre has always performed a more diverse role for the local catchment population alongside Westfield Stratford City, and it must continue to do so.

Table 5.3: Stratford Town Centre Diversity of Uses by Number of Units 2010-2022

	% of Total 2010	% of Total 2016	% of Total 2022
Convenience	6.6%	8.1%	8.3%
Comparison	30.5%	27.4%	19.4%
Service	55.8%	56.5%	59.2%
Vacant	7.1%	8.1%	13.1%

Convenience examples: bakers, butchers, supermarket, fishmongers, grocers, newsagent;

Comparison examples: clothing, footwear, chemist, charity, cycle shop, DIY/electrical, florist, mobile phone;

Leisure Service examples: café, bars, restaurants, hot food take-away, bars/wine bars;

Financial & Business examples: banks, building societies, estate agents, employment and careers;

Retail Service examples: dry cleaners, opticians, Post Office, health and beauty, hairdressers.

Diversity of Uses / Retailer Representation: Westfield Stratford City

- 5.30 Westfield Stratford City opened in 2011. It has a total retail floorspace of over 157,370 sq m and consists of retail, food, hotel, leisure and entertainment, office and professional services. It is the third largest shopping centre in the UK (in terms of retail floorspace), and one of the largest urban shopping centres in Europe offering a wide range of shops and restaurants/bars, an All Star Lanes bowling, Gymbox and Aspers Casino. It lies adjacent to the Queen Elizabeth Olympic Park, East Village and Stratford stations. Major multiple retailers which anchor the shopping centre include John Lewis, Waitrose, M&S and a Vue cinema.
- 5.31 Based on the latest survey by Experian Goad, Westfield Stratford City comprises 157,370 sq m gross of retail, leisure and service floorspace across 352 units. Table 5.4 and 5.5 below set out the diversity of uses in Westfield Stratford City compared to the national average in respect of town centre



composition. The data demonstrates the continued strong presence of comparison goods retailing across all categories, substantially above the national average, and reinforcing the centres strong position amongst the network of London Metropolitan Centres. We discuss the further below.

Table 5.4: Westfield Stratford City Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance
Convenience	20	5.8	9.1	-3.3
Comparison	172	49.9	27.5	22.4
Leisure Service	85	24.6	24.6	0.0
Retail Service	20	5.8	15.7	-9.9
Financial & Business Service	5	1.4	9.2	-7.8
Vacant	43	12.5	13.9	-1.4
Total	352	100	100	-

Table 5.5: Westfield Stratford City Composition of Uses (Floorspace sq m gross)

	Floorspace	% of Total	UK Average (%)	Variance
Convenience	4,090	2.6	15.6	-13.0
Comparison	112,620	71.6	31.6	40.0
Leisure Service	23,600	15.0	25.7	-10.7
Retail Service	2,000	1.3	7.2	-5.9
Financial and Business Service	1,570	1.0	7.0	-6.0
Vacant	13,490	8.6	12.9	-4.3
Total	157,370	100	100	-

- 5.32 Performance and footfall is driven by comparison goods retailing, offering 172 operators from high street brands such as Primark, H&M, TK Maxx, Next, New Look, and River Island, through to more upmarket brands normally only found in the larger town centres, including Urban Outfitters, Diesel, Ted Baker, Kurt Geiger, Carvela, Reiss and Cos. There is a broad range of ‘other’ comparison goods retailers include other key attractors, such as Foyles bookstore, Boots the Chemist, Argos, Apple, Curry’s, Lakeland, Nespresso; alongside twelve jewellers, four furniture retailers (in addition to John Lewis), sports and camping equipment, cosmetics and beauty, and toys and games.
- 5.33 There are 20 convenience goods operators including Waitrose and M&S Simply Food, but also offering a broad range of deli’s, bakers and confectioners, and health foods. There are just five financial and business services – compared to 39 in the traditional part of the town centre – including high street banks Nationwide, Lloyds, Barclays and HSBC. There are 85 leisure services, including 19 cafes, 5 bars/wine bars, 29 restaurants and a number of high end take-away operators. Key leisure attractors include Aspers casino, Vue Cinema, All Star Lanes Bowling, Gymbox gym and three hotels. There are only 20 retail service, largely comprising health and beauty businesses. The level of vacant units (43) is marginally below the national average.



Linked Trips

5.34 The household telephone survey enabled this evidence base to explore the relationship and level of linked trips between Stratford Shopping Centre/The Broadway and Westfield Stratford City. The Town Centre Bridge Link (Fig.5.3) opened in September 2011, and forms an important pedestrian and cycle crossing over one of the busiest sections of railway in London – connecting and overcoming considerable level changes. The bridge serves shoppers, residents and workers and visitors to the Westfield Stratford City retail destination and the Queen Elizabeth Olympic Park (Fig.5.4 below).

5.35 The analysis demonstrated a strong relationship and high level of linked trips, with the following questions asked:

- When you visit the town centre as your main destination, do you also visit Westfield? 63% responded 'yes'.
- When you visit Westfield as your main destination, do you also visit the town centre? 58% responded 'yes'.

Fig.5.3: Stratford Pedestrian Bridge Link

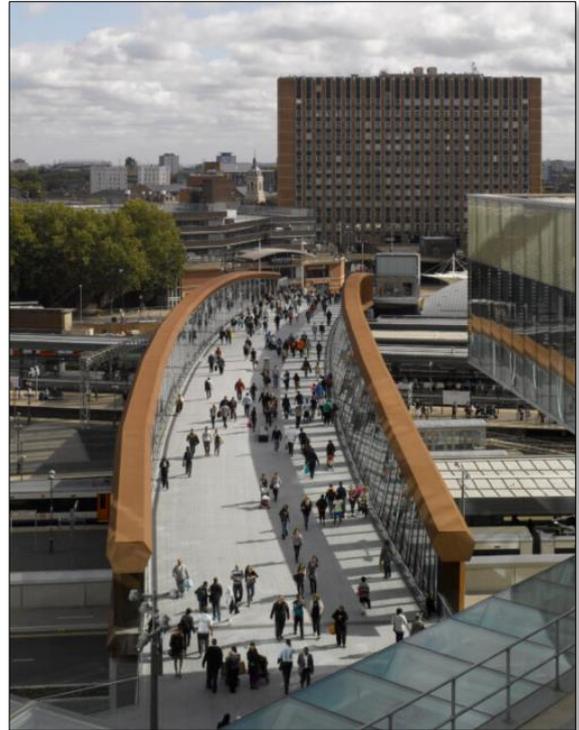


Figure 5.4: Main Link Route Between Stratford Town Centre and Westfield Stratford City



Proposals / Planning Commitments

5.36 There are currently two major strategic planning permissions in Stratford. The Madison Square Garden (MSG) live music and entertainment venue lies within the London Borough of Newham, but within the jurisdiction of the London Legacy Development Corporation (LLDC), and was granted



planning permission by the LLDC (Ref: 19/00097/FUL) on 22nd March 2022, and is now subject to a final decision by the Mayor of London. The site is vacant and bound by railway lines on all sides, sandwiched between Westfield/Olympic Park and Stratford Town Centre. The proposed 21,500 capacity entertainment dome is 120 metres wide and has a height of 90 metres, intended to provide ‘immersive experiences’, bars and restaurants, and featuring the biggest LED external advertising screen in the world.

Figure 5.5: Proposed MSG Entertainment Sphere, Stratford



5.37 Stratford Waterfront/‘East Bank’ also lies within the London Borough of Newham, but within the jurisdiction of the London Legacy Development Corporation (LLDC), and was granted planning permission by the LLDC (Ref: 18/00470/OUT) /FUL) in June 2019. The scheme will create a world-class destination, bringing together outstanding organisations to showcase exceptional art, dance, history, craft, science, technology and cutting edge design. The site will comprise major new facilities for the Victoria and Albert Museum East (V&A East), Sadler’s Wells East, the University of the Arts London College of Fashion and the BBC. The scheme will deliver (a maximum of) around 4,000 sq m of day-to-day shopping, cafes, restaurants and bars.

Figure 5.6: Stratford Waterfront/East Bank Cultural Quarter





Customer Views and Behaviour

5.38 The household telephone survey asked a series of qualitative attitudinal questions probing respondents about their usage of the town centre, their likes and dislikes, and how they think Stratford Town Centre and Westfield Stratford City could be improved in the future. A number of the questions are multiple response, enabling the respondent to state more than one answer, and as a result some of the percentage figures are greater than 100%. The key findings are summarised below:

- i. Reflective of its role serving the local catchment population, the frequency of visit to Stratford Town Centre is high, with 66% visiting at least once a week or more often. A further 20% visit every 2-3 weeks, whilst 15% visit once a month or less often. These figures suggest that Stratford town centre has a relatively tight catchment area, comprising the local area and those living in close proximity visiting regularly for their day to day shopping. It also suggests that people are still travelling infrequently, from further afield, to shop in the town centre, i.e. monthly or less often.

The frequency of visit to Westfield is lower, with people undertaking bulk clothing and footwear shopping less often; only 36% visit once a week or more often. A greater proportion visit less often, with 24% visiting every 2-3 weeks, and 40% visiting once a month or less often.

- ii. An analysis of dwell time also reflects the different roles of the Town Centre and Westfield; with the town centre having a shorter dwell time overall. Over a half of respondents (53%) stay in the town centre for up to an hour, whilst 24% stay between 1-2 hours, and 23% for over 2 hours.

The opposite trend is identified for Westfield, with people staying for longer periods; only 20% stay in the shopping centre for up to an hour, whilst 37% stay between 1-2 hours, and 43% for over 2 hours. These figures reflect the high number of operators represented, the infrequent 'leisure activity', longer travel distances and the wider mix of cafes and restaurants – all driving longer dwell times.

- iii. The highest response when asked about the main purpose of their trip to the town centre was food shopping (36%), followed by non-food shopping (32%). For Westfield, the responses were different, with 49% stating their main trip as non-food shopping and only 12% stating food shopping.

People also note their main purpose of visiting the town centre is to access transport (6%), window shopping (5%), daytime eating (4.5%) and meeting family/friends (3%). In Westfield, the additional responses included window shopping (11%), meeting family/friends (7%), the cinema (4%), and daytime eating (4%).

- iv. When asked what they liked about Stratford town centre, the most cited response was that the centre was 'close to home' (39%), that it was familiar to them and that they were a regular visitor (18%), and that it had good access by bus (17%). The top response for Westfield was that it was an attractive environment/nice place (27%), followed by being close to home (25%), and the good range of non-food shops (19%).

'Other' responses for Stratford town centre included the good cafes/restaurants (16%), the compact layout (14%), the good market (12%), the good range of non-food shops (10%), access by train (9%), the good range of affordable shops (9%), that it was close to work/en-route (9%), and the good range of foodstores (5%).



‘Other’ responses for Westfield included good cafes/restaurants (17%), that it was familiar to them (14%), good access by train (14%), good range of high street retailers (12%), a good day out (12%), good range of clothes shops (10%), clean and well-maintained (10%), easy access by car (9%), and the compact layout (9%).

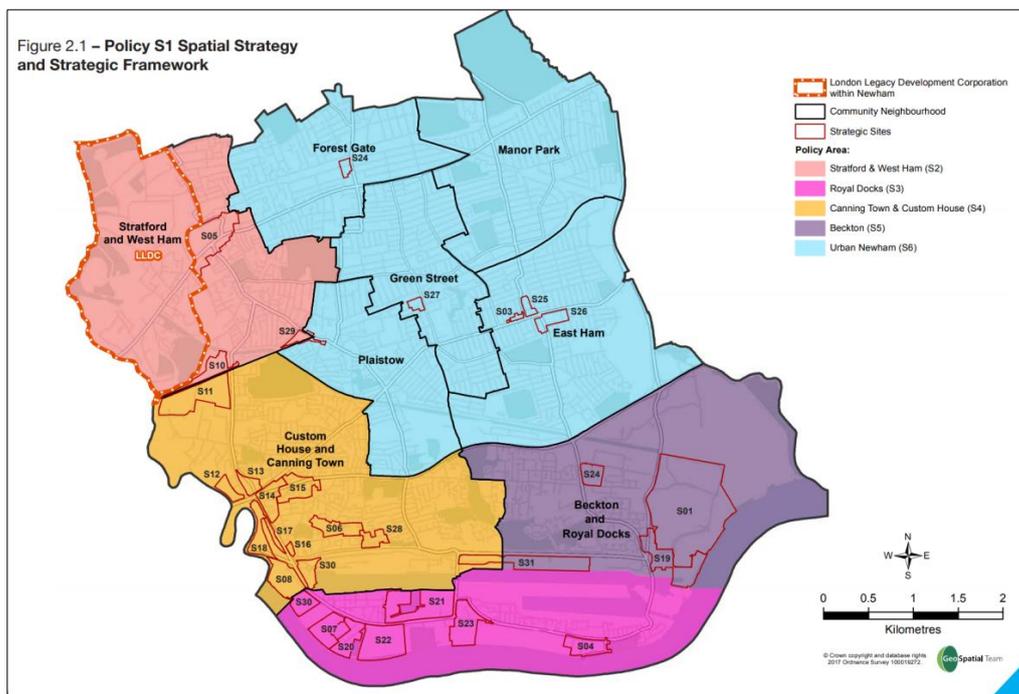
- v. Respondents were then asked what they disliked about the centre. The highest responses in respect of the town centre were that it was too busy (17%), the dirty streets/poorly maintained (13%), the poor environment (8%), and the poor quality public toilets (6%). For Westfield, the responses were that it was too busy (30%), the expensive car parking (10%), not enough ‘other’ services (4%), and lack of security (3%).



6. East Ham

6.1 East Ham is defined as a Major Centre in the Local Plan and London Plan. It is located in the East of the eastern part of the borough in the ‘Urban Newham’ Local Plan spatial policy area (Fig.5.1). The centre comprises 327 shop units, the third largest town centre in Newham – in terms of shop units – after Stratford and Green Street. The town centre is predominantly linear in form running north/south along High Street North, and eastwards from the junction with Barking Road in the south. The town centre has an excellent level of accessibility, achieving a PTAL rating of 6a. There are regular bus services throughout the centre, and the entrance to East Ham underground station leads directly into the northern part of High Street North with direct access to the District and Hammersmith & City lines.

Figure 6.1: Newham Spatial Policy Areas, Local Plan 2018



6.2 Policy INF5 of the Local Plan (Town Centre Hierarchy and Network) confirms the aim to maintain the role and function of East Ham as a Major Centre, “ensuring it continues to meet a wide range of borough-wide and local needs through improvements to accessibility, growth and renewal of floorspace, particularly aimed at consolidating its strong convenience role, whilst improving its comparison, quality leisure and community offer and retaining its independent retailers”.

6.3 Local Plan Policy S6 (Urban Newham) sets out the strategic principles and spatial strategy for Urban Newham, including the following relevant extracts:

East Ham town centre will continue to be important within the borough as a whole, with recognised heritage assets, employment, civic and community spaces, good accessibility by bus, foot and tube, and vibrancy and popularity added by its independent shops as well as a range of multiples. Through new development, particularly in the southern part of the centre, as well as renewal of existing floorspace, the centre will provide a better quality and



mix of offer during the day and into the evening within an improved public realm that better manages pedestrian flows, has attractive gateways and revitalised and enhanced heritage assets.

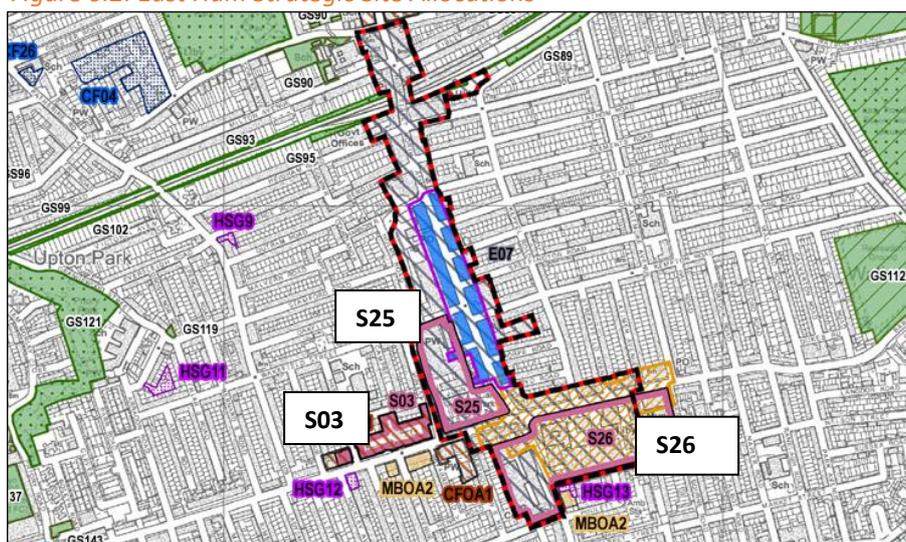
Complementary high density residential development will make use of the public transport accessibility, which will be enhanced with step-free station access. The town centre will be less linear, with primary activity spreading out towards its wider boundaries including an enhanced street environment at Ron Leighton Way, and clearer delineation of its boundaries.

Elsewhere in East Ham, most change will be focused on windfall sites along main roads, particularly Barking Road and High Street North and South, contributing to their improvement as movement corridors. There will be more general emphasis on conservation and enhancement of the residential environment and valued open space.”

6.4 There are two Local Plan Strategic Site Allocations within East Ham town centre boundary, and one on the edge of the town centre - all are located to the south of the town centre fronting Barking Road, and close to the junction with High Street North (Fig.6.1 & 6.2):

- **S25, East Ham Market (town centre):** Allocated for mixed-use comprising retail, incorporating residential, office and community uses, in a scheme sensitive to important heritage and civic assets on the site. Indicative building heights of 6 to 8 storeys subject to sensitivity to the Conservation Area and listed buildings.
- **S26, East Ham Town Hall Campus (town centre):** Allocated for mixed-use comprising retail, incorporating residential, office and community uses, in a scheme sensitive to important heritage and civic assets on the site. Indicative building heights of 6 to 8 storeys subject to sensitivity to the Conservation Area and listed buildings. Almost the entirety of S26 lies within a Conservation Area.
- **S03, East Ham Western Gateway (edge of centre):** Allocated for mixed-use comprising residential and community uses making efficient use of the site. Design and public realm reflecting the town centre gateway location and Key Corridor status. Indicative height: 6 to 8 storeys.

Figure 6.2: East Ham Strategic Site Allocations





- 6.5 The London Plan does not identify any future reclassification of East Ham Major Centre in the town centre hierarchy, but does record it as having ‘medium’ commercial growth potential, i.e. having moderate levels of demand for retail, leisure or office floorspace, and with physical and public transport capacity to accommodate it. The London plan omits reference to office guidelines, indicating the limited office role of East Ham, but does recognise a ‘high’ level of residential growth potential moving forwards. There is no night-time economy classification for East Ham, recognising the limited role and contribution of the town centre to this sector of the London economy.
- 6.6 The Major Centre is identified as falling within a London Plan ‘Strategic Area for Regeneration’; i.e. where the impacts of inequality and causes of deprivation are particularly concentrated. London Plan Policy SD10 states that Boroughs should identify Strategic Areas for Regeneration in their Local Plans and develop policies that are based on a thorough understanding of the demographics of communities and their needs.

Diversity of Uses / Retailer Representation

- 6.7 Based on the latest survey by Experian Goad (June 2021), East Ham Major Centre comprises 57,960 sq m gross of retail, leisure and service floorspace across 327 units. Table 6.1 and 6.2 below set out the diversity of uses in East Ham Major Centre compared to the national average in respect of town centre composition. The data demonstrates the strong role of the convenience goods sector and financial and business services, and a low vacancy rate. We discuss the further below.

Table 6.1: East Ham Major Centre Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance
Convenience	58	17.7	9.1	8.6
Comparison	83	25.4	27.5	-2.1
Leisure Service	69	21.1	24.6	-3.5
Retail Service	49	15.0	15.7	-0.7
Financial & Business Service	53	16.2	9.2	7.0
Vacant	15	4.6	13.9	-9.3
Total	327	100	100	-

Table 6.2: East Ham Major Centre Composition of Uses (Floorspace sq m gross)

	Floorspace	% of Total	UK Average (%)	Variance
Convenience	10,700	18.5	15.6	2.9
Comparison	19,020	32.8	31.6	1.2
Leisure Service	14,890	25.7	25.7	0.0
Retail Service	3,780	6.5	7.2	-0.7
Financial and Business Service	7,260	12.5	7.0	5.5
Vacant	2,310	4.0	12.9	-8.9
Total	57,960	100	100	-



- 6.8 Consistent with the findings of the 2010 and 2016 evidence base, the centre continues to have a strong independent food, non-food, and ethnic retail offer, a key part of the town centre composition driving specialist shopping trips and broader reasons to visit the town centre.
- 6.9 The proportion of convenience goods operators (17.7%) is substantially above the national average of 9.1%, comprising 58 businesses. The offer is anchored by small-scale Sainsbury's supermarket accessed from Myrtle Road, a Tesco Express store on Pilgrims Way and an Iceland store fronting High Street North – all relatively small and dated stores that have traded in East Ham for a number of years. There is also a small Lidl foodstore towards the north of the town centre, also fronting High Street North. East Ham has a strong range of convenience goods independent operators, spread throughout the retail frontage, including a number of bakers, butchers, fishmongers, grocers, mini-markets, deli's and small supermarkets. The closest and most accessible main food superstores are located in Barking and Beckton.
- 6.10 The proportion of comparison goods operators (25.4%) is below the national average of 27.5%, comprising 83 units. A more in-depth analysis highlights that 17% of these are clothing, footwear and sports-wear operators, including just three well-known high street brands Primark, Field & Trek, Shoe Zone, but mostly comprising local, independent businesses. Other national multiple retailers include The Works, Boots Pharmacy, Wilko, Card Factory, Poundland, WH Smith, Specsavers, Sports Direct, JD Sports, Superdrug, Savers and The Perfume Shop. There is also a good range of chemists, florists, household goods, jewellers, household textiles, computer gaming, and toys and games. The strongest category is 'mobile phone/telephone' shops with sixteen businesses represented.
- 6.11 East Ham has a particularly strong representation of financial and business services comprising 16.2% of all businesses in the centre; well above the national average of 9.2%. A third of businesses (17) offer global money exchange services, enabling people to send money online to friends and family abroad; reflecting, and consistent with, the vibrant ethnic diversity in this catchment area. There are also 16 estate agents and – despite national trends – eight major bank and building society operators continue to be represented on the high street. Other businesses include a selection of pawnbrokers, solicitors and accountants.
- 6.12 Leisure services are the second largest category in East Ham after comparison goods, comprising 69 businesses. The quality of offer is, however, poor, comprising 9 (13%) betting offices and 27 (40%) fast-food take-aways, including Paddy Power, Coral, Lucky Star, Ladbrokes, KFC, McDonalds and various kebab, international food, burger and chicken hot food take-aways. There are also 11 cafes, 3 amusement arcades, 'The Gym' health club, and the East Ham Leisure Centre located to the south of Barking Road. There are 14 African, Chinese, Indian and Middle Eastern restaurants, and just outside the town centre boundary on Barking Road, is the 'Flip Out' trampoline warehouse.
- 6.13 East Ham Major Centre has 49 retail service businesses with a particularly strong focus on hairdressing salons (26 businesses (53%)). There are also a small number of dry cleaners, beauty salons, natural therapy services, opticians, travel agents, and a tattooist, undertakers, photography film developers, and a Post Office. There are a number of 'other' town centre uses contributing to the overall vitality and viability of East Ham. These include two dental surgeries, a selection of small scale offices, a doctors surgery on Barking Road, Health Centre on Lathom Road, two internet cafés, two student tuition centres, Newham Collegiate Sixth Form Centre, Newham Register Office, two community centres, the new library and customer services centre on Barking Road, and four 'places of worship'.



6.14 The Experian Goad survey (June 2021) recorded just 15 vacant units across East Ham Major Centre. This proportion (4.6%) is substantially below the national average (13.9%), and is consistent with the findings of the 2010 and 2016 evidence base studies. The number and proportion of vacant units in East Ham remains low, and includes smaller units scattered throughout the northern and southern periphery of the town centre. There are no larger, centrally positioned vacant units or specific clusters detracting from the overall health of the town centre.

Diversity of Uses: Town Centre Change 2010-2022

6.15 Table 6.3 below, compares the town centre composition by number of units since 2010. The figures and analysis highlights the fall in comparison goods businesses since 2010 as recorded in the 2016 evidence base, but demonstrates that this downwards trend has continued over the period to 2022. Comparison goods businesses now comprise 25.4% of all retail and leisure businesses in East Ham – a fall from 29.9% recorded in 2016. The fall in comparison goods businesses correlates with the increase in convenience goods operators, whilst all other categories have remained relatively static between 2016 and 2022.

Table 6.3: East Ham Major Centre Diversity of Uses by Number of Units 2010-2022

	% of Total 2010	% of Total 2016	% of Total 2022
Convenience	14.4%	13%	17.5%
Comparison	35.1%	29.9%	25.4%
Retail Service	13.3%	14.6%	15.0%
Leisure Service	17.9%	21.6%	21.1%
Financial & Business	14.4%	16%	16.2%
Vacant	4.9%	5.0%	4.6%

Convenience examples: bakers, butchers, supermarket, fishmongers, grocers, newsagent;

Comparison examples: clothing, footwear, chemist, charity, cycle shop, DIY/electrical, florist, mobile phone;

Leisure Service examples: café, bars, restaurants, hot food take-away, bars/wine bars;

Financial & Business examples: banks, building societies, estate agents, employment and careers;

Retail Service examples: dry cleaners, opticians, Post Office, health and beauty, hairdressers.

Proposals / Planning Commitments

6.16 There are a number of town centre sites which either have planning permission, are under construction, or have been developed and completed since the 2016 evidence base. These can be summarised as follows:

- **East Ham Market (southern portion):** southern part of Strategic Site Allocation S25, previously in use as a car park. Planning permission for the redevelopment of the site for mixed use comprising residential, retail and gym. A total of 2,120 sq m of retail floorspace, comprising two units with the larger unit (1,860 sq m) let to TK Maxx. First floor gym, and 98 residential 1 and 2-bed units. The scheme is under construction (image below):



Fig.6.3: East Ham Market (southern portion)



- **East Ham Market (northern portion):** northern part of Strategic Site Allocation S25, previously occupied by East Ham Market, eight terraced houses on St. John’s Road, a public car park and Kina House. Planning permission (Ref: 17/03612/FUL) was granted in late 2018 for the demolition of the existing buildings (with the exception of Kina House) and redevelopment of the site to deliver a mixed use development comprising 277 residential units and flexible commercial floorspace (Use Class A1-A4) at ground floor in buildings ranging from 2 to 15 storeys. The scheme (image below), currently under construction, will provide 2,714 sq m (GIA) of flexible commercial space (A1-A4, B1, D1, D2) comprising one double storey unit on the corner of Ron Leighton Way and Pilgrims Way and the potential to subdivide the remaining space into 14 units within an internal mall.

Fig.6.4: East Ham Market (northern portion)





- **Poundland, 72-76 High Street North:** Planning permission (Ref: 19/01697/FUL) granted (April 2020) for the erection of part one, part two, part three storey extension to roof of existing building to provide retail (Class A1) and cafe (Class A3) floor space at ground floor and hotel (Class C1) on the upper floors. The existing shopfront and entrance into the ground floor retail space on High Street North will be retained and an entrance and reception area serving the hotel will be created on Skeffington Road.
The ground floor retail will be retained and refurbished with a new café and reception area provided for the hotel accommodation above (entrance and storage). Overall the proposed development will provide 848 sqm (GIA) of enhanced ground floor retail space supported by a 177 sqm (GIA) café, and a 89 bed hotel at the upper floors. There is a small loss of retail sales floorspace given the introduction of a new café at ground floor. *Permitted, not yet implemented.*
- **East Ham Western Gateway, 281 Barking Road:** Strategic Site Allocation S03, change of use of part first floor from Leisure Facility (Class D2) to Day Nursery (Class D1); the area of floorspace being changed totals at 404m². No additional retail or leisure floorspace. Granted planning permission July 2019. *Permitted, not yet implemented.*

Customer Views and Behaviour

- 6.17 The household telephone survey asked a series of qualitative attitudinal questions probing respondents about their usage of the town centres, their likes and dislikes, and how they think East Ham Major Centre could be improved in the future. A number of the questions are multiple response, enabling the respondent to state more than one answer, and as a result some of the percentage figures are greater than 100%. The key findings are summarised below:
- i. Frequency of visit is very high, with 72% visiting the Major Centre at least once a week or more often. A further 18% visit every 2-3 weeks, whilst 10% visit once a month or less often. These figures suggest that East Ham has a relatively tight catchment area, predominantly comprising the local area and those living in close proximity – visiting regularly for their day to day shopping, leisure and service requirements.
 - ii. In terms of dwell time, 48% of respondents stay in the major centre for up to an hour, whilst 32% stay between 1-2 hours, and 21% for over 2 hours. This suggests a relatively strong dwell time, driven by the broad range of shopping, leisure and retail service providers, and those 'other' town centre uses driving footfall.
 - iii. The highest response when asked about the main purpose of their trip was food shopping (45%), followed by non-food shopping (15%), financial services (8%), 'other' services such as hair and beauty (5%), window shopping (5%) and a health service (3%). The strong draw of the financial services sector reflects the qualitative findings in respect of diversity of uses discussed above, and is clearly an important footfall driver in East Ham.
 - iv. When asked what they liked about the centre, the most cited response was that that centre was 'close to home', reinforcing conclusions drawn elsewhere in this report about the local nature of shopping and services, and the strength and importance of the local catchment population. Other responses included access by bus (18%), that the centre was familiar to them (15%), the financial services sector (9%), the Market (9%), the good range of high street shops (8%), that the high street is close to work (7%), and the good range of cafes/restaurants (5%).



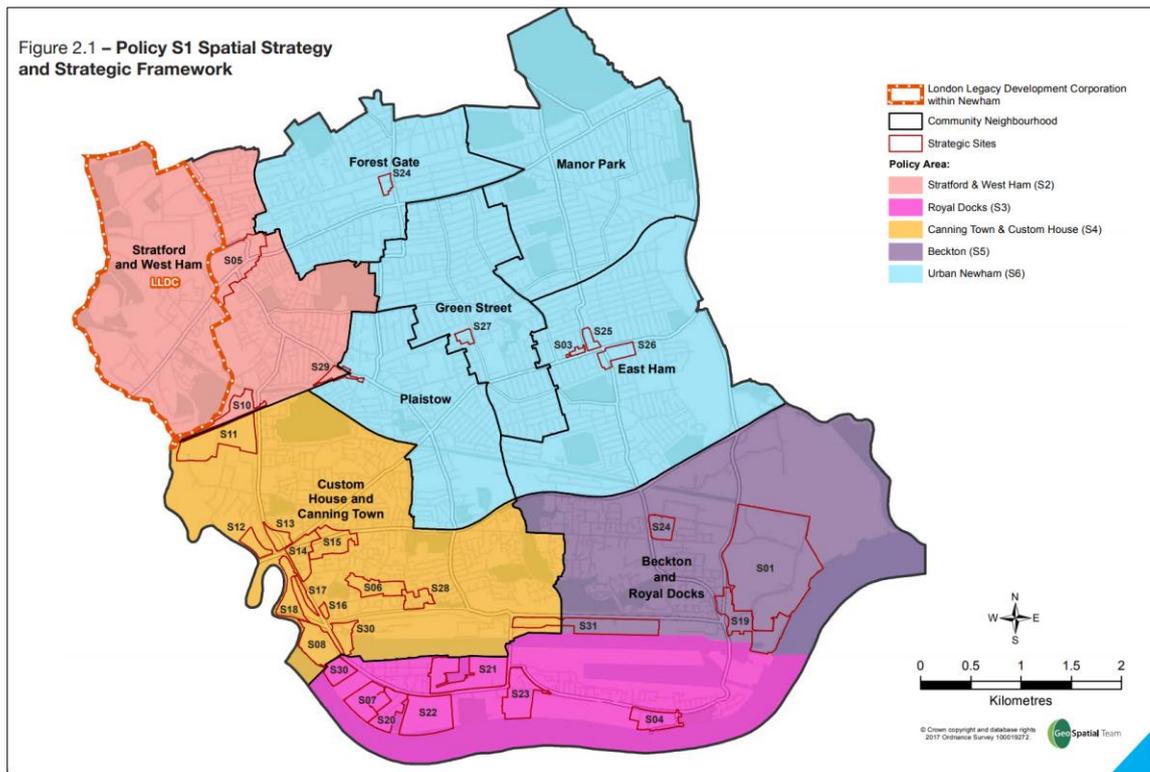
- v. Respondents were then asked what they disliked about the centre, with 19% stating dirty streets, 12% highlighting that they don't feel safe and 9% noting the poor environment. Other responses included 'too busy', 'poor quality cafes and restaurants', 'poor quality clothes shops', 'parking', 'public toilets', and 'traffic congestion'.



7. Green Street

- 7.1 Green Street is defined as a District Centre in the Local Plan and London Plan. It is located in the central/northern part of the borough, in the ‘Urban Newham’ Local Plan spatial policy area (Fig.5.1). The centre comprises 427 shop units, the second largest town centre in Newham after Stratford. The town centre is predominantly linear in form running north/south on Green Street, but also including the East Shopping Centre in the northern part of the centre, and Plashet Grove running eastwards off Green Street.
- 7.2 The town centre has a good level of accessibility, achieving a PTAL rating of 4 in the north of the centre and 5 in the south of the town centre and on Plashet Grove. Upton Park underground station is located on Green Street in the south of the town centre, adjacent to Queens Market, providing direct access to the district and Hammersmith & City tube lines. Buses run north-bound connecting to Forest Gate, and south-bound to East Ham and Canning Town.

Figure 7.1: Newham Spatial Policy Areas, Local Plan 2018



- 7.3 Policy INF5 of the Local Plan (Town Centre Hierarchy and Network) confirms the aim to maintain and develop the role and function of Green Street as a District Centre and a specialist ethnic centre through improvements to accessibility and the growth and renewal of floorspace, creating a wider range of unit sizes and aiming to expand its comparison, community and quality leisure offer and retain its independent retailers.



7.4 Local Plan Policy S6 (Urban Newham) sets out the strategic principles and spatial strategy for Urban Newham, including the following relevant extracts:

“Green Street town centre will maintain its specialist ethnic retail identity with a local to international draw, popular market place and independent shops and quality evening offer that continues to evolve. This will demand innovation in design and formats, a consistently high quality environment and the development of complementary employment to help reinforce its distinctive character, with a mix of quality shops and services that meets both local and specialist needs.

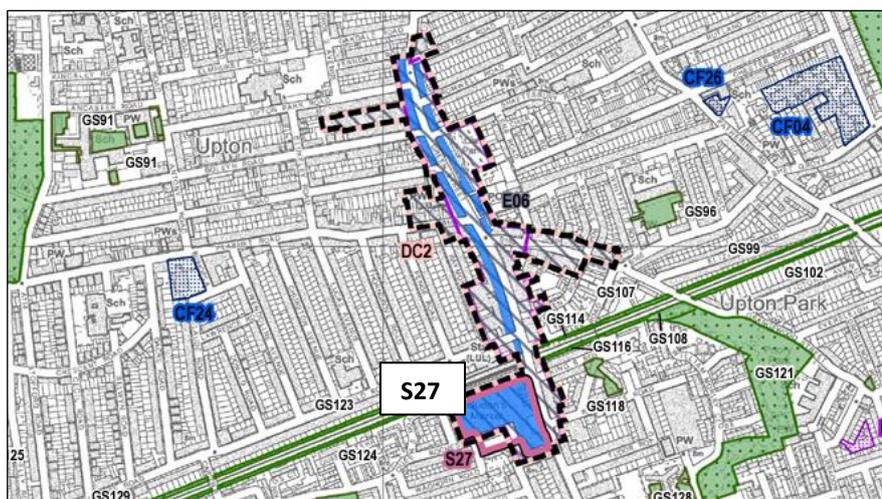
Queen’s Market will continue to be an important meeting place for the local community as at present, reinforced through co-location of other community uses, and with development densities commensurate with its public transport accessibility that will be enhanced through step-free access to the station; and

The redevelopment of Upton Park football ground will significantly boost the southern part of the area providing new housing choice, modern flexible community facilities and renewed public spaces. Development within the setting of West Ham Park will complement and enhance views from the park, and promote access to it.” [Policy S6, Local Plan 2018]

7.5 There is one Local Plan Strategic Site Allocations in Green Street District Centre, located in the south of the town centre; ‘Queen’s Market’ forms Strategic Site Allocation S27:

- **S27, Queen’s Market:** Mixed-use redevelopment comprising retail, residential and community uses (notably healthcare) and including retention of a viable market to provide a central focus for the site’s commercial and community role, as well as improvements to the site’s relationship with the wider town centre and adjacent station, where step-free access will be facilitated. Indicative building heights of 8 to 12 storeys with potential for a step-up in height of up to 19 storeys at station and stepping down to the low-rise residential context.

Figure 7.2: Green Street Strategic Site Allocation



7.6 The London Plan does not identify any future reclassification of Green Street District Centre in the town centre hierarchy, but does record it as having ‘medium’ commercial growth potential, i.e. having



moderate levels of demand for retail, leisure or office floorspace, and with physical and public transport capacity to accommodate it. The London plan omits reference to office guidelines, indicating the limited office role of Green Street, but does recognise a ‘high’ level of residential growth potential moving forwards. There is no night-time economy classification for Green Street, recognising the limited role and contribution of the town centre to this sector of the London economy.

- 7.7 The District Centre is identified as falling within a London Plan ‘Strategic Area for Regeneration’; i.e. where the impacts of inequality and causes of deprivation are particularly concentrated. London Plan Policy SD10 states that Boroughs should identify Strategic Areas for Regeneration in their Local Plans and develop policies that are based on a thorough understanding of the demographics of communities and their needs.

Diversity of Uses / Retailer Representation

- 7.8 Based on the latest survey by Experian Goad, Green Street District Centre comprises 46,080 sq m gross of retail, leisure and service floorspace across 427 units. Table 7.1 and 7.2 below set out the diversity of uses in Green Street Major Centre compared to the national average in respect of town centre composition. The data demonstrates the continued strong role of the convenience and comparison goods sector, and a low vacancy rate – consistent with the previous evidence base studies. The more in-depth analysis discussed below highlights the continued strong role of ethnic retailing in Green Street, underpinning the centre’s vibrancy, diversity and identity.

Table 7.1: Green Street District Centre Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance
Convenience	74	17.3	9.1	8.2
Comparison	185	43.3	27.5	15.8
Leisure Service	57	13.3	24.6	-11.3
Retail Service	42	9.8	15.7	-5.9
Financial & Business Service	33	7.7	9.2	-1.5
Vacant	36	8.4	13.9	-5.5
Total	427	100	100	-

Table 7.2: Green Street District Centre Composition of Uses (Floorspace sq m gross)

	Floorspace	% of Total	UK Average (%)	Variance
Convenience	10,250	22.2	15.6	6.6
Comparison	19,840	43.1	31.6	11.5
Leisure Service	5,070	11.0	25.7	-14.7
Retail Service	4,280	9.3	7.2	2.1
Financial and Business Service	2,580	5.6	7.0	-1.4
Vacant	4,060	8.8	12.9	-4.1
Total	46,080	100	100	-



- 7.9 The proportion of convenience goods operators (17.3%) remains substantially above the national average (9.1%), representing 74 units in total. Whilst Tesco Metro and Iceland have retained their units on Green Street, businesses are dominated by ethnic retailers, including 6 bakers, 13 halal butchers, confectionary and biscuits, and market bazaars. There is also a strong range of general convenience stores (19), fishmongers (7), greengrocers and tobacconists. Holland and Barratt – the health food shop – are also represented.
- 7.10 The proportion of comparison goods operators (43.3%) is substantially above the national average (27.5%), comprising 185 businesses. Like convenience goods, the representation of comparison goods businesses continues to be driven by ethnic retailers; and the health of Green Street continues to be underpinned by its ethnic role overall, performing as a local, national and international shopping destination. The offer comprises predominantly bridal-wear, jewellery and ladies/men clothing selling sari's and traditional Indian dress catering for general wear and also weddings. Other comparison businesses include chemists, and a small number of health and beauty, carpets/furniture, shoes and mobile phone shops. National multiple retailers represented include Boots, Superdrug, Shoezone and Mark One, but Peacocks has closed down since the 2016 evidence base.
- 7.11 The previous evidence base reported the opening of the East Shopping Centre in March 2015, heralded as a 'world-renowned Asian shopping destination' towards the northern periphery. The shopping centre is open and trading, including the Souk food court, but the survey identified eight vacant units – a strong concentration within the district centre. This suggests that the shopping centre is experiencing challenges in respect of attracting and retaining businesses compared to high street units which have a relatively low vacancy rate. This should be monitored as town centres continued to recover from the Covid-19 pandemic.

Figure 7.3: East Shopping Centre, Green Street



- 7.12 The proportion of leisure services (13.3%) is substantially below the national average of 24.6%; comprising 57 operators. It is evident that 27 of these are hot food take-aways (47%), 5 are betting offices, and 2 are amusement arcades. There are only 10 sit down restaurants and 1 pub, the Queen's at the entrance to Queens Market in the south of the town centre. The leisure services sector in Green Street is unbalanced and heavily focused on more undesirable take-aways and betting offices.



- 7.13 The proportion of retail services (9.8%) is substantially below the national average of 15.7%, comprising 42 businesses. This category is dominated by hairdressers, with 26 operators represented (62%). Other uses include beauty and nail salons (6), opticians (3), travel agents (4), and a dry cleaners, laundrette and clothing alterations. Green Street does not have a Post Office, with the closest premises being St Stephen’s Parade Post Office just outside the northern boundary of the town centre.
- 7.14 The proportion of financial and business services (7.7%) is marginally below the national average of (9.2%), comprising 33 businesses. Half of business offer global money exchange services, enabling people to send money online to friends and family abroad; reflecting, and consistent with, the vibrant ethnic diversity in this catchment area. Other uses include estate agents (5), solicitors (3), pawnbroker (1) and accountants (2); and Barclays Bank and Nationwide Building are also represented as key national multiples.
- 7.15 There are 36 recorded vacant units (8.4% of total) in Green Street District Centre, which is substantially below the national average of 13.9%. There is a concentration of vacant units (7) within the East Shopping Centre and also nearby on the peripheral Shaftesbury Road (5) where units are particularly small in size and off-pitch. Remaining vacant units are scattered throughout Green Street, with the most prominent being the unit previously occupied by Peacocks clothing alongside an adjoining vacant bank. The range of ‘other’ town centre uses is more limited than identified in Stratford, East Ham and Forest Gate, but does include three dental surgeries and the library opposite Iceland convenience store.

Diversity of Uses: Town Centre Change 2010-2022

- 7.16 Table 7.3 below, compares the town centre composition by number of units since 2010. Comparison goods have always been dominant in Green Street District Centre, but the figures do highlight the impact of wider national trends, with a small decline in recent years from 47.6% in 2016 to 43.3% in 2022. This is not significant, and could be a short term impact as a consequence of the Covid-19 pandemic, but should be monitored moving forwards over the plan period. The proportion of convenience goods and leisure services has increased, but retail services and financial and business services have both seen a small decrease. Vacant units have, overall, decreased since 2010.

Table 7.3: Green Street District Centre Diversity of Uses by Number of Units 2010-2022

	% of Total 2010	% of Total 2016	% of Total 2022
Convenience	15.9%	14.9%	17.3%
Comparison	45.6%	47.6%	43.3%
Retail Service	12.1%	11.7%	9.8%
Leisure Service	9.4%	9.8%	13.3%
Financial & Business	7.4%	8.2%	7.7%
Vacant	9.7%	7.7%	8.4%

Convenience examples: bakers, butchers, supermarket, fishmongers, grocers, newsagent;
 Comparison examples: clothing, footwear, chemist, charity, cycle shop, DIY/electrical, florist, mobile phone;
 Leisure Service examples: café, bars, restaurants, hot food take-away, bars/wine bars;
 Financial & Business examples: banks, building societies, estate agents, employment and careers;
 Retail Service examples: dry cleaners, opticians, Post Office, health and beauty, hairdressers.



Proposals / Planning Commitments

7.17 There are a number of town centre sites which either have planning permission, are under construction, or have been developed and completed since the 2016 evidence base. These can be summarised as follows:

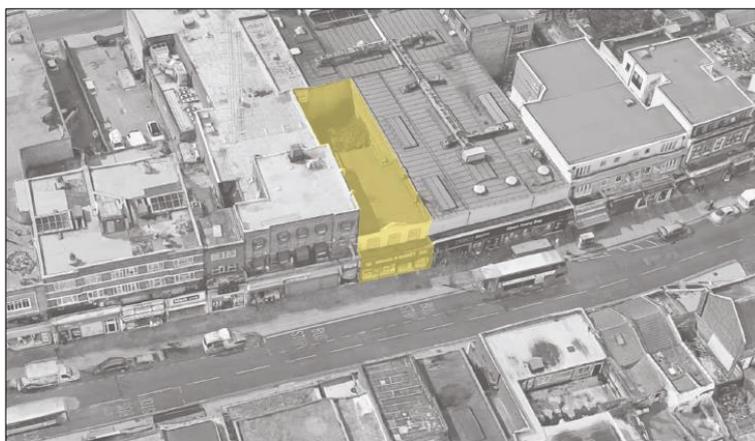
- **Strategic Site S27, The Queen’s Market and Hamara Ghar Investment Strategy Study:** Due for completion in September 2022, the Study is exploring how to make the best investment for this Council-owned and managed strategic site (S27). Whilst retaining and modernising the Queen’s Market and Hamara Ghar buildings, the options will explore opportunities for the site to also accommodate a new health centre, library and community centre, as well as more social housing.

Figure 7.4: Queen’s Market, Green Street



- **Holland & Barratt Redevelopment, 354-356 Green Street (Ref: 19/01714/FUL):** Located in the prime pitch, adjoining Tesco Metro. Planning permission granted for the demolition of the two storey retail property to provide an extended ground floor retail unit (A1) at ground floor, a new basement and 9 apartments on five upper floors. The proposed ground floor commercial unit measures 421.4m² in area, a small uplift in retail floorspace. *Approved, August 2019, not yet implemented.*

Figure 7.5: Holland & Barratt Redevelopment Site





- **Former Peacocks shop unit/Lidl Foodstore**, planning permission for development and alteration to accommodate Lidl foodstore, 374-378 Green Street. Located in prime pitch, in close proximity to Tesco Metro, Iceland, Boots and Superdrug. Erection of a rear extension including rooftop external plant equipment and external alterations including a new shopfront. The proposed extension will add 214 sq m GIA on the ground floor and 83 sq m GIA on the first floor. Equates to an internal net sales area of 989 sqm. *Under construction.*
- **277B Green Street** (Ref: 19/02066/FUL): Located on the east side of Green Street, opposite the entrance to the East Shopping Centre in the north of the district centre. Planning permission granted for the change of use of the 2nd floor from retail (storage ancillary to A1) to residential (C3) including a 3 storey rear infill extension and a single storey roof extension for the creation of 7 self-contained flats at 2nd and 3rd floor level with associated amenity space. No change to ground floor retail sales area. *Under construction.*

Figure 7.6: 277B Green Street



Customer Views and Behaviour

- 7.18 The household telephone survey asked a series of qualitative attitudinal questions probing respondents about their usage of the town centres, their likes and dislikes, and how they think Green Street District Centre could be improved in the future. A number of the questions are multiple response, enabling the respondent to state more than one answer, and as a result some of the percentage figures are greater than 100%. The key findings are summarised below:
- i. Frequency of visit is very high, with 75% visiting the District Centre at least once a week or more often. A further 15% visit every 2-3 weeks, whilst 11% visit once a month or less often. Consistent with most of the other larger centres in Newham, this indicates the relatively tight and localised catchment area, with shoppers visiting regularly for their day to day shopping, leisure and service requirements. Green Street has always pulled visitors in from further afield, attracted by the diverse and substantial ethnic non-food goods available, and this is likely to remain the case, particularly as the country continues to emerge from Covid-19.
 - ii. Green Street has a reasonably strong dwell time for a district centre, with only 37% staying for up to an hour. A further 38% stay for between 1-2 hours, and 25% stay for longer – over 2 hours.



Dwell time is driven by a diverse range of goods and services encouraging linked trips and reasons to stay for longer periods of time.

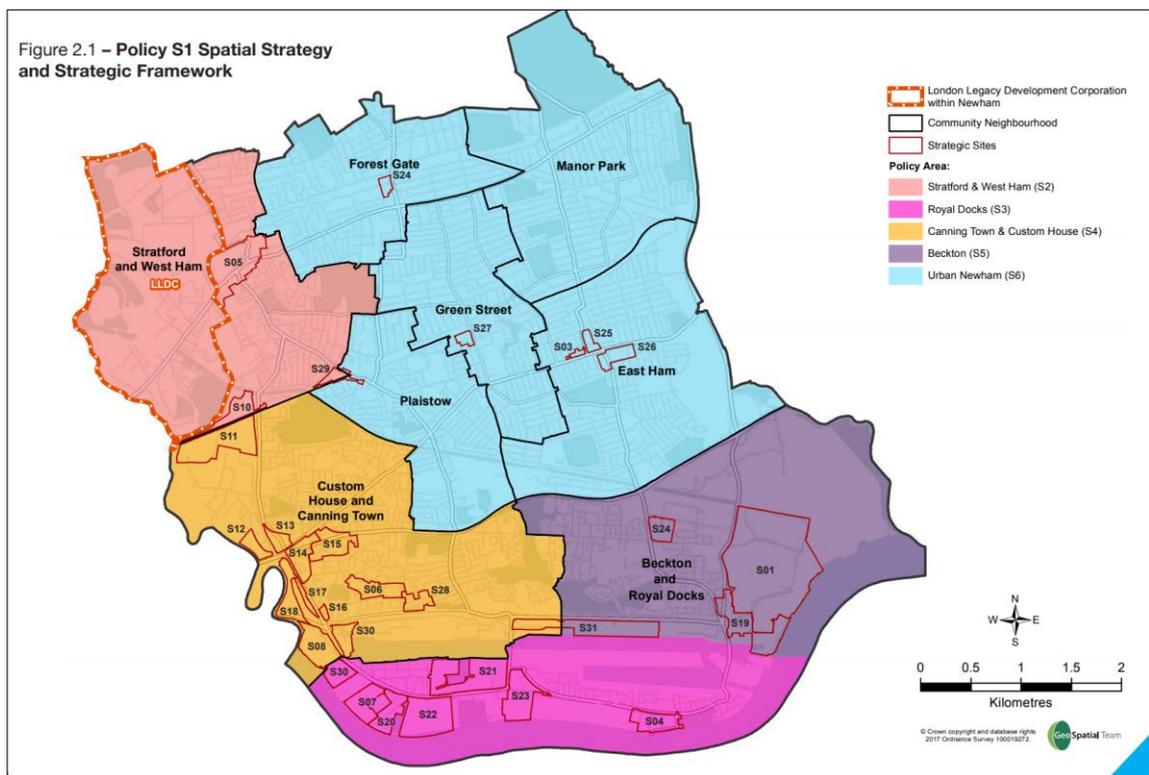
- iii. The highest response when asked about the main purpose of their trip was food shopping (64%), followed by non-food shopping (13%), 'other services' (4%), accessing transport (3%), and visiting the gym (3%). The convenience goods sector is clearly driving frequent shopping trips, which in turn will benefit the wider shopping and service offer. This is consistent with the above average representation of convenience goods, and the increase in this sector over the last 12 years; as well as the strength of the market.
- iv. The reasons for 'liking' the centre were diverse, including that it was close to home (31%), close to friends/family (15%), regular visit/familiarity (14%), the Market (13%), access by car (11%), the attractive environment (11%), access by bus (11%), access by train (9%), well maintained streets (9%), good range of quality shops (9%), good range of bakers/butchers (9%), good range of clothes shops (8%) and compact/good layout (7%).
- v. The dislikes listed by respondents were more limited, and focused on insufficient/expensive parking, dirty and poorly maintained streets and environment, too busy/crowded, don't feel safe, traffic congestions, a need for more affordable shops, and insufficient financial services.



8. Forest Gate

- 8.1 Forest Gate is defined as a District Centre in the Local Plan and London Plan. It is located in the northern part of the borough, in the ‘Urban Newham’ Local Plan spatial policy area (Fig.5.1). The centre comprises 230 shop units and is the fifth largest town centre in Newham after Stratford, Green Street, East Ham and Canning Town. The town centre is predominantly linear in form running north/south on Woodgrange Road (A114) and Upton Lane, crossing over the Romford Road which runs east/west.
- 8.2 The town centre has a good level of accessibility, achieving a PTAL rating of 4 across most of the town centre, but a higher rating of 5 in the north of the centre outside Forest Gate Train Station, and around the junction of the main high street with Romford Road further south. The overline station provides direct links to Romford and Shenfield in the east, and Stratford, Liverpool Street, Ealing Broadway, Paddington, Reading and Heathrow to the west. Buses run north-bound connecting to Leyton, south-bound to Plaistow, and west to Stratford.

Figure 8.1: Newham Spatial Policy Areas, Local Plan 2018



- 8.3 Policy INF5 of the Local Plan (Town Centre Hierarchy and Network) confirms the aim to maintain and develop the role and function of Forest Gate town centre through the growth and renewal of floorspace to better meet a wide range of local community needs, targeting a medium-sized food store and comparison retailers but retaining its independent offer, and improving north-south integration over the Romford Road.



8.4 Local Plan Policy S6 (Urban Newham) sets out the strategic principles and spatial strategy for Urban Newham, including the following extracts relevant to Forest Gate:

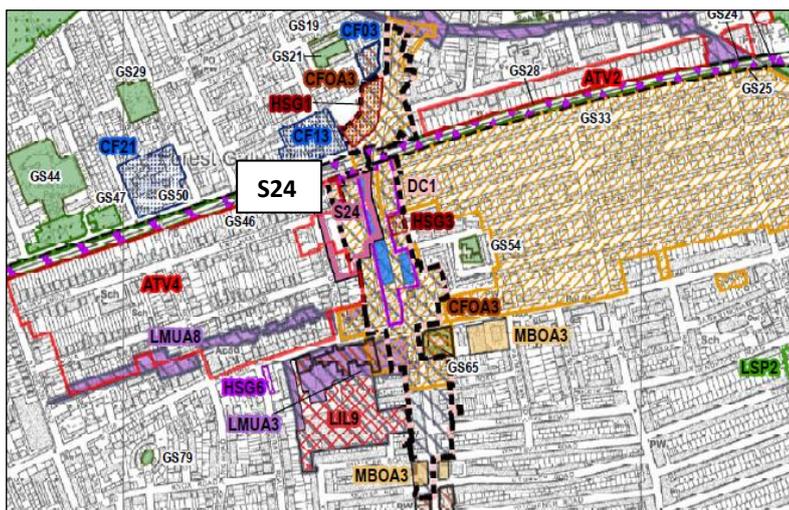
“Forest Gate town centre will become an attractive and vibrant centre, retaining its urban village feel founded on established independent shops, arts and cultural activity and revitalised heritage assets. Further cafes and restaurants, community facilities, and retail variety, including a small to medium-sized foodstore, will add to the mix and quality of offer. Alongside commercial uses, new town centre housing will extend safer, more convivial activity into the evening.

The town centre environment and new development will complement, integrate with and reinforce its attractive heritage identity and popularity of local neighbourhoods, and facilitate a better north-south integration of the centre across Romford Road, building on the opportunity presented by Crossrail and identified development sites.”

8.5 A number of site allocations fall within or directly adjoining Forest Gate, as illustrated in Figure 8.2 below, including the inclusion of the high street within a large Conservation Area. There is one Local Plan Strategic Site Allocation in Forest Gate District Centre, located in the north west of the town centre adjacent to the train station; ‘Woodgrange Road West’ forms Strategic Site Allocation S24:

- **S24, Woodgrange Road West:** Mixed-use comprising town centre uses including retail, arts and cultural, community, business and residential; limited intensification to take advantage of opportunities afforded by Crossrail. There is potential for higher residential densities closer to Forest Gate Station. Development proposals must demonstrate a positive contribution to local character and distinctiveness with a clear strategy for responding positively to the built heritage and conservation area context of this site. Indicative building heights of 4-6 storeys overall with scope for mid-rise development of up to a maximum of 8-storeys in the vicinity of the station.

Figure 8.2: Forest Gate Local Plan Site Allocations (2018)



8.6 A large ‘Local Mixed Use Area’ (LMUA3) is allocated to the south of the district centre, bound by Romford Road, Nursery Lane and Upton Lane. LUMA’s are allocated in Local Plan Policy J2 for employment-led mixed use that:



- i. protects and promotes Class B1 uses and other employment-generating uses compatible with residential, subject to town centre and other infrastructure policies; and/or
 - ii. allows for Managed Transition (subject to listed design and technical criteria) and redevelopment to focus on the ongoing viable operation of such uses and design incorporating or compatible with residential uses, whilst addressing any other site-specific issues.
- 8.7 Two key local community facilities are protected in the north of the district centre under Local Plan Policy INF8 (Community Facilities). Site Allocations CF03 'Lord Lister Health Centre' and CF13 the 'Forest Gate Community School' are recognised as key community facilities adjoining the district centre boundary that should be retained for the benefit of the local community.
- 8.8 The Local Plan allocates two 'residential led mixed use' development sites within the district centre boundary; the first (HSG1), lies to the north of the railway line and train station; and the second (HSG3), is the site of the former Methodist Church Community Centre.
- 8.9 The London Plan does not identify any future reclassification of Forest Gate District Centre in the town centre hierarchy, and records it as having 'low' commercial growth potential, i.e. town centres that are encouraged to pursue a policy of consolidation by making the best use of existing capacity, either due to (a) physical, environmental or public transport accessibility constraints, or (b) low demand. The London plan omits reference to office guidelines, indicating the limited office role of Forest Gate, and recognises only an 'incremental' residential growth potential moving forwards. There is no night-time economy classification for Forest Gate, recognising the limited role and contribution of the town centre to this sector of the London economy.
- 8.10 The District Centre is identified as falling within a London Plan 'Strategic Area for Regeneration'; i.e. where the impacts of inequality and causes of deprivation are particularly concentrated. London Plan Policy SD10 states that Boroughs should identify Strategic Areas for Regeneration in their Local Plans and develop policies that are based on a thorough understanding of the demographics of communities and their needs.

Diversity of Uses / Retailer Representation

- 8.11 Based on the latest survey by Experian Goad (June 2021), Forest Gate Centre comprised 31,540 sq m gross of retail, leisure and service floorspace across 230 units. Table 8.1 and 8.2 below set out the diversity of uses in Forest Gate District Centre compared to the national average in respect of town centre composition. The data demonstrates the strong role of the convenience goods, retail service and financial and business sectors, and a low vacancy rate. Consistent with the previous evidence base, the proportion of comparison and leisure uses remains below the national average. We discuss this further below.
- 8.12 The proportion of convenience goods operators (17.8%) is substantially above the national average (9.1%), representing 41 shop units in total. The district centre has three small multiple retailers including Co-op close to the railway station, and Tesco Express and Iceland towards the Romford Road cross roads. The remaining 38 units are occupied by 7 butchers, 23 convenience stores/grocers, cake making supplies, confectionary, 2 fishmongers, 3 deli's and one tobacconist – a good selection of shops with a good representation across ethnic products.



Table 8.1: Forest Gate District Centre Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance
Convenience	41	17.8	9.1	8.7
Comparison	47	20.4	27.5	-7.1
Leisure Service	47	20.4	24.6	-4.2
Retail Service	49	21.3	15.7	5.6
Financial & Business Service	26	11.3	9.2	2.1
Vacant	20	8.7	13.9	-5.2
Total	230	100	100	-

Table 8.2: Forest Gate District Centre Composition of Uses (Floorspace sq m gross)

	Floorspace	% of Total	UK Average (%)	Variance
Convenience	6,940	22.0	15.6	6.4
Comparison	7,570	24.0	31.6	-7.6
Leisure Service	7,170	22.7	25.7	-3.0
Retail Service	4,990	15.8	7.2	8.6
Financial and Business Service	2,900	9.2	7.0	2.2
Vacant	1,970	6.2	12.9	-6.7
Total	31,540	100	100	-

- 8.13 Forest Gate has a limited comparison goods shopping offer – largely consistent with its district centre role. The proportion of businesses (20.4%) is below the national average of 25.5%, although does represent 47 different businesses from a cross section of categories including books, chemists, florist, furniture, hardware, health and beauty, household goods, newsagents, pet shop, stationer, mobile phones/telephones, gifts and interior decorations. There are only three national multiple retailers, including Superdrug, Hallmark and Poundland. There are just two independent clothing shops in the centre, but no shoe shops; products are targeted to local, everyday requirements.
- 8.14 Woodgrange Market is a particular asset and strong visitor attractor in Forest Gate. The community led market takes place every Saturday (10am-4pm) on the corner of Sebert Road and Woodgrange Road, opposite Forest Gate station. Stalls offer quality fruit and vegetables, hot and cold foods, crafts, jewellery, and vintage clothes and collectibles; and provides a hub for the local community, and opportunity to showcase and sell local products and produce.
- 8.15 The proportion of leisure service businesses (20.4%) remains below the national average (24.6%), comprising 47 operators. The largest category comprises hot food take-away, including pizza, fish & chips, kebabs, burgers and chicken; there is also a KFC and a large drive-thru McDonalds on the edge of the town centre. There are five betting offices, which is a strong representation for a centre of this size; and there are only eight cafés and nine restaurants. The large coffee shops – such as Nero’s, Starbucks and Costa Coffee – are not represented in Forest Heath district centre.



- 8.16 The proportion of financial and business services (11.3%) is marginally above the national average of 9.2%, but very few provide consumer financial services in the form of banking – Barclays is the only major bank represented on the high street. Remaining businesses comprise solicitors, estate agents, and a pawnbroker, accountant, financial advisor, housing association and insurance office. Access to everyday financial services is, however, limited.
- 8.17 The provision of retail services is the largest category in Forest Gate District Centre, comprising 49 businesses, which is 5.6% above the national average. Within this category, 35% of businesses are hairdressers (17), but there is also representation from beauty salons, dry cleaners, laundrettes, opticians, a photographer, Post Office, undertakers and an upholsterers. There are six car repair providers, a car wash, and a tyre and exhaust centre. The district centre offers a variety of businesses within this category to encourage footfall and linked trips across.
- 8.18 Forest Gate district centre has only 20 vacant units, representing just 8.7% of total units – substantially below the national average of 13.9%. The vacant units are generally concentrated in the north of the district centre, north of the railway line, and also in the south of the centre on Upton Lane and Romford Road. There are only two vacant units in the prime retail pitch on Woodgrange Road. Four or five of the identified units are ‘under alternation’ suggesting investment and reinstatement to the trading shop frontage in the near future.
- 8.19 There are a number of additional uses that contribute to the vitality and viability of Forest Gate District Centre. These include some scale offices, the postal sorting office on Earlham Grove, dental surgeries, a doctors surgery and health centre, the library on Woodgrange Road, a community centre, the Emmanuel Parish Church on the junction of Romford Road/Upton Lane, and two taxi hire companies. These uses are spread throughout the district centre, assisting in footfall and linked trips.

Diversity of Uses: Town Centre Change 2010-2022

- 8.20 Table 8.3 below, compares the town centre composition by number of units since 2010. The figures and analysis highlights a relatively stable position over the last 12 years, with a small increase in the proportion of convenience, retail service and leisure service operators, but a small decrease in the proportion of comparison goods and financial and business services. Unlike many other town centres across the UK, the level of comparison goods has remained stable at the same level as that recorded in 2010, but is below the national average as discussed above.
- 8.21 The convenience goods role continues to strengthen, whilst the leisure services offer has increased in recent years. The proportion of vacant units has increased, although a number ‘under alteration’ were recorded, inflating the actual figure for 2022.

Table 8.3: Forest Gate Major Centre Diversity of Uses by Number of Units 2010-2022

	% of Total 2010	% of Total 2016	% of Total 2022
Convenience	20.9%	15.4%	17.8%
Comparison	20.9%	23.2%	20.4%
Retail Service	18.8%	20.6%	21.3%
Leisure Service	17.1%	18.6%	20.4%
Financial & Business	15.4%	13.8%	11.3%
Vacant	6.8%	8.3%	8.7%

Convenience examples: bakers, butchers, supermarket, fishmongers, grocers, newsagent;



Comparison examples: clothing, footwear, chemist, charity, cycle shop, DIY/electrical, florist, mobile phone;
Leisure Service examples: café, bars, restaurants, hot food take-away, bars/wine bars;
Financial & Business examples: banks, building societies, estate agents, employment and careers;
Retail Service examples: dry cleaners, opticians, Post Office, health and beauty, hairdressers.

Proposals / Planning Commitments

8.22 There are two key town centre sites which have planning permission in Forest Gate District Centre. These can be summarised as follows:

- **39A-49A Woodgrange Road, new Lidl foodstore:** (Ref: 16/02395/FUL). Planning permission granted for the demolition of the existing buildings and redevelopment to provide a mixed use building of 1-7 storeys, accommodating 1,233.4 sq m GIA of retail space falling within Use Classes A1, A2 and A3 and 74 residential units within Use Class C3. Subsequent non-material amendment (Ref: 18/00808/NONMAT) approved in April 2018 following Lidl agreeing terms for a 25 year lease, but scheme retaining one small corner unit on Earlam Grove/Woodgrange Road as a separate, independent unit. Under construction.

Figure 8.3: 39A-49A Woodgrange Road





- **89-93 Woodgrange Road, Forest Gate:** (Ref: 20/02800/FUL). Approved November 2021. The site is located in the far north west of the district centre, north of the railway line and station. Positioned on the western side of Woodgrange Road, the site was previously vacant, having been in use as a car sales yard. The site comprises a street frontage access and associated 'backland' space abutting Whitehall Place to the rear.

The front section of the development consists of a four storey building facing Woodgrange Road, accommodating ground floor commercial uses with three 3-bed dwellings arranged on the first, second and first floors. The rear section of the development consists of a 3 storey building that would accommodate ground floor commercial uses with residential units above. At ground level a total of 282 sq m of commercial space would be delivered. Primary access to the commercial floorspace would be provided directly off Woodgrange Road and each unit accessed in turn via an internal courtyard arrangement (Fig.9.4 below). It is envisaged that the commercial floorspace will function as mixed use creative hub, facilitating a variety of retail, studio/workshops/exhibition space, co-working and a bakery-café-restaurant. *Not yet implemented.*

Fig.8.4: 89-93 Woodgrange Road, Ground Floor Commercial Courtyard



Customer Views and Behaviour

- 8.23 The household telephone survey asked a series of qualitative attitudinal questions probing respondents about their usage of the town centres, their likes and dislikes, and how they think Forest Gate District Centre could be improved in the future. A number of the questions are multiple response, enabling the respondent to state more than one answer, and as a result some of the percentage figures are greater than 100%. The key findings are summarised below:
- Forest Gate has the highest frequency of visit when compared to the other main town centres across Newham, reflecting its local shopping and service function, and tightly defined catchment area. Of those using Forest Gate most often, 84% visit at least once a week or more often, with 16% of those visiting everyday. In comparison, only 6% visit every 2-3 weeks, whilst 10% visit monthly or less often.
 - In terms of dwell time, 43% of respondents stay in the district centre for up to an hour, whilst 17% stay between 1-2 hours, and 40% for over 2 hours. This suggests a strong dwell time,



reflecting the broad and balanced mix of uses discussed above, and opportunity for linked trips across the town centre.

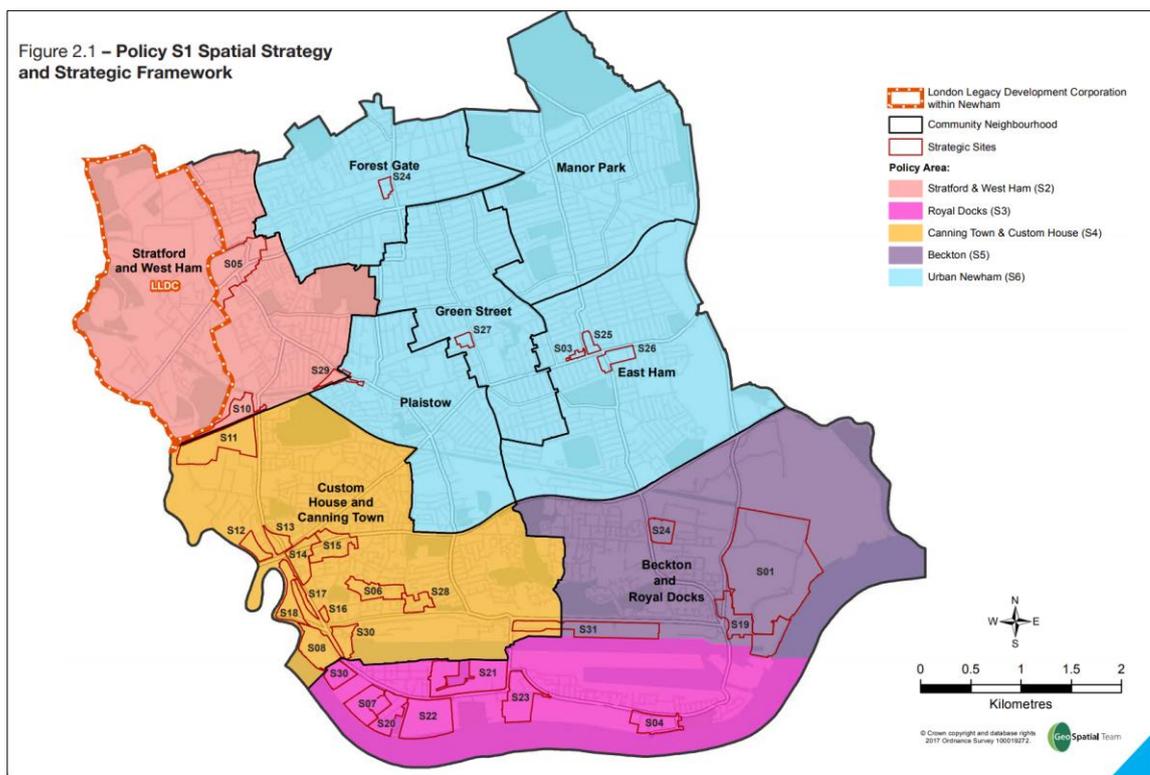
- iii. The highest response when asked about the main purpose of their trip was food shopping (41%), followed by 'other' retail services (11%), accessing transport (10%), non-food shopping (9%) and using the Post Office (4%). These findings reinforce the qualitative audit of uses discussed above, including the strong food and service sector and weak comparison goods offer. Again, this is consistent with the centres role as a district centre.
- iv. When asked what they liked about the centre, the most cited response was that the centre was 'close to home' (28%), followed by the attractive environment (20%), access by train (15%), good range of high street shops (14%), a good market (12%), the clean and well-maintained streets (12%), that the centre was familiar to them (11%), the good cafes/restaurants (7%) and the good range of supermarkets (6%). These figures reflect the good mix of uses and high frequency of visit.
- v. Respondents were then asked what they disliked about the centre, with 19% stating there was a need for more quality shops (19%), that it was poorly maintained (9%), the poor quality pubs and bars (8%), the poor range of non-food shops (7%), and a need for public toilets (6%). Overall, most people are happy with the district centre, but there are clear ideas around how it could be improved.



9. Canning Town

- 9.1 Canning town is defined as a District Centre in the Local Plan and London Plan. It is located in the south west part of the borough, in the 'Custom House and Canning Town' Local Plan spatial policy area (Fig.9.1). The centre comprises 81 units and is the fifth largest town centre in Newham after Stratford, East Ham, Green Street, and Forest Gate. A significant area of industrial and commercial units are located to the north west of the town centre, around Cody Road, and a strong visitor economy is focused around the international conference and events centre, ExCeL, to the south east.
- 9.2 The traditional part of the town centre is predominantly linear in form running east/west from the junction of the A13 and along Barking Road westwards (A124). The Local Plan supports the substantial growth of Canning Town in and around Silvertown Way to the west of the district centre, through a number of large-scale Strategic Site Allocations. These sites are discussed later in this section.
- 9.3 The town centre has an excellent level of accessibility, achieving a PTAL rating of 6a across the centre. The main transport interchange is located at the western end of the centre accessed from Silvertown Way, providing access to the Jubilee Line underground, the DLR, and a network of buses linking to Forest Gate, Victoria Dock, Westminster and eastwards to East Ham, Barking and Romford. The new Elizabeth Line Crossrail station at Custom House – adjacent to the ExCeL Centre, and linked to the DLR station – will also shortly open.

Figure 9.1: Newham Spatial Policy Areas, Local Plan 2018



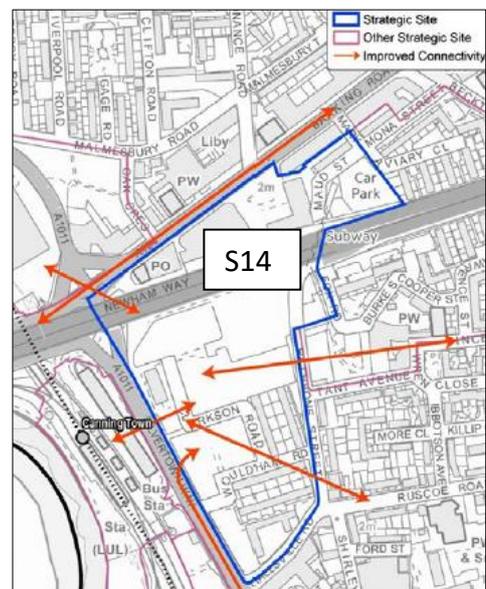


- 9.4 Policy INF5 of the Local Plan (Town Centre Hierarchy and Network) confirms the aspiration for Canning Town town centre, (currently a District Centre) to move up the hierarchy “through transformational change to the scale, layout, accessibility and nature of its offer whilst continuing to meet local needs, integrating the new and existing parts of the centre”.
- 9.5 Local Plan Policy S4 (Canning Town and Custom House) sets out the strategic principles and spatial strategy for the area, aiming to achieve an enhanced, integrated, mixed and balanced neighbourhood including new waterside quarters, an expanded successful town centre at its heart, intensification at Thames Wharf, West Ham and Custom House/Freemasons Local Centres, and strengthened employment areas – all bolstered by the new Elizabeth Line Crossrail station. Town Centre growth and change is intended to achieve a step change upwards from District Centre to Major Centre status.
- 9.6 London Plan Policy S4 sets out the spatial strategy for Canning Town District Centre as follows:

“Canning Town town centre will be revitalised, intensified and expanded, growing in status – marked by some of the tallest buildings in the borough – as well as physical extent, benefiting from high quality public realm, a renewed market space, a better quality and mix of shops and other uses including leisure and workspace that improve activation, trade draw and dwell time, and improved east-west links to the station interchange and to adjacent residential neighbourhoods, functioning as an employment hub and broader focus for activity and facilities both during the day and into the evening.

Variety and distinctiveness will be fostered by the range of uses in the centre; a mix of unit types and scale; and effective integration with the existing high street part of the town centre, surrounding neighbourhoods and heritage assets, including development of attractive gateway sites with complementary uses and settings and a careful distribution and composition of tall buildings that protect views and make appropriate transitions.”

- 9.7 A number of site allocations fall within or directly adjoining Canning Town District Centre (see Fig.9.2 below), the most central being S14: Canning Town Central. The site allocation supports an expanded District Centre abutting the transport hub on Silvertown Way.

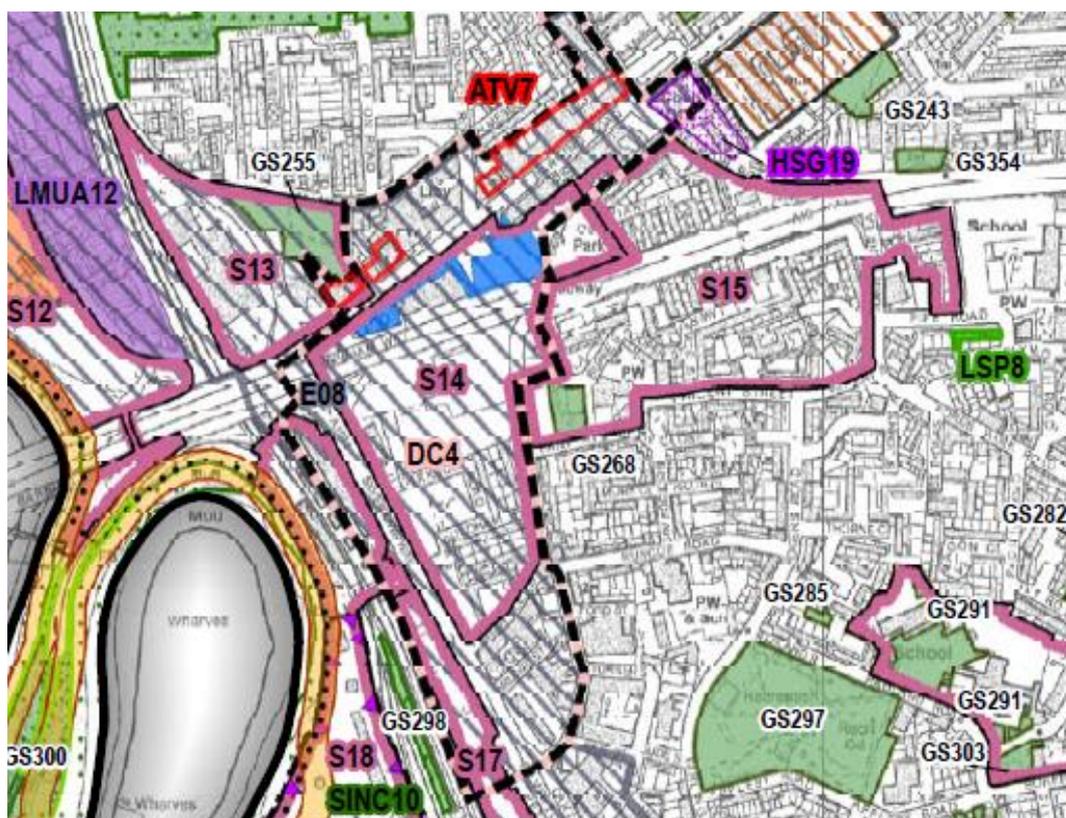


- 9.8 The policy intention of the S14 site allocation is for Canning Town to move towards a Major Centre in composition and scale, within a revised boundary to comprise town centre uses notably anchor foodstore, significant comparison goods floorspace (up to 25,000 sq m net), leisure, workspace and civic space making use of the more pleasant street environment. The site allocation allows for buildings of 20 storeys plus.
- 9.9 Strategic Site Allocations S13, S15 and S17 adjoin the district centre, with a marginal overlap with the district centre boundary. Site S13, Manor Road Retail Park, is allocated for a residential-led mixed-use incorporating high quality, prominent open space; a defined cluster of flexible B1 business space, and town centre commercial and community frontage to



the part of the town centre along Barking Road which lies within the town centre boundary. Site S15, Canning Town East, is allocated for residential with supporting community uses easily accessible from the town centre. Site S17 adjoins Silvertown Way, sandwiched between the railway line and main road on an elongated site.

Figure 9.2: Canning Town Local Plan Site Allocations (2018)



- 9.10 A large 'Local Mixed Use Area' (LMUA12) is allocated to the north west of the district centre, sandwiched between the Cody Road Strategic Industrial Land and the north/south DLR and Strategic Site Allocation S13. LUMA's are allocated in Local Plan Policy J2 for employment-led mixed use that:
- iii. protects and promotes Class B1 uses and other employment-generating uses compatible with residential, subject to town centre and other infrastructure policies; and/or
 - iv. allows for Managed Transition (subject to listed design and technical criteria) and redevelopment to focus on the ongoing viable operation of such uses and design incorporating or compatible with residential uses, whilst addressing any other site-specific issues.
- 9.11 Unlike the Local Plan, the London Plan does not identify any future reclassification of Canning Town District Centre in the town centre hierarchy, and omits reference to office guidelines, indicating the limited office role of Canning Town. The London Plan does, however, record it as having 'medium' commercial growth potential, i.e. those town centres with moderate levels of demand for retail,



leisure or office floorspace, and with physical and public transport capacity to accommodate it; and also high residential growth potential.

- 9.12 There is no night-time economy classification for Canning Town in the London Plan, recognising the limited role and contribution of the town centre to this sector of the London economy. The District Centre is identified as falling within a London Plan ‘Strategic Area for Regeneration’; i.e. where the impacts of inequality and causes of deprivation are particularly concentrated. London Plan Policy SD10 states that Boroughs should identify Strategic Areas for Regeneration in their Local Plans and develop policies that are based on a thorough understanding of the demographics of communities and their needs.

Diversity of Uses / Retailer Representation

- 6.24 Based on the latest survey by Experian Goad, the traditional high street within Canning Town District Centre – predominantly based on Barking Road – comprises 14,000 sq m gross of retail, leisure and service floorspace across 81 units. The analysis below focuses on the historic Barking Road high street and Rathbone Market to gauge current levels of vitality and viability and change over time; whilst the new extension to the district centre south of the A13 Newham Way, in the form of the Hallsville Quarter, is discussed later in this section.
- 6.25 Given the gradual opening of the new Hallsville Quarter, it is important to first gauge at this stage the performance and health of the existing historic part of the town centre to enable effective monitoring moving forwards over the plan period, including any impacts arising as a consequence of the Hallsville Quarter. Once the Hallsville Quarter is complete, with commercial units fully open for trading, the overall town centre health check should be undertaken as ‘one’ complete town centre and monitored as such moving forwards.
- 6.26 Table 9.1 and 9.2 below set out the diversity of uses in Canning Town District Centre compared to the national average in respect of town centre composition. The data demonstrates the strong role of the convenience goods, and retail and leisure services sectors, and a below average vacancy rate. Key anchor retailers include Savers, Londis, Iceland, Co-Op, KFC and Domino’s Pizza. We discuss this further below.

Table 9.1: Canning Town District Centre Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance
Convenience	15	18.5	9.1	9.4
Comparison	10	12.3	27.5	-15.2
Leisure Service	25	30.9	24.6	6.3
Retail Service	19	23.5	15.7	7.8
Financial & Business Service	3	3.7	9.2	-5.5
Vacant	9	11.1	13.9	-2.8
Total	81	100	100	-



Table 9.2: Canning Town District Centre Composition of Uses (Floorspace sq m gross)

	Floorspace	% of Total	UK Average (%)	Variance
Convenience	3,050	21.8	15.6	6.2
Comparison	1,330	9.5	31.6	-22.1
Leisure Service	5,250	37.5	25.7	11.8
Retail Service	1,880	13.4	7.2	6.2
Financial and Business Service	360	2.6	7.0	-4.4
Vacant	2,130	15.2	12.9	2.3
Total	14,000	100	100	-

- 9.16 The proportion of convenience goods operators (18.5%) is substantially above the national average of 9.1%, comprising 15 operators. The offer on Barking Road is anchored by a Co-Op foodstore (1,030 sq m gross) at the far western end of the district centre; and there is an Iceland foodstore located to the eastern end of the centre. Remaining businesses include a small Londis store and a selection of newsagents/grocery shops, and a butcher, off licence and shoe repair business.
- 9.17 The proportion of comparison goods operators (12.3%) is substantially below the national average of 27.5%, comprising just 10 businesses. These comprise charity shops, pharmacy's, and home improvement/DIY stores. Savers is the only comparison goods national multiple retailer in this part of the district centre. The number of financial and business services is particularly limited, comprising only three units and offering no banking or building society services to local people. This is substantially below the national average, and a significant gap in the local district centre offer.
- 9.18 Leisure services is the largest category, comprising 30.9% of all units – above the national average of 24.6%. There is a relatively good balance of uses including five cafés, seven hot-food take-aways, six restaurants, one bar/restaurant, the Anchor House hotel, and Fitness 4 Less health club/gym. National multiples comprise only KFC and Domino's Pizza take-away. There are 19 retail service operators, comprising 23.5% of all units – above the national average of 15.7%. These include twelve hairdressers, three dry cleaners, two opticians, one funeral directors, and the Post Office located at the far western end of the centre adjacent to Co-Op.
- 9.19 The proportion of vacant units (11.1%) is below the national average of 13.9%, comprising 9 units in total. The three largest units include the old Canning Town Library, which has now relocated into the new Rathbone Market development across the road, and two large ground floor units to the rear of the Rathbone Market piazza.
- 9.20 Canning Town District Centre has a small number of 'other' town centre uses, helping to drive footfall and adding to the overall vitality and viability of the centre. These include the new library and community hub within the new Rathbone Market mixed-use development on Barking Road, a veterinary practice and dental surgery at either end of the district centre, St Margaret's Catholic Church, the Community Links Community Centre, and a selection of private tuition centres.
- 9.21 At the time of the 2016 Retail and Town Centre Study, the Rathbone Market mixed-use development was under construction, and completed shortly afterwards in 2017. Occupying a central area within



the district centre (part of Strategic Site Allocation S14), the scheme was delivered – in partnership with the London Borough of Newham – by The English Cities Fund as a joint venture with Legal & General and Homes England. Delivering over 650 new homes, the mixed-use scheme also includes a new library and community hub, retail units on the ground floor, and a revitalised Rathbone Market that was kept running during the construction phases.

Figure 9.3: Rathbone Market, Canning Town District Centre



Diversity of Uses: Town Centre Change 2010-2022

6.33 Table 9.3 below, compares the town centre composition by number of units since 2010, focusing on the historic Barking Road part of the district centre, and excluding the Hallsville Quarter. The most significant change has been the strong decline of comparison goods businesses across the district centre, compensated by the increase in retail and leisure service uses. The vacancy rate has experienced a consistent and gradual decline, which is a positive vitality indicator for the district centre.

Table 9.3: Canning Town District Centre Diversity of Uses by Number of Units 2010-2022

	% of Total 2010	% of Total 2016	% of Total 2022
Convenience	17.7%	17.6%	18.5%
Comparison	21.2%	18.7%	12.3%
Service	46.9%	51.7%	58.1%
Vacant	14.2%	12.1%	11.1%

Convenience examples: bakers, butchers, supermarket, fishmongers, grocers, newsagent;

Comparison examples: clothing, footwear, chemist, charity, cycle shop, DIY/electrical, florist, mobile phone;

Leisure Service examples: café, bars, restaurants, hot food take-away, bars/wine bars;

Financial & Business examples: banks, building societies, estate agents, employment and careers;

Retail Service examples: dry cleaners, opticians, Post Office, health and beauty, hairdressers.



District Centre Extension: Hallsville Quarter

9.23 The Hallsville Quarter comprises the largest area within Strategic Site S14, south of the A13 Newham Way. Currently being delivered over a series of phases, the development is creating a new neighbourhood in the heart of Canning Town, with the intention to seamlessly integrate and extend the existing district centre focused on Barking Road and Rathbone Market. The proposed development was approved in 2012 (Ref: 11/00662/LTGCD) to include retail, leisure, new foodstore, residential, health, offices, hotel, research/development/light industry, and student accommodation.

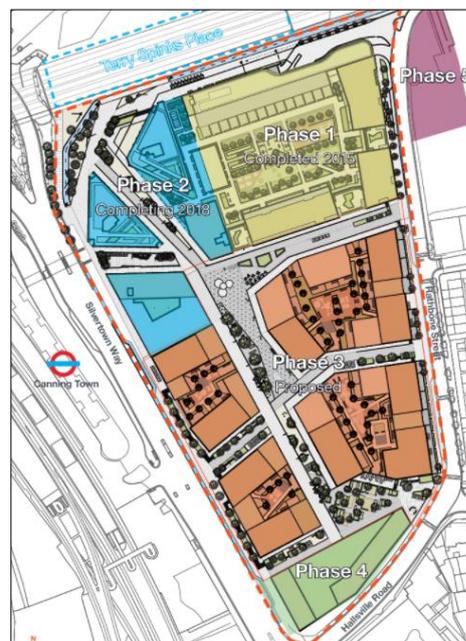
Condition C4 of the original planning permission fixed the following minimum and maximum floorspace thresholds:

- Retail A1-A5: 29,200 sq m GEA Min / 31,700 sq m GEA Max [plus 8,200 sq GEA foodstore]
- Community/Culture/Health Centre (D1): 3,000 sq m GEA Min / 5,500 sq m GEA Max
- Leisure (D2): 3,500 sq m GEA Min / 10,500 sq m GEA Max

9.24 The Minimum retail A1-A5 floorspace was reduced in June 2019 when planning permission was granted (Ref: 17/04045/VAR) for a reduction from 29,200 sq m GEA to 21,250 sq m GEA. This was a response to changing market conditions, during the preparation of the Phase 3 planning application.

9.25 On-Site development progress can be summarised as follows:

- Phase 1 has delivered a 7,600 sq m Morrisons supermarket with direct covered access to the car park for shoppers. Additional retail units are double height and front the Town Square thereby creating active frontages to enhance shopper experience within the public realm area.
- Phase 2 (Ref: 14/00147/REM) has delivered 349 new homes, a new 296 bedrooms Ibis Hotel, and around 4,000 sq m of new restaurants, shops and leisure spaces have also been delivered to activate the public realm and create a vibrant new town centre. Block B commercial floorspace amended under 18/00598/REM to add gym (D1) and health centre (D2); replacing c.500 sq m ground floor retail space.
- Phase 3 (Ref: 17/04046/REM) is under construction, including 620 new homes, 50 extra care homes, c.8,000 sq m retail, c.1,500 sq m leisure, 1,125 sq m offices and an NHS health centre.





- **Phase 4** is subject to consultation on an emerging scheme; aiming to complete the main body of the new town centre to include student accommodation and approximately 500 sq m of new ground floor commercial spaces.

9.26 Retail and commercial leisure operators open and trading within the Hallsville Quarter, include Morrisons, Starbucks, The Gym, Pret, the Ibis Hotel, Yapix Coffee & Wine, McDonalds, Superdrug, Petit Café, Tian Tian Market, Crossfit, Northway Clinic, Wok Go, and MooBoo; predominantly eating/drinking leisure businesses. All are located within the Phase 1 and Phase 2 parcels, which are complete.

Proposals / Planning Commitments

9.27 **Strategic Site S17, Silvertown Way West** (Ref: 16/03428), was approved October 2017; the scheme, known as Brunel Street Works, is under construction. The application site comprises a long, thin parcel of land and measures approximately 2.48 hectares and is located on Silvertown Way in Canning Town. The site is located to the immediate south of Canning Town Underground/Docklands Light Railway (DLR) station and bus station and is bound by road and rail infrastructure on all sides. Detailed planning permission was granted for:

... 975 residential units (Use Class C3), 152 bedroom hotel (Use Class C1), 3,000 sq. m (GIA) of flexible commercial floor space (Use Classes B1 (A,B&C), A1-A4, D2 and a nursery within Use Class D1), an enhanced public realm with cycle ways, tree planting and public squares, amenity space, car parking, cycle parking, refuse stores and servicing arrangements and all associated works. Plus the relocation of existing electricity substation.

9.28 The policy intention of the Local Plan and Strategic Site Allocation S14 in particular, is for Canning Town to move towards a step change upwards to Major Centre in composition and scale, within a revised boundary to comprise town centre uses notably an anchor foodstore, significant comparison goods floorspace (up to 25,000 sq m net), leisure, workspace and civic space. The analysis above has, however, identified that the level of comparison goods floorspace has decreased in scale since the 2016 Retail Study evidence base, even taking into account Phase 1 and Phase 2 of the Hallsville Quarter.

9.29 In 2016, Canning Town had a net comparison goods floorspace of 3,304 sq m (Appendix 3, 2016 Study), but this has now fallen to 865 sq m net (2022, Table 9.2 above). The only comparison goods operator introduced into the Hallsville Quarter is Superdrug, and – whilst there has been substantial improvements in wider place-shaping – this one unit has made no impact on replacing lost floorspace in this category across the District Centre. In respect of comparison goods, Canning Town has not taken the necessary step towards Major Centre status, and is unlikely to have diverted lost trade from the immediate catchment being lost to competing destinations elsewhere in Newham and beyond.

9.30 It is also relevant to highlight the continued ‘above average’ vacancy rate in the historic part of the centre (Barking Road/Rathbone Market), although this has experienced a gradual reduction over the last 12 years.



Customer Views and Behaviour

- 9.31 The household telephone survey asked a series of qualitative attitudinal questions probing respondents about their usage of the town centres, their likes and dislikes, and how they think Canning Town District Centre could be improved in the future. A number of the questions are multiple response, enabling the respondent to state more than one answer, and as a result some of the percentage figures are greater than 100%. The key findings are summarised below:
- i. Frequency of visit is very high, with 78% visiting the District Centre at least once a week or more often. A further 11% visit every 2-3 weeks, and 11% visit once a month or less often. This reflects the localised nature of the retail offer and consequent localised catchment area.
 - ii. Dwell time is particularly low, with 64% staying in the district centre for up to an hour, and only 18% staying for 1-2 hours, and 18% staying for over 2 hours. This again reflects the localised and top-up nature of the retail and service offer within the district centre, serving only day-to-day requirements.
 - iii. The highest response when asked about the main purpose of their trip was food shopping (51%), followed by non-food shopping (12%), accessing transport (9%), visiting a health service (5%), or visiting a retail service (such as the hairdressers) (3%).
 - iv. When asked what they liked about the centre, the most cited response was that the centre was 'close to home' (44%), reinforcing conclusions drawn about the centre's tight catchment area. Other responses included access by train (14%), good cafés/restaurants (11%), close to work (10%), close to friends/family (10%), access by bus (8%), access by car (6%), and a good range of high street retailers (6%).
 - v. Respondents were then asked what they disliked about the centre, with the main responses being the dirty/poorly maintained streets, a feeling of being unsafe, the lack of butchers/bakers, the poor quality cafés/restaurants, traffic congestion, insufficient parking, and a need for a better range of shops and more independent shops.



10. East Beckton/Beckton Area

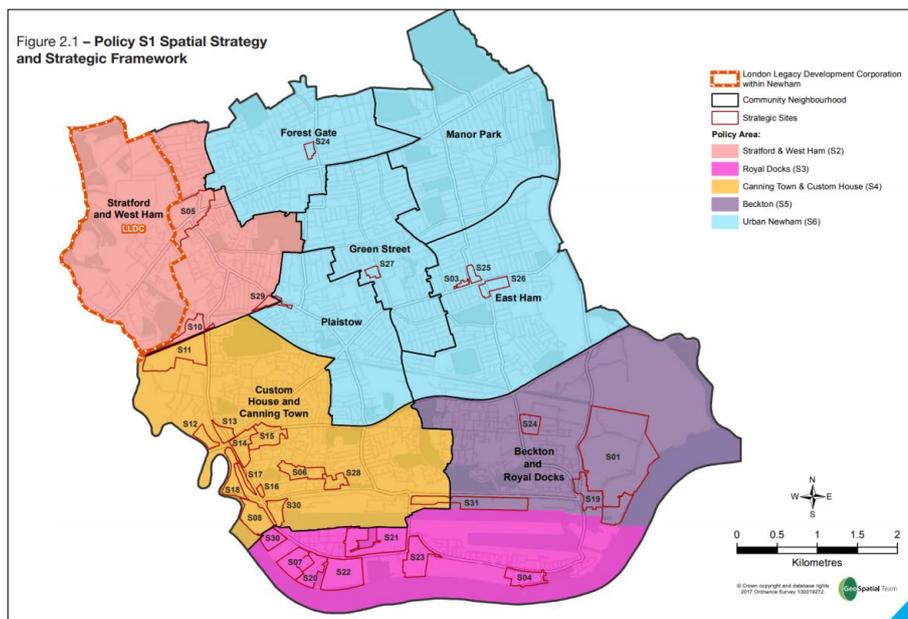
10.1 East Beckton is defined as a District Centre in the Local Plan and London Plan. It is located in the south east part of the borough, in the ‘Beckton and Royal Docks’ Local Plan spatial policy area (Fig.10.1). The district centre comprises 19 units and is the sixth largest town centre in Newham after Stratford, East Ham, Green Street, Forest Gate and Canning Town. The purpose built District Centre is anchored by a large Asda food superstore and the adjoining Mary Rose Mall – a small parade of shops. The town centre boundary also incorporates a Lidl foodstore and a range of other uses including a health centre, sports club, library, hotel and other associated community uses.

10.2 The Local Plan highlights that ‘Beckton’ is a large area, but currently has a relatively low population density due to large extents of land being in retail, warehousing, utilities and industrial use. In addition to the East Beckton District Centre are a series of out-of-centre retail parks, the largest being Gallions Reach to the east. It is recognised that the District Centre provides little community focus:

“...it is primarily based in an indoor precinct and surrounded by a large car park, with a poor relationship with Beckton DLR Station, and the area lacks any Local Centres, with only scattered isolated shops. Gallions Reach, whilst employing significant numbers of people, fails to perform the function of a local high street, and instead provides a wider sub-regional shopping function attracting predominantly car-borne customers.

10.3 East Beckton District Centre has a lower PTAL accessibility rating than elsewhere (3). The centre does include the Beckton DLR station, but access to it is via a pedestrian crossing on the A117 Woolwich Manor Way. A bus station is located adjacent to the Asda foodstore car park, providing extensive services to Gallions Reach, Wanstead, Stratford, Canning Town, East Ham, Major Park and North Woolwich. Previous evidence base studies highlight, however, low usage of the DLR and bus services in East Beckton District Centre, with over 75% arriving by car.

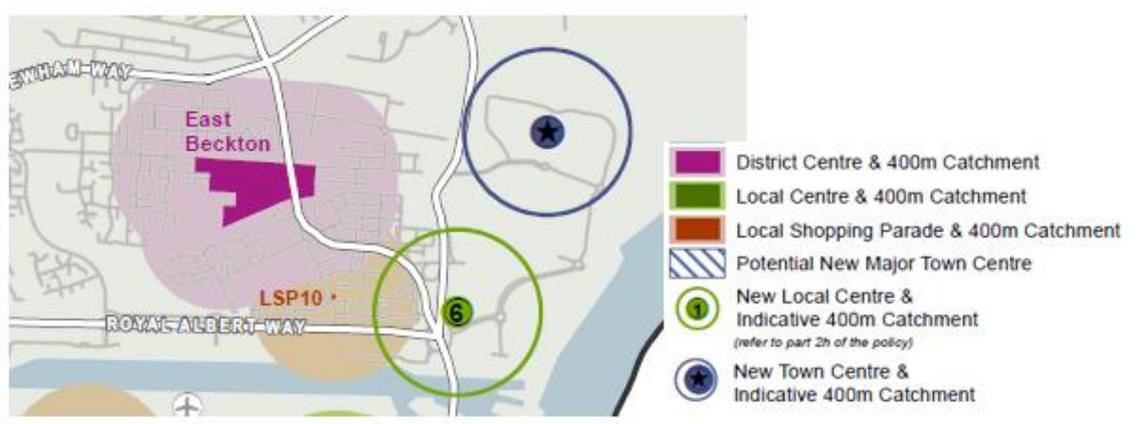
Figure 10.1: Newham Spatial Policy Areas, Local Plan 2018





- 10.4 Policy INF5 of the Local Plan (Town Centre Hierarchy and Network) confirms the need for East Beckton town centre “to consolidate its convenience and local service District Centre role through renewal of floorspace and improved diversity of offer, whilst enhancing its links with local neighbourhoods”.
- 10.5 Elsewhere in Beckton, Policy INF5 sets out the need for Gallions Reach Shopping Park to become a Major Centre (Fig.10.2 below) serving the eastern edge of Newham and wider growth area, through re-configuration of its floorspace as part of a wider masterplan for the area to incorporate a more rounded offer and vertical mixed use, with improved local connections and public transport links. A new Local Centre is also endorsed at Albert Basin (Gallions Reach DLR) (Fig.10.2 below, No.6), with “further sites to be identified in Beckton Riverside at accessible locations with high footfall that do not have reasonable pedestrian access (400-800m) to existing or proposed centres serving similar needs”.

Figure 10.2: Beckton Planned Retail/Town Centre Hierarchy, Local Plan 2018



- 10.6 The Local Plan notes that Gallions Reach has always been regarded as an out-of-centre location in policy terms. However, the reality is that it accounts for a significant amount of spend and hence employment in the Borough, is on the edge of an area of sub-regional population growth, and offers a qualitatively different offer to other nearby centres (Barking, East Ham and East Beckton). It is therefore proposed that it changes to become a Major town centre as part of the development of the Beckton Riverside site which will:

“...increase its local trading potential, recognising its current deficiencies in terms of its limited range and offer, the dominance of access by car despite some improvements to bus usage, and a layout and design that cuts it off from nearby residential areas. Allocation of Gallions Reach as part of the wider site allocation for a significant new piece of urban development would allow for the various constraints that impact on the site to be managed to best effect and for the retail provision to be better integrated into the town centre network.

Importantly, the immediate focus therefore, should be on qualitative change and re-configuration rather than a net increase in floorspace, which should be closely linked to an increase in residents in the immediate Beckton Riverside area. Moreover, any changes in floorspace should be comprehensively masterplanned as part of wider changes to retail, residential and other employment, transport and utilities development in the area.



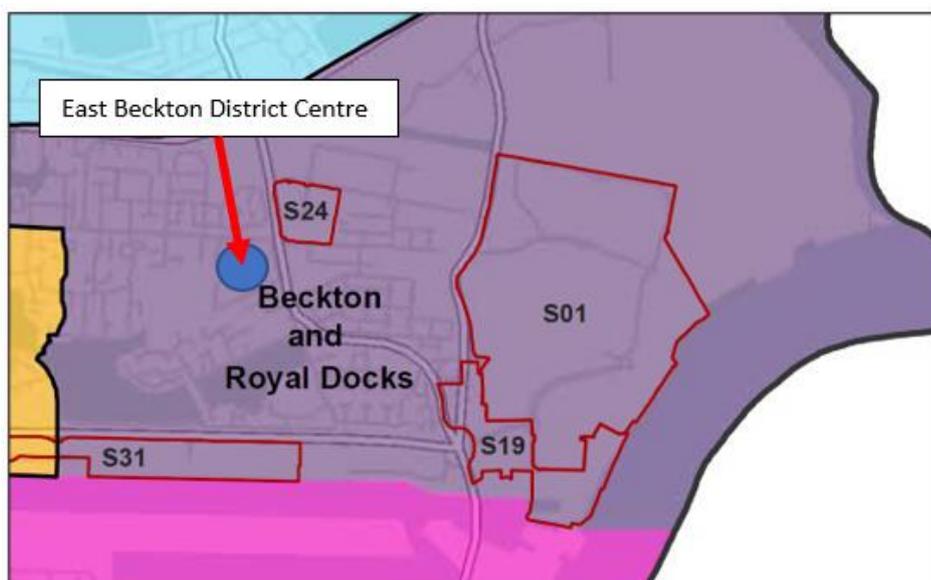
10.7 Local Plan Policy S5 (Beckton) sets out the strategic objective to deliver a “new well-integrated piece of city whilst accommodating significant transport depot and waste and utilities infrastructure needs, a new internationally oriented hi-tech, knowledge-intensive business district benefiting from Enterprise Zone status, and renewal and improvements to the existing residential and industrial areas”. Major new housing (at least 5,278 units) and infrastructure provision and significant numbers of the borough’s targeted jobs growth will be delivered primarily on 4 Strategic Sites (through partial Managed Release of SIL). The strategic sites are discussed later in this section.

10.8 The spatial strategy for retailing and town centres, set out in Policy S5, includes:

- A new mixed-use area within the Beckton Riverside Strategic Site Allocation, with Gallions Reach Shopping Park evolving and intensifying to become a Major town centre for the area focused around a transport hub, and well-integrated with local residential areas and new housing, and also encouraging a reduction in the dominance of car parking (Strategic Site S01).
- New residential development, community facilities and small scale business use and a local centre at the station to consolidate the new community developing around Albert Basin, with good connections to East Beckton District Centre (Strategic Site S19).
- The consolidation of East Beckton District Centre at the eastern end close to public transport links, becoming less island-based and inward-looking, with an improved public realm, renewal of the convenience offer and a wider array of town centre uses. Redevelopment of the adjacent Alpine Way retail park (Strategic Site S24) will enhance the centre’s vitality and viability ensuring it is more clearly the commercial and community hub for the area, and better manage its integration with the residential development to the east.

10.9 The Strategic Sites of relevance to the strategic direction of retail and town centres in the Beckton area over the plan period, are illustrated on figure 10.3 below.

Figure 10.3: Strategic Site Allocations, Beckton, Local Plan 2018





- 10.10 Strategic Site 01, Beckton Riverside, proposes a mix of uses delivering new neighbourhoods centres on a Major town centre and new station and wider transport hub. The new neighbourhoods and town centre – comprising residential, open space, riverside access, retail, leisure, supporting community uses and other employment generating uses - will be delivered through partial Managed Release of SIL, appropriate buffering of remaining SIL, and re-formatting and diversification of the existing retail park around the new transport hub, preferably moving it south.
- 10.11 Strategic Site S19, Albert Basin, adjoins Beckton Riverside on the south west boundary. Local Plan policy supports new housing around Albert Basin and a new Local Centre focused around Gallions Reach DLR station, providing day-to-day shopping and community uses with some B1 business space.
- 10.12 Strategic Site S24, Alpine Way, is focused on Beckton Retail Park – in close proximity to East Beckton District Centre. Local Plan policy supports mixed-use across the site consolidating existing housing located on the north and south of Winsor Terrace together with employment uses along Alpine Way complementing the SIL to the north and east. The predominantly residential area on the southern end of the site will benefit from a new dedicated access and improved links to East Beckton District Centre. The site allocation does not support the retention of retail uses, instead changing the focus of the site to residential and employment, with improved linkages to the existing and adjoining district centre.
- 10.13 The London Plan does not identify any future reclassification of East Beckton District Centre in the town centre hierarchy, and records it as having ‘low’ commercial growth potential, i.e. town centres that are encouraged to pursue a policy of consolidation by making the best use of existing capacity, either due to (a) physical, environmental or public transport accessibility constraints, or (b) low demand. The London plan omits reference to office guidelines, indicating the limited office role of East Beckton, but does recognise a ‘high’ residential growth potential moving forwards.
- 10.14 There is no night-time economy classification for East Beckton, recognising the limited role and contribution of the town centre to this sector of the London economy. The District Centre is identified as falling within a London Plan ‘Strategic Area for Regeneration’; i.e. where the impacts of inequality and causes of deprivation are particularly concentrated. London Plan Policy SD10 states that Boroughs should identify Strategic Areas for Regeneration in their Local Plans and develop policies that are based on a thorough understanding of the demographics of communities and their needs.
- 10.15 Gallions Reach is recognised within the London Plan retail hierarchy as a currently unclassified retail destination, but with a potential future reclassification to a Major Centre – consistent with the policy aspirations set out in the Newham Local Plan (2018). The London Plan identifies Gallions Reach as having a medium commercial, and high residential growth potential.

Diversity of Uses / Retailer Representation

- 10.16 Based on the latest survey by Experian Goad, East Beckton District Centre comprises 16,160 sq m gross of retail, leisure and service floorspace across 26 shop units. Table 10.1 and 10.2 below set out the diversity of uses in East Beckton District Centre compared to the national average in respect of town centre composition. The data demonstrates the stronger role of the convenience goods, leisure and retail service, and financial and business services categories. There are currently no vacant units in East Beckton District Centre. We discuss the further below.



Table 10.1: East Beckton District Centre Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance
Convenience	4	15.4	9.1	6.3
Comparison	6	23.1	27.5	-4.4
Leisure Service	7	26.9	24.6	2.3
Retail Service	6	23.1	15.7	7.4
Financial & Business Service	3	11.5	9.2	2.3
Vacant	0	0.0	13.9	-13.9
Total	26	100	100	-

Table 10.2: East Beckton District Centre Composition of Uses (Floorspace sq m gross)

	Floorspace	% of Total	UK Average (%)	Variance
Convenience	8,770	54.3	15.6	38.7
Comparison	930	5.8	31.6	-25.8
Leisure Service	5,460	33.8	25.7	8.1
Retail Service	600	3.7	7.2	-3.5
Financial and Business Service	400	2.5	7	-4.5
Vacant	0	0.0	12.9	-12.9
Total	16,160	100	100	-

- 10.17 The retail offer in East Beckton District Centre is particularly limited and it is not necessarily relevant to compare data with the national average. A more in-depth analysis does, however, help identify the diversity of uses and the vitality of the district centre in meeting the needs of the local population.
- 10.18 The Asda superstore continues to anchor the district centre, with a floorspace of 7,470 sq m gross. The store is open from 7am-midnight, and offers a pharmacy, opticians, café, bureau to change, cash machine, petrol filling station, George clothing range, Costa Coffee, Decathlon sports range, Johnson’s Dry Cleaners and Timpson shoe repairs/key cutting. Other convenience goods businesses include Cake Box bakers & confectioners, and Lidl foodstore (1,220 sq m gross).
- 10.19 There are six comparison goods retailers, including three chemists, Shoezone footwear, Claire’s Accessories, and a mobile phone shop. Financial and business services are limited to a Natwest Bank and an estate agent; whilst retail services include a dry cleaners, health and beauty retailers, photo processing, a Post Office and vehicle repair depot and servicing. Leisure services include William Hill betting office, McDonalds hot food take-away, the Premier Inn Hotel, a pub, restaurant, and the East London Gymnastics Club. ‘Other’ businesses include a dental surgery and health centre, St Mary’s Community Centre and Church, the library, and the Beckton DLR train station.
- 10.20 Whilst the number of units is relatively small, and the choice of goods and services limited, there is a good breadth and range of uses within the district centre meeting the majority of day-to-day needs of the local population.



Diversity of Uses: Town Centre Change 2010-2022

10.21 Table 10.3 below, compares the town centre composition by number of units since 2010. The figures highlight the fall in comparison goods operators over the last 6 years, and the considerable increase in leisure and retail service business, and decline of vacant units to 0%. The Asda superstore offers a good range of non-food clothing and homeware ranges, whilst the adjoining Mary Rose Mall provides a good range of other town centre uses and services. The fall in comparison goods within this small-scale district centre is not a huge concern to the overall health and vitality and viability – particularly given the close proximity of large scale non-food retail parks.

Table 10.3: East Beckton Centre Diversity of Uses by Number of Units 2010-2022

	% of Total 2016	% of Total 2022
Convenience	12.1%	15.4%
Comparison	30.3%	23.1%
Service	48.5%	61.5%
Vacant	9.1%	0.0%

Convenience examples: bakers, butchers, supermarket, fishmongers, grocers, newsagent;
 Comparison examples: clothing, footwear, chemist, charity, cycle shop, DIY/electrical, florist, mobile phone;
 Leisure Service examples: café, bars, restaurants, hot food take-away, bars/wine bars;
 Financial & Business examples: banks, building societies, estate agents, employment and careers;
 Retail Service examples: dry cleaners, opticians, Post Office, health and beauty, hairdressers.

Proposals / Planning Commitments

10.22 There are no development proposals or planning commitments within the boundary of East Beckton District Centre at the current time.

Customer Views and Behaviour

10.23 The household telephone survey asked a series of qualitative attitudinal questions probing respondents about their usage of the town centres, and their likes and dislikes. A number of the questions are multiple response, enabling the respondent to state more than one answer, and as a result some of the percentage figures are greater than 100%. The key findings are summarised below:

- i. Frequency of visit is lower than other centres in the borough, with just 58% visiting the district centre at least once a week or more often. A further 15% visit every 2-3 weeks, whilst 27% visit once a month or less often.
- ii. In terms of dwell time, 47% of respondents stay in the district centre for up to an hour, whilst 42% stay between 1-2 hours, and – as you might expect – only 12% stay for over 2 hours. This indicates a relatively short dwell time as people undertake their main food shopping and perhaps one or two retail/leisure services whilst visiting.
- iii. The highest response when asked about the main purpose of their trip was food shopping (62%), followed by non-food shopping (31%). A very small number of respondents cited the bank, health service/doctors, and buying fuel at the filling station.



- iv. When asked what they liked about the centre, the most cited response was that the centre was ‘close to home’, followed by ‘easy parking’ (22%), the supermarket (9%), familiarity (9%), the good layout/compact (9%), and ease of access by car (7%).
- v. Respondents were then asked what they disliked about the centre, with the majority of respondents saying ‘nothing’, whilst a small number of people mentioned the lack of security, range of shops and poor quality environment.

Out-of-Centre Retail and Leisure Uses - Beckton

10.24 Within the wider Beckton Area there is a concentration of additional retail warehousing provision alongside other major food retailers in out of centre locations.

Gallions Reach

10.25 Tesco Extra anchors the retail park, and is the main convenience goods offer. Representation from comparison goods retailers represents the highest proportion (59%), although this has fallen since the 2016 evidence base which recorded 69% - like town centres, Gallions Reach is subject to wider national trends. Comparison operators include Boots, Card Factory, Clarks Shoes, Footlocker, H&M, Holland & Barratt, JD, Next, Poundland, River Island, Shoe Zone, Sleep.8, Smyths, Sports Direct.com, Superdrug, EE, O2, Autoglass, webuyanycar, and TK Maxx. Leisure service operators include Bella Italia, Costa Coffee, McDonalds, Nandos, Shakes etc, Subway, Pure Gym, Cookies Island and Talent Central Cheerleading.

Table 10.4: Gallions Reach Composition of Uses (Floorspace sq m gross)

	No.of Units	% of Total	UK Average (%)	Variance
Convenience	1	2.9	9.1	-6.2
Comparison	20	58.8	27.5	31.3
Leisure Service	9	26.5	24.6	1.9
Retail Service	0	0.0	15.7	-15.7
Financial and Business Service	0	0.0	9.2	-9.2
Vacant	4	11.8	13.9	-2.1
Total	34	100	100	-

10.26 Retailers represented at the Beckton Triangle Retail Park include Curry’s, Carpetright, Bensons for Beds, B&M Home Bargains, Lazboy Furniture, Tapi Carpets and Floors, Pizza Hut, and Costa Coffee. Sainsbury’s Superstore anchors Beckton Triangle, and Lidl are currently building a new store within the retail park. Beckton Gateway Retail Park is occupied by Wren Kitchens, B&Q, Crystal Concessions Double Glazing, Halfords, Pets @ Home, McDonalds, KFC, Starbucks, Dominoes and Creams Ice-Creams.



11. Local Centres

- 11.1 This section provides an overview of existing and proposed Local Centres across the LB Newham, setting the context for their necessity within sustainable neighbourhoods and the Council's wider health, wealth and well-being strategies. The borough's aspirations combined with the high level of regeneration, land intensification and improved connectivity/transport investment across the borough has necessitated the adopted and emerging Local Plan to consider the geographical distribution of these important centres within the hierarchy, and to plan for new and enhanced centres where required.
- 11.2 It is recognised that the intensification of employment use and substantial new housing will drive a need for new local centre provision, but that they should meet only local needs and not emerge as 'destinations' seeking to compete with the wider hierarchy of higher order town centres. Aside from retail and leisure uses, local centres within new and growing neighbourhoods can be crucial in providing a focus for community, cultural and civic life.
- 11.3 Section 2 of this report has detailed the Council's borough-wide priorities including accessible and inclusive neighbourhoods and the need to share the benefits of growth equally and fairly. The NPPF sets clear guidance as to how planning policy can and should positively support neighbourhoods across LB Newham, providing shared and community spaces, ensuring the necessary infrastructure and facilities amongst new homes, and planning for a strong network of town centres at the heart of local communities.
- 11.4 This section provides an overview of local centre composition, planned and emerging new local centres, opportunities for additional proposed local centres, and those commercial frontages outside of town centres that could potential be lost through change of use. To inform this section, we draw on data provided by LB Newham, the recently available GLA's High Streets Data Service, and the emerging Draft Characterisation Study being prepared as part of the Council's evidence base.
- 11.5 The Greater London Authority (GLA) has launched a new High Streets Data Service with the aim of providing organisations broader access to local high streets and town centre data. It uses spend and anonymised footfall data from across London in its raw form and via a custom built Data Explorer Tool; with outputs enabling a deeper understanding of how different areas have responded to the pressures of the Covid-19 lockdown, and to assess the impact of local initiatives. The mapping of commercial retail frontages across LB Newham enables this assessment to assess the extent of 'on the ground' provisions against policy defined town centre boundaries, and informs our conclusions in respect of boundary changes and those areas that could support change of use to non-retail/town centre land uses.

LB Newham Local Plan, 2018

- 11.6 There are currently 13 allocated Local Centres within the borough:
- LC1 - Manor Park
 - LC2 - Maryland
 - LC3 - High Street North
 - LC4 - Vicarage Lane
 - LC5 - Church Street

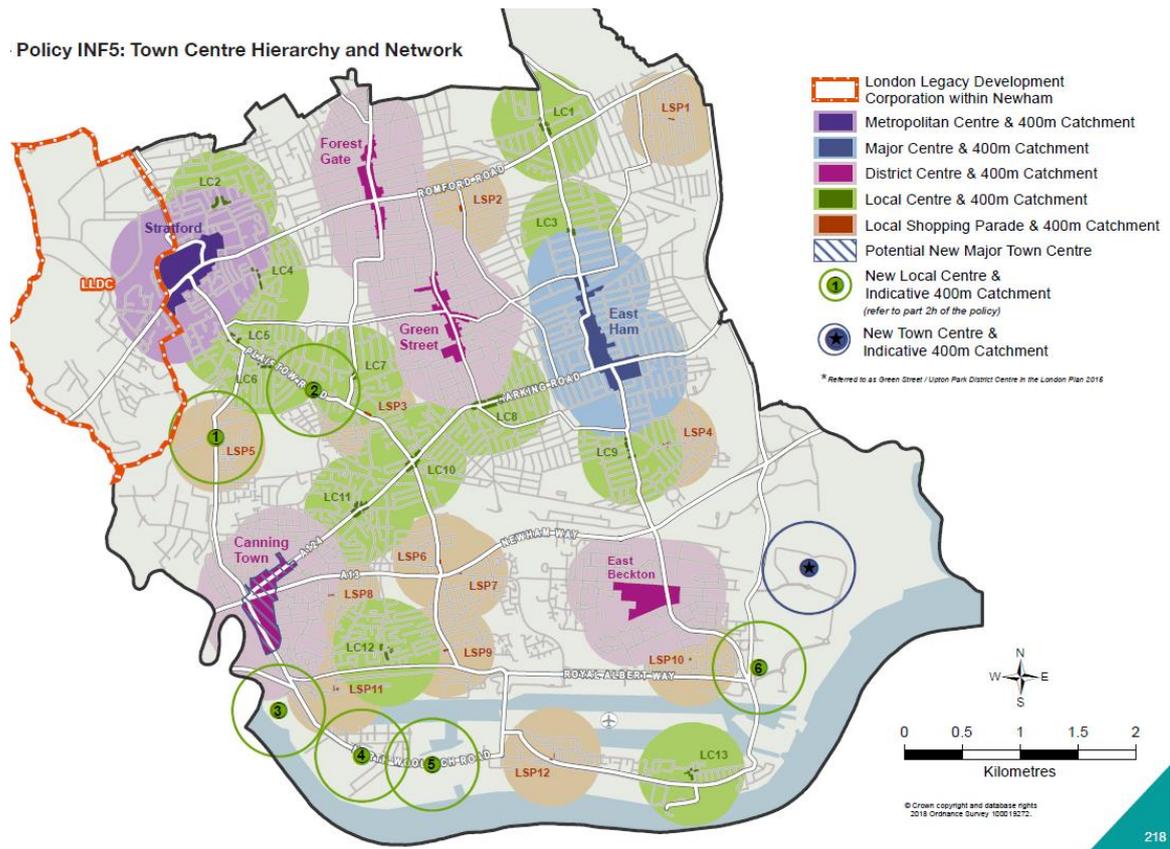


- LC6 - Plaistow Road
- LC7 - Terrace Road
- LC8 - Boleyn
- LC9 - High Street South
- LC10 - Greengate
- LC11 - Abbey Arms
- LC12 - Freemasons Road
- LC13 - North Woolwich

11.7 Figure 11.1 illustrates the existing town centre hierarchy and network across LB Newham, including the 13 Local Centres listed above, with 400m catchments (Policy INF5, Local Plan). Figure 11.1 also identifies the location of planned new local centres (1-6), and one new Major Town Centre in the Beckton Area – we discuss these below in more detail.

11.8 Policy INF5 sets out the principals and strategy for the ‘Town Centre Hierarchy and Network’. The policy confirms the need to maintain existing Local Centres, and recognises the particular regeneration and enhancement opportunities at North Woolwich (LC13), Manor Park (LC1) and Freemasons Road (Custom House) (LC12) Local Centres.

Figure 11.1: LB Newham Town Centre Hierarchy and Network



11.9 Policy INF5 also sets out the need and opportunity to create new Local Centres reflecting accessible locations with high footfall, large scale development sites and gaps in the network at West Ham



station [1], Plaistow station [2], Thames Wharf [3], West Silvertown / Silvertown [4/5], and Albert Basin (Gallions Reach DLR) [6], with further sites to be identified in Beckton Riverside at accessible locations.

- 11.10 The need for Gallions Reach Shopping Park to become a Major Centre is supported with the intention to serve the eastern edge of Newham and wider growth area, through re-configuration of its floorspace as part of a wider masterplan. This location is marked in a blue 'New Town Centre' radius and marker on Figure 11.1 above, in the south east of the borough.

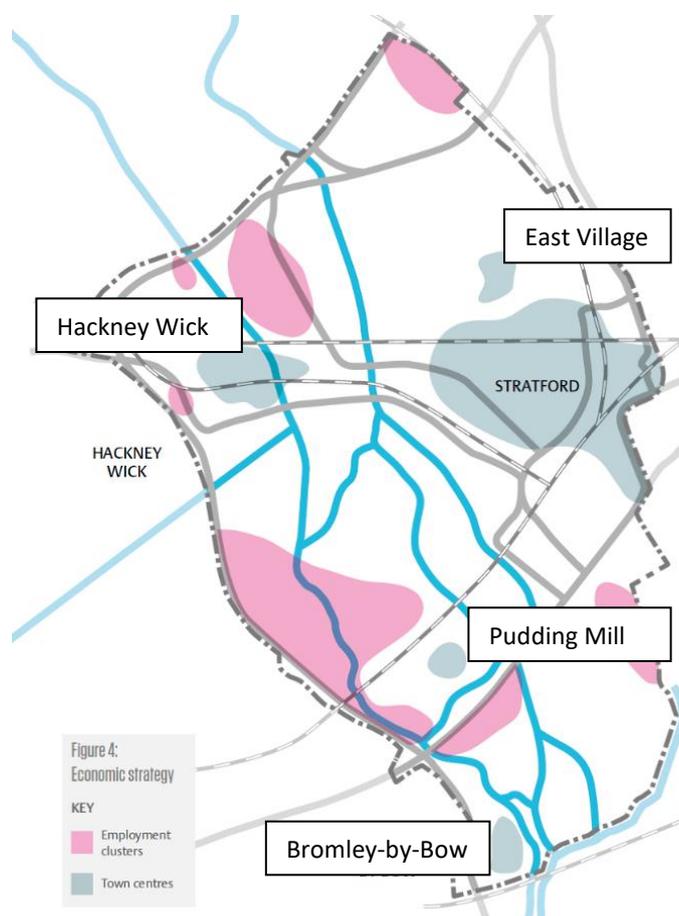
London Legacy Development Corporation (LLDC) Local Plan

- 11.11 The LLDC Local Plan was adopted in July 2020; LB Newham contains 65% of the LLDC area. The Local Plan vision reinforces the role of Stratford as a Metropolitan Town Centre (LB Newham) with an international role; whilst a wider network of new smaller town centres will include:

- District Centre at Bromley-by-Bow (LB Tower Hamlets);
- Neighbourhood Centre at Hackney Wick (LB Hackney/LB Tower Hamlets);
- Local Centre at **Pudding Mill (LB Newham)** and
- Local Centre at **East Village (LB Newham)**.

- 11.12 These town centres will provide a focus for local shops, services and community activities, surrounded by thousands of well-designed new homes, to create a network of distinctive and mixed urban districts. Stratford and East Village are existing centres; whereas Bromley-by-Bow, Hackney Wick and Pudding Mill do not yet exist as coherent centres but are planned for delivery through comprehensive redevelopment and regeneration interventions. East Village comprises 23 units, anchored by a Sainsbury's Local foodstore, and offers other key facilities including a community hall for hire, high end restaurants, 9Round Boxing Gym, hairdressers, and photographer studio.

- 11.13 Paragraph 4.21 confirms that the Centres will provide different functions; the Metropolitan Centre will provide for a range of London-wide retail and leisure requirements, including a focus on the night-time economy, whilst the District, Neighbourhood and Local Centres will provide a range of small-scale uses to meet the varied local day-to-day requirements arising from new neighbourhood housing and local employment.





Local Centre Audit

11.14 In 2021 LB Newham undertook an audit of all 13 Local Centres, capturing data on different business categories, vacant units, and ‘other’ community uses. Table 11.1 below summarises the findings, and sorts the local centres by size, from the largest (Boleyn) through to the smallest (Terrace Road), and includes emerging Local Centre – Silvertown, within Royal Wharf. We have also added in East Village Local Centre which currently fall within the LLDC, but will soon fall back into the jurisdiction of LB Newham. Pudding Mill is included for the purposes of monitoring, but left blank in the table as the scheme is not yet built. The data assists in identifying the scale, depth and quality of offer alongside our analysis of geographic spread. Table 11.1 identifies the geographic sub-area within which each local centre is located, in order to inform our discussion, conclusions and recommendations.

Table 11.1: Local Centre Audit, LB Newham, 2021

Local Centre	Sub-Area	No. of Units	E(a)	E(b)	E(c)	Vacant	Key Facilities
Boleyn LC8	B	63	34	3	7	4	Post Office, Pharmacy, Tesco Express, Opticians, Londis, Barclays, Boleyn Cinema
Abbey Arms LC11	C	50	26	3	3	4	Post Office, Newsagent, Iceland, Pharmacy, Optician
Greengate LC10	C	44	28	2	2	0	Tesco Express, Nisa Local, Pharmacy, Halifax, Greengate Business Centre, Dentist
Manor Park LC1	D	43	19	3	7	7	Printers, Dry Cleaners, Physio Clinic, Library
Maryland LC2	A	42	23	2	6	0	Maryland Supermarket, Travel Agent, Pharmacy
Vicarage Lane LC4	A	42	15	5	5	4	Express Supermarket, Travel Agent, Dentist, Business Centre
High Street South LC9	E	23	16	1	1	0	McColl’s, Dry Cleaners, Post Office, Pharmacy, Tesco, Chiropodist
East Village LLDC	A	23	2	12	2	0	Sainsbury’s Local, The Hall community hall
Silvertown/Royal Wharf	C	23	3	7	7	0	Sainsbury’s Local, Health Centre, Dentist, Children’s Nursery
North Woolwich LC13	C	21	8	1	1	1	Nisa, Pharmacy, Post Office, Library, Dry Cleaners



Plaistow Road LC6	A	21	9	3	1	0	Nisa, Funeral Directors, Dentist, Laundrette, Employment/Training
Freemasons Road LC12	C	21	9	1	1	2	Pharmacy, Nisa, Post Office, Credit Union, Medical Training/Midwifery, Dry Cleaners
Church Street LC5	A	15	6	1	2	1	Pharmacy, Dry Cleaners, Recruitment, Veterinary, Day Nursery
High Street North LC3	D	14	6	3	3	2	Travel Agents
Terrace Road LC7	A	13	9	0	0	0	Pharmacy, Post Office, Mini Market, Dentist

- 11.15 The five largest local centres, comprising 40+ shop units, are all located within the central and northern part of the borough. Abbey Arms, Greengate and Boleyn are spread along the A124 Barking Road running east/west across the borough; whilst Maryland and Vicarage Lane are located on the outskirts of Stratford, and Manor Park is located in the north east of the borough. There are ten local centres in the central/north of the borough, and only 3 in the southern half of the borough. Freemasons Road, North Woolwich and High Street South, the three Local Centres within the southern part of the borough, have around 20 shop units each – substantially fewer than the largest local centres. The analysis demonstrates a limited spread of allocated local centres in this broad location – in policy terms.
- 11.16 Boleyn, Abbey Arms, Greengate, Maryland and Vicarage Lane – four of the largest local centres – all have either a national multiple or independent small convenience store, but there is currently no such operator within the Manor Park Local Centre defined boundary. Policy should support enhanced provision in this location, and this may come through the targeted investment and current policy support for growth and consolidation.
- 11.17 The medium sized local centres – North Woolwich, High Street South, East Village, Plaistow Road and Freemasons Road – all have a good quality small anchor convenience store; whereas there is no convenience store in the three smallest local centres of Church Street, High Street North and Terrace Road. Communities in and around Church Street and Terrace Road will benefit from an enhanced network over the plan period with new centres at West Ham and Plaistow (see further below), but High Street North is limited in offer with no current policy support for improvement.

Planned New Local Centres

- 11.18 Within the Strategic Site Allocations, the LB Newham Local Plan (2018) identifies a number of planned new Local Centres across the borough, with four being located in the south of the borough, an area with recognised deficiencies:
- **West Ham:** Abbey Mills Strategic Site Allocation S11 (Spatial Policy Area ‘Stratford & West Ham’): The site will be developed for a mix of residential and employment generating uses and



contribute to the creation of a new Local Centre in the vicinity of West Ham overground, underground and DLR train station.

- **Plaistow:** Plaistow North Strategic Site Allocation S29 (Spatial Policy Area ‘Stratford & West Ham’): Mixed-use development including residential and a new clearly-defined Local Centre incorporating retail and community use frontage to both sides of Plaistow Road and step-free access to Plaistow station.
- **Thames Wharf:** Thames Warf Strategic Site Allocation S08 (Spatial Policy Area ‘Custom House & Canning Town’): A new neighbourhood, comprising new residential and community uses including a school, and employment and leisure/tourism grouped around a new DLR station and new Local Centre.
- **Albert Basin:** Albert Basin Strategic Site Allocation S19 (Spatial Policy Area ‘Beckton’): New housing around Albert Basin will consolidate existing residential development, with a new Local Centre focused around Gallions Reach DLR station. Legible walking and cycling routes should be provided through the site to the Beckton Riverside area and from the enhanced DLR station to the waterfront opening this up for public access.
- **Silvertown:** Silvertown Quays Strategic Site Allocation S21 (Spatial Policy Area ‘Royal Docks’) and Minoco Wharf Strategic Site Allocation S22 (Spatial Policy Area ‘Royal Docks’): Residential-led mixed-use, building on the visitor attraction cluster at the western end of the docks (ExCeL, Siemens building). New residential development on these sites will form part of the wider neighbourhood at Silvertown. A new Local Centre focused around North Woolwich Road will provide a focus to the new neighbourhood as a whole and provide connections to both DLR stations, and pedestrian and cycle links to Silvertown Quays.
- **Lyle Park West:** Lyle Park West Strategic Site Allocation S20 (Spatial Policy Area ‘Royal Docks’): the consolidation of a new neighbourhood at West Silvertown, with an additional small scale Local Centre around the station complementing that at Minoco Wharf (Royal Wharf).

Enhancement of Existing LB Newham Local Centres

11.19 The LB Newham Local Plan (2018) identifies three key Local Centres subject to enhancement and growth, two of which are in the south of the borough:

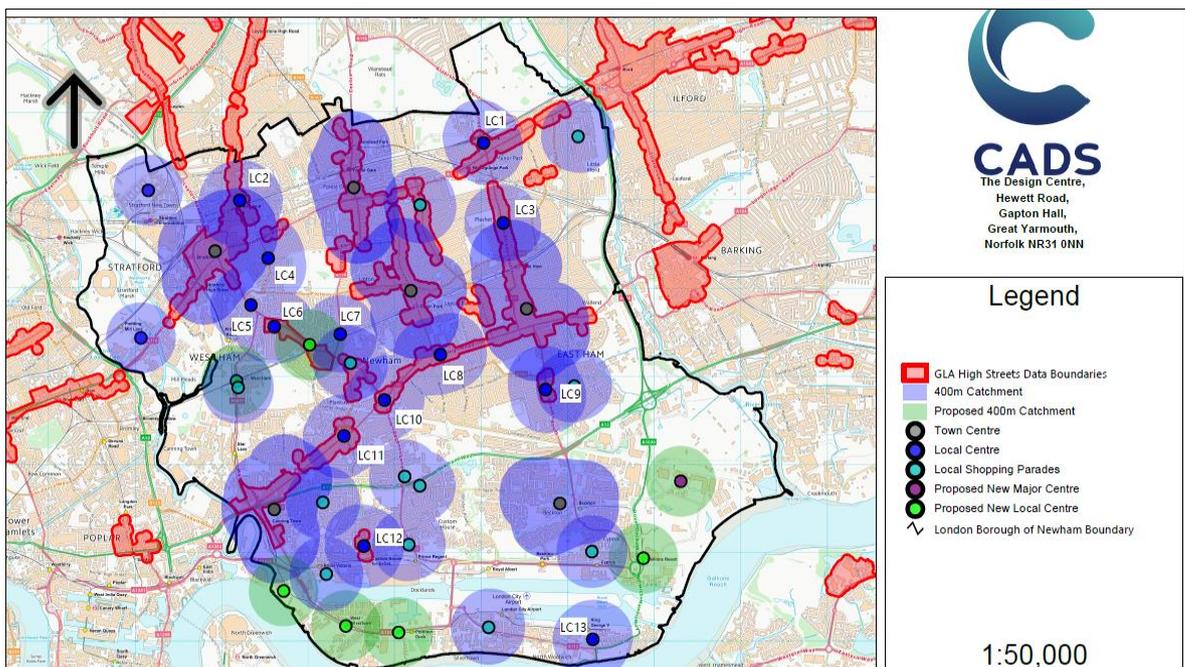
- **North Woolwich Road** Local Centre (LC13) (Royal Docks Spatial Policy Area): subject of planned investment and expansion. Will be enhanced in terms of the quality and diversity of offer.
- **Freemasons Road** (Custom House) Local Centre (LC12) (Custom House and Canning Town Spatial Policy Area): Subject of planned investment and expansion. Will be expanded in the context of the connectivity with Crossrail Elizabeth Line, intensified residential, community, and commercial/ business space, enhanced accessibility, improved physical and functional links to ExCeL and enhanced open spaces.
- **Manor Park** Local Centre (LC1) (Urban Newham Spatial Policy Area): Will see most change around the new Crossrail station which will gradually redefine and reinvigorate Manor Park Local Centre, creating a more significant focus to the area for the local community.



Local Centre Hierarchy

- 11.20 We have undertaken a ‘gap analysis’ exercise to explore the opportunity to introduce new local centres and local shopping parades in locations where there is an apparent deficiency in provision. We are also able to identify those areas of commercial shop/town centre activity and shop frontages that spread beyond allocated policy boundaries and could be considered for change of use to alternative land uses. We have drawn on the analysis undertaken in this section, above, and also data from the GLA’s High Streets Data Service – a new service providing access to data on the health and performance of high streets and town centres.
- 11.21 For this study, we have used the GLA data to illustrate and map the location of ground floor commercial shopping activity, and combined this with GIS layers illustrating the location of the borough’s existing and planned town centre hierarchy and a 400 metre walk-in radius. See Figure 11.2 below. This exercise identifies any gaps in the network and also where commercial activity on the ground is not consistent with planning policy boundaries, and where adjustments may need to be made in the Local Plan.

Figure 11.2: London Borough of Newham Town Centre Hierarchy and Activity Analysis

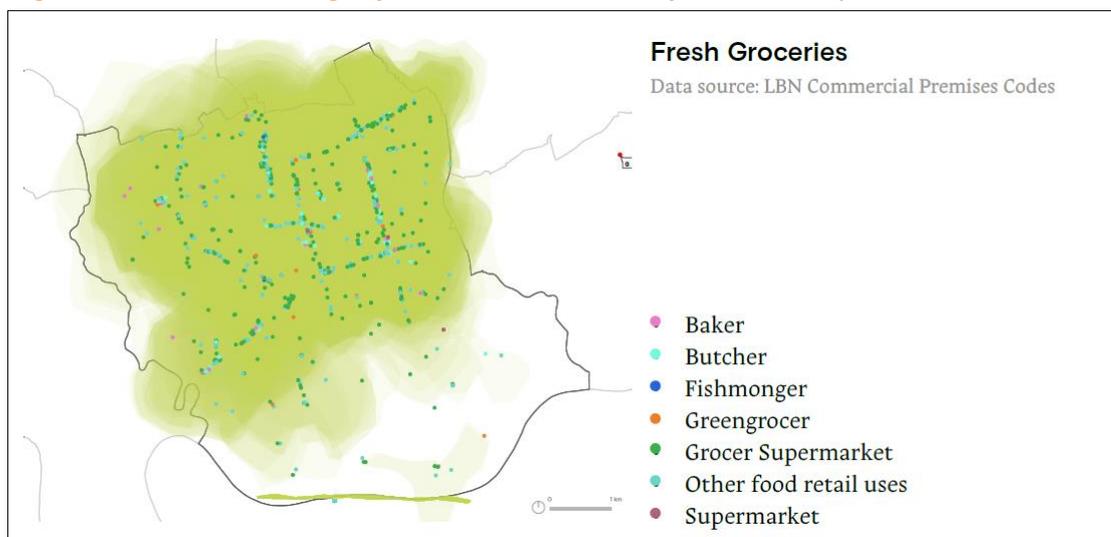


Note: Reproduced in Appendix 4

- 11.22 We have also used this data set to compare with the Characterisation Study, an evidence base study being prepared on behalf of the LB Newham to inform the Local Plan Review, mapping individual key shops and services including fresh groceries, for example (see Figure 11.3 below).



Figure 11.3: London Borough of Newham Distribution of Fresh Grocery Businesses



11.23 The analysis highlights the following key conclusions:

- Gap in north east, potential to expand Manor Park, and new Local Shopping Parade in Church Road;
- Reduce commercial frontages outside revised Manor Park Local Centre boundary;
- Commercial frontages extend beyond Katherine Road Local Shopping Parade (LSP2);
- Gap on Katherine Road between Barking Road and Plashet Grove;
- Gap in south/central part of the borough in proximity of LSP6 (Prince Regent Lane) and LSP7 (Tollgate Road);
- Support for planned investment and enhancement of North Woolwich Local Centre (LC12);
- Redeveloped/re-provided Local Centre in/around Albert Road Local Shopping Parade (LSP12);
- Gap in provision on Factory Road, but currently protected Strategic Industrial Location (SIL);
- Support for new Major Centre at Gallions Reach Retail Park, and new Local Centre at Albert Basin;
- Review opportunity to extend boundary of High Street North to incorporate a more diverse range of key services and facilities.

11.24 More detailed policy recommendations are set out in Section 14 of this report.

Summary

- The retention and reinforcement of a sustainable network of Local Centres across Newham, alongside wider regeneration and land intensification, forms a key part of the borough's core priorities in respect of health, wellbeing, wealth-building and 15-minute neighbourhoods. Equally, in planning terms, the NPPF encourages the provision of social, recreational and cultural facilities and services that the



community needs in order to promote strong neighbourhoods, inclusive and safe places, social interaction and healthy lifestyles.

- Newham has 13 existing Local Centres and six planned new Local Centres – 2 in the Stratford and West Ham Spatial Policy Area, 1 in the Custom House and Canning Spatial Policy Area, 1 in the Beckton Spatial Policy Area and 2 in the Royal Docks Spatial Policy Area. Existing Local Centres, including North Woolwich Road, Freemasons Road and Manor Road are subject to planned investment and growth, recognising the regeneration and enhancement opportunities. The LLDC includes a network of five town centres, with Stratford Metropolitan Centre and East Village and Pudding Mill Local Centres falling within the LB Newham. East Village is developed, whilst Pudding Mill remains in the planning stage.
- It is important that new local centres are of an appropriate scale to meet just local needs, rather than delivering new 'destination' town centres that might compete with the wider network of town centres. The conclusions and recommendations set out in Section 14 identifies how the planning framework can help plan for and manage new local centres and local shopping parades.



12. Quantitative Need

- 12.1 In this section we set out our assessment of the need for additional convenience and comparison goods retail floorspace across the London Borough of Newham. We set out the performance of existing floorspace as the basis for forecasting the need for additional retail floorspace to the period 2038, incorporating interim years of 2027 and 2032. The quantitative tabulations accompanying this assessment are set out in Appendix 1 (convenience) and 2 (comparison).
- 12.2 In identifying need, it is important to note that forecasts become increasingly open to margins of error over time, and accordingly will need to be refreshed over the course of the Council's Local Plan. This is particularly the case given the recent Covid-19 health pandemic. Whilst the country's high streets have re-opened fully, the longer term consequences for the economy remain uncertain.
- 12.3 We have used a conventional and widely accepted step by step methodology, drawing upon the results of the household telephone survey of existing shopping patterns (December 2021) to model the existing flows of available expenditure to the network of centres and edge/out-of-centre retail provision. To develop the baseline, we have:
- Calculated the total amount of convenience and comparison goods expenditure which is available within the postcode areas comprising the LB Newham study area;
 - Allocated the available projected expenditure to the convenience and comparison goods shopping destinations, on the basis of the household telephone 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/performance in each shopping destination.
- 12.4 Building on the baseline position, we have explored the need for further convenience and comparison retail floorspace within LB Newham, having regard to the identified performance of existing floorspace and growth in residual expenditure.
- 12.5 The baseline need forecasts to 2038 for convenience and comparison goods are based on ONS census trend-line population forecasts, presenting a conservative, lower threshold baseline position. Later in this section we present a second scenario, drawing on GLA borough-wide and ward based population forecasts in order to project forwards across the local plan period. This population is substantially greater than trend-line given the extent of regeneration and development planned and taking place across much of the borough; and presents a higher threshold need forecast for retail floorspace to 2038.

Data Inputs

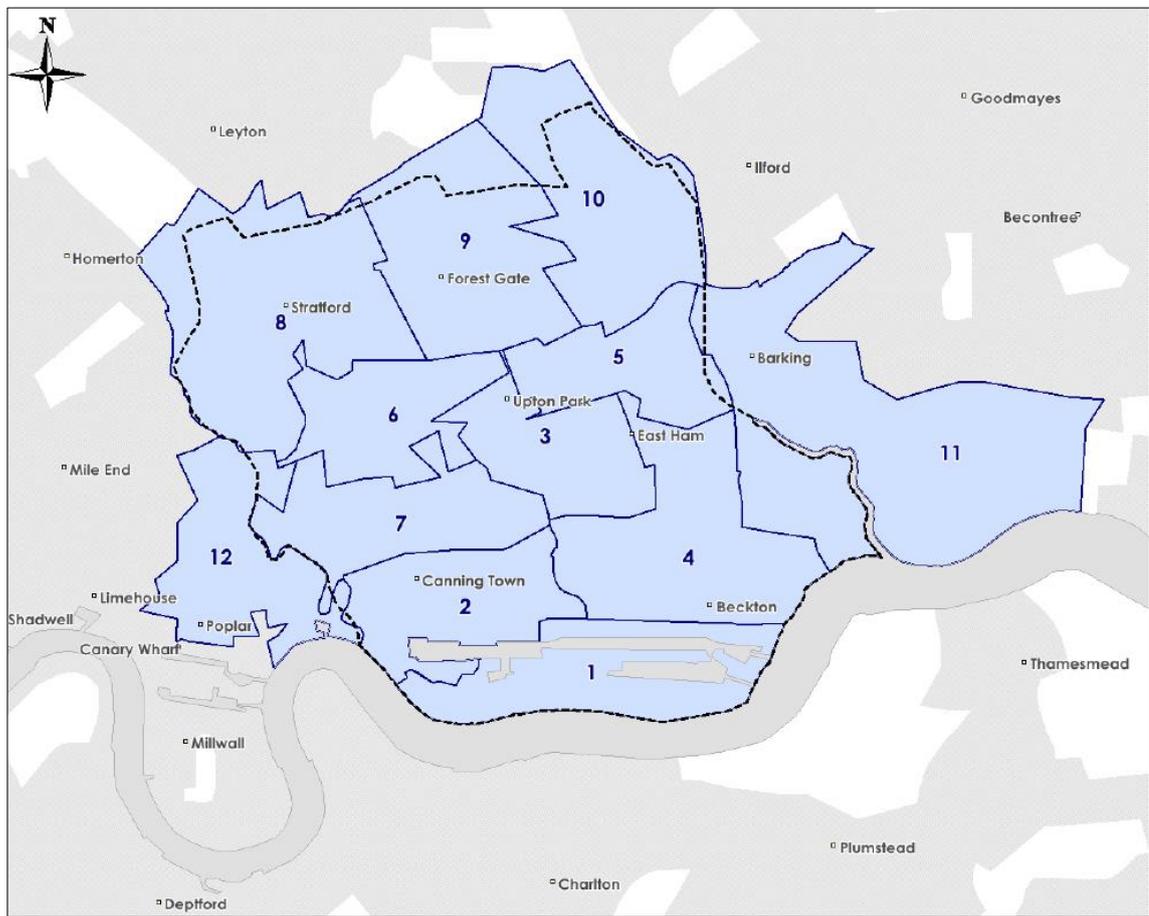
Survey Area and Household Telephone Survey

- 12.6 As introduced earlier in this study, a new household telephone interview survey was undertaken covering 1,200 households across 12 survey zones (Figure 12.1 below). Urban Shape designed the survey questionnaire in consultation with the Council and NEMS Market Research, who undertook the interviewing and data processing in December 2021. The survey area is shown below, and is



- consistent with that used for the 2010 and 2016 evidence base studies, enabling direct comparisons and longer term trends to be identified.
- 12.7 The survey results (2021) identify shopping habits of households for both convenience and comparison goods. Where necessary, survey results have been rebased to remove some responses (such as ‘don’t shop for particular goods’ and ‘internet shopping’) to ensure consistency with categories included and excluded in the expenditure projections.
 - 12.8 For convenience goods, the household telephone 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 goods type (70% main food / 30% top-up food). This forms a composite pattern of convenience spending, expressed as a market share for each destination centre or foodstore for each survey zone.

Figure 12.1: London Borough of Newham Household Telephone Survey Area (2021)



- 12.9 The household telephone survey also included seven questions on where respondents normally undertake shopping for the following comparison goods types, which coincide with Experian Business Strategies definitions of comparison goods expenditure:



- Clothing and footwear;
- Furniture, floor coverings and household textiles;
- DIY and decorating goods;
- Domestic appliances;
- Audio-visual equipment;
- Personal and medical goods; and
- Recreational and luxury goods.

12.10 In order to determine the composite market share for all comparison goods spending within the survey area, we apply the weighted averages of the household telephone survey results for each goods type based on the proportion of per capita spend on that goods type. This process establishes the pattern of comparison spending for residents in each of the survey zones and is an accepted approach which ensures that market shares for centres and stores are not skewed by any particular goods category.

Population

- 12.11 Baseline ONS population estimates and forecasts for each of the survey zones are derived using the Experian E-Marketer in-house system. This provides estimates of population based on trend-line projections and the 2011 census for small, localised areas. This forms the initial 'baseline conservative' scenario.
- 12.12 Overall, the population of the survey area is currently estimated to be 468,987, growing to 480,519 in 2027, 491,391 in 2032, and 503,055 in 2038. Population growth across the full Zone 1-12 Survey Area represents an overall increase of 7.3% over the course of the assessment period.
- 12.13 The analysis in this section has also tested a higher, upper threshold floorspace need, drawing on data held by the GLA. GLA population growth reflects a more substantial level of population growth across LB Newham based on data input in respect of regeneration and strategic growth/opportunity areas. We have analysed this 'optimistic' growth scenario in order to set out upper threshold floorspace need forecasts through to 2038. This is discussed and set out in detail later in this section, following the presentation of the baseline scenario.

Available Expenditure in the Survey Area

- 12.14 The Experian E-Marketer system provides estimates of per capita expenditure for convenience and comparison goods expenditure in 2019 prices. We have made deductions for Special Forms of Trading (SFT) which represent expenditure not available to spend in shops (for example internet or catalogue shopping). The deductions we have applied for SFT for convenience and comparison goods are derived from Experian Retail Planner Briefing Note 19 (January 2022).
- 12.15 As section 3 of this report set out, online shopping (SFT) is accounting for an increasingly significant share of total available expenditure, particularly in respect of comparison goods shopping, and Experian forecast that the 'claim' which online shopping makes on total available comparison and convenience goods spend will increase considerably in future years. Retail capacity forecasts are only concerned with identifying the need for new physical 'bricks and mortar' retail floorspace, and it is



necessary to deduct spending via Special Forms of Trading (SFT) from baseline expenditure forecasts (Table 3, Appendix 1 and 2).

- 12.16 To estimate available expenditure in the survey area, we have applied growth rates based on economic forecasts published by Experian Business Strategies, ensuring due consideration to the consequences of Covid-19 (Retail Planner 19, January 2022).
- 12.17 There was a food shopping boom during 2020 as people went through a period of lockdown ‘panic-buying’ amid fears of food shortages, and restaurants and pubs closed removing the option to ‘eat out’. This fluctuation was cancelled out in 2021, as more normal shopping patterns returned, with growth per head returning to pre-Covid levels. For convenience goods we have applied a growth rate of 0.1% per annum for the period 2022-2038.
- 12.18 Comparison goods did benefit from an improvement in confidence and a ‘post Covid-19 world’ helping to stimulate discretionary spending. Retail spending had already bounced back swiftly following the easing of lockdown during summer 2020, however Experian forecast this to lose momentum in the near term as weak confidence and household cost pressures weigh on the recovery. For comparison goods, we have applied growth rates of 2.8% 2023-2028, and 2.9% 2029-2038.
- 12.19 Using the growth rates above and applying relevant deductions for SFT, total available expenditure across the survey area has been grown in five-year intervals, including 2027, 2032 and 2038. Total expenditure is forecast as follows:
- Appendix 1, Table 3 applies per capita expenditure to the population forecasts, which indicates that total available **convenience** goods expenditure within the survey area is £789.4m (2022). This is forecast to grow to £803.4m by 2027, £822.2m by 2032, and again to £843.2m by 2038. This equates to an overall growth of £53.7m (6.8%) between 2022 and 2038 (Appendix 1, Table 4).
 - **Comparison** goods expenditure within the survey area is currently £857.m. This is forecast to grow to £938.4m by 2027, £1.08b by 2032, and again to £1.26b by 2038. This equates to an overall growth for comparison goods expenditure in the survey area of £401.1m between 2022 and 2038 (46.8% growth) (Appendix 2, Table 4).
- 12.20 Longer term projections should be treated with caution due to the potential for changing economic circumstances and growing margins of error over the longer term. The projections are subject to greater than usual uncertainty due to the unprecedented nature of the Covid-19 pandemic.

Sales Efficiency, Existing Floorspace

- 12.21 In forecasting quantitative need for future retail floorspace, we have drawn on economic commentary published by Experian in January 2022. In particular, our analysis and need assessment has regard to the implications of Covid-19 and wider economic trends on floorspace efficiency; i.e. the rate in which existing floorspace will absorb any growth in expenditure over the plan period. This has a direct impact on the levels of floorspace need arising.
- 12.22 Consistent with growth in expenditure per head on convenience goods, the recent outlook in respect of the sales efficiency of existing floorspace was upgraded to reflect the boost to spending on food during the Covid-19 pandemic. This was a consequence of social distancing measures such as working from home and spending more time at home, and being unable to eat out in restaurants and cafes.



- 12.23 Post pandemic, these trends have persisted, reflecting the increasing numbers of people ‘working from home’. In the context of these trends, Experian assumed – in January 2022 – an increase in sales efficiency rate for existing convenience goods floorspace of 0.2% in 2023 and 0.3% between 2023-2038.
- 12.24 To the period February 2020 (pre-Covid-19), Experian confirmed that sales densities for comparison goods floorspace had risen at a strong pace, and were expected to continue to do so – remaining between 3.2% and 3.6% to the period 2026. At that point in time, budgetary challenges, rising costs and tight margins were driving retailers to either close down or seek floorspace efficiencies. Experian explained that lacklustre demand for retail property, stubborn levels of vacant units and a lull in retail construction point to limited prospects for expansion in retail floorspace over the next few years.
- 12.25 In this context, it was expected that existing comparison goods floorspace would continue to absorb a greater proportion of any growth in retail expenditure as businesses sought to improve the quality and interest of their shops for visitors. Experian concluded that there would not therefore be a strong demand for additional comparison goods retail space, with a growing proportion of expenditure growth being directed to the internet and the consolidation and improvement of existing floorspace – particularly in stronger town and city centres.
- 12.26 Subsequent to the publication of these trends in February 2020, the Covid-19 pandemic had far reaching consequences for our high streets and town centres as all but essential shops and services closed for long periods of time.
- 12.27 The Experian Retail Planner Briefing Note October 2020 revised sales efficiency forecasts in the context of Covid-19, stating that sharp swings in retail spending due to the temporary closure of businesses as well as ongoing social distancing restrictions led to volatile floorspace performance. This is already correcting itself as the spending recovery post Covid continues, and the forecasts for sales densities have subsequently been revised upwards in line with an upgrade in the outlook for comparison spending. Nevertheless, budgetary challenges from rising costs and tight margins will remain a key factor underpinning floor space efficiencies over the coming years.
- 12.28 In the context of these trends, Experian assumed – in January 2022 – an increase in sales efficiency rate for existing convenience goods floorspace of 2.2% in 2023, 2.4% between 2024-2028, and 2.9% between 2029-2038. This reflects the limited development of new floorspace, and the growth in retail expenditure being directed in larger volumes to existing comparison goods floorspace. This reflects a positive impact on existing comparison goods floorspace.

Convenience Goods Trade Retention / Leakage

- 12.29 This step in the methodology enables us to calculate the levels of trade retention and leakage from the borough of Newham. This analysis helps inform our understanding of the baseline performance of existing floorspace, with the findings from the calculation underpinning recommendations on the need to enhance market share in conjunction with town centre strategies and identified development opportunities.
- 12.30 Table 12.1 summarises the most popular foodstores in the borough, based on turnover derived from the survey area. The top performing foodstores in the borough in terms of turnover, include the three major food superstores in Beckton, and the two Morrisons stores in Stratford and Canning Town. The



new Morrisons store in Canning Town has opened since the previous 2016 evidence base and has made an immediate and significant impact on convenience goods shopping patterns.

- 12.31 The important role of Local Centres across the borough is also highlighted, attracting strong levels of convenience goods trade – in particular, Boleyn, Abbey Arms, Greengate and High Street South. These popular and well used Local Centres are all located centrally within Urban Newham, ‘filling the gap’ between Stratford, Forest Gate, Green Street and East Ham to the north, and Canning Town and Beckton to the south.

Table 12.1: Most Popular Foodstores in Newham Borough by Total Turnover

Foodstore	Turnover (£m)	Sequential Location
Tesco Extra, Gallions Reach Beckton	£58.3m	Out-of-Centre
Asda, Tollgate Road, East Beckton	£57.2m	Town Centre
Morrisons, The Grove, Stratford	£39.2m	Town Centre
Sainsbury’s, Claps Gate Lane, Beckton	£31.4m	Out-of-Centre
Morrisons, Silvertown Way, Canning Town	£29.4m	Town Centre
Lidl, Stratford Shopping Centre, Stratford	£25.3m	Town Centre
Sainsbury’s, Myrtle Road, East Ham	£18.8m	Town Centre
Sainsbury’s, Stratford Shopping Centre, Stratford	£18.2m	Town Centre
Tesco Express, Green Street	£16.1m	Town Centre
Lidl, High Street North, East Ham	£14.7m	Town Centre
Iceland, High Street North, East Ham	£12.8m	Town Centre
Lidl, Tollgate Road, East Beckton	£12.4m	Town Centre
Boleyn Local Centre (LC8) (Inc.Tesco Express)	£12.2m	Town Centre
Abbey Arms Local Centre (LC11) (Inc.Iceland)	£11.0m	Town Centre
Sainsbury’s Local, Romford Rd, Stratford/Forest Gate	£10.2m	Out-of-Centre
Greengate Local Centre (LC10) (Inc.Tesco Express)	£10.0m	Town Centre
Lidl, Claps Gate Lane, Beckton	£9.8m	Out-of-Centre
Iceland, Barking Road, Canning Town	£8.5m	Town Centre
Iceland, Woodgrange Road, Forest Gate	£8.1m	Town Centre
High Street South Local Centre (LC9) (Inc.Tesco Express)	£7.2m	Town Centre
Co-Op, Woodgrange Road, Forest Gate	£7.0m	Town Centre
Tesco Express, Woodgrange Road, Forest Gate	£6.0m	Town Centre
Tesco Express, Romford Road, Stratford	£5.9m	Out-of-Centre
Local Shops, Stratford Town Centre (Exc.Westfield)	£5.5m	Town Centre
Waitrose, Westfield Stratford City	£5.2m	Town Centre
Freemasons Road Local Centre (LC11) (Inc.Nisa)	£4.1m	Town Centre

Source: Table 6, Appendix 1



12.32 Foodstores in Newham, listed in Table 6, Appendix 1, have a turnover of £489.2m, equating to a strong **market share/trade retention of 62%** within survey Zones 1-12. This is an increase from 58% in 2016, highlighting the consolidation, enhancement and improved usage of the foodstore in the borough.

12.33 Table 12.2 below sets out the convenience goods market share of each town centre within its location zone, illustrating how much local trade each town centre retains within a local catchment area, and how much leaks to alternative destinations. The outputs aren't directly comparable given the different scale and geographical composition of each survey zone, but the exercise does provide some indication of town centre performance within each immediate catchment area.

Table 12.2: Town Centre Location Zone, Convenience Goods Market Share

Town Centre	Location Zone	Market Share
Stratford Metropolitan Town Centre	8	50.3%
East Ham Major Centre	5	43.3%
Green Street District Centre	6	13.3%
Forest Gate District Centre	9	24.4%
Canning Town District Centre	2 & 7	Zone 2 – 29.1% Zone 7 – 22.4%
East Beckton District Centre	4	36.5%

12.34 Both Stratford Metropolitan Centre and the Beckton area have experienced a fall in market share within their location zones since the 2016 evidence base; Stratford falling from 70.5% to 50.3% in Zone 8, and Beckton falling from 68.8% to 60.3% in Zone 4. Previous evidence demonstrated the dominance of the north west and south east, but more recent evidence suggests this has become more balanced across the borough, with Canning Town, Forest Gate, East Ham and Green Street all experiencing an uplift in market share within their location zone:

- Canning Town has recently benefitted from the opening of a new Morrisons foodstore within the Hallsville Quarter. Town Centre market share in Zone 2 has subsequently increased from 6% in 2016 to 29.1% in 2022; and in Zone 7 from 11.7% in 2016 to 22.4% in 2022. The new foodstore has helped meet local needs and improved choice and breadth of product; in turn reducing the need for the local population to travel further afield. Market share retention remains, however, lower than Stratford, East Ham and Beckton, but may continue to improve as development and construction is completed and new floorspace has time to settle in to trading patterns and establish a stronger customer base.
- Forest Gate has increase market share from 15.4% to 24.4% in Zone 9, again demonstrating a consolidated and stronger local catchment area. A greater number of people are 'shopping local' despite no significant change in foodstore representation in the district centre since 2016. The town centre health check highlighted the good range of small national multiple and also independent stores and the market – with provision substantially above the national average, and a growth in proportion of total units since 2016.
- The 'shop local' trend is also evident in East Ham, with market share in Zone 5 increasing from 30.9% to 43.3%. Elsewhere, further afield, East Ham has lost market, most notably in



Zone 3 (14.6% down to 10.5%); Zone 4 (13.8% down to 7.8%); and Zone 10 (18.5% down to 17.1%).

- Green Street is located centrally, on the boundary of Zone 3, 6 and 9, with market share in both Zone 3 and Zone 6 increasing from 5.0% and 4.8% to 6.0% and 13.3% respectively. Market share in Zone 9 has fallen from 11.1% to 6.0%, likely as a consequence of Forest Gate increasing trade retention in this zone. We would expect market share to increase over the plan period following the opening of a new Lidl foodstore in the prime retail pitch.

12.35 A number of foodstores located outside Newham borough attract trade from Zones 1-12, identified as ‘competing foodstores’ to those trading within the borough. These include Asda, Tesco and Lidl in Barking, drawing trade primarily from Zone 11 but also having a relatively strong influence on shopping patterns for those living in Zones 5 and 10. Tesco, Bromley-by-Bow, draws trade from Zone 6 (4.9%); Asda, Leyton, draws trade from Zone 8 (4.3%) and Zone 9 (3.2%); and Lidl, Ilford draws trade from Zone 10 (6.4%). Borough’s are not closed systems and some leakage of trade would always be expected; but the analysis has demonstrated the strength of foodstore provision in Newham, and the high expenditure trade retention of 62%.

Convenience Goods: Floorspace Performance

- 12.36 The data analysis has enabled us to rank the six study centres by convenience goods turnover performance (Table 12.3, below). This assists in a more in-depth understanding of the performance of each town centre in terms of this particular goods type, and how the centres compare with each other.
- 12.37 Stratford Metropolitan Centre continues to have the highest convenience goods turnover, despite a substantial loss of market share since 2016; followed by East Beckton, East Ham, Canning Town, Forest Gate and then Green Street. Canning Town has taken a significant step up in terms of turnover following the opening of the new Morrisons foodstore, whilst Green Street will shortly benefit from a new Lidl foodstore within the prime pitch, which is currently under construction. Given the popularity of Lidl foodstores across the borough, this is likely to have a significant positive impact on the convenience goods turnover and performance within the district centre.

Table 12.3: Town Centre Convenience Goods Turnover

Town Centre	Key Anchor Foodstores	Town Centre Turnover (£m)
Stratford	Morrisons / Sainsbury’s / Lidl / M&S / Waitrose / The Market	£101.3m
East Beckton	Asda / Lidl	£69.6m
East Ham	Sainsbury’s, Lidl, Tesco Express, Iceland / The Market	£52.4m
Canning Town	Morrisons / Co-Op / Iceland / The Market	£43.1m
Forest Gate	Co-Op / Tesco Express / Iceland / The Market	£24.7m
Green Street	Tesco Express / Iceland / The Market	£21.6m

12.38 Table 10, Appendix 1, sets out the floorspace performance of each foodstore in the borough in terms of their sales density. This identifies whether an individual foodstore is over or under-trading.



- 12.39 Whilst the food superstores in East Beckton District Centre and the wider Beckton area are the top performing foodstores in the borough in terms of turnover, they are not performing well in terms of expected floorspace performance/sales density. The Asda foodstore in East Beckton has a turnover of £58.9m. Based on this turnover, and with a net convenience goods sales area of 3,126 sq m, we estimate the sales density to be around £18,284 per sq m net – marginally below the expected company average for Asda of £18,830 per sq m net. The out-of-centre Tesco and Sainsbury's superstores have a considerably weaker performance, and the analysis suggests that these stores are substantially under-trading.
- 12.40 Foodstores in the other five larger centres are mostly performing well, exceeding company average expectations. The Morrisons store in Stratford Town Centre is the third strongest store in the borough in terms of turnover; and it is also exceeding floorspace performance expectations despite recent fall in market share. Based on the stores turnover of £39.2m, and with a net convenience goods sales area of 2,271 sq m, we estimate the sales density to be around £17,256 per sq m net – higher than company average expectations of £12,968 per sq m net.
- 12.41 The Sainsbury's and Lidl foodstore in the Stratford Centre are also performing very strongly, exceeding floorspace performance expectations; with the Lidl store in particular achieving a significant sales density. The Morrisons foodstore has lost considerable market share, but continues to be one of the top performing stores in the borough (3rd) in terms of turnover, and has a strong sales density – above expected company average levels. Consistent with the previous 2016 evidence base, the Waitrose and M&S stores in Westfield are identified as under-performing in this assessment. It is recognised that such stores in larger 'comparison goods' shopping centres are often used for 'top up/lunch/passing trade' shopping, rather than a 'food shopping destination' for the local population. They remain open and trading within a highly successful shopping centre, and it is highly likely that they are performing substantially better than reflected in the household survey results. The analysis is not a cause for concern in this instance.
- 12.42 The Morrisons foodstore in Canning Town has the fifth highest turnover in the borough, and is exceeding floorspace performance expectations despite only opening recently in 2019 shortly before the Covid-19 pandemic. Based on the stores turnover of £27.1m, and with a net convenience goods sales area of 2,090 sq , we estimate the sales density to be around £14,045 per sq m net – marginally higher than company average expectations of £12,968 per sq m net. When compared, the Morrisons store in Stratford continues to have a stronger performance sales density. The Co-Op in Canning Town is performing adequately, but the Iceland store is performing particularly well, substantially above company average expectations.
- 12.43 Sainsbury's, Myrtle Road, East Ham, has the seventh highest turnover in the borough, and is exceeding performance expectations along with the Lidl and Iceland foodstores. The trend towards 'affordability' is clear in East Ham with the Lidl and Iceland stores having particularly strong sales densities – well above company average expectations; whilst the Sainsbury's store is just above company average expectations, and the Tesco Express is 'under-performing' – unlike most other Tesco Express stores across the borough. Shoppers in East Ham are predominantly choosing the most affordable shopping foodstore operators.
- 12.44 Foodstores in Green Street are performing well, with both the Tesco Express and Iceland performing above company average expectations – not, however, significantly. Despite having lower turnovers



compared to other foodstores in the borough, all main stores in Forest Gate are performing strongly in terms of sales density. The Co-Op, Tesco Express and Iceland on Woodgrange Road are all performing significantly above company average expectations, reflecting the earlier analysis identifying the strong uplift in market share within the district centre's location zone (Zone 9).

Commitments: Convenience Goods

- 12.45 In identifying future retail floorspace need, it is also necessary to take into account 'commitments' for new retail floorspace, which will act as 'claims' on the amount of convenience spending which is available to support new floorspace. Commitments include proposed new developments which will include floorspace for retail use, which have been granted planning permission, but which were not built/trading at the time of the household survey.
- 12.46 As a rule, we only incorporate 'strategic' commitments, i.e. those that are of sufficient scale and presence to impact/change shopping patterns and to absorb a notable level of expenditure. New local centres, small scale ancillary retail, and smaller ad hoc shop units are not included; they are generally 'self-supporting' from local communities and also new residential development.
- 12.47 In particular, new local centre and local shopping parades are designed to serve new communities, supported by newly generated expenditure. The localised nature of their pull, the development of major new residential development, and the limited operator line-up in small-scale units, means they have a negligible impact on absorbing comparison and convenience goods expenditure. There are two convenience goods commitments in LB Newham included within the floorspace need assessment:
- Lidl, Green Street District Centre, former Peacocks Unit (Ref: 21/01394/FUL) (989 sq m net)
 - Lidl, Forest Gate District Centre, 39A-49A Woodgrange Road (Ref: 16/02395/FUL) (950 sq m net)
- 12.48 In total, we estimate that the commitments amount to 1,939 sq m net floorspace, of which up to c.97 sq m net could be used for the sale of comparison goods, and up to 1,842 sq m net could be used for the sale of convenience goods. Both foodstores would have a combined turnover of c.£15.8m by 2027, growing to £16.4m by 2038, claiming expenditure over the plan period.

Convenience Goods Floorspace Need – Baseline Scenario

- 12.49 The convenience goods baseline need assessment has assumed that LB Newham will maintain existing market share, and the model has forecast the need for new convenience goods floorspace to the years 2027, 2032 and 2038. Based on population and expenditure growth, and the detailed performance analysis of existing floorspace, the analysis identifies a deficiency in residual expenditure to support additional convenience goods floorspace across Newham. At the borough-wide global level, there is no need for additional convenience goods floorspace within the baseline scenario. This is primarily a consequence of the current under-performance of foodstores in the Beckton area; whereas a finer-grained analysis identifies some need within individual sub-areas (Table 12.5 below).
- 12.50 In assessing capacity for future convenience goods floorspace, we have assumed that the efficiency with which existing floorspace is being used will increase over time; i.e. existing floorspace will absorb a proportion of expenditure growth identified. Experian forecast an increase in sales efficiency rate for existing floorspace of 0.2% in 2022 and 0.3% thereafter. When converting residual expenditure



into new quality floorspace, operators would be expected to achieve at least £12,000 per sq m net over the plan period. The level of borough-wide need for additional convenience goods floorspace is set out in Table 12.4 by total borough, and also in Table 12.5 by Sub-Areas A-E.

Table 12.4: LB Newham Quantitative Need: Convenience Goods

2027 Sq m net	2032 Sq m net	2038 Sq m net
-2,515	-2,365	-2,127

Source: Table 12, Appendix 1

Table 12.5: LB Newham Quantitative Need: Convenience Goods, by Sub-Area

	2027 Sq m net	2032 Sq m net	2038 Sq m net
A: Stratford	360	390	442
B: East Ham/Green Street	26	50	82
C: Canning Town/Royal Docks	600	626	660
D: Forest Gate	25	41	54
E: Beckton	-3,526	-3,472	-3,365

Source: Table 13-17, Appendix 1

Convenience Goods Floorspace Need – GLA Population Growth Scenario

- 12.51 GLA population growth reflects a more substantial level of growth across LB Newham based on data input in respect of regeneration and strategic growth/opportunity areas. We have analysed this ‘optimistic’ growth scenario in order to set out upper threshold floorspace need forecasts through to 2038. The GLA population data is presented by Ward; and – to fit with the forecast model – we have assigned each of the wards which fall within the survey area to one of the ten borough survey zones (excluding Zone 11 and 12, which predominantly fall outside of the borough). This uses a best-fit approach, as the survey zones are defined by postcode sectors rather than ward boundaries.
- 12.52 As set out above, the baseline scenario forecasts a total population of 503,055 by 2038 within Zones 1-12; a growth of 34,068. The GLA data forecasts a total population of 568,155 by 2038 within Zones 1-12; a substantially higher growth of 109,658 – projected from a slightly lower 2022 baseline starting position. Based on the same survey results, economic assumptions, shopping patterns and market share, Table 12.6 and 12.7 set out convenience goods floorspace need based on the higher GLA population projections.

Table 12.6: LB Newham Quantitative Need: Convenience Goods, GLA Population Projections

2027 Sq m net	2032 Sq m net	2038 Sq m net
-1,077	2,207	4,085

Source: Appendix 3



Table 12.7: Quantitative Need: Convenience Goods, by Sub-Area, GLA Population Projections

Sub-Area	2027 Sq m net	2032 Sq m net	2038 Sq m net
A: Stratford	222	1,252	1,643
B: East Ham/Green Street	-586	-340	-219
C: Canning Town/Royal Docks	1,123	1,592	1,806
D: Forest Gate	289	276	276
E: Beckton	-2,125	-573	579

Source: Appendix 3

- 12.53 The highest level of convenience goods need arises in Stratford and Canning Town/Royal Docks, based on strong performance of existing floorspace combined with strong levels of population growth in these areas including the LLDC area of change. Floorspace need forecasts in Beckton are more conservative despite strong levels of population growth; this is a consequence of the current under-performance (and thereby over-provision) of existing convenience goods floorspace in this sub-area at the current time. Forecasts are also nominal in Sub-Area B and D given the identified commitments and short term delivery of new Lidl foodstores in Green Street and Forest Gate. These forecast ‘need’ figures reflect the current ‘status quo’ in the borough; if development wishes to ‘build above’ these figures on the edge/outside of town centres and via the development of new town/local centres, it will change the status quo and a robust retail impact assessment should be required – as recommended in the final section of this report.

Comparison Goods Trade Retention

- 12.54 For comparison goods, we have calculated the levels of comparison goods trade retention in each of the six larger town centres to inform the baseline understanding of floorspace performance. Section 3 discussed in detail the role of those town centres within the wider sub-region, and here we explore the floorspace performance of the individual town centres in greater depth.
- 12.55 Table 12.8 (below) sets out the market share and trade retention of each of the Newham town centres within the Zone 1-12 survey area, in 2010, 2016 and 2022.

Table 12.8: LB Newham Comparison Goods Spending Destinations (2022)

	Zone 1-12 Market Share % 2010	Zone 1-12 Market Share % 2016	Zone 1-12 Market Share % 2022	Zone 1-12 £m 2022
Stratford Metropolitan Centre	9.8%	28.4%	30.3%	£260.0m
Beckton Area	23.3%	22.7%	24.3%	£208.5m
East Ham Major Centre	10.9%	9.1%	6.2%	£53.4m
Green Street District Centre	1.5%	0.9%	1.3%	£10.8m
Forest Gate District Centre	0.6%	0.9%	1.2%	£10.4m
Canning Town District Centre	0.4%	0.3%	0.9%	£7.9m
TOTAL				£551.0m



- 12.56 The data in Table 12.8 above demonstrates that – as you would expect – Stratford continues to be the most popular town centre in the borough drawing 30.3% of Zone 1-12 comparison goods trade; but is closely followed by the Beckton area, including all retail parks. East Beckton District Centre has little comparison goods floorspace, and does not – on its own – appear as a ‘destination’ with the survey results. The north/west, south/east dominance in the borough, in respect of comparison goods shopping, remains consistent with the previous 2016 evidence base.
- 12.57 It is also evident that all town centres have improved their market share over the period from 2010, aside from East Ham, which has experienced a trendline downward trajectory from 10.9% in 2010 to 6.2% in 2022. As noted earlier in this report, East Ham is currently undergoing substantial development and construction work across the East Ham Market strategic site, with the town centre benefitting from considerable investment and enhancement. The performance of East Ham should continue to be monitored to understand the longer term impacts of development.
- 12.58 The results of the survey set out in Table 12.6, above, demonstrate that the five higher order town centres and the East Beckton Retail Parks combined, retain £551.0m of comparison goods expenditure generated within the Zone 1-12 Survey Area.
- 12.59 Table 12.9 below, compares 2022 borough market share/trade retention with that recorded in the 2010 and 2016 evidence base studies. This confirms a market share increase from 46.5% in 2010 to 62.3% in 2016, largely as a consequence of the opening of Westfield Stratford City. The new and up-to-date analysis confirms that the borough has further enhanced market share from 62.3% in 2016 to 64.2% in 2022 – a positive indicator of overall health and performance. The current market share of 64.3% is considered strong in the London-wide context, driven primarily by the role of Stratford City in the north west and the Beckton area in the south east.

Table 12.9: Total Newham Borough Trade Retention/Market Share [Comparison Goods], 2010-2022

Study Year	Zone 1-12 Market Share %
2010	46.5%
2016	62.3%
2022	64.2%
Difference 2010-2022	17.7%
Difference 2016-2022	1.9%

- 12.60 Table 12.10 (below) focuses in more detail on the localised catchment of each of the six main town centres, setting out their location zone and comparison goods market share within that zone. It has also been possible to compare trade retention with 2016 to highlight any change over time. The data demonstrates that each of the six main town centres has increased market share within their core location zone, aside from East Ham, which has experienced a decline in market share from 29.3% to 26.1%.



Table 12.10: Town Centre Location Zone, Comparison Goods Market Share

Town Centre	Location Zone	Market Share % in Location Zone 2010	Market Share % in Location Zone 2021
Stratford	8	54.6%	62.5%
East Ham	5	29.3%	26.1%
Forest Gate	9	2.9%	8.8%
Canning Town	2/7	Zone 2 – 0.1% Zone 7 – 4.9%	Zone 2 – 4.7% Zone 7 – 4.4%
Green Street	3/6	Zone 3 – 0.0% Zone 6 – 2.1%	Zone 3 – 4.4% Zone 6 – 2.9%
Beckton Area	4	47.8%	48.8%

12.61 The post Covid-19 ‘shop local’ trends are apparent in this data, as consumers visit their closest, often smaller town centre more frequently, whilst undertaking higher order shopping online. Stratford Metropolitan Centre continues to compete effectively with the internet and market share within the local catchment has seen a strong consolidation. East Ham, in comparison, is the most vulnerable town centre within this specific set of data.

12.62 Table 12.11 below sets out the market share of the individual retail park destinations across Beckton, highlighting the most dominant for comparison goods shopping. The data highlights that Gallions Reach Shopping Park is the most influential on people choices, but that Beckton Triangle and Beckton Retail Park continue to be population destinations.

Table 12.11: Market Share Beckton Retail Parks

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12
Beckton Triangle	7.9%	10.0%	5.2%	7.8%	4.5%	7.9%	7.2%	1.0%	4.6%	5.3%	7.7%	1.8%
Gallions Reach	22.1%	14.5%	12.4%	18.3%	2.8%	6.2%	11.7%	2.2%	1.7%	3.4%	8.3%	4.4%
Beckton Retail park	3.2%	9.6%	3.8%	5.0%	3.2%	8.0%	4.9%	1.7%	2.7%	1.2%	2.9%	1.4%

Comparison Goods Inflow

12.63 In addition to generated expenditure from survey area residents, there will also be a level of trade flowing into the borough from further afield. This will contribute to supporting additional/new floorspace and needs to be quantified as part of this assessment. Based on an in-depth analysis of the composition and role of each town centre, and evidence from previous in-centre surveys and travel pattern analysis, this assessment has assumed an inflow of expenditure to Westfield Stratford City and Green Street from beyond Zones 1-12.

12.64 Westfield Stratford City is a major shopping destination attracting shoppers from London and further afield, whilst Green Street is a vibrant and diverse non-food ethnic retail destination for those living locally and further afield across London, travelling to access the breadth and quality of offer. Exit data previously released from Westfield in 2016 captured home postcode data from over 2,000 shoppers



whilst visiting the shopping centre. The 2016 evidence base confirmed that 76% of people visiting Westfield live outside of the Zone 1-12 Survey Area - a substantial inflow of expenditure from across the UK, with visitors living as far afield as Scotland and the South West.

- 12.65 Consistent with wider ‘shop local’ trends, Stratford Metropolitan Centre has lost market shares in those zones further afield, including Zone 1, 2 and 11; whilst enhancing market share in those zones closer to the town centre. Given this ‘shop local’ trend evidenced across the UK, particularly in the larger towns and cities, this analysis has reduced the level of inflow to Stratford from 76% to 70%, as more people further afield are shopping for their higher order goods online.
- 12.66 For Green Street an inflow of 20% has been assumed to reflect the district centre’s role beyond serving local shopping needs. When forecasting need, Tables 11 and 12, Appendix 2, factor in these inflow levels and we summarise this output in Table 12.12 below, highlighting total town centre ‘turnover’ for each of the six main town centres.

Table 12.12: LB Newham Comparison Goods Town Centre Turnover 2022 (£m)

Town Centre	Turnover (£m)
Stratford	£866.6m
East Ham	£53.4m
Forest Gate	£10.4m
Canning Town	£7.9m
Green Street	£13.5m
Beckton Area	£208.5m

Comparison Good: Floorspace Performance

- 12.67 This part of the analysis sets out the trading performance of comparison goods floorspace, i.e. the sales density per sq m. The calculations formed as part of Appendix 2 are summarised here:
- Stratford Metropolitan Town Centre has a comparison goods turnover of c.£866.6m; improving market share in every survey zone except those furthest afield (Zone 1/2/11). Based on a net comparison goods floorspace of 105,000 sq m, we estimate that the town centre has a sales density of c.£8,254 per sq m net. This is an increase from that recorded in 2010 (£4,200 per sq m net) and 2016 (£6,810 per sq m net), highlighting a strong improvement in recent years.
 - East Ham Major Centre has a comparison goods turnover of £53.4m; the centre has lost market share in more survey zones than any other town centre, including Zone 1/3/5/7/8/9/10 and 11. Based on a net comparison goods floorspace of 14,265 sq m, we estimate that the town centre has a sales density of c.£3,745 per sq m net. This highlights a reduction since 2010 (£5,425 per sq m net), and 2016 (£5,181 per sq m net).

East Ham is the only main town centre in Newham to have experienced a fall in comparison goods sales density, and given the continued downward trend of the comparison goods sector, it is unlikely to increase in the near future/over the Local Plan period – the mix and diversity of ‘other’ uses will be particularly important in East Ham in order to encourage dwell time and linked trips.



- Canning Town District Centre has a comparison goods turnover of only £7.9m; the only town centre to improve market share in all survey zones. Based on a net comparison goods floorspace of 3,953 sq m, we estimate that the town centre has a sales density of c.£1,997 per sq m net. This is a strong increase from that recorded in 2010 (£460 per sq m net) and 2016 (£446 per sq m net), reflecting the wider regeneration of the area, new retail and town centre uses and a new main foodstore encouraging visits and related linked trips within the centre.
- Green Street District Centre has a comparison goods turnover of £10.8m; with market share staying broadly the same or growing in every survey zone. Based on a net comparison goods floorspace of 14,880 sq m, we estimate that the town centre has a sales density of c.£906 per sq m net. This is an increase from that recorded in 2010 (£730 per sq m net) and 2016 (£520 per sq m net), reflecting the consolidation of the centre identified throughout this assessment.
- Forest Gate District Centre has a comparison goods turnover of £10.4m; improving market share in every zone except 2 and 8 – those zones closest to Stratford. Based on a net comparison floorspace of 5,678 sq m, we estimate that the town centre has a sales density of c.£1,823 per sq m net. This is an increase from that recorded in 2010 (£606 per sq m net) and 2016 (£983 per sq m net).
- The Beckton area, including East Beckton District Centre and out-of-centre retail parks, has a comparison goods turnover of £208.5m. The 'destination' has substantially improved market share in those closest zones geographically, but lost market share in those zone further afield, including Zone 5, 9, 10 and 12. Based on a net comparison floorspace of 40,000 sq m, we estimate that the comparison goods floorspace has a sales density of c.£5,213 per sq m net. This is an increase from that recorded in 2010 (£3,308 per sq m net) and 2016 (£3,503 per sq m net).

Comparison Goods Floorspace Need – Baseline Scenario

- 12.68 The 'baseline' comparison goods need assessment has assumed that Newham will maintain existing market share and the model has forecast the need for new comparison goods floorspace to the years 2027, 2032 and 2038. In assessing capacity for future comparison goods floorspace, we have assumed 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 net of 2.2% in 2023, 2.4% between 2024-2028, and 2.9% between 2029 and 2038. Based on the role and performance of the town centres, we would expect new quality floorspace to achieve at least £10,000 per sq m net.
- 12.69 The level of borough-wide need for additional comparison goods floorspace is set out in Table 12.11, by total borough and also in Table 12.12 by each of the five sub-areas.
- 12.70 The figures demonstrate that – within the baseline scenario – there is currently only a small need for additional comparison goods floorspace over the plan period (1,549 sq m net to the period 2038). The reasons for this are consistent with identified national trends. Expenditure growth has been hit in the short to medium term as a consequence of Covid-19, SFT is substantially greater through accelerated trends, and the rate that existing floorspace is absorbing expenditure continues to remain strong (claiming a high proportion of expenditure growth), as the level of floorspace continues on a downwards trajectory.



12.71 The rate of expenditure growth is not sufficient to substantially override the rate that existing floorspace is absorbing spend over time. Combined with such a strong growth in SFT leads to the current status quo, and only a small level of additional need over the plan period. The over-supply is not currently substantial, so that doesn't raise a huge concern in respect of the need to lose space, but the strategy must protect existing provision to consolidate and support healthy town centres over the plan period.

Table 12.13: LB Newham Quantitative Need: Comparison Goods - Baseline

2027, Sq m net	2032, Sq m net	2038 Sq m net
-314	386	1,549

Source: Table 10, Appendix 2

Table 12.14: LB Newham Quantitative Need: Comparison Goods, by Sub-Area - Baseline

Sub-Area	2027 Sq m net	2032 Sq m net	2038 Sq m net
A-Stratford	-128	463	1,378
B – East Ham/Green Street	-215	-229	-180
C – Canning Town/Royal Docks	-23	-24	-17
D – Forest Gate	-30	-30	-22
E - Beckton	-607	-624	-438

Source: Table 11-15, Appendix 2

Comparison Goods Floorspace Need – GLA Population Growth Scenario

12.72 GLA population growth reflects a more substantial level of growth across LB Newham based on data input in respect of regeneration and strategic growth/opportunity areas. We have analysed this 'optimistic' growth scenario in order to set out upper threshold floorspace need forecasts through to 2038.

12.73 The GLA population data is presented by Ward; and – to fit with the forecast model – we have assigned each of the wards which fall within the survey area to one of the ten borough survey zones (excluding Zone 11 and 12, which predominantly fall outside of the borough). This uses a best-fit approach, as the survey zones are defined by postcode sectors rather than ward boundaries.

12.74 As set out earlier in this section, the baseline scenario forecasts a total population of 503,055 by 2038 within Zones 1-12; a growth of 34,068. The GLA data forecasts a total population of 568,155 by 2038 within Zones 1-12; a substantially higher growth of 109,658 – projected from a slightly lower 2022 baseline starting position.

12.75 Based on the same survey results, economic assumptions, shopping patterns and market share, Table 12.15 and 12.16 set out comparison goods floorspace need based on the higher GLA population projections. Within the sub-areas, need primarily arises within the Stratford Sub-Area A, and the



Beckton Area Sub-Area E; this is driven by the existing high market share and strong population growth over the plan period – including within the LLDC.

- 12.76 These forecast ‘need’ figures reflect the current ‘status quo’ in the borough; if development wishes to ‘build above’ these figures on the edge/outside of town centres and via the development of new town/local centres, it will change the status quo and a robust retail impact assessment should be required – as recommended in the final section of this report.

Table 12.15: Quantitative Need: Comparison Goods – GLA Population Projections

2027, Sq m net	2032, Sq m net	2038 Sq m net
7,110	16,739	21,888

Source: Appendix 3

Table 12.16: Quantitative Need: Comparison Goods, by Sub-Area – GLA Population Projections

Sub-Area	2027 Sq m net	2032 Sq m net	2038 Sq m net
A-Stratford	5,658	12,909	16,389
B – East Ham/Green Street	-573	-292	-57
C – Canning Town/Royal Docks	59	150	203
D – Forest Gate	-72	-70	-64
E - Beckton	833	2,698	4,074

Source: Appendix 3

Summary

- Convenience goods floorspace in Newham borough is performing well and has improved market share within the Zone 1-12 Survey Area since 2016 – from 58% to 62%. There is some leakage of trade from the borough, although in the London context this is not significant, with the analysis demonstrating the strength of foodstore provision in the borough and the strong expenditure trade retention of 62%.
- Food shopping patterns have become more balanced across the borough, with Stratford and Beckton experiencing a fall in market share within their location zone, whilst Canning Town, East Ham, Green Street and Forest Gate all achieving an uplift. The new Morrisons in Canning Town has had a positive impact on trade retention in that geographic area, whilst Green Street and Forest Gate will shortly benefit from new Lidl foodstores, boosting consumer choice to visit/stay in the district centres.
- Consistent with national trends, the data has highlighted the strong trend towards affordable choices with Lidl and Iceland foodstores performing particularly well across the borough, recording strong sales densities. The trend towards ‘shopping local’ is also evident, with catchment areas shrinking and core areas consolidating reflected in market share uplift. The Beckton area is also following national trends with the larger food superstores losing market share, and under-performing when compared to expected company average sales densities. Foodstores across the other five main town centres are performing well with strong sales densities.



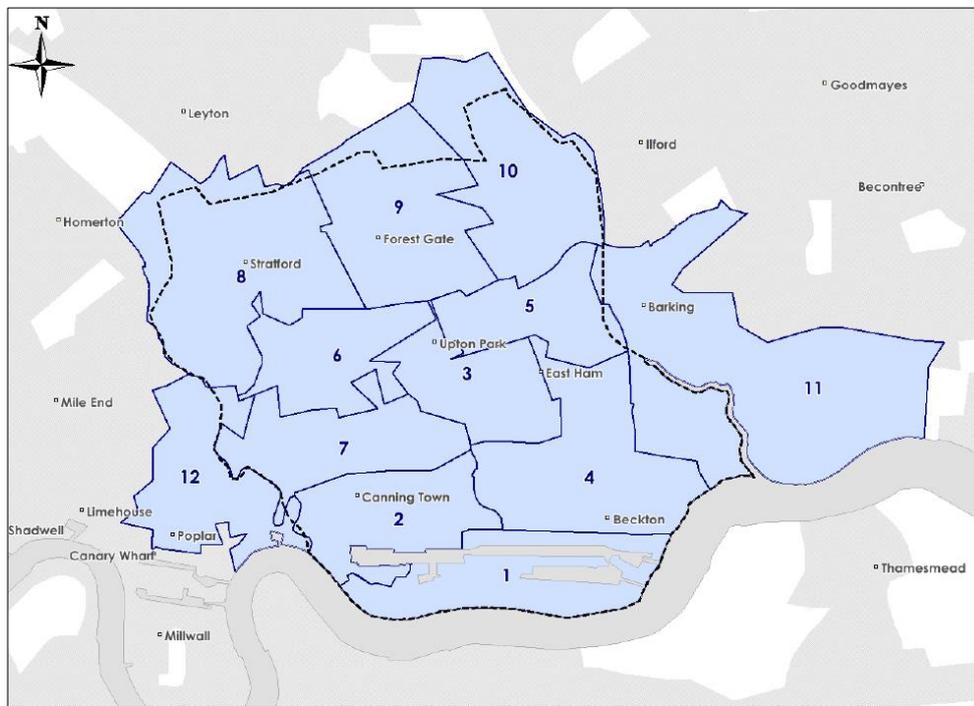
- Forecasts for convenience goods floorspace over the plan period identifies no need for additional floorspace over the plan period within the conservative baseline scenario; but the forecasts identify a need for up to 4,085 sq m net within the more optimistic GLA population forecast growth scenario. Geographically, this level of need arises predominantly in Sub-Areas A (Stratford, including LLDC area) and C (Canning Town). Despite strong population growth in Sub-Area E (Beckton), the considerable over-supply of floorspace – reflected in the under-performance of the out-of-centre Sainsbury's Claps Gate and Tesco Gallions Reach superstores – leads to little additional need for new foodstores.
- In respect of comparison goods, Stratford and Beckton continue to be the dominant destinations, attracting the largest share of trade. The data highlights that all five main town centres and the Beckton area have improved their survey area market share, except for East Ham which has experienced a continuous downward trajectory since 2010. The same is the case for market share within each respective location zone, and the sales density of each destination. In the current market, the role of town centres is not necessarily dependent entirely on the comparison goods sector, but it does highlight the need for East Ham to diversify moving forwards.
- Comparison goods floorspace in Newham is, overall, performing well and has improved market share within the Zone 1-12 survey area since 2016 – from 62.3% to 64.2%. A small level of floorspace need has been identified over the plan period within the conservative baseline scenario (1,549 sq m net), with most of this demand arising in the Stratford Sub-Area A. Floorspace need is substantially more limited than previous evidence base studies given new constraints on expenditure growth, an increase in online shopping, and the strong sales efficiency growth of existing floorspace. Nevertheless, the more optimistic GLA population forecasts lead to higher levels of floorspace need – up to 21,888 sq m net over the plan period. Geographically, this need predominantly arises within Sub-Area A (Stratford) and Sub-Area E (Beckton); driven by the already strong market share alongside strong forecast population growth.



13. Leisure Assessment

- 13.1 Commercial leisure and cultural uses have played an increasingly important role in the vitality and viability of town centres by providing complementary uses that strengthen both the daytime and evening economies. This section of the report considers the current provision of commercial leisure uses throughout the study area, including patterns of visits to restaurants, cafes, cinema, nightclubs, children’s soft play and health and fitness.
- 13.2 Drawing on the qualitative analysis of current provision, consumer choices, visitor patterns and commercial trends, we provide commentary on the potential need for different leisure uses. For the purposes of this leisure assessment we have analysed leisure travel patterns across the individual survey zones 1-12 (See Fig.13.1).

Figure 13.1: London Borough of Newham Household Telephone Survey Area (2021)



- 13.3 The telephone survey achieved the target response of 1,000 interviews, and within that sample 90% stated that they took part in leisure or cultural activities. In respect of sampling, 44% were male respondents and 56% were female; and the age classifications were as follows:

■ 18-24	-	16.5%
■ 25-34	-	22.9%
■ 35-44	-	24.9%
■ 45-54	-	13.8%
■ 55-64	-	11.4%
■ 65+	-	10.5%



National Context

- 13.4 Trends in the commercial leisure sector have been discussed in earlier sections of this report, documenting the need to inject life into our high streets and the continued evolution towards multi-dimensional town centres. The town centre of the future should attract local people to take part in a variety of activities – including dining, leisure and sport, culture and the arts, entertainment and medical services alongside business premises, offices, and residential.
- 13.5 In recent years, the commercial leisure sector has played an increasingly important role in the vitality and viability of town centres, as the nature of town centres continues to evolve. Leisure uses will continue to be important attractors in town centres, but there are challenges. The casual dining sector, for example, has reached a level of saturation and increased competition has led to casualties in recent years. Analysts suggest that in addition to market saturation, the rise in food costs, staff costs, rents and business rates have all impacted on operators’ profits; as well as emerging on-line delivery companies such as Uber Eats, Deliveroo and Just Eat.
- 13.6 The consequences of Covid-19 and associated lockdown and social distancing since March 2020, will have further far-reaching impacts on the leisure and casual dining sector, with on-line delivery companies becoming firmly established in people’s homes. Competition for high street operators has exacerbated and accelerated over a very short period of time.
- 13.7 Nevertheless, leisure uses will continue to form an important part of our town centres over the forthcoming plan period. Section 12 of this report has discussed forecast growth in spend per head for food and non-food goods, and in Table 13.1 below we compare this to spend per head on leisure experiences. In summary, food shopping experienced strong growth during the pandemic in 2020 whilst non-food saw a strong fall in expenditure due to lockdown measures and shop closures for long periods of time. Whilst not to pre-pandemic levels, both corrected themselves to some extent during 2021 and future forecasts beyond 2021 reflect ‘more normal’ longer term trends.
- 13.8 The impacts of Covid-19 on leisure spend has been substantially greater, with a fall of 53.8% in spend per head during 2020 as all leisure venues closed for long periods of time. The ‘pent up’ demand for leisure experiences and socialising is reflected in the particularly strong growth in spend per head during 2021 (64.7%). Whilst this is an anomaly within longer term trends, it is clear that leisure spend will experience a stronger growth than retail throughout 2022 and remain at strong levels from 2023 to 2027 (2.9%).

Table 13.1: UK retail and leisure spend per head 2020-40

Vol Growth Per Head (%)	2012-19	2020	2021	2022	2023-27	2028-40
Convenience Goods	-0.2%	8.4%	-6.2%	0.2%	0.0%	0.1%
Comparison Goods	3.9%	-8.5%	6.5%	3.8%	3.0%	2.9%
Leisure Spend	0.6%	-53.8%	64.7%	14.8%	2.9%	0.9%

Source: Experian Business Strategies, October 2020, [Figure 1a]



- 13.9 It is evident from the data that leisure uses will remain a valued and relevant part of our town centres in the future. Despite 'at home' leisure experiences such as streaming services growing in popularity, the pandemic has highlighted the need and desire for people to leave their homes and socialise with friends and family across a range of leisure experiences.
- 13.10 When considering the need for new leisure floorspace and leisure uses over the plan period, recent planning reform must be taken into consideration. This is discussed in detail in Section 2 of this report, setting out the wide-reaching reforms to the Use Classes Order following the on-set of the Covid-19 pandemic; the overall aim of government being to support the high street and respond to high vacancy rates and consumer demands.
- 13.11 This was a specific and swift response to the economic impact of Coronavirus on high streets and those premises in A1 and A3 in particular. In force from 1st September 2020, new planning regulations revoked parts A and D of the existing use classes order and introduced a new 'commercial, business and service' Use Class E. Leisure uses are now split into Use Class E, Use Class F and sui generis, as follows:
- **Use Class E includes:**
 - sale of food and drink consumption on premises, 'cafes and restaurants' (former A3)

 - **Sui Generis includes:**
 - theatres
 - night-clubs
 - public houses, wine bars, or drinking establishments – from 1 September 2020, previously Class A4
 - drinking establishments with expanded food provision – from 1 September 2020, previously Class A4
 - hot food takeaways (for the sale of hot food where consumption of that food is mostly undertaken off the premises) – from 1 September 2020, previously Class A5
 - venues for live music performance – newly defined as 'Sui Generis' use from 1 September 2020
 - cinemas – from 1 September 2020, previously Class D2(a)
 - concert halls – from 1 September 2020, previously Class D2(b)
 - bingo halls – from 1 September 2020, previously Class D2(c)
 - dance halls – from 1 September 2020, previously Class D2(d)

 - **Use Class F1 includes:**
 - F1(b) Display of works of art (otherwise than for sale or hire) – from 1 September 2020, previously Class D1
 - F1(c) Museums – from 1 September 2020, previously Class D1



13.12 New Use Class E does not allow policy to control the mix and proportions of shops, cafes and restaurants, but all other leisure uses fall within sui generis or Use Class F1 enabling a development plan to promote or restrict uses as necessary.

Commercial Leisure Choices

13.13 The household survey results enabled the identification of the most popular leisure activities across the sub-region, the most frequent being ‘cafés’ and the least frequent being ‘nightclubs’:

▪ Cafes	-	35.0%
▪ Evening Eating Out/Restaurants	-	33.4%
▪ Cinema	-	35.8%
▪ Daytime Eating Out/Restaurants	-	30.9%
▪ Pubs and Bars	-	19.4%
▪ Health & Fitness (Commercial Gyms)	-	19.4%
▪ Children’s Soft Play Venues	-	10.2%
▪ Nightclubs	-	7.3%

Cinema

13.14 There are now only two cinemas in LB Newham, including the Stratford Picture House, Stratford Town Centre, and the Vue Cinema, Westfield Stratford. The 14 screen multi-plex Showcase Cinema at Jenkins Lane Leisure Park, Beckton, has closed down as part of development proposals (and planning permission (Ref:21/03193/FUL) for redevelopment. Before The Vue Cinema opened in Westfield Shopping Centre, the Showcase cinema was the largest cinema in the borough, capturing a 26% market share. Existing cinema provision can be described as follows:

- **Picturehouse, Stratford Town Centre:** Located on Salway Road/Gerry Raffles Square, the cinema opened in 1997 and is the only cinema in the traditional 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.

The Stratford Picturehouse, Stratford Town Centre





- **Vue Cinema, Westfield:** The cinema opened in 2011 as part of the Westfield Stratford City Shopping Centre. The state-of-the-art cinema offers 17 screens, with two super-sized VueXtreme screens seating up to 500 people, and high quality digital sound and screen imaging.

The Stratford Picturehouse, Stratford Town Centre



- **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.

The Boleyn Cinema, Barking Road, Boleyn Local Centre



13.15 Table 13.2 demonstrates that the Vue Westfield is the most popular cinema for those living in LB Newham, achieving the highest market share in three of the five sub-areas; within the Stratford, Canning Town and Forest Gate general geographic areas. The Showcase Cinema in Barking has the highest market share in Sub-Area B and E. The Stratford Picturehouse is also popular for those living in the north of the borough, achieving a market share of 22.5% in Sub-Area A, and 21.9% in Sub-Area D.



The Showcase Cinema Beckton recently closed and those living in Sub-Area E are choosing to travel to the Showcase Cinema in Barking (45.6%) and the Vue Westfield (20.1%). There is a clear absence in cinema provision in the south and east of the borough.

Table 13.2: Preferred Cinema Choices for residents living in each Sub-Area A-E

Sub-Area A Stratford	Vue, Westfield Stratford City (51.7%) Stratford Picturehouse, Stratford (22.5%) Cineworld, O2 (2.6%) Vue, Dagenham (2.2%) Cineworld, Canary Wharf (1.7%) Cineworld, Ilford (1.7%)
Sub-Area B East Ham/Green Street	Showcase Cinema, Barking (33.8%) Vue, Westfield Stratford City (20.2%) Vue, Dagenham (13.9%) Cineworld, Ilford (6.2%) Stratford Picturehouse, Stratford (5.5%) Cineworld, O2 (2.5%)
Sub-Area C Canning Town/Royal Docks	Vue, Westfield Stratford City (39.4%) Cineworld, Canary Wharf (12.9%) Showcase Cinema, Barking (11.4%) Stratford Picturehouse, Stratford (8.4%) Cineworld, O2 (6.1%) Vue, Dagenham (2.8%)
Sub-Area D Forest Gate	Vue, Westfield Stratford City (36.2%) Stratford Picturehouse, Stratford (21.9%) Cineworld, Ilford (14.7%) Odeon, South Woodford (4.7%) Cineworld, O2 (2.4%)
Sub-Area E Beckton	Showcase Cinema, Barking (45.6%) Vue, Westfield Stratford City (20.1%) Stratford Picturehouse, Stratford (11.4%) Cineworld, O2 (10.7%)

- 13.16 Traditional cinema venues are changing and adapting in response to wider TV, movie and streaming trends, and whilst the presence of cinemas in the leisure sector appears secure at present, the future is somewhat uncertain. From an historic high immediately post-war of 1.64 billion admissions during 1946, UK cinema admissions gradually declined to an all-time low of just 54 million in 1984. Since that time, the advent of the multiplex and record levels of investment in improving the theatrical experience, has seen admissions recover and since 2000 they have remained above 150 million.
- 13.17 There has been much uncertainty in the cinema market given the advent of on-demand streaming services such as Netflix, a cheaper option in the comfort of your own home. Nevertheless, a serious detrimental impact has not yet occurred, with cinemas experiencing their highest admission figures in 2018 and 2019 since 1971.



- 13.18 Reasons for the market growth is varied. The industry has focused on the release of major blockbuster movies drawing in the crowds, and – importantly – include a more diverse genre from musicals to superhero and animated family films. Alongside films, cinemas have sought to diversify to offer live theatre and opera screenings, providing an alternative entertainment experience, and making West End productions affordable to a wider audience.
- 13.19 Alongside film release has been the significant investment in the actual cinema venues and the creation of an attractive cinema-going experience. Consumer expectations have risen, and cinemas have become places of comfy sofas, licensed bars, and good quality food and drink. Big cinema chains have installed higher-quality screens, and are beginning to introduce monthly subscription plans similar to the ‘streamers’. Notably, the industry has seen the rise of more boutique operators such as Everyman; and chain that has tripled its number of venues and level of attendance across the UK over the last 4 years by offering a high end, boutique, quality cinema experience.
- 13.20 Crucially, as the younger generation question the need for cinema visits, preferring to stream more cost effectively at home, the largest growth has been in the older age categories. These groups, with a greater disposable income, often enjoy a pre-film dinner in the bar with friends, followed by a drink in the comfy reclining chairs on offer.
- 13.21 A relatively new trend in the cinema market is the growth of the ‘pop-up’ cinema, estimated to be worth around £10 million in 2019, and growing at between 20-25% per year. A pop-up cinema is a mobile or temporary cinema, usually set-up in locations such as a park, beach, the grounds of a visitor attraction, on a city centre roof-top or other distinctive indoor or outdoor venue. Sometimes, for example, they are decorated seasonally, such as the Christmas themed secret cinemas. They tend to screen timeless classics or popular modern films that consumers are very familiar with, enjoying the experience of watching them again in a very different environment. Operators include Luna, Rooftop Film Club, Sundown Cinema, Backyard Cinema and Secret Cinema, for example.
- 13.22 In LB Newham, these trends would suggest that the three existing cinemas will remain viable, and following the recent closure of the Showcase Cinema in Beckton for redevelopment, (Ref:21/03193/FUL) suggests there may be a need/commercial demand for additional cinema provision in the borough. At present facilities are focused solely in Stratford and a small cinema remains in Boleyn.
- 13.23 Cinemas were continuing to perform well throughout 2019, but a post Covid world and the continued march of streaming services like Netflix and the Pop-Up Cinema trend, retain a level of uncertainty over what the future for the cinema industry might look like and what direction it might take. We conclude that the Council should plan for a small scale boutique cinema in the Canning Town, Royal Docks and/or Beckton Spatial Policy Areas, within town centre locations (2-4 screens). Any proposals driven by commercial demand for new facilities within the network of town centres should be considered favourably.

Cafes

- 13.24 Visiting cafes is the most popular choice of leisure activity amongst those living in the survey area. It is evident from a more detailed analysis, however, that in most cases the main town centres in each sub-area are not the first choice café destination for those living within that sub-area. In Sub-Area B, for example, East Ham is the second most popular destination after Barking town centre, and Green



Street is having little impact in the café sector. In Sub-Area C, Central London is the most popular destination, with Canning Town second; and in Sub-Area D, the most popular choice is Wanstead, ahead of Forest Gate. In Sub-Area E, Beckton is not yet having any impact in the café sector.

- 13.25 The exception is Sub-Area A, with Stratford Metropolitan Town Centre fully meeting the café requirements of local residents. The café offer in East Ham, Green Street, Forest Gate, Canning Town and Beckton could be improved to better meet the needs of the local catchment area. This is consistent with the findings of the town centre health checks set out in earlier sections.

Table 13.3: Preferred Café Choices for residents living in each Sub-Area A-E

Sub-Area A Stratford	Westfield, Stratford City (29.6%) Stratford Town Centre (27.1%) West Ham (4.8%) Wanstead (4.2%)
Sub-Area B East Ham/Green Street	Barking Town Centre (23%) East Ham Town Centre (20.8%) Central London/West End (9.2%) Westfield Stratford City (6.7%) Stratford Town Centre (5.6%) Green Street (1.7%)
Sub-Area C Canning Town/Royal Docks	Central London/West End (15.5%) Canning Town (13.5%) Westfield, Stratford City (12.2%) Stratford Town Centre (11.8%) Gallions Reach Shopping Park, Beckton (6.1%)
Sub-Area D Forest Gate	Wanstead Town Centre (20.2%) Forest Gate Town Centre (17.6%) Westfield, Stratford City (16.6%) Ilford Town Centre (13.9%) Central London/West End (9.3%) East Ham (7%) Stratford Town Centre (6.3%)
Sub-Area E Beckton	East Ham (25.6%) Stratford Town Centre (13.2%) Wanstead Town Centre (12.2%) Westfield, Stratford City (11.2%) Rochester Town Centre (6.9%)

Note: Highest responses only

Restaurants

- 13.26 Eating out in the evenings is the second most popular leisure activity for those living within the LB Newham survey area. Table 13.4 demonstrates that Central London/West End is the most popular destination for those living in Sub-Areas B, C and E, whilst Westfield, Stratford City is the most popular for those living in the north of the borough in Sub-Areas A and D.



- 13.27 Westfield Stratford City is a strong attractor for evening restaurant visits across all five Sub-Areas. For residents living in Sub-Area A, alternative destinations including Stratford Town Centre, Ilford and Green Street. Stratford Town Centre has a more limited level of attraction, but does draw people from Sub-Areas A, B and D, covering the north/east areas. East Ham has a restaurant market share of 11.6% in Sub-Area B, losing out to Central London and Westfield; whilst Green Street has a negligible level of attraction across the survey area, and this offer could be substantially improved.
- 13.28 Within Sub-Area C, Canning Town has a weak market share (3.6%), demonstrating a considerable opportunity to enhance this sector, particularly given the strong population growth taking place. Similarly, Forest Gate has a weak market share in Sub-Area D, with only 6.5% choosing the town centre 'most often'. In the south east of the borough, Gallions Reach Shopping Park has a reasonably strong draw for evening restaurant trips.

Table 13.4: Preferred Restaurant Choices for residents living in each Sub-Area A-E

Sub-Area A Stratford	Westfield Stratford City (35.6%) Central London/West End (14.7%) Stratford Town Centre (8.0%) Ilford Town Centre (7.6%) Green Street (5.1%)
Sub-Area B East Ham/Green Street	Central London/West End (28.4%) Westfield, Stratford City (15.0%) East Ham Town Centre (11.6%) Stratford Town Centre (9.5%) Barking Town Centre (7.4%) Lakeside Shopping Centre (5.6%)
Sub-Area C Canning Town/Royal Docks	Central London/West End (33.6%) Canary Wharf (16.8%) Westfield, Stratford City (14.7%) Gallions Reach Shopping Park (5.5%) Canning Town (3.6%)
Sub-Area D Forest Gate	Westfield, Stratford City (17.9%) Wanstead Town Centre (15.5%) Central London/West End (14.2%) Green Street/Upton Park (9.4%) Forest Gate (6.5%) Stratford Town Centre (5.9%)
Sub-Area E Beckton	Central London/West End (33.1%) Gallions Reach Shopping Park (20.6%) Westfield, Stratford City (19.4%) Canary Wharf (14.3%) Ilford Town Centre (6.3%)

Note: Highest responses only



Pubs/Bars

- 13.29 Pubs/Bars are the fifth most popular leisure activity for those living within the LB Newham Survey Area (19.4% of respondents). The traditional part of Stratford Town Centre is by far the most popular destination for those living within Sub-Area A, with Westfield Stratford City having a substantially more limited impact on consumer choices. The role of Westfield is limited across the whole survey area; and outside Sub-Area A, the popularity of Stratford (traditional) town centre as a pub/bar destination is also limited. East Ham and Green Street are cited as popular choices in Sub-Area B, but only after Barking Town Centre. East Ham is very popular for those living in Sub-Area E, alongside East Beckton.
- 13.30 The role of pubs/bars in Canning Town is not significant, demonstrated by the low response rate in Sub-Area C; whilst Forest Gate performs particularly well in this category, being the most popular destination in Sub-Area D. East Ham, Green Street and Canning Town are identified as town centres with the most limited range of pubs/bars, and therefore an opportunity to enhance this particular sector to enhance local market share, subject to licencing.

Table 13.5: Preferred Pub/Bar Choices for residents living in each Sub-Area A-E

Sub-Area A Stratford	Stratford Town Centre (29.1%) Shoreditch (10.5%) Charlton (8.5%) Plaistow (7.1%)	Isle of Dogs (7.1%) Westford, Stratford City (6.7%) Barking Town Centre (5.2%)
Sub-Area B East Ham/Green Street	Barking Town Centre (32.4%) East Ham Town Centre (16%) Central London/West End (9%)	Green Street Town Centre (8.7%) Stratford Town Centre (5.1%) Westfield, Stratford City (2.2%)
Sub-Area C Canning Town/Royal Docks	Central London/West End (37.2%) Canary Wharf (9.1%) Canning Town (6.9%)	Beckton Gateway Retail Park (5.6%) Plaistow (5.2%) Stratford Town Centre (4.3%)
Sub-Area D Forest Gate	Forest Gate Town Centre (35.1%) Wanstead Town Centre (10.6%) Manor Park Town Centre (9.1%) Westfield, Stratford City (8.0%)	Stratford Town Centre (6.8%) Ilford Town Centre (6.5%) East Ham (4.9%)
Sub-Area E Beckton	East Ham (20.8%) East Beckton (20.7%) Central London/West End (19.8%)	Canary Wharf (15.2%) Green Street (10.4%) Gallions Reach shopping Park (4.8%)

Note: Highest responses only

Nightclubs

- 13.31 The nightclub industry has experienced a sharp decline in recent years, with over half of clubs closing down within a decade. This was partly attributed to the change of pub licensing laws in 2005, when pubs and bars could obtain licences to stay open later. This discouraged 'moving on' to the next venue once the pub had shut at 11am; with consumers able to stay in their pub and bar of choice until 12am or later.



- 13.32 More recently, nightclubs have experienced a 'stop / start' trend following various periods of 'lockdown' as a consequence of the Covid-19 pandemic since March 2020. It is thought that for many the financial burden of closure will lead to many never re-opening or having to close down over the next few months. Aside from pub licenses and economic challenges, it is widely documented that 'Generation Z' – the younger generation that has never known a life without technology – are no longer frequenting nightclubs as a staple weekend activity. There have been a number of growing trends in recent years:
- 'Generation Z' are more aware of healthy lifestyles, including lower alcohol consumption and healthier drinking and eating habits;
 - Nightclubs are no longer the way to meet people. Meeting through friends and family, and online dating apps, is generally considered the preferred option;
 - There is a lack of brand loyalty, with this generation not committing to visiting the same nightclub time and again, week in week out. Technology has opened the doors to different destinations and alternative leisure experiences;
 - Millennials and Generation Z instead enjoy experiences from home, including take-aways, online movie streaming services, and luxury/varied drink offerings such as wine clubs, gin experiences and craft beer delivered straight to your door;
 - The importance of 'human connection' has risen, with everyone so reliant on technology in their lives. When people meet up it is reported that they want to do it properly over a nice meal and conversation, with nightclubs not providing the right atmosphere or setting for this.
- 13.33 It is thought that there will always be a place for nightclubs in their current form, but perhaps fewer niche venues will specialise in becoming a 'clubbing paradise', whilst many others diversify instead to meet wider consumer needs. Hybrid venues are likely to rise in popularity, signalling a new era of nightclubs. Hybrid venues offer a daytime offering and nightlife scene too; from coffee and brunch in the morning through to cocktails and live music at night, extending the revenue period.
- 13.34 The results of the household telephone survey demonstrates that nightclubs are the least popular leisure activity for those living within the survey area, with only a very small proportion (7.3%) stating that they visit this type of venue. Amongst the younger age groups the participation rate is also low, totalling 12% (18-24 yr olds), 11% (25-34 yr olds), and 8% (35-44 yr olds) of respondents in each age group respectively. This leisure activity is predominantly age specific and limited in reach to the full catchment population, and residents in the survey area – including within the borough – state that they predominantly visit Central London for this leisure activity, with little reference made to any facilities in LB Newham.
- 13.35 Societal trends and a deep commercial understanding of local markets will drive investment in any new nightclub venues in LB Newham. The composite analysis suggests that there is unlikely to be a need to plan for new nightclub venues over the plan period, and that nightclubs are not crucial in maintaining the vitality and viability of any particular LB Newham town centre. A policy framework can manage the introduction of new nightclub uses effectively – whether supporting or resisting – as they continue to fall under the 'Sui Generis' Use Classes classification. This is more often the remit of licensing as a consequence of potential noise and impact on residential amenity. Any applications should consequently be considered robustly on a case by case basis.



Children's Soft Play Venues

13.36 Children's soft play venues have become popular attractors over recent years, and can play a key part in town centre diversity, footfall and consumer choice. Within the LB Newham survey area, 'Cookie's Island' at Gallion Reach Shopping Park is the most popular destination, with the highest response rate in Sub-Area A, B, C and E. Elsewhere, Atherton Leisure Centre in Forest Gate, the Discover Children's Story Centre in Stratford, and the Flip Out Trampoline Park in East Ham are all popular destinations for this type of children's activity. The south west and south of the borough are deficient in this type of town centre activity.

Table 13.6: Preferred Children's Soft Play Choices for residents living in each Sub-Area A-E

Sub-Area A Stratford	Cookie's Island, Gallions Reach Shopping Park (48.3%) Atherton Leisure Centre, Forest Gate (23.4%) The Idol Indoor Soft Play, Barking (17.4%) Discover Children's Story Centre, Stratford (9.4%)
Sub-Area B East Ham/Green Street	Cookie's Island, Gallions Reach Shopping Park (19.9%) A's Nursery and Soft Play, Ilford (19.0%) Discover Children's Story Centre, Stratford (12.1%) The Idol Indoor Soft Play, Barking (10.4%) Romford Town Centre (9.2%) Flip Out Trampoline Park, East Ham (7.1%)
Sub-Area C Canning Town/Royal Docks	Cookie's Island, Gallions Reach Shopping Park (51.1%) Discover Children's Story Centre, Stratford (16.5%) East London Gymnastics Centre (10.2%) Snakes & Ladders, Brentford (7.6%) Flip Out Trampoline Park, East Ham (5.5%)
Sub-Area D Forest Gate	Romford Town Centre (41.1%) Atherton Leisure Centre, Forest Gate (30.5%) A's Nursery and Soft Play (28.5%)
Sub-Area E Beckton	Cookie's Island, Gallions Reach Shopping Park (90.5%) ZapSpace Trampoline Park (9.5%)

Summary

- It is evident from the data that leisure uses will remain a valued and relevant part of our multi-dimensional town centres in the future. Despite 'at home' leisure experiences such as streaming services growing in popularity, the pandemic has highlighted the need and desire for people to leave their homes and socialise with friends and family across a range of leisure experiences. Leisure spend growth forecasts demonstrate the importance of leisure venues and attractions, and the continued trend to visit and use these facilities moving forwards.
- Cafes and evening eating out in restaurants are the two most popular leisure activities for those living within the survey area. The data suggests that Stratford Town Centre is fully meeting the café requirements of local residents, but the café offer in East Ham, Green Street, Forest Gate, Canning



Town and Beckton could be improved to better meet the needs of the local catchment area. In the restaurant sector, East Ham and Gallions Reach are performing reasonably well but with room for improvement; whereas Forest Gate, Canning Town and Green Street are all performing poorly in this sector and could be substantially improved to better meet the needs of their local catchment areas.

- East Ham, Green Street and Canning Town are identified as town centres with the most limited range of pubs/bars, and this sector could be enhanced depending on environmental health and licensing.
- All other leisure uses fall within sui generis or Use Class F and can be controlled in policy and through development control decisions. Following the closure of the Showcase Cinema in Beckton, there is now a clear absence of cinema provision in the south and east of the borough. The data suggest LB Newham could support a small cinema in this geographic area, dependent on commercial demand. The analysis also highlights that the south west and south of the borough is deficient in 'children's soft play/activity' venues.
- Nightclubs are the least used leisure activity in the borough and this sector has faced numerous challenges in recent years from evolving leisure habits, leading to their decline. There is no need to plan for additional provision, and proposals will be market driven and considered against environmental health and licensing. Commercial demand is likely to be limited over the plan period.



14. Conclusions and Recommendations

- 14.1 Drawing on previous sections, including both the qualitative and quantitative analysis, this section sets out the key conclusions and recommendations to take forward into the new Local Plan. We consider the scope to accommodate new retail and leisure development in the borough, and set out opportunities for a pro-active development plan policy framework to facilitate sustained long-term strength in town centre performance.
- 14.2 The NPPF advises Councils to plan positively to meet needs arising for town centre uses. Policies should protect and support the vitality and viability of town centres, consider frontages and boundaries, and allocate a range of suitable sites to meet the scale and type of retail development needed.

Conclusions

Policy Framework

- 14.3 The NPPF advocates a ‘town centres first’ approach, and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. The NPPF encourages LPA’s to recognise that town centres are the heart of their communities and to pursue policies which protect their health and vitality.
- 14.4 The London Plan (2021) aims to build strong and inclusive communities, and emphasises that development must also promote the crucial role of town centres as places that provide important opportunities for face-to-face contact and social interaction during the daytime, evening and night-time. The London Plan encourages the strengthening of the role of town centres, and acknowledges that the adaptation and diversification of town centres should be supported in response to changes in technology and consumer behaviour.
- 14.5 The London Plan also promotes higher density mixed-use or residential development in and on the edge of town centres – where suitable. Funding is secured for the Silvertown Tunnel, linking Silvertown to the Greenwich Peninsula, and is due to open in 2025; whilst the extension of the DLR to Beckton Riverside remains in the feasibility stage and funding is not yet secured. The scale of development in and around Beckton Riverside is dependent on the DLR extension.
- 14.6 The Draft Royal Docks and Beckton Riverside Opportunity Area Planning Framework endorses the Local Plan, including two existing District Centres, two existing Local Centres, one proposed new Major Centre, and four proposed new Local Centres (nine centres in total). Elsewhere in the borough, the London Plan confirms that all six main town centres fall within a Strategic Area for Regeneration, i.e. within the 20% most deprived areas in England, but also recognised the substantial level of investment and development taking place across the entire borough.
- 14.7 The London Plan endorses the application of the sequential and impact test, but – contrary to the NPPF – also requires an impact assessment on proposals for new, or extensions to existing, edge or out-of-centre office uses [that are not in accordance with the Development Plan] – in addition to retail and leisure uses. The Local Plan sets an impact threshold of 300 sq m net.



- 14.8 The Local Plan promotes a new Major Centre at Gallions Reach, six new Local Centres across the west and south of the borough, and the enhancement/growth of three existing Local Centres, including North Woolwich Local Centre, Freemasons Road (Custom House) Local Centre and Manor Park Local Centre.
- 14.9 New Crossrail routes through LB Newham include a new station at Custom House as part of the Paddington to Abbey Wood line; whilst Stratford, Maryland, Forest Gate and Manor Park lie on the Liverpool Street to Shenfield line. All stations have completed upgrades, and services are expected to commence during 2022. The Local Plan endorses investment and land intensification around Crossrail Stations. Investment in connectivity across the borough, including the new Silvertown Tunnel, two Crossrail lines and feasibility in respect of the DLR extension, are driving investment, regeneration and change.
- 14.10 The Legacy Corporation Local Plan supports and facilitates a new network of five town centres, including Stratford Metropolitan Centre; Pudding Mill and East Village also fall within LB Newham. The Bromley-by-Bow District Centre lies within LB Tower Hamlets, and Hackney Wick Neighbourhood spans the boundary of LB Hackney and LB Tower Hamlets. East Village is complete and open, whilst Pudding Mill remains in the planning stage.
- 14.11 In force from 1st September 2020, new planning regulations revoked parts A and D of the existing use classes order and introduced a new 'commercial, business and service' Use Class E, incorporating former A1, A2 and A3 retail uses. Former A4 (drinking establishments, public houses/wine bars) and A5 (hot food takeaway) uses and D2 cinemas, concert halls/live music venues, bingo halls and dance halls are now defined as Sui Generis. This change has far reaching implications on emerging Local Plans; with relevant policies requiring – in most cases – a complete review from previous adopted development plans.

National Trends

- 14.12 The role of town centres as a focus for retail remains relevant in today's market to draw in shoppers and footfall. Current thinking and research consistently repeats, however, the need to look beyond the role of retail in order to reinvent the high street, emphasising that the town centre of the future must add an extra dimension to the retail experience. Covid-19 and new planning legislation have and will continue to accelerate these trends. Away from the high street, the composition and role of out-of-centre retail and retail parks will almost certainly evolve towards more mixed uses spaces and places as a consequence of the same factors. This trend is endorsed in the London Plan.
- 14.13 It is apparent that these 'extra layers/diversity of uses' are in addition to the core retail role, but should be closely connected to ensure a joined-up experience within a comprehensive town centre strategy. Investment in a wider mix of land-uses and public realm/public space improvements will benefit a consolidated retail offer, leading to improved town centre footfall activity. Short-term investment projects alongside longer term investment for major projects can have far-reaching positive benefits to the performance of a town centre.

Sub-Regional Context

- 14.14 There has been no major strategic change to the retail/town centre network since the 2016 evidence base, when the opening of Westfield Stratford City in 2011 had had a significant impact on shopping patterns in LB Newham. The up-to-date analysis demonstrates the continued dominance of Stratford



Metropolitan Centre and the 'Beckton area' as dominant shopping destinations within the borough, followed by East Ham Major Centre. Stratford continues to outperform Beckton in terms of trade draw, but not by a great margin. Green Street, Forest Gate and Canning Town continue to perform at the district centre level, with Canning Town having the least influence on shopping patterns in respect of comparison goods trade draw.

- 14.15 Each of the main town centres in LB Newham, aside from East Ham, has marginally improved their market share since 2016; East Ham has experienced a decline of 2.9%. It is clear that all competing destinations outside Newham have lost market share from the Zone 1-12 survey area since the period 2010 and 2016. This is, overall, a positive indicator of health for the town centres in Newham, and also reflects the growing 'shop local' trend evidenced since the Covid-19 pandemic, and growth in on-line shopping for higher order goods.

Local Centres

- 14.16 The retention and reinforcement of a sustainable network of Local Centres across Newham, alongside wider regeneration and land intensification, forms a key part of the borough's core priorities in respect of health, wellbeing, wealth-building and 15-minute neighbourhoods. Equally, in planning terms, the NPPF encourages the provision of social, recreational and cultural facilities and services that the community needs in order to promote strong neighbourhoods, inclusive and safe places, social interaction and healthy lifestyles.
- 14.17 Newham has 13 existing Local Centres and six planned new Local Centres – 2 in the Stratford and West Ham Spatial Policy Area, 1 in the Custom House and Canning Spatial Policy Area, 1 in the Beckton Spatial Policy Area and 2 in the Royal Docks Spatial Policy Area. Existing Local Centres, including North Woolwich Road, Freemasons Road and Manor Road are subject to planned investment and growth, recognising the regeneration and enhancement opportunities. The LLDC includes a network of five town centres, with Stratford Metropolitan Centre, and East Village and Pudding Mill Local Centres falling within the LB Newham. East Village is developed/built-out, whilst Pudding Mill remains in the planning stage.
- 14.18 It is important that newly developed local centres are of an appropriate scale to meet local needs, rather than delivering new 'destination' town centres that might compete with the wider network of town centres. All site allocations for new local centres should be accompanied by a policy requirement to test the appropriateness of new retail and leisure floorspace and mix of uses within the remit of a robust retail and leisure impact assessment. Any floorspace above the retail need forecasts will change the current status quo of the town centre hierarchy, and this should be robustly tested. The introduction of leisure floorspace in these locations should also be subject to rigorous impact testing, afforded the same weight as proposed retail.
- 14.19 Floorspace need and commercial demand will be driven by the scale of housing and generated population and expenditure within the localised catchment area. This should be carefully considered within site specific retail and leisure assessments/impact assessments, considering the geographic context, scale of population, expenditure generated, physical layout, built form, target markets, accessibility, and nearby facilities. Planning applications should include a retail and leisure impact assessment to consider these issues.



Quantitative Need - Baseline

- 14.20 Convenience goods floorspace in Newham borough is performing well and has improved market share within the Zone 1-12 Survey Area since 2016 – from 58% to 62%. There is some leakage of trade from the borough, although in the London context this is not significant. The analysis has demonstrated the strength of foodstore provision in the borough and the strong comparison goods trade retention of 62%.
- 14.21 Food shopping patterns have become more balanced across the borough, with Stratford and Beckton experiencing a fall in market share within their location zone, whilst Canning Town, East Ham, Green Street and Forest Gate all achieving an uplift. The new Morrisons in Canning Town has had a positive impact on trade retention in that geographic area, whilst Green Street will shortly benefit from a new Lidl foodstore, boosting consumer choice to visit the district centre.
- 14.22 Consistent with national trends, the data has highlighted the strong trend towards affordable choices with Lidl and Iceland foodstores performing particularly well across the borough, recording strong sales densities. The trend towards ‘shopping local’ is also evident, with catchment areas shrinking and core areas consolidating reflected in market share uplift. The Beckton area is also following national trends with the larger food superstores losing market share, and under-performing when compared to expected company average sales densities. Foodstores across the other five main town centres are performing well with strong sales densities.
- 14.23 Baseline forecasts for convenience goods floorspace over the plan period are based on conservative ONS population forecasts; this identifies a need for c.1,521 sq m net within the borough, to the period 2038. A finer grained analysis identified quantitative surplus capacity to accommodate additional convenience goods floorspace in Sub-Areas A (Stratford), B (East Ham/Green Street), C (Canning Town/Royal Docks), and D (Forest Gate); whilst there is a considerable over-supply in Sub-Area E (Beckton), reflected in the under-performance of the out-of-centre Sainsbury’s Claps Gate and Tesco Gallions Reach superstores.

Table 14.1: LB Newham Quantitative Need: Convenience Goods - Baseline

2027 Sq m net	2032 Sq m net	2038 Sq m net
1,066	1,241	1,521

Source: Table 12, Appendix 1

Table 14.2: LB Newham Quantitative Need: Convenience Goods, by Sub-Area - Baseline

	2027 Sq m net	2032 Sq m net	2038 Sq m net
A: Stratford	660	697	758
B: East Ham/Green Street	2,090	2,121	2,169
C: Canning Town/Royal Docks	1,251	1,368	1,417
D: Forest Gate	509	526	542
E: Beckton	-3,526	-3,472	-3,365

Source: Table 13-17, Appendix 1



- 14.24 In respect of comparison goods, Stratford and the Beckton Area (predominantly Gallions Reach) continue to be the dominant destinations, attracting the largest share of trade. The data highlights that all four main town centres and the Beckton area have improved their survey area market share, but that East Ham has experienced a continuous downward trajectory since 2010. The same is the case for market share within each respective location zone, and the sales density of each destination. In the current market, the role of town centres is not necessarily dependent entirely on the comparison goods sector, and this data highlights the need for East Ham to enhance the town centre and diversify moving forwards.
- 14.25 Comparison goods floorspace in Newham is, overall, performing well and has improved market share within the Zone 1-12 survey area since 2016 – from 62% to 64%. A small level of floorspace need has been identified within the baseline scenario over the plan period (1,549 sq m net), with most of this demand arising in the Stratford Sub-Area A.
- 14.26 Floorspace need is substantially more limited than previous evidence base studies given new constraints on expenditure growth, an increase in online shopping, and the strong sales efficiency growth of existing floorspace. The data concludes that – within this conservative baseline scenario – the Local Plan does not need to plan for accommodating additional comparison goods floorspace to the period 2038, with any surplus being directed to town centres in the first instance. Outputs from this analysis concludes that comparison goods development/uplift in floorspace outside of the town centre network is likely to have a detrimental impact given the absence of surplus expenditure, and any proposals in edge or out-of-centre locations should be carefully considered in accordance with the impact test.

Table 14.3: LB Newham Quantitative Need: Comparison Goods - Baseline

2027, Sq m net	2032, Sq m net	2038 Sq m net
-314	386	1,549

Source: Table 10, Appendix 2

Table 14.4: LB Newham Quantitative Need: Comparison Goods, by Sub-Area - Baseline

Sub-Area	2027 Sq m net	2032 Sq m net	2038 Sq m net
A-Stratford	-128	463	1,378
B – East Ham/Green Street	-215	-229	-180
C – Canning Town/Royal Docks	-23	-24	-17
D – Forest Gate	-30	-30	-22
E - Beckton	-607	-624	-438

Source: Table 11-15, Appendix 2



Quantitative Need – GLA Population Growth Projections

- 14.27 GLA population growth reflects a more substantial level of growth across LB Newham based on data input in respect of regeneration and strategic growth/opportunity areas. We have analysed this ‘optimistic’ growth scenario in order to set out upper threshold need forecasts through to 2038. The baseline scenario forecasts a total population of 503,055 by 2038 within Zones 1-12; a growth of 34,068. The GLA data forecasts a total population of 568,155 by 2038 within Zones 1-12; a substantially higher growth of 109,658 – projected from a slightly lower 2022 baseline starting position. Based on the same survey results, economic assumptions, shopping patterns and market share, Table 14.5 and 14.6 set out convenience goods floorspace need based on the higher GLA population projections.

Table 14.5: LB Newham Quantitative Need: Convenience Goods, GLA Population Projections

2027 Sq m net	2032 Sq m net	2038 Sq m net
-1,077	2,207	4,085

Source: Appendix 3

Table 14.6: Quantitative Need: Convenience Goods, by Sub-Area, GLA Population Projections

Sub-Area	2027 Sq m net	2032 Sq m net	2038 Sq m net
A: Stratford	222	1,252	1,643
B: East Ham/Green Street	-586	-340	-219
C: Canning Town/Royal Docks	1,123	1,592	1,806
D: Forest Gate	289	276	276
E: Beckton	-2,125	-573	579

Source: Appendix 3

- 14.28 The highest level of convenience goods need arises in Stratford and Canning Town/Royal Docks, based on the strong performance of existing floorspace combined with strong levels of population growth in these areas including the LLDC area of change. Floorspace need forecasts in Beckton are more conservative despite strong levels of population growth; this is a consequence of the current under-performance (and thereby over-provision) of existing convenience goods floorspace in this sub-area at the current time. Forecasts are also negligible in Sub-Area B and D given the identified commitments and short term delivery of new Lidl foodstores in Green Street and Forest Gate.
- 14.29 Table 14.7 and 14.8 set out comparison goods floorspace need based on the higher GLA population projections; up to 21,888 across the borough to 2038. Within the sub-areas, need primarily arises within the Stratford Sub-Area A, and the Beckton Area Sub-Area E; this is driven by the existing high market share and strong population growth over the plan period – including within the LLDC.

Table 14.7: Quantitative Need: Comparison Goods – GLA Population Projections

2027, Sq m net	2032, Sq m net	2038 Sq m net
7,110	16,739	21,888

Source: Appendix 3



Table 14.8: Quantitative Need: Comparison Goods, by Sub-Area – GLA Population Projections

Sub-Area	2027 Sq m net	2032 Sq m net	2038 Sq m net
A-Stratford	5,658	12,909	16,389
B – East Ham/Green Street	-573	-292	-57
C – Canning Town/Royal Docks	59	150	203
D – Forest Gate	-72	-70	-64
E - Beckton	833	2,698	4,074

14.30 These upper forecast convenience and comparison goods floorspace ‘need’ figures reflect the current ‘status quo’ in the borough; if development wishes to ‘build above’ these figures on the edge/outside of town centres and via the development of new town/local centres, it will change the status quo and a robust retail impact assessment should be required – as recommended in more detail later in this section.

Leisure Sector

- 14.31 It is evident from the data that leisure uses will remain a valued and relevant part of our multi-dimensional town centres in the future. Despite ‘at home’ leisure experiences such as streaming services growing in popularity, the pandemic has highlighted the need and desire for people to leave their homes and socialise with friends and family across a range of leisure experiences. Leisure spend growth forecasts demonstrate the importance of leisure venues and attractions, and the continued trend to visit and use these facilities moving forwards.
- 14.32 Cafes and evening eating out in restaurants are the two most popular leisure activities for those living within the survey area. The data suggests that Stratford Town Centre is fully meeting the café requirements of local residents, but the café offer in East Ham, Green Street, Forest Gate, Canning Town and Beckton could be improved to better meet the needs of the local catchment area. In the restaurant sector, East Ham and Gallions Reach are performing reasonably well but with room for improvement; whereas Forest Gate, Canning Town and Green Street are all performing poorly in this sector and could be substantially improved to better meet the needs of their local catchment areas.
- 14.33 East Ham, Green Street and Canning Town are identified as town centres with the most limited range of pubs/bars, and this sector could be enhanced depending on environmental health and licensing.
- 14.34 All other leisure uses fall within sui generis or Use Class F and can be controlled in policy and through development control decisions. Following the closure of the Showcase Cinema in Beckton, there is now a clear absence of cinema provision in the south and east of the borough. The data suggest LB Newham could support a small cinema in this geographic area, dependent on commercial demand. The analysis also highlights that the south west and south of the borough is deficient in ‘children’s soft play/activity’ venues.
- 14.35 Nightclubs are the least used leisure activity in the borough and this sector has faced numerous challenges in recent years from evolving leisure habits, leading to their decline. There is no need to plan for additional provision, and proposals will be market driven and considered against environmental health and licensing. Commercial demand is likely to be limited over the plan period.



Recommendations

- 14.36 In this section, we set out a series of Borough-wide / strategic objectives which the Council may wish to take forward in the development of policies for its new Local Plan and other future development plan documents. These are structured around the following key topics:
- Retail Floorspace Need and Accommodating growth
 - Borough-wide planning policy recommendations
 - Hierarchy of centres
 - Town centre boundaries and frontages
 - Permitted development and the use of Article 4 Directions

Retail Floorspace Need and Accommodating Growth

Comparison Goods

- 14.37 There is only a small need for additional comparison floorspace in the borough over the plan period within the conservative population growth scenario; whereas the GLA population forecasts are more optimistic identifying need for around 21,888 sq m net by 2038. This need is identified within the Stratford/LLDC/West Ham area (16,389 sq m net) and the Beckton area (4,074 sq m net).
- 14.38 Irrespective of population growth, market trends combined with average town centre floorspace data generated by Experian Goad, highlight the decline of comparison goods floorspace within Newham and the wider UK in recent years. Within this market context, proposals for comparison goods led schemes within LB Newham are unlikely over the plan period and there is no need to allocate sites outside of town centres for comparison floorspace.
- 14.39 The strong growth in expenditure and higher threshold floorspace projection under the GLA growth scenario will be accommodated across the LLDC within the network of new district/local centres, West Ham, and also within the existing Stratford Metropolitan Town Centre, which can continue to absorb expenditure growth and footfall generated. This level of growth will seek to consolidate the role of Stratford as a Metropolitan Town Centre and – into the future – an International Town Centre. The increase in population and associated spend will assist the centres transition towards a step change upwards in the London-wide town centre hierarchy. The actual delivery of floorspace need will be closely linked to commercial demand and appetite for investment; and given the current market there is no need to plan for accommodating any need outside of town centres.
- 14.40 Floorspace need arising within Sub-Area E (Beckton) should be directed to the planned new Major Centre at Gallions Reach Shopping Park, the planned new Local Centre at Albert Basin, and other sustainable settlements as they emerge through planned growth. There is no need to allocate additional edge or out-of-centre sites to accommodate floorspace need across the Beckton Area, with all new proposed development directed to the existing, emerging and planned new town centres and settlements. Within the current commercial markets there is unlikely to be proposals for new out-of-centre floorspace; however, any such proposed development should comply robustly with the impact



and sequential site assessment considering all existing and planned town centres as detailed within the Local Plan.

- 14.41 Commercial demand for new comparison goods floorspace across the network of town centres should be supported subject to wider local plan policies. This might be a redevelopment of existing space within a Primary Shopping Area – as currently evidenced throughout many of the LB Newham town centres – and lead to positive investment and an enhanced and consolidated retail and leisure offer. The introduction of comparison goods floorspace within town centres should be supported.
- 14.42 Town centre redevelopment proposals to include ground floor retail/leisure within the Primary Shopping Area should be encouraged subject to the wider policy framework. There are a number of good examples of high street frontage redevelopment sites currently under construction or recently completed, which include retail at ground floor and residential/offices on the upper floors. These are set out in the health check chapters and include East Ham Market, Poundland redevelopment East Ham, Holland & Barratt redevelopment Green Street, and 39a-49a and 89-93 Woodgrange Road Forest Gate.

LBN1: Despite strong population growth within the GLA optimistic growth scenario, there is no need to allocate sites outside the existing, emerging and planned network of town centres for comparison floorspace over the plan period. This should be kept under review, particularly beyond the first 5 year period to 2027.

Convenience Goods

- 14.43 Within the baseline conservative scenario there is no need for additional convenience goods floorspace over the plan period. The GLA higher growth scenario does, however, identify need for up to 4,085 sq m net to the period 2038. Geographically, this arises predominantly in Sub-Area A (Stratford) and Sub-Area C (Canning Town/Royal Docks), where the highest levels of population growth will take place. Beckton does have a high forecast population growth, but current floorspace represents such a huge over-supply, the growth in population only serves to support this existing space rather than drive a need for additional space.
- 14.44 Identified floorspace need should be directed to the network of existing town centres, relevant Strategic Sites, and proposed and emerging new town/local centres in the first instance – and in accordance with the sequential approach. Policy should be clear where new floorspace is supported to comply with the requirements of the sequential site assessment; thereby planning applications and development proposals are either in accordance with the NPPF, or not.
- 14.45 Given the level of planned new town centres across the borough, we do not conclude there is a need to allocate out-of-centre sites to accommodate new foodstores. We make the following observations in respect of convenience goods floorspace:
- Small to medium sized foodstores should be supported in emerging and planned new local centres of an appropriate scale to serve the local community;
 - In East Ham/Green Street, the opening of a new Lidl foodstore will meet the need arising and should be monitored moving forwards;
 - In Stratford, the performance of the town centre Morrisons store has declined substantially since 2016, and whilst still meeting expected trading levels. The Lidl foodstore in particular is



performing strongly, and reflects the affordability choices being made in the borough – the store is small and a larger store might be appropriate in the future provided it continues to anchor the historic part of the town centre. The current Lidl foodstore is one of the key footfall drivers in this location. Floorspace need should also be directed to the new centres in the LLDC and West Ham areas;

- Floorspace need in Forest Gate has been identified for some years, but not yet delivered. Small scale foodstores are performing well, but there is substantial leakage of trade, and a continued need to deliver additional floorspace in this spatial policy area. The new Lidl foodstore will meet the need in this location over the plan period. There may be opportunity for a new small top up convenience store where the demand arises;
- Canning Town is performing well following the opening of the new Morrisons foodstore, and a residual need has been identified to support additional convenience goods floorspace across the Sub-Area including Royal Docks. This could be met across the District Centre, including the new Hallsville Quarter which falls within the district centre boundary, and also within the western Royal Docks Spatial Policy Area and planned new Local Centres;
- In Beckton, the two out-of-centre food superstores (Tesco, Gallions Reach and Sainsbury's, Claps Gate Lane) are underperforming, but the growth in population and expenditure will help to support this level of floorspace over the plan period. The absence of convenience goods quantitative 'need' in this Spatial Policy Area should not preclude planned town centres from being delivered, anchored by small convenience stores. Impact on out-of-centre retail destinations is not a material planning consideration, and the delivery of sustainable new communities and town centres at Gallions Reach and Albert Basin/Gallions Reach DLR should be prioritised over protecting out-of-centre floorspace. New development in the form of housing and employment will support new town centre floorspace.

LBN2: Set out preferred locations and sites to meet the convenience goods need arising focusing on the network of town centres, planned new centres, Opportunity Areas and Strategic Site Allocations in the first instance. This should include consideration of the network of local centre and local shopping parades as set out below.

Borough-wide Planning Policy Recommendations

- 14.46 The Council's existing approach to protect and enhance the vitality and viability of town centres is set out in Policies SP6 and INF5 of the Local Plan, detailed in Section 2 of this report.
- 14.47 Policy SP6 seeks to create successful town and local centres, stating that they should be vibrant, vital and valued as components of local neighbourhoods and the borough as a whole. The policy encourages diversification of uses, maintaining a robust retail core and ensuring a variety of unit sizes, preventing non-retail uses particularly hot food take-ways, and managing centres as part of a clearly defined network and hierarchy and responding to the individual visions for each.
- LBN3:** The approach driving Policy SP6 should be endorsed in the new Local Plan.
- 14.48 Policy INF5 sets out the principals and strategy for the 'Town Centre Hierarchy and Network', highlighting the need to maintain existing Local Centres, to recognise regeneration and enhancement opportunities in a selection of existing Local Centres, the need to create new Local Centres, the need



for Gallions Reach Shopping Park to become a Major Centre, and for town centre uses to be directed to the designated Town and Local Centre first as appropriate to their scale.

LBN4: The approach driving Policy INF5 should be endorsed in the new Local Plan.

14.49 We make a number of additional recommendations in respect of specific development management policies of relevance to retail and town centres in the borough. We set these out below.

LBN5: Land uses within the relevant locational policies of the Local Plan should be broadened to apply to the 'Location of New *Town Centre* Uses', to ensure all planning applications comply with the key policy tests, notably the sequential site and impact tests. New retail and leisure development should continue to be encouraged across the network of town centres as a key driver of footfall. New retail, leisure and mixed use town centre development can be controlled through conditions to ensure ground floor occupancy is restricted to specific land uses within the retail and leisure categories. The NPPF Glossary defines the full list of 'Main Town Centre Uses' as follows:

Main town centre uses: Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).

LBN6: Policy and town centre strategies should aim to **retain the core retail functions** of the Metropolitan, Major and District Centres. In the context of the new Use Class E, the Council should continue to monitor and review regularly the land use composition throughout each town centre.

To ensure an in-depth understanding of role and composition, the updates should go beyond Use Class E and monitor and record by land use category including comparison goods, convenience goods, retail service, leisure service, financial and professional uses and vacant units. Drawing on Experian Goad definitions, the audits should provide a further finer-grained break-down within each land use category at points in time; including for example cafes, restaurants, fast food restaurant and public houses within the leisure services category.

This should include maintaining and regularly reviewing shopping frontages and primary shopping areas and other key town centre uses, venues or facilities in each town centre which contribute to footfall and overall character/identity. This approach will identify the extent and effectiveness of each LB Newham town centre to evolve and diversify in response to wider town centre trends. Later in this section, we review primary shopping area and frontage policies, suggesting amendments which the Council may wish to consider.

LBN7: The Council should **seek to diversify the role of its town centres**. The Council should look to accommodate an increasing range of uses within the network of town centres, including community space and facilities and housing, to help improve the sustainability of town centres in the long term. Policy should ensure that the introduction of such uses at the expense of ground floor retail/leisure frontage within the defined Primary Shopping Areas is considered carefully within a retail impact assessment. Any applications should be considered on a case by case basis, underpinned by a robust retail impact assessment.



The consistency of retail frontages should be retained and protected through policy. Sites could instead include upper floors or well-connected edge-of-centre, for example. There may be exceptional beneficial circumstances of locating other uses within the primary shopping area retail frontage, if that use brings particular linked trip, footfall and vibrancy benefits to the town centre. **Any loss of retail floorspace within the PSA should be robustly tested** within a retail impact assessment, to consider the overall loss to the health of the town centre, and the extent to which the new use mitigates against this loss.

LBN8: The Council should provide policy guidance on the **upper floors** of retail and town centre shop units, encouraging residential space in vacant and under-used spaces. An Article 4 Direction (discussed later in this section) should encompass upper floors thereby enabling the Council to manage conversion to residential where appropriate whilst ensuring the protection of upper floors for storage areas associated with the viability of ground floor retail/leisure businesses. Any subsequent planning application for change of use of an upper floor should be accompanied by a commercial usage strategy addressing this point, to ensure retail space remains viable with sufficient back office/storage space. Within the framework of an Article 4 Direction, planning applications for change of use from Use Class E commercial to residential should be accompanied with details of storage space and associated viability of the retail unit at ground floor level.

LBN9: The Council should **support the delivery of redeveloped or refurbished sub-standard or low density space** to deliver the diversification of town centre uses, alongside support for the retention of ground floor shop frontages. The Council should work with developers/landlords to bring forward sites and spaces that could be used to intensify the economic function of town centres. This includes a wide range of space that can be used to support the future economic evolution of LB Newham's town centres, including retail and leisure; community, religious, health and education; and more general employment space and workspace (including SME workspaces, artists spaces and maker spaces). Town centre strategies should encourage diversification alongside support for ground floor shop frontages to underpin and future proof the vitality and viability of town centres; any loss of retail floorspace should be assessed robustly by a retail impact assessment.

LBN10: The identification of sites to meet the retail and commercial leisure floorspace 'need' should be subject to **the sequential test**. In accordance with the approach set out in the NPPF (paragraphs 87-88), new floorspace should be directed towards the Council's network of Metropolitan, Major, District and Local centres in the first instance, alongside carefully planned new town centres, including new Major and Local Centres across the Canning Town/Custom House, Royal Docks and Beckton Spatial Policy Areas (and any new town centres to address gaps identified within this study). This network of new centres is endorsed in the Local Plan and the London Plan as part of the Beckton Riverside and Draft Royal Docks Opportunity Area Planning Framework. The economic analysis in this report endorses this policy approach and strategic location of new town centres.

Based on the evidence presented, there is no requirement to allocate sites outside of the network of town centres for comparison or leisure floorspace. The Council should allocate sites to meet forecast convenience goods need over the plan period; this should be directed to the network of existing, planned and proposed new town/local centres in the first instance – primarily in Sub-Areas A, C and E.

LBN11: The Council should explore options for the **intensification of out-of-centre retail sites** for non-retail uses, including existing retail parks and large format supermarkets. Reflecting the requirements



of London Plan Policy SD7, the emerging Local Plan should recognise the potential of these locations to deliver housing intensification through redevelopment, ensuring these locations become more sustainable in transport terms. The consideration of opportunity to realise the full potential of such sites should be encouraged in policy.

The importance of the retail floorspace and its contribution to meeting shopping needs should be considered as part of any redevelopment proposals. This type of intensification is most relevant to the Beckton Spatial Policy Area, with market trends continuing to support the evolution of Gallions Reach into a more mixed-use town centre area, i.e. a policy endorsed Major Centre. There is a deficit of expenditure to support additional comparison goods floorspace, but any evolution of the destination should support the retention and ongoing role of retail in this location. Stratford and the Beckton Area continue to be the two major comparison goods shopping destinations in the borough, and Beckton/Gallions Reach should be supported in policy to continue to perform this role, to retain borough trade retention, and to meet shopping needs. This report does not encourage the loss/removal of comparison goods floorspace across the Beckton area, but concludes that it should evolve as a destination through a place-making approach.

Out-of-centre and bulky goods retailing remains an important shopping function, and within LB Newham, the Beckton Area is the key destination to undertake this type of shopping. The Local Plan should continue to acknowledge that. The intensification of retail parks with alternative and more mixed uses (including residential) is supported in the London Plan, but this shouldn't necessarily come at the expense of retail floorspace. Nevertheless, opportunities to reconfigure, redevelopment, reposition etc should be considered as part of a wider development. Gallions Reach has become less bulky in nature, and will continue on that trajectory through evolution to a Major Town Centre. Commercial operator demand across the retail parks and out-of-centre retailing should inform planning applications.

The out-of-centre food superstores, including Tesco Gallions Reach and Sainsbury's Claps Gate Lane, are under-performing and their consolidation and down-sizing to allow for alternative land uses – including housing or employment land – should be supported alongside the emergence of sustainable new town centres at Gallions Reach (Major Centre) and Albert Basin/Gallions Reach DLR Local Centre. The more optimistic GLA population floorspace projections concludes that the existing level of floorspace can be supported over the plan period; but ideally, this would be rebalanced to reduce the scale of the major out-of-centre foodstores, and to introduce more sustainable provision within the network of town centres and within core community areas.

If the out-of-centre foodstores remain 'as is' over the plan period, the delivery of new sustainable town centres should continue to be supported even in the context of the under-performing out-of-centre foodstores. Foodstores will continue to form an important part of the Beckton area given the emergence of new and growing communities.

LBN12: Policy should aim to control proposals for new/redeveloped Use Class E floorspace in out-of-centre locations where possible, clearly setting out the type of floorspace by stated land use, scale and location, to ensure new development accords with what has been testing through the planning application process. The Council should use conditions when issuing planning permissions to control the land use type at a finer level of detail than generic 'Use Class E'.



LBN13: Policy should endorse *the sequential and impact test*. Planning applications for the development of retail, commercial leisure and other ‘main town centre uses’ (as defined by the NPPF) which are not within a defined centre – including new Local Centres – will need to demonstrate *compliance with the sequential and impact ‘tests’* set out at paragraphs 87-91 of the NPPF (2021). The impact test threshold should remain at 300 sq m gross. The Local Plan should go beyond advice set out in the NPPF to ensure consistency with London Plan Policy SD7; i.e. requiring proposals for edge or out-of-centre office development (not compliant with the Development Plan) to be accompanied by an office impact assessment.

During the preparation of a sequential site assessment, local authorities should be proactive in presenting sites to developers as potential town centre development opportunities, which could include vacant units. These will include the Strategic Sites as part of the new Local Plan. The Council should work closely and pro-actively with applicants to identify sequentially preferable sites which should be considered through the sequential test. Where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the considerations in paragraph 90, it should be refused.

LBN14: The Local Plan should confirm and enforce a *retail impact threshold*, ensuring that edge and out-of-centre retail development proposals are required to undertake a full and detailed retail impact assessment for schemes at or above 300 sq m gross. This level remains robust to define anything proposal that is ‘more than just local’ in nature/scale; a small convenience/newsagent is generally no larger than 300 sq m gross, and would sit comfortably within a localised and sustainable community without having a detrimental impact on the hierarchy of town centres. Anything larger becomes more strategic in nature, having a stronger consumer trade draw, and therefore a potential impact on existing floorspace. Anything over 300 sq m gross should be carefully considered through an impact assessment to ensure the Local Plan strategy to define and protect the network of town and local centres is reinforced and protected.

LBN15: Policy allocations and conditions attached to Local Centre planning permissions should encourage *active frontages*, and uses which serve the public and enhance the function, vitality and viability of each centre as a shopping and leisure destination. High street retail areas should avoid and prevent ‘closed/dead’ frontages which are inactive and discourage vitality, vibrancy and pedestrian footfall. Policy should encourage transparent glazing, and high quality and consistent shop frontage design and signage.

LBN16: The importance of *affordable retail and shopping* has been observed as part of the analysis throughout this assessment. A number of Lidl and Iceland foodstores are performing particularly strongly compared to other retail operators, and affordability choices were cited in the household telephone survey, with respondents stating why they liked a particular town centre, and what they would like to see improved in the town. The Local Plan should incorporate a policy supporting the inclusion of affordable retail space within new developments, including a floorspace threshold and percentage level, for example. This policy requirement should be considered as part of planning application, and controlled through the most appropriate mechanism, including, for example, a Section 106 and freehold ownerships/leaseholders.

LBN17: Policy should support flexibility and the temporary or ‘*meanwhile*’ uses of vacant properties. The term ‘meanwhile use’ refers to the short-term use of temporarily empty buildings, including



shops until they can be brought back into commercial use. Such innovative action provides an opportunity to help keep a town centre vibrant, whilst the landlord is able to continue to look for a new commercial occupant for the space during the meanwhile use. Meanwhile uses are generally for the benefit of the local community, for example; meeting spaces, informal training and learning spaces, temporary rehearsal spaces, pop-up shops and exhibitions, and so on. They can offer a breeding ground for innovative ideas and empower the local community, lasting just a few days or several years. Policy should continue to encourage this mechanism within the LB Newham town centres.

LBN18: The NPPF encourages local authorities to retain and enhance existing **markets**; and in this context relevant Local Plan Policy should be retained. The health checks and town centre analysis demonstrates the continued importance of markets to the overall vitality and viability of town centres, attracting local customers and those from further afield – Green Street in particular. Markets should be supported and protected within the Local Plan.

LBN19: The quantitative retail and commercial leisure needs identified in this study should be subject to **regular review** throughout the Council’s Local Plan period. We advise that quantitative forecasts beyond 2027 are considered indicative because key inputs into the quantitative need assessment such as population, rates of online shopping and expenditure growth will invariably change. Expenditure forecasts are particularly susceptible to change as the implications of Brexit and the Covid-19 pandemic are realised over time. Alongside this, patterns of shopping will continue to evolve, both as technologies change, and residents of the Borough respond to new retail and leisure developments both inside and outside the Borough, i.e. the new Lidl foodstore in Green Street, completion of the Hallsville Quarter, Canning Town, and numerous other Strategic Sites across the borough.

LBN20: In response to London Plan Policy HC6, the Council may wish to consider a **Night-Time Economy Strategy** for the Borough or focused on Stratford Metropolitan Centre. The night-time economy is becoming increasingly important to London’s economy, with continued momentum to promote London as a 24-hour global city. However, it is recognised that 24-hour activities are not suitable for every part of London, and boroughs should balance the needs of local residents in all parts of London with the economic benefits of promoting a night-time economy.

The nature of many night time economy uses (e.g. late night bars, clubs, and associated uses such as takeaways and late night fast-food outlets) means that it is particularly important for a joined-up approach to the development of a strategy, including planning, licencing, culture, regeneration, cleansing services and community safety. Boroughs are advised to work closely with stakeholders such as neighbouring boroughs, the police, local businesses, patrons, workers and residents.

Applications for new Night Time Economy Uses (6pm-6am operational) should be directed to Stratford Metropolitan Town Centre – in accordance with their current roles and London Plan hierarchy/strategic areas of such activity. Applications for development elsewhere in the Borough should be considered on individual merits, with particular consideration to amenity and safety. The Beckton Riverside and Royal Docks Draft OAPF recognises Canning Town as a location that could support additional events and night-time economy.



Hierarchy of Town Centres

- 14.50 The current hierarchy of main town centres in the Borough, as set out in the Local Plan, is summarised below:
- Metropolitan Centre: Stratford;
 - Major Centre: East Ham;
 - District Centres: Green Street, Forest Gate, Canning Town, East Beckton.
- 14.51 Based on our assessment, we do not consider there to be a policy case for any change to the Borough’s hierarchy of town centres at the present time. They are all performing a role and function in line with Development Plan definitions and aspirations. There is also no evidence to suggest that any of the centres should be de-designated from the Borough’s hierarchy of centres.
- 14.52 To inform this appraisal, the in-depth health check analysis and quantitative assessment has considered the London Plan policy role, scale, number of operators, retailer representation and status of multiple retailers, evening economy and cultural attractions, turnover and sales density, and sub-regional / national / and international role.
- 14.53 Canning Town has had substantial new retail floorspace development, as an extension to the district centre, with a Local Plan aspiration to uplift this centre to a Major Centre, retaining a greater level of comparison goods trade within the sub-area. Whilst a greatly beneficial investment to Canning Town and a necessary addition to ensure a socially and economically inclusive and sustainable neighbourhood, the floorspace does not comprise a substantial level of comparison goods floorspace and does not meet the Major Centre thresholds at this point in time.
- 14.54 This evidence base does not support additional comparison goods floorspace in Canning Town, and it is unlikely – given commercial / national trends and current forecasting – that Canning Town will achieve any further uplift in comparison floorspace over the plan period. Any new comparison goods operators seeking to occupy existing floorspace should be encouraged given the town centre location and clear commercial demand.. Canning Town will not perform as a Major Centre over the forthcoming Local Plan period. The focus should be on strengthening the diversity and mix of uses, and place-making.
- LBN21:** Retain the existing hierarchy of town centres.
- 14.55 The town centre network gap analysis has identified a more limited range of town centres across the south and south-east of the borough. A number of these are addressed with planned Local Centres – some of which are already under construction (recommendations above). This evidence base supports the creation of a new Major Town Centre as part of the evolution of Gallions Reach Shopping Park, including the intensification of the site with a more diverse mix of uses, and the retention of comparison goods retail floorspace and other Use Class E and Use Class F as appropriate. Any planning application should test each town centre land use thoroughly, and a planning permission should control the accepted scale of different uses robustly.
- LBN22:** Support the evolution of Gallions Reach Shopping Park into a Major Town Centre.



Local Centres

LBN23: The network of **new Local Centres** will deliver local retail, leisure and service needs within newly emerging neighbourhoods. Within these new local centres, policy should encourage smaller unit sizes appropriate to local centres, between 80 and 150 sq m gross. This will ensure an appropriate selection of operator and goods type, and smaller and independent businesses serving communities for their local shopping and service requirements. Larger units would need to be justified and limited in number. Planning applications for new Local Centres should be accompanied by a **Retail Impact Assessment** to ensure their scale is appropriate to the development and the geographic locality and wider network of town centres.

The upper forecast convenience and comparison goods floorspace 'need' figures set out earlier in this report, reflect the current 'status quo' in the borough; if development wishes to 'build above' these figures - either on the edge/outside of town centres and/or via the development of new town/local centres – it will change the status quo and a robust retail and leisure impact assessment should be required.

LBN24: Policy should restrict land uses within new Local Centres through the use of tightly worded policies, allocations and eventually conditions (at a greater level of detail than 'Use Class E' – see lists below) attached to planning permissions. Planning conditions should be led by land uses tested within the submitted Retail Impact Assessment. This policy and development management approach will assist the Council in managing the health of the new centres moving forwards, ensuring a truly sustainable community with access to an appropriate mix of retail and leisure services. Policy allocations specific to local centres could allow all or a selection of the following Use Class E, Use Class F and Sui Generis uses, and should be defined in detail to ensure clarity as follows:

- Display or retail sale of goods, other than hot food, confined to '*comparison goods non-food retail*' and '*convenience goods retail*' in the form of foodstores, bakers, butchers, fishmongers, delicatessens, newsagents, health food shops and off licences;
- Sale of food and drink consumption (mostly) on premises, confined to include cafes and restaurants;
- public houses, wine bars, or drinking establishments / drinking establishments with expanded food provision (sui generis);
- Financial and professional services;
- Other appropriate services in a commercial, business or service locality, to include:
 - i. Dry cleaners
 - ii. Hairdressers
 - iii. Beauty salons
 - iv. Opticians
 - v. Photo processing
 - vi. Post offices
 - vii. Travel agents
 - viii. Clothing and fancy dress hire
 - ix. Repairs, alterations and restoration
 - x. Electronics and home entertainment
 - xi. Mobile phones and accessories

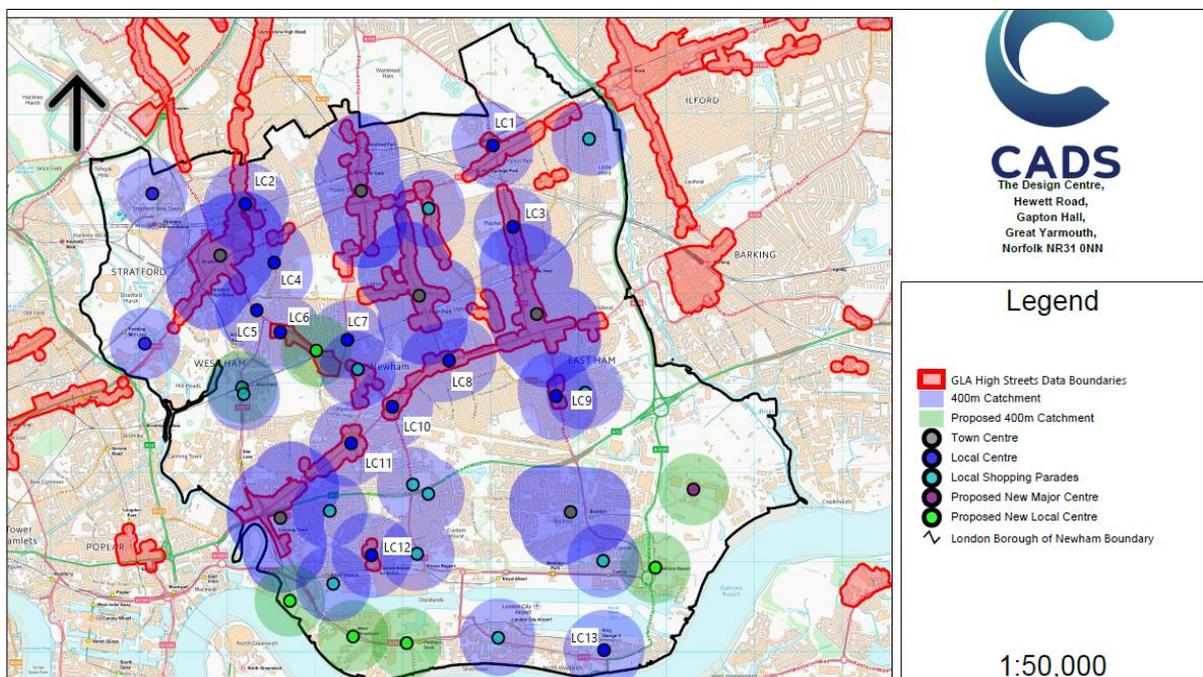


- Provision of medical or health services – to cover dentist surgery’s and other private, medical services.
- New Use Class F includes education, display of works of art, museums, public libraries, public halls or exhibition halls, public worship, law courts, halls and meeting places, outdoor sport and recreation, and indoor and outdoor swimming pools. Some of these will not be relevant to or located with a Local Centre, but policy should give consideration to the inclusion of wider social and community facilities underpinning social inclusion and accessibility, and addressing social isolation.

LBN25: Policy should restrict sui generis uses from forming part of a new Local Centre, unless discussed and tested through the planning application process. Any town centre uses not falling within Use Class E or Use Class F, should be restricted/prevented through conditions attached to a planning permission. These restricted town centre sui generis uses should include amusement arcades, taxi businesses, retail warehouse clubs, nightclubs, casinos, betting offices/shops, pay day loan shops, public houses/wine bars/drinking establishments, hot food take-aways, venues for live music performances, cinemas, concert halls, bingo halls and dance halls. Proposals including these uses should be fully tested as part of the planning application process.

LBN26: The gap analysis undertaken across the borough (Fig.14.1 below) has identified a small number of gaps within the network when considering Local Centre and Local Shopping Parades. Local Centres across the southern part of the borough are generally smaller in scale in terms of the number of units; but this does not necessarily, however, dictate that centres should grow in size, and the mix and quality of operator and business type is a more important indicator of vitality and viability and also contribution to a local community.

Figure 14.1: London Borough of Newham Local Centre Activity Analysis



Note: See full-sized plan in Appendix 4



The following recommendations could be considered:

- A general gap is identified in the north east of the borough, sandwiched between Manor Park Local Centre and East Ham Major Centre. This area is annexed to some extent by the railway lines and also includes Little Ilford Park. Little Ilford Local Shopping Parade should be protected in this location, and the GLA High Streets data does identify a small parade on Church Road, including a Londis convenience store; the Council may wish to consider allocating this as a Local Shopping Parade that warrants protection, helping to fill a gap in the town centre hierarchy/network.
- Investment around Manor Park Local Centre will also benefit this north eastern area. Manor Park Local Centre is the fourth largest local centre in the borough with 43 shop units, compared to the largest Local Centre – Boleyn, with 63 shop units. The GLA High Streets Data demonstrates that commercial retail frontages stretch far beyond the Local Centre boundary, and there may be opportunity to extend the boundary, beyond which the Council may wish to actively encourage change of use away from retail. This may help strengthen and consolidate the defined Local Centre.
- The GLA High Streets data shows that retail frontage in Katherine Road Local Shopping Parade (LSP2) extends beyond the centre boundary. Given the geographic importance of this Local Shopping Parade within the wider town centre network, the Council may wish to upgrade this to a Local Centre and extend the town centre boundary.
- The GLA High Streets data identifies an unallocated stretch of frontage on Katherine Road, running north from Barking Road to the railway line/Plashet Grove. This frontage fills a geographic gap in this location, and the Council may wish to consider a Local Centre and/or a Local Shopping Parade to include this frontage within the town centre hierarchy.
- There is a broad gap in provision within the central part of the borough, south of Barking Road, west of Prince Regent Lane and including Stansfeld Road and the Newham University Hospital area. Two Local Shopping Parades – LSP6 (Prince Regent Lane) and LSP7 (Tollgate Road) are located in this area, but these parades are small in scale with limited offer. The Council may wish to consider adding to and/or expanding the network in this general geographic area. Planned investment in Freemasons Road Local Centre (LC12) will also benefit this area.
- North Woolwich Local Centre (LC13) is an important centre for the community in this location in the far south of the borough, largely cut off by water (The Docks and River Thames). This analysis supports the planned investment in this location.
- Local Shopping Parade (LSP12), Albert Road, is located in the southern part of the borough, occupying an important location geographically to meet local needs. Without this defined centre there would be a substantial gap in the network, albeit this centre is limited in offer, and outdated and run down in built form. The Council may wish to consider a new town centre in this general location as part of wider development/redevelopment plans – but located north of the railway line to ensure accessibility. A further centre could be considered as part of Strategic Site Allocation S23.



- This analysis and report supports current proposals for a new Major Town Centre at Gallions Reach Retail Park, and also a new Local Centre at Albert Basin/Gallions Reach DLR, to meet the changing nature of this sub-area; i.e. evolution towards place-making and inclusive communities.

LBN27: The Council may wish to consider **allocating new Local Centres and Local Shopping Parades** across the borough based on existing provision and our earlier analysis (Section 11), and recommendations above, in respect of geographic distribution, gap analysis and the GLA high streets data. It is also possible to recognise shopping areas outside of allocated town centre boundaries that might be identified as not serving a purpose within the network and town centre hierarchy; policy could support change of use in these areas, away from retail/shops to residential, for example. This will help consolidate each individual town centre, whilst also ensuring the highest level of accessibility, inclusivity and community cohesion within localised areas.

LBN28: Controlling Local Centres within New development: ensure the scale of new Local Centres is appropriate to the communities they are intended to serve in accordance with the London Plan Good Growth concept. The scale of retail and leisure floorspace within new Local Centres should be appropriate to the scale of residential and commercial development on-site, meeting needs arising rather than creating 'destination' retailing.

Planning applications for new Local Centres should be accompanied by a **Retail and Leisure Impact Assessment** – irrespective of any local plan allocation – to ensure their scale is appropriate to the development and the geographic locality, and to ensure the new floorspace does not have a detrimental impact on the wider of town centres. Proposals for development above the baseline need forecasts must demonstrate that the retail and leisure floorspace is necessary to support the wider development and is ancillary to the wider mix of uses and not rely on inflow or the diversion of trade from elsewhere – including nearby town centres. Expenditure to support new local centres should be generated locally, within the catchment community through place-making.

LBN29: Defining Local Centres within existing urban areas: informed by the new Use Classes Order, to include appropriate town centre uses within Use Class E (Commercial, Business and Service), Use Class F (Local Community and Learning) and Sui Generis. Future proofing town centres is increasingly reliant on community uses, health services and leisure venues, alongside more traditional retail and shopping; allocated town centre boundaries should take the wider mix of uses into account.

Town Centre Boundaries and Frontages

- 14.56 The NPPF directs local planning authorities to define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre.
- 14.57 The Planning Practice Guidance (PPG) emphasises that whilst the NPPF has removed reference to primary and secondary shopping 'frontages', authorities may, where appropriate, wish to define primary and secondary retail frontages where their use can be justified in supporting the vitality and viability of particular centres. These frontage allocations would, combined, form the Primary Shopping Areas.
- 14.58 We draw attention to the following definitions set out at Annex 2 of the NPPF (2021), which now excludes reference to primary and secondary shopping frontages:



Town centre – Area defined on the local authority’s policies map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance.

Primary Shopping Area – ‘Defined area where retail development is concentrated’. (The Primary Shopping Area is the relevant boundary when considering the retail sequential site and impact assessment. Edge and out-of-centre is measured from the boundary of the Primary Shopping Area).

Edge of centre: For retail purposes, a location that is well connected to, and up to 300 metres from, the primary shopping area. [For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances.]

- 14.59 Previous versions of the NPPF provided definitions of primary and secondary shopping frontages – ‘Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.’ As noted above, the PPG confirms that local authorities may continue to use these frontage allocations if it is justified in supporting the vitality and viability of particular centres. Previous versions of the NPPF confirm that Primary and Secondary Shopping Frontages (combined) form a Primary Shopping Area.

LBN30: Policy should protect shop uses at ground floor level. This policy position should be enforced in the new Local Plan, ensuring *new and redevelopment of space* includes ground floor retail / leisure floorspace within the defined primary and secondary shopping frontage. New planning permissions should be conditioned accordingly by land use category/description, not general Use Class.

LBN31: Retain clear illustrations and definitions of Primary Shopping Frontage and Primary Shopping Area for each main town centre. The Council’s current Local Plan Policies Map allocates defined town centre boundaries and Primary Shopping Frontages for each of the Metropolitan, Major and District Centres. The Policies Map also illustrates each ‘Primary Shopping Area’ in addition to each respective town centre boundary in order to ensure clarity for the purposes of the retail sequential site and impact assessments. This is particularly the case for ‘other’ town centre uses. This should be retained in accordance with the NPPF glossary and policy guidelines.

It is recommended that policy wording is consistent with the NPPF to ensure clarity when agreeing the scope of an impact and sequential site assessment for all town centre uses which have different distance thresholds for testing. Whilst it is not possible to enforce a specific land use within Use Class E, town centre strategies should make clear that retail and leisure uses are encouraged and prioritised at ground floor level within the Primary Shopping Area. Those uses should remain central to a town centre strategy and function of a Primary Shopping Area. The Council should work closely with developers and landlords to retain these land uses in ground floor frontages.

- 14.60 Current Local Plan (2018) Policy SP9 considers the technical frontage composition criteria to apply to ensure the retention of healthy and vibrant retail shopping frontages. In particular it seeks to ensure that within the ***Primary Shopping Frontage***, 70% of units are in A1 use. The creation of new class E



means that changing a former class A1 use to any of former class A2, A3, B1, D1 or D2 uses would not constitute development and no planning application would therefore be required. As a result, this part of Policy SP9 can now only be used to control changes from former class A1 uses (now class E) to non-class E uses. It is no longer possible to control the loss of former A1 shop uses within a Primary Shopping Frontage, and a percentage approach is no longer operable within current planning legislation.

LBN32: Within the **Primary Shopping Frontage**, Local Plan policy should prevent change of use to any non-Use Class E land use. Retail and leisure uses at ground floor should continue to be supported in the Local Plan as the preferred land use within the Primary Shopping Frontage, and any loss of retail/leisure (rather than stating Use Class E) should be restricted where possible. Any change of use to Use Class F and town centre Sui Generis may be considered on a case by case basis, but a full Retail Impact Assessment must be undertaken to assess the overall detrimental impact – or otherwise – that this may have on the health and vitality and viability of the retail frontage and wider Primary Shopping Area.

Sui Generis uses that should be carefully managed and restricted within a Primary Shopping Frontage and considered on a case by case basis, include:

- Amusement arcades and casinos;
- Nightclubs;
- Betting offices/shops;
- Pay day loan shops;
- Public houses, wine bars or drinking establishments;
- Hot food take-aways.

14.61 Current Local Plan (2018) Policy SP9 aims to protect ‘quality leisure uses’, retaining a large proportion (67%) of former Use Class D2, A4 or A3 within a **Primary Shopping Area**. Policy SP9 added that less desirable Use Class A5 – including amusement arcades and betting shops – should not account for more than 33% of town centre leisure uses. Since the introduction of a new Use Class E, Use Class F and an updated Sui Generis category, this part of Policy SP9 is no longer operable in its current form. Instead, new Local Plan policy should seek to restrict less desirable uses and those uses that should be managed/restricted throughout the Primary Shopping Area. A number of less desirable uses fall outside Use Class E and these should be restricted within the Primary Shopping Area, and listed in detail within the local plan policy to ensure clarity on that point (see below).

LBN33: Policy should prevent non Use Class E within the **Secondary Shopping Frontage**, but note that the introduction of former Use Class A4 (public houses, wine bars or drinking establishments) might be appropriate. Change of use to these former Use Class A4 (drinking establishments) should be considered on a case by case basis and on the merits of each respective planning application. This land use could form part of a wider Evening Economy Strategy - an over proliferation should be avoided and other issues considered, such as noise and safety.

Sui Generis uses that should be carefully managed and restricted across a **Primary Shopping Area** and considered on a case by case basis. The Council may wish to include a percentage threshold similar to the SP9: ‘no more than 33%’ within uses including:



- Amusement arcades and casinos;
- Nightclubs;
- Betting offices/shops;
- Pay day loan shops;
- Public houses, wine bars or drinking establishments;
- Hot food take-aways.

LBN34: Policy allocations and conditions attached to planning permissions should prevent the proliferation of **fast food take-aways** (sui generis). The national average is currently 6%, and policy may wish to ensure the representation of fast-food take-aways (Sui Generis) does not exceed 3-5%, and each application should be considered on a case-by-case basis to take into account operating hours, proximity to education, and noise/public health and ventilation. The new Local Plan should reinforce current Local Plan (2018) Policy SP9 in respect of proliferation, distribution and catchment areas to avoid clustering and proliferation.

LBN35: Policy should protect shop uses above (or below) ground floor level within town centres unless it is successfully demonstrated that their loss will not adversely impact required operational storage space, leading to an unviable or unlettable shop unit. It is crucial that retail and leisure businesses can retain and secure the necessary storage areas to make their businesses viable.

14.62 Existing and new Local Centres should have clearly defined Primary Shopping Areas (PSA). Given their small scale it is not necessary to define frontages within the PSA. The criteria with which to define a Local Centre is discussed in detail above under the Local Centre recommendations.

LBN36: Implement clear illustrations and definitions of Primary Shopping Areas, consistent with the NPPF, for each existing and emerging Local Centre. Planned new Local Centres should consider the PSA boundary during the planning application process and be agreed as part of any planning permission.

14.63 In respect of each of the individual town centres, we make the following observations for town centre boundary changes which the Council may wish to consider:

- Stratford – to incorporate Stratford City/Westfield Shopping within the LLDC (as illustrated with the London Legacy Development Plan) and Stratford Town Centre as one Metropolitan Centre over the forthcoming Local Plan period;
- Forest Gate – Retain Primary Shopping Area, including S24 which already falls within the Primary Shopping Area;
- Green Street – Retain Primary Shopping Area, including S27 which already falls within the Primary Shopping Area;
- East Ham – Extend Primary Shopping Area to incorporate S25 East Ham Market site on key junction/gateway;
- Canning Town – Retain District Centre boundary as defined on the Policies Map; and review Primary Shopping Frontage and Primary Shopping Area once Hallsville Quarter and other relevant Strategic Sites are completed and trading/footfall ‘settles down’;
- East Beckton – no change to Primary Shopping Area.



LBN37: Review and consider amending Primary Shopping Areas and Town Centre Boundaries in the context of the recommendations above.

LBN38: Retain defined Primary and Secondary Shopping Frontages. We recommend these are retained to control land uses as far as is possible within the newly revised Use Classes Order.

Permitted Development and the Use of Article 4 Directions

- 14.64 Retail continues to remain a vitally important footfall driver in centres, and continues to be the main reason that people are visiting the centres. A retail offer which mixes representation from national multiple retailers which act as ‘anchors’ and specialist independents which provide diversity is important to attracting footfall, and we expect this to continue over the course of the Council’s new Local Plan period.
- 14.65 At the national level, whilst town centres are undoubtedly going through a period of transition, successful centres continue to be supported by retail. The continued importance of retailing in underpinning the vitality and viability of the Borough’s network of centres is also borne out by the findings of the household telephone survey undertaken in support of the study. In total, LB Newham’s network of metropolitan, major and district centres attract £0.5 billion of comparison goods retail expenditure into the borough – excluding any gross value. These figures confirm the vital role which retail plays in supporting the overall health of the Borough’s town centres.
- 14.66 The diversification of each town centre is crucial if the borough’s town centres are to remain relevant and viable over the plan period. If there was, however, a significant shift away from ‘shop’ retail in LB Newham’s main town centres, the reasons for visiting the centre would fall and potentially erode footfall, dwell time, frequency of visit, and turnover, with potential implications for the wider vitality and viability of centres. Ground floor retail and shops in town centres should therefore be protected.

Permitted Development Rights

- 14.67 A new permitted development (PD) right to allow the change of use from any use, or mix of uses, from the Commercial, Business and Service use class (Class E) to residential use (Class C3) came into force on 1 August 2021. In town centres, retail shops can change use to residential use without the need for planning permission. This applies to ‘unused’ buildings that have been vacant for 3 months, are not larger than 1,500 sq m, and were previously used for at least 2 years for commercial, business or service use. This new permitted development could dilute retail frontages and erode the overall vitality and viability of a town centre.

Article 4 Directions

- 14.68 Councils have the power to remove national permitted development rights under what is known as an ‘Article 4 Direction’. Paragraph 53 of the NPPF confirms that, when related to change from non-residential commercial use (Use Class E) to residential use (Use Class C3), the use of an Article 4 Direction should be limited to situations where it is necessary to avoid wholly unacceptable adverse impacts; including the loss of the essential core of a primary shopping area which would seriously undermine its vitality and viability.
- 14.69 Whilst this study has demonstrated that the Borough’s network of centres are generally healthy, some – East Ham in particular – continue to be vulnerable to decline. There is a need to ensure the main



town centres remain strong centres which meet a full range of local residents' day-to-day shopping, and, in the case of the higher order town centres, a good choice and breadth of 'shopping'. A number of town centres comprise 2-3 storey frontages that could easily convert to residential buildings at ground floor; and many buildings in peripheral areas of the Primary Shopping Area may be vulnerable to this change of use.

- 14.70 The vitality and viability of centres is dependent on providing a critical mass of quality, footfall-generating retail and leisure uses, and the application of appropriate Article 4 directions will ensure that the Borough's network of centres continue to function as healthy centres over the new Plan period.

LBN39 Introduce an Article 4 Direction across all LB Newham main town centres and Local Centres to prevent permitted change of use from Use Class E to Use Class C3 (dwelling-house), to protect the Primary Shopping Area – the 'thriving core of the high street'.

Monitoring

- 14.71 As advised in the NPPF, it is recommended that the Council should update its retail evidence base at frequent intervals throughout the Local Plan period to 2038, as new information on the economy, population growth, expenditure growth and 'special forms of trading' becomes available. The need to update should be reviewed every 5 years and implemented if needed at that point (NPPF, para.33). Updates to retail capacity forecasts will also be required once new floorspace comes forward at throughout the network of town centres and on the Strategic Site Allocations, in order to assess the implications that this development might have on the network of town centres.