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PLANNING CONSULTANTS

# Appendix 1

London Borough of Newham  
Retail & Leisure Study 2022

Baseline Convenience Goods  
Need Assessment

## LB Newham Retail and Leisure Study, 2022 Convenience Goods Retail Need Forecasts

Table 1: Survey Area Postcode Composition

Zone	Postcode Sectors
Zone 1	E16 2
Zone 2	E16 1/3
Zone 3	E6 3; E13 9
Zone 4	E6 5/6/7
Zone 5	E6 1/2
Zone 6	E13 0; E15 3
Zone 7	E13 8; E16 4
Zone 8	E15 1/2/4; E20 1/2/3
Zone 9	E7 0/8/9
Zone 10	E12 5/6
Zone 11	IG11 0/7/8
Zone 12	E14 0/2/6; E3 3

**LB Newham Retail and Leisure Study, 2022**  
**Convenience Goods Retail Need Forecasts**

**Table 2: Survey Area Population Forecasts**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	TOTAL
<b>2022</b>	23,759	35,636	36,500	24,133	35,039	33,581	25,196	63,398	51,746	40,628	44,334	55,037	468,987
<b>2027</b>	24,297	36,307	37,017	24,583	35,621	34,205	25,615	64,810	52,873	41,350	45,273	58,568	480,519
<b>2032</b>	24,791	36,963	37,638	25,009	36,229	34,830	26,058	65,858	54,076	42,173	45,977	61,789	491,391
<b>2038</b>	25,438	37,700	38,339	25,595	36,910	35,503	26,544	67,055	55,190	43,051	46,834	64,896	503,055
<b>Change 2022-2027</b>	538	671	517	450	582	624	419	1,412	1,127	722	939	3,531	11,532
<b>Change 2027-2032</b>	494	656	621	426	608	625	443	1,048	1,203	823	704	3,221	10,872
<b>Change 2032-2038</b>	647	737	701	586	681	673	486	1,197	1,114	878	857	3,107	11,664
<b>TOTAL Change 2022 - 2038</b>	<b>1,679</b>	<b>2,064</b>	<b>1,839</b>	<b>1,462</b>	<b>1,871</b>	<b>1,922</b>	<b>1,348</b>	<b>3,657</b>	<b>3,444</b>	<b>2,423</b>	<b>2,500</b>	<b>9,859</b>	<b>34,068</b>

Source: Experian

## LB Newham Retail and Leisure Study, 2022 Convenience Goods Retail Need Forecasts

**Table 3: Survey Area per Capita Expenditure Forecasts**

	Expenditure per Capita (£)	SFT (%)	SFT (£)	Expenditure per capita less SFT
2022	1,785	5.7%	102	1,683
2027	1,794	6.8%	122	1,672
2032	1,803	7.2%	130	1,673
2038	1,812	7.5%	136	1,676

Expenditure growth rates: 2023-2028: 0.1%; 2029-2038: 0.1%

Source: Experian E-Marketer. Expenditure growth rates and allowance for SFT are sourced from Experian Retail Planner 19 (January 2022)

Price Base: 2019



**LB Newham Retail and Leisure Study, 2022  
Convenience Goods Retail Need Forecasts**

**Table 4 - Survey Area Convenience Goods Expenditure**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Total
	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
2022	40.0	60.0	61.4	40.6	59.0	56.5	42.4	106.7	87.1	68.4	74.6	92.6	<b>789.4</b>
2027	40.6	60.7	61.9	41.1	59.6	57.2	42.8	108.4	88.4	69.1	75.7	97.9	<b>803.4</b>
2032	41.5	61.8	63.0	41.8	60.6	58.3	43.6	110.2	90.5	70.6	76.9	103.4	<b>822.2</b>
2038	42.6	63.2	64.3	42.9	61.9	59.5	44.5	112.4	92.5	72.2	78.5	108.8	<b>843.2</b>
<b>Change 2022-2038 (£m)</b>	<b>2.6</b>	<b>3.2</b>	<b>2.8</b>	<b>2.3</b>	<b>2.9</b>	<b>3.0</b>	<b>2.1</b>	<b>5.7</b>	<b>5.4</b>	<b>3.8</b>	<b>3.9</b>	<b>16.1</b>	<b>53.7</b>
<b>Change 2022-2038 (%)</b>	<b>6.6</b>	<b>5.3</b>	<b>4.6</b>	<b>5.6</b>	<b>4.9</b>	<b>5.3</b>	<b>4.9</b>	<b>5.3</b>	<b>6.2</b>	<b>5.5</b>	<b>5.2</b>	<b>17.4</b>	<b>6.8</b>

Source: Tables 2 and 3

Table 5 - Convenience Goods Allocation - % Market Share (2022)

Survey Location Zone	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %	Zone 10 %	Zone 11 %	Zone 12 %	
<b>Destinations for Convenience Goods in Newham Borough</b>													
<b>8</b>	<b>Stratford Metropolitan Town Centre</b>												
	Morrisons, The Grove, Stratford	1.0%	0.0%	0.2%	1.6%	2.2%	12.5%	2.1%	17.7%	10.2%	1.0%	0.0%	0.3%
	Sainsbury's Superstore, The Mall, Stratford	2.1%	2.4%	1.3%	0.8%	0.0%	4.1%	1.6%	9.0%	1.3%	1.2%	0.0%	0.3%
	Lidl, Stratford Shopping Centre, Stratford	2.1%	2.8%	0.0%	3.8%	1.5%	7.5%	0.5%	13.0%	1.9%	0.0%	0.0%	0.4%
	Local Shops, Stratford Town Centre (excluding Westfield)	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	4.2%	0.0%	0.0%	0.0%	0.0%
	M&S, Westfield, Stratford City	0.0%	3.8%	0.0%	0.2%	0.0%	1.7%	0.4%	2.6%	1.4%	0.4%	0.1%	0.0%
	Waitrose, Westfield Stratford City	0.4%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	3.8%	0.6%	0.3%	0.0%	0.0%
	<b>Sub-Total</b>	<b>5.7%</b>	<b>9.0%</b>	<b>1.5%</b>	<b>6.4%</b>	<b>3.8%</b>	<b>28.3%</b>	<b>4.6%</b>	<b>50.3%</b>	<b>15.4%</b>	<b>2.9%</b>	<b>0.1%</b>	<b>0.9%</b>
<b>5</b>	<b>East Ham Major Centre</b>												
	Sainsbury's Superstore, Myrtle Road, East Ham	0.0%	0.0%	5.1%	4.9%	16.1%	0.0%	0.1%	0.0%	0.4%	5.6%	0.0%	0.0%
	Lidl, High Street North, East Ham	1.8%	0.0%	2.2%	1.1%	9.9%	1.6%	0.8%	0.0%	1.6%	5.5%	0.0%	0.0%
	Tesco Express, Pilgrims Way, East Ham	0.0%	0.0%	1.0%	0.0%	1.1%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%
	Iceland, High Street North, East Ham	0.0%	0.0%	0.0%	1.6%	14.3%	0.0%	0.2%	0.4%	0.8%	3.6%	0.0%	0.0%
	Local Shops, East Ham Major Centre	0.0%	1.1%	2.2%	0.3%	1.9%	0.0%	0.2%	0.0%	0.0%	1.1%	0.0%	0.0%
	<b>Sub-Total</b>	<b>1.8%</b>	<b>1.1%</b>	<b>10.5%</b>	<b>7.8%</b>	<b>43.3%</b>	<b>1.6%</b>	<b>1.3%</b>	<b>0.4%</b>	<b>2.7%</b>	<b>17.1%</b>	<b>0.0%</b>	<b>0.0%</b>
<b>2/7</b>	<b>Canning Town District Centre</b>												
	Morrisons, Silvertown Way, Canning Town	1.2%	22.9%	1.4%	0.0%	0.6%	4.5%	11.6%	2.0%	2.1%	0.0%	0.0%	2.7%
	Co-op, Barking Road, Canning Town	3.1%	1.7%	0.0%	0.0%	0.0%	0.6%	0.9%	0.0%	0.0%	0.0%	0.0%	0.7%
	Iceland, 146-148 Barking Road, Canning Town	1.8%	3.2%	0.0%	0.4%	0.0%	1.8%	8.0%	0.0%	0.5%	0.0%	0.0%	0.9%
	Local Shops, Canning Town District Centre	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%
	<b>Sub-Total</b>	<b>6.1%</b>	<b>29.1%</b>	<b>1.8%</b>	<b>0.0%</b>	<b>0.6%</b>	<b>6.8%</b>	<b>22.4%</b>	<b>2.0%</b>	<b>2.5%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>4.3%</b>
<b>3/9</b>	<b>Green Street District Centre</b>												
	Tesco Express, Green Street, Upton Park	0.0%	0.7%	4.3%	0.0%	3.7%	10.7%	0.2%	0.4%	4.4%	0.0%	0.7%	0.0%
	Iceland, Green Street, Upton Park	0.0%	0.1%	1.7%	0.0%	1.0%	2.5%	0.0%	0.0%	0.3%	0.7%	0.0%	0.0%
	Local Shops, Green Street District Centre	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%
	<b>Sub-Total</b>	<b>0.0%</b>	<b>1.6%</b>	<b>6.0%</b>	<b>0.0%</b>	<b>4.7%</b>	<b>13.3%</b>	<b>0.2%</b>	<b>0.4%</b>	<b>6.0%</b>	<b>0.7%</b>	<b>0.7%</b>	<b>0.0%</b>
<b>9</b>	<b>Forest Gate District Centre</b>												
	Co-op, Woodgrange Road, Forest Gate	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.1%	0.0%	0.0%	0.0%
	Tesco Express, Woodgrange Road, Forest Gate	0.0%	0.0%	0.2%	1.4%	0.0%	0.0%	0.0%	0.0%	4.7%	1.8%	0.0%	0.0%
	Iceland, Wood Grange Road, Forest Gate	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	9.2%	0.0%	0.0%	0.0%
	Local Shops, Forest Gate District Centre	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	2.5%	1.1%	0.5%	0.0%
	<b>Sub-Total</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.2%</b>	<b>1.4%</b>	<b>0.5%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.1%</b>	<b>24.4%</b>	<b>2.8%</b>	<b>0.5%</b>	<b>0.0%</b>
<b>4</b>	<b>East Beckton District Centre</b>												
	Asda, Tollgate Road, Beckton	19.2%	12.2%	14.7%	28.7%	4.8%	6.6%	11.7%	1.6%	3.0%	5.1%	2.4%	0.5%
	Lidl, Tollgate Road, Beckton	2.4%	2.1%	2.1%	7.8%	1.1%	2.9%	4.9%	0.0%	1.2%	0.0%	0.4%	0.0%
	<b>Sub-Total</b>	<b>21.6%</b>	<b>14.3%</b>	<b>16.8%</b>	<b>36.5%</b>	<b>5.9%</b>	<b>9.5%</b>	<b>16.6%</b>	<b>1.6%</b>	<b>4.2%</b>	<b>5.1%</b>	<b>2.8%</b>	<b>0.5%</b>
	<b>Total Main Town Centres</b>	<b>35.2%</b>	<b>55.1%</b>	<b>36.7%</b>	<b>52.1%</b>	<b>58.8%</b>	<b>59.4%</b>	<b>45.1%</b>	<b>54.8%</b>	<b>55.1%</b>	<b>28.6%</b>	<b>4.0%</b>	<b>5.8%</b>
	<b>Local Centres/Local Shopping Parades*</b>												
<b>10</b>	Manor Park LC1	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.8%	0.0%	0.0%
<b>8</b>	Maryland LC2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%
<b>10</b>	High Street North LC3	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%
<b>8</b>	Vicarage Lane LC4	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%
<b>3</b>	Boleyn LC8	0.0%	0.8%	5.6%	0.4%	2.2%	1.2%	0.4%	1.5%	3.1%	0.0%	2.2%	0.0%
<b>3</b>	High Street South LC9	0.0%	0.0%	1.9%	4.0%	2.2%	0.0%	0.9%	0.0%	0.7%	3.1%	0.0%	0.0%
<b>3</b>	Greengate LC10	0.0%	2.0%	7.0%	0.0%	3.6%	0.4%	1.1%	0.0%	0.7%	0.0%	1.4%	0.0%
<b>7</b>	Abbey Arms LC11	0.0%	0.0%	1.5%	0.0%	0.0%	3.4%	15.9%	0.4%	1.2%	0.0%	0.0%	0.0%
<b>2</b>	Freemasons Road LC12	1.1%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	2.6%	0.0%	0.0%
<b>1</b>	North Woolwich LC13	3.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>2</b>	Western Gateway LSP11	0.8%	1.2%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>1</b>	Albert Road LSP12	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>8</b>	Sainsbury's Local, Celebration Avenue, East Village (LLDC)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%
	<b>Sub-Total</b>	<b>8.3%</b>	<b>6.3%</b>	<b>17.5%</b>	<b>4.4%</b>	<b>8.3%</b>	<b>5.0%</b>	<b>20.0%</b>	<b>3.3%</b>	<b>5.6%</b>	<b>11.7%</b>	<b>3.6%</b>	<b>0.0%</b>
	<b>Out-of-Centre</b>												
<b>4</b>	Tesco Extra, Gallions Reach, Beckton	26.0%	16.1%	14.0%	12.9%	3.7%	6.4%	10.2%	2.1%	4.5%	4.2%	6.6%	0.3%
<b>4</b>	Sainsbury's Superstore, Claps Gate Lane, Beckton	5.3%	8.4%	8.2%	9.1%	3.8%	3.4%	6.3%	0.4%	1.2%	3.1%	6.5%	0.2%
<b>4</b>	Lidl Claps Gate Lane, Beckton	3.8%	1.6%	6.6%	1.8%	0.1%	2.2%	1.1%	0.0%	0.0%	0.6%	0.5%	0.0%
<b>7</b>	Iceland, 480-482 Barking Road, Nr Balam Street, Plaistow	0.0%	0.0%	1.4%	0.4%	0.0%	0.3%	5.4%	0.2%	0.0%	0.0%	0.0%	0.0%
<b>8</b>	Sainsbury's Local, Romford Road, Near Stratford/Forest Gate	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	6.6%	2.5%	0.0%	0.0%	0.0%
<b>8</b>	Tesco Express, Romford Road, Stratford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	2.3%	3.3%	0.0%	0.4%
<b>1</b>	Sainsbury's Local, Royal Crest Avenue, Royal Wharf	2.4%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>1</b>	Nisa Local, Heron Place, Waterside Park, Bramwell Way	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	<b>Sub-Total</b>	<b>38.6%</b>	<b>27.7%</b>	<b>30.2%</b>	<b>24.1%</b>	<b>7.6%</b>	<b>14.8%</b>	<b>23.1%</b>	<b>10.2%</b>	<b>10.5%</b>	<b>11.1%</b>	<b>13.6%</b>	<b>0.9%</b>
	<b>Total Town Centre and Out-of-Centre Newham</b>	<b>82.0%</b>	<b>89.1%</b>	<b>84.5%</b>	<b>80.7%</b>	<b>74.7%</b>	<b>79.2%</b>	<b>88.2%</b>	<b>68.3%</b>	<b>71.2%</b>	<b>51.4%</b>	<b>21.2%</b>	<b>6.6%</b>
	<b>Destinations for Convenience Goods Outside Newham Borough</b>												
<b>11</b>	Asda, Vicarage Fields, Barking	2.1%	0.0%	0.7%	1.5%	1.2%	1.6%	0.0%	0.6%	0.0%	1.4%	29.9%	0.0%
<b>11</b>	Tesco Superstore, Highbridge Road, Barking	0.0%	0.0%	2.1%	0.5%	8.6%	0.3%	0.7%	0.4%	0.5%	7.4%	11.8%	0.0%
<b>11</b>	Lidl, Ripple Road, Barking	1.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.6%	1.5%	0.0%	7.3%	0.0%
<b>12</b>	Tesco Superstore, Bromley By Bow	0.0%	0.0%	0.1%	0.4%	0.5%	4.9%	0.0%	2.2%	0.0%	0.0%	0.0%	14.9%
<b>12</b>	Iceland, Vesey Path, Poplar	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.9%
-	Asda, East Ferry Road, Isle Of Dogs	0.0%	0.9%	0.0%	0.0%	0.5%	0.4%	0.0%	1.7%	0.0%	0.0%	0.5%	16.7%
-	Asda, Marshall Road, Leyton Mills	0.0%	0.0%	0.0%	0.0%	1.3%	0.2%	0.0%	4.3%	3.2%	0.4%	1.2%	1.1%
-	Asda, Merrilands Crescent, Dagenham	0.0%	0.0%	0.0%	0.6%	0.1%	0.4%	0.0%	0.7%	0.3%	0.3%	7.4%	0.1%
-	Lidl, 155-161 High Road, Ilford	0.0%	0.3%	0.5%	0.0%	0.6%	0.1%	0.0%	0.2%	0.3%	6.4%	2.5%	0.0%
-	Tesco Superstore, Gainsborough Road, Leytonstone	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	5.6%	3.0%	0.0%	0.0%
	<b>Sub-Total</b>	<b>3.2%</b>	<b>1.2%</b>	<b>3.4%</b>	<b>4.0%</b>	<b>13.7%</b>	<b>7.8%</b>	<b>1.1%</b>	<b>11.7%</b>	<b>11.8%</b>	<b>18.9%</b>	<b>60.6%</b>	<b>42.7%</b>
	<b>ALL DESTINATIONS</b>	<b>85.2%</b>	<b>90.3%</b>	<b>87.8%</b>	<b>84.7%</b>	<b>88.4%</b>	<b>87.1%</b>	<b>89.3%</b>	<b>80.1%</b>	<b>83.0%</b>	<b>70.3%</b>	<b>81.7%</b>	<b>49.3%</b>
	<b>OTHER DESTINATIONS</b>	<b>14.8%</b>	<b>9.7%</b>	<b>12.2%</b>	<b>15.3%</b>	<b>11.6%</b>	<b>12.9%</b>	<b>10.7%</b>	<b>19.9%</b>	<b>17.0%</b>	<b>29.7%</b>	<b>18.3%</b>	<b>50.7%</b>

Notes: \* List includes those mentioned and most used by survey respondents. Some centres or parades not cited by survey respondents. Results highlight the most dominant destinations.



Table 7 - Convenience Goods Allocation - Spend (£) 2027

Survey Location Zone	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Zone 11 £m	Zone 12 £m	Total £m	Total %
<b>Total Available Convenience Goods Spend - 2027 (£m)</b>														
	40.6	60.7	61.9	41.1	59.6	57.2	42.8	108.4	88.4	69.1	75.7	97.9	803.4	100.0
<b>Destinations for Convenience Goods in Newham Borough</b>														
8	<b>Stratford Metropolitan Town Centre</b>													
	Morrisons, The Grove, Stratford												0.4	0.0
	Sainsbury's Superstore, The Mall, Stratford												0.9	1.4
	Lidl, Stratford Shopping Centre, Stratford												0.9	1.7
	Local Shops, Stratford Town Centre (excluding Westfield)												0.0	0.0
	M&S, Westfield, Stratford City												0.0	2.3
	Waitrose, Westfield Stratford City												0.2	0.0
	<i>Sub-Total</i>												2.3	5.5
5	<b>East Ham Major Centre</b>													
	Sainsbury's Superstore, Myrtle Road, East Ham												0.0	0.0
	Lidl, High Street North, East Ham												0.7	0.0
	Tesco Express, Pilgrims Way, East Ham												0.0	0.0
	Iceland, High Street North, East Ham												0.0	0.0
	Local Shops, East Ham Major Centre												0.0	0.7
	<i>Sub-Total</i>												0.7	0.7
2/7	<b>Canning Town District Centre</b>													
	Morrisons, Silvertown Way, Canning Town												0.5	13.9
	Co-op, Barking Road, Canning Town												1.3	1.0
	Iceland, 146-148 Barking Road, Canning Town												0.8	2.0
	Local Shops, Canning Town District Centre												0.0	0.8
	<i>Sub-Total</i>												2.5	17.7
3/9	<b>Green Street District Centre</b>													
	Tesco Express, Green Street, Upton Park												0.0	0.4
	Iceland, Green Street, Upton Park												0.0	0.1
	Local Shops, Green Street District Centre												0.0	0.5
	<i>Sub-Total</i>												0.0	1.0
9	<b>Forest Gate District Centre</b>													
	Co-op, Woodgrange Road, Forest Gate												0.0	0.0
	Tesco Express, Woodgrange Road, Forest Gate												0.0	0.0
	Iceland, Wood Grange Road, Forest Gate												0.0	0.0
	Local Shops, Forest Gate District Centre												0.0	0.0
	<i>Sub-Total</i>												0.0	0.0
4	<b>East Beckton District Centre</b>													
	Asda, Tollgate Road, Beckton												7.8	7.4
	Lidl, Tollgate Road, Beckton												1.0	1.3
	<i>Sub-Total</i>												8.8	8.7
<b>Total Main Town Centres</b>														
	14.3	33.4	22.7	21.4	35.0	34.0	19.3	59.4	48.7	19.8	3.0	5.7	316.8	39.4
<b>Local Centres/Local Shopping Parades</b>														
10	Manor Park LC1												0.0	0.0
8	Maryland LC2												0.0	0.0
10	High Street North LC3												0.0	0.0
8	Vicarage Lane LC4												0.0	0.0
3	Boleyn LC8												0.0	0.5
3	High Street South LC9												0.0	0.0
3	Greengate LC10												0.0	1.2
7	Abbey Arms LC11												0.0	4.4
2	Freemasons Road LC12												0.4	1.4
1	North Woolwich LC13												1.5	0.0
2	Western Gateway LSP11												0.3	0.7
1	Albert Road LSP12												1.0	0.0
8	Sainsbury's Local, Celebration Avenue, East Village												0.0	0.0
	<i>Sub-Total</i>												3.4	3.8
<b>Out-of-Centre</b>														
4	Tesco Extra, Gallions Reach, Beckton												10.5	9.8
4	Sainsbury's Superstore, Claps Gate Lane, Beckton												2.2	5.1
7	Lidl Claps Gate Lane, Beckton												1.5	1.0
4	Iceland, 480-482 Barking Road, Nr Balam Street, Plaistow												0.0	0.0
8	Sainsbury's Local, Romford Road, Near Stratford/Forest Gate												0.0	0.0
8	Tesco Express, Romford Road, Stratford												0.0	0.0
1	Sainsbury's Local, Royal Crest Avenue, Royal Wharf												1.0	1.0
1	Nisa Local, Heron Place, Waterside Park, Bramwell Way												0.4	0.0
	<i>Sub-Total</i>												15.7	16.8
<b>Total Town Centre and Out-of-Centre Newham</b>														
	33.3	54.1	52.3	33.1	44.5	45.3	37.8	74.1	62.9	35.5	16.0	6.5	495.4	61.7
<b>Destinations for Convenience Goods Outside Newham Borough</b>														
11	Asda, Vicarage Fields, Barking												0.9	0.0
11	Tesco Superstore, Highbridge Road, Barking												0.0	0.0
11	Lidl, Ripple Road, Barking												0.4	0.0
12	Tesco Superstore, Bromley By Bow												0.0	0.0
12	Iceland, Vesey Path, Poplar												0.0	0.0
-	Asda, East Ferry Road, Isle Of Dogs												0.0	0.5
-	Asda, Marshall Road, Leyton Mills												0.0	0.0
-	Asda, Merrilands Crescent, Dagenham												0.0	0.0
-	Lidl, 155-161 High Road, Ilford												0.0	0.2
-	Tesco Superstore, Gainsborough Road, Leytonstone												0.0	0.0
	<i>Sub-Total</i>												1.3	0.7
<b>ALL DESTINATIONS</b>														
	34.6	54.8	54.4	34.8	52.6	49.8	38.2	86.8	73.3	48.6	61.9	48.3	638.1	79.4
<b>OTHER DESTINATIONS</b>														
	6.0	5.9	7.5	6.3	6.9	7.4	4.6	21.6	15.1	20.6	13.8	49.6	165.3	20.6





**LB Newham Retail and Leisure Study, 2022**  
**Convenience Goods Retail Need Forecasts**

**Table 10 - Convenience Goods Floorspace 2022**

	Total net floorspace (sq.m)	Net Conv Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sqm net)	Average Turnover 2022 (£m)
<b>Stratford Metropolitan Town Centre</b>					
Morrisons, The Grove, Stratford	2,391	95%	2,271	12,968	29.5
Sainsbury's Superstore, The Mall, Stratford	936	95%	889	13,410	11.9
Lidl, Stratford Shopping Centre, Stratford	579	95%	550	8,468	4.7
Local Shops, Stratford Town Centre (excluding Westfield)	3,998	95%	3,798	2,200	8.4
M&S, Westfield, Stratford City	12,635	10%	1,264	12,062	15.2
Waitrose, Westfield Stratford City	1,948	95%	1,851	14,774	27.3
<i>Sub-Total</i>	<i>22,486</i>		<i>10,622</i>	<i>9,129</i>	<i>97.0</i>

	Total net floorspace (sq.m)	Net Conv Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sqm net)	Average Turnover 2022 (£m)
<b>East Ham Major Centre</b>					
Sainsbury's Superstore, Myrtle Road, East Ham	1,189	95%	1,130	13,410	15.1
Lidl, High Street North, East Ham	929	95%	883	8,468	7.5
Tesco Express, Pilgrims Way, East Ham	272	95%	258	14,202	3.7
Iceland, High Street North, East Ham	224	95%	213	7,802	1.7
Local Shops, East Ham Major Centre	5,355	95%	5,087	2,200	11.2
<i>Sub-Total</i>	<i>7,969</i>		<i>7,571</i>	<i>5,170</i>	<i>39.1</i>

	Total net floorspace (sq.m)*	Net Conv Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sqm net)	Average Turnover 2021 (£m)
<b>Canning Town District Centre</b>					
Morrisons, Silvertown Way, Canning Town	2,200	95%	2,090	12,968	27.1
Co-op, Barking Road, Canning Town	824	95%	783	5,280	4.1
Iceland, 146-148 Barking Road, Canning Town	376	95%	357	7,802	2.8
Local Shops, Canning Town District Centre	918	95%	872	2,200	1.9
<i>Sub-Total</i>	<i>4,318</i>		<i>4,102</i>	<i>8,762</i>	<i>35.9</i>

	Total net floorspace (sq.m)*	Net Conv Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sqm net)	Average Turnover 2021 (£m)
<b>Green Street District Centre</b>					
Tesco Express, Green Street, Upton Park	1,053	95%	1,000	14,202	14.2
Iceland, Green Street, Upton Park	465	95%	442	7,802	3.4
Local Shops, Green Street District Centre	4,116	95%	3,910	2,200	8.6
<i>Sub-Total</i>	<i>5,634</i>		<i>5,352</i>	<i>4,906</i>	<i>26.3</i>

	Total net floorspace (sq.m)*	Net Conv Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sqm net)	Average Turnover 2021 (£m)
<b>Forest Gate District Centre</b>					
Co-op, Woodgrange Road, Forest Gate	489	95%	465	6,600	3.1
Tesco Express, Woodgrange Road, Forest Gate	306	95%	291	14,202	4.1
Iceland, Wood Grange Road, Forest Gate	380	95%	361	7,802	2.8
Local Shops, Forest Gate District Centre	3,200	95%	3,040	2,200	6.7
<i>Sub-Total</i>	<i>4,375</i>		<i>4,156</i>	<i>4,018</i>	<i>16.7</i>

	Total net floorspace (sq.m)*	Net Conv Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sqm net)	Average Turnover 2021 (£m)
<b>East Beckton District Centre</b>					
Asda, Tollgate Road, Beckton	4,809	65%	3,126	18,830	58.9
Lidl, Tollgate Road, Beckton	929	95%	883	8,468	7.5
<i>Sub-Total</i>	<i>5,738</i>		<i>4,008</i>	<i>16,548</i>	<i>66.3</i>
<b>Out-of-Centre</b>					
Tesco Extra, Gallions Reach, Beckton	8,204	65%	5,333	14,202	75.7
Sainsbury's Superstore, Claps Gate Lane, Beckton	6,410	80%	5,128	13,410	68.8
Lidl, Claps Gate Lane, Beckton	929	95%	883	8,468	7.5
<i>Sub-Total</i>	<i>14,614</i>		<i>10,461</i>	<i>13,814</i>	<i>144.5</i>

**LB Newham Retail and Leisure Study, 2022**  
**Convenience Goods Retail Need Forecasts**

**Table 11 - Convenience Goods Floorspace 2022**

Proposed development	Net Floorspace (sq.m)	Net Convenience Floorspace (%)	Net Convenience Floorspace (sq.m)	Company Average Sales (£/sq.m net)	Average turnover 2022 (£m)	Average turnover 2027 (£m)	Average turnover 2032 (£m)	Average turnover 2038 (£m)
Lidl foodstore, Green Street Town Centre	989	95%	940	8,468	8.0	8.1	8.2	8.4
Lidl foodstore, Forest Gate Town Centre	950	95%	903	8,468	7.6	7.8	7.9	8.0
<b>Sub-total</b>	<b>1,939</b>	-	<b>1,842</b>	-	<b>15.6</b>	<b>15.8</b>	<b>16.1</b>	<b>16.4</b>

Former Peacocks shop unit; new Lidl Foodstore, 374-378 Green Street (21/01394/FUL)  
39A-49A Woodgrange Road, new Lidl foodstore: (Ref: 16/02395/FUL)



## LB Newham Retail and Leisure Study, 2022 Convenience Goods Retail Need Forecasts

Table 12 - Global Convenience Goods Floorspace Need - Borough-wide

	2022	2027	2032	2038
Total Available Expenditure (Zone 1-12) (£m)	789.4	803.4	822.2	843.2
Market Share from Survey Area (Zone 1-12) (%)	52	52	52	52
Convenience goods spending in Study Area (£m)	412.1	417.5	425.6	435.1
Existing Retail Floorspace (sq m net)	46,272	46,272	46,272	46,272
Sales per sqm net (£)	8,907	9,342	9,483	9,626
Sales from Existing Floorspace (£m)	412.1	432.3	438.8	445.4
Sales from Committed Floorspace (£m) (Table 11)	-	15.8	16.1	16.4
Residual Spending to support new floorspace (£000)	0.0	-30.6	-29.2	-26.7
Sales per sq m net in new shops (£)	12,000	12,181	12,365	12,551
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>-2,515</b>	<b>-2,365</b>	<b>-2,127</b>

Sales density of 0.20% 2022; 0.3% 2023-38 (source: Experian Retail Planner 19, January 2022)

LB Newham Retail and Leisure Study, 2022  
Convenience Goods Retail Need Forecasts

Table 13 - Convenience Goods Floorspace Need - Sub-Area A (Zone 6/8) (Stratford)

	2022	2027	2032	2038
Total Available Expenditure (Zone 1-12) (£m)	789.4	803.4	822.2	843.2
Market Share from Survey Area (Zone 1-12) (%)	13	13	13	13
Convenience goods spending in Study Area (£m)	101.3	102.8	104.7	107.0
Existing Retail Floorspace (sq m net)	10,622	10,622	10,622	10,622
Sales per sqm net (£)	9,541	9,267	9,407	9,549
Sales from Existing Floorspace (£m)	101.3	98.4	99.9	101.4
Residual Spending to support new floorspace (£000)	0.0	4.4	4.8	5.5
Sales per sq m net in new shops (£)	12,000	12,181	12,365	12,551
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>360</b>	<b>390</b>	<b>442</b>

Sales density of 0.20% 2022; 0.3% 2023-38 (source: Experian Retail Planner 19, January 2022)

Table 15 - Convenience Goods Floorspace Need - Sub-Area C (1/2/7/12) (Canning Town / Royal Docks)

	2022	2027	2032	2038
Total Available Expenditure (Zone 1-12) (£m)	789.4	803.4	822.2	843.2
Market Share from Survey Area (Zone 1-12) (%)	5	5	5	5
Convenience goods spending in Study Area (£m)	43.1	43.8	44.8	45.9
Existing Retail Floorspace (sq m net)	4,102	4,102	4,102	4,102
Sales per sqm net (£)	10,507	8,894	9,028	9,164
Sales from Existing Floorspace (£m)	43.1	36.5	37.0	37.6
Residual Spending to support new floorspace (£000)	0.0	7.3	7.7	8.3
Sales per sq m net in new shops (£)	12,000	12,181	12,365	12,551
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>600</b>	<b>626</b>	<b>660</b>

Sales density of 0.20% 2022; 0.3% 2023-38 (source: Experian Retail Planner 19, January 2022)

Table 17 - Convenience Goods Floorspace Need - Sub-Area E (Zone 4) (Beckton)

	2022	2027	2032	2038
Total Available Expenditure (Zone 1-12) (£m)	789.4	803.4	822.2	843.2
Market Share from Survey Area (Zone 1-12) (%)	22.0	22.0	22.0	22.0
Convenience goods spending in Study Area (£m)	169.0	171.1	174.3	178.3
Existing Retail Floorspace (sq m net)	14,469	14,469	14,469	14,469
Sales per sqm net (£)	11,683	14,791	15,014	15,241
Sales from Existing Floorspace (£m)	169.0	214.0	217.2	220.5
Residual Spending to support new floorspace (£000)	0.0	-42.9	-42.9	-42.2
Sales per sq m net in new shops (£)	12,000	12,181	12,365	12,551
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>-3,526</b>	<b>-3,472</b>	<b>-3,365</b>

Sales density of 0.20% 2022; 0.3% 2023-38 (source: Experian Retail Planner 19, January 2022)

Table 14 - Convenience Goods Floorspace Need - Sub-Area B (3/5/11) (East Ham / Green Street)

	2022	2027	2032	2038
Total Available Expenditure (Zone 1-12) (£m)	789.4	803.4	822.2	843.2
Market Share from Survey Area (Zone 1-12) (%)	9	9	9	9
Convenience goods spending in Study Area (£m)	74.0	74.8	76.2	77.8
Existing Retail Floorspace (sq m net)	12,923	12,923	12,923	12,923
Sales per sqm net (£)	5,726	5,137	5,215	5,293
Sales from Existing Floorspace (£m)	74.0	66.4	67.4	68.4
Sales from Committed Floorspace (£m)	0.0	8.1	8.2	8.4
Residual Spending to support new floorspace (£000)	0.0	0.3	0.6	1.0
Sales per sq m net in new shops (£)	12,000	12,181	12,365	12,551
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>26</b>	<b>50</b>	<b>82</b>

Sales density of 0.20% 2022; 0.3% 2023-38 (source: Experian Retail Planner 19, January 2022)

Table 16 - Convenience Goods Floorspace Need - Sub-Area D (Zone 9/10) (Forest Gate)

	2022	2027	2032	2038
Total Available Expenditure (Zone 1-12) (£m)	789.4	803.4	822.2	843.2
Market Share from Survey Area (Zone 1-12) (%)	3	3	3	3
Convenience goods spending in Study Area (£m)	24.7	25.0	25.6	26.2
Existing Retail Floorspace (sq m net)	4,156	4,156	4,156	4,156
Sales per sqm net (£)	5,932	4,078	4,140	4,203
Sales from Existing Floorspace (£m)	24.7	17.0	17.2	17.5
Sales from Committed Floorspace (£m)	0.0	7.8	7.9	8.0
Residual Spending to support new floorspace (£000)	0.0	0.3	0.5	0.7
Sales per sq m net in new shops (£)	12,000	12,181	12,365	12,551
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>25</b>	<b>41</b>	<b>54</b>

Sales density of 0.20% 2022; 0.3% 2023-38 (source: Experian Retail Planner 19, January 2022)



**urban shape**  
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# Appendix 2

London Borough of Newham  
Retail & Leisure Study 2022

Baseline Comparison Goods  
Need Assessment

## LB Newham Retail and Leisure Study, 2022 Comparison Goods Retail Need Forecasts

Table 1: Survey Area Postcode Composition

Zone	Postcode Sectors
Zone 1	E16 2
Zone 2	E16 1/3
Zone 3	E6 3; E13 9
Zone 4	E6 5/6/7
Zone 5	E6 1/2
Zone 6	E13 0; E15 3
Zone 7	E13 8; E16 4
Zone 8	E15 1/2/4; E20 1/2/3
Zone 9	E7 0/8/9
Zone 10	E12 5/6
Zone 11	IG11 0/7/8
Zone 12	E14 0/2/6; E3 3

**LB Newham Retail and Leisure Study, 2022**  
**Comparison Goods Retail Need Forecasts**

**Table 2: Survey Area Population Forecasts**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	TOTAL
<b>2022</b>	23,759	35,636	36,500	24,133	35,039	33,581	25,196	63,398	51,746	40,628	44,334	55,037	468,987
<b>2027</b>	24,297	36,307	37,017	24,583	35,621	34,205	25,615	64,810	52,873	41,350	45,273	58,568	480,519
<b>2032</b>	24,791	36,963	37,638	25,009	36,229	34,830	26,058	65,858	54,076	42,173	45,977	61,789	491,391
<b>2038</b>	25,438	37,700	38,339	25,595	36,910	35,503	26,544	67,055	55,190	43,051	46,834	64,896	503,055
<b>Change 2022-2027</b>	538	671	517	450	582	624	419	1,412	1,127	722	939	3,531	11,532
<b>Change 2027-2032</b>	494	656	621	426	608	625	443	1,048	1,203	823	704	3,221	10,872
<b>Change 2032-2038</b>	647	737	701	586	681	673	486	1,197	1,114	878	857	3,107	11,664
<b>TOTAL Change 2022 - 2038</b>	<b>1,679</b>	<b>2,064</b>	<b>1,839</b>	<b>1,462</b>	<b>1,871</b>	<b>1,922</b>	<b>1,348</b>	<b>3,657</b>	<b>3,444</b>	<b>2,423</b>	<b>2,500</b>	<b>9,859</b>	<b>34,068</b>

Source: Experian

## LB Newham Retail and Leisure Study, 2022 Comparison Goods Retail Need Forecasts

**Table 3: Survey Area per Capita Expenditure Forecasts**

	Expenditure per Capita (£)	SFT (%)	SFT (£)	Expenditure per capita less SFT
2022	2,402	23.9%	574	1,828
2027	2,683	27.2%	730	1,953
2032	3,089	28.9%	893	2,196
2038	3,563	29.8%	1,062	2,501

*Expenditure growth rates: 2023-2028: 2.8%; 2029-2038: 2.9%*

*Source: Experian E-Marketer. Expenditure growth rates and allowance for SFT are sourced from Experian Retail Planner 19 (January 2022).*

*Price Base: 2019*

**LB Newham Retail and Leisure Study, 2022**  
**Comparison Goods Retail Need Forecasts**

**Table 4 - Survey Area Comparison Goods Expenditure**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Total
	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
2022	43.4	65.1	66.7	44.1	64.0	61.4	46.1	115.9	94.6	74.3	81.0	100.6	<b>857.3</b>
2027	47.4	70.9	72.3	48.0	69.6	66.8	50.0	126.6	103.3	80.8	88.4	114.4	<b>938.4</b>
2032	54.4	81.2	82.7	54.9	79.6	76.5	57.2	144.6	118.8	92.6	101.0	135.7	<b>1,079.1</b>
2038	63.6	94.3	95.9	64.0	92.3	88.8	66.4	167.7	138.1	107.7	117.2	162.3	<b>1,258.4</b>
<b>Change 2022-38 (£m)</b>	<b>20.2</b>	<b>29.2</b>	<b>29.2</b>	<b>19.9</b>	<b>28.3</b>	<b>27.4</b>	<b>20.3</b>	<b>51.8</b>	<b>43.5</b>	<b>33.4</b>	<b>36.1</b>	<b>61.7</b>	<b>401.1</b>
<b>Change 2022-2038 (%)</b>	<b>46.5</b>	<b>44.8</b>	<b>43.7</b>	<b>45.1</b>	<b>44.2</b>	<b>44.7</b>	<b>44.2</b>	<b>44.7</b>	<b>46.0</b>	<b>45.0</b>	<b>44.6</b>	<b>61.4</b>	<b>46.8</b>

Source: Tables 2 and 3

## LB Newham Retail and Leisure Study, 2022 Comparison Goods Retail Need Forecasts

Table 5 - Comparison Goods Allocation - % Market Share (2022)

Survey Location Zone	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %	Zone 10 %	Zone 11 %	Zone 12 %	
<b>Destinations for Comparison Goods in London Borough of Newham</b>													
8	Stratford Metropolitan Centre	15.6%	26.4%	20.9%	18.1%	17.3%	42.8%	22.8%	62.5%	39.2%	25.1%	6.1%	32.9%
5	East Ham Major Centre	1.1%	2.7%	14.5%	10.4%	26.1%	3.6%	6.9%	0.4%	4.5%	12.6%	0.6%	0.4%
2	Canning Town District Centre	1.6%	4.7%	0.2%	0.6%	0.4%	0.3%	4.4%	0.0%	0.3%	0.7%	0.0%	0.4%
3/9	Green Street District Centre	0.7%	0.0%	4.4%	1.4%	2.5%	2.9%	0.1%	0.1%	1.1%	2.1%	0.2%	0.7%
9	Forest Gate District Centre	0.0%	0.0%	0.1%	0.4%	0.4%	0.3%	2.0%	0.0%	8.8%	0.7%	0.0%	0.0%
4	Beckton (See Note A)	52.6%	45.2%	34.9%	48.8%	18.9%	28.8%	35.7%	7.6%	15.9%	14.4%	24.9%	10.4%
<b>Total for Destinations Inside London Borough of Newham</b>		<b>71.6%</b>	<b>78.9%</b>	<b>75.1%</b>	<b>79.8%</b>	<b>65.6%</b>	<b>78.7%</b>	<b>71.8%</b>	<b>70.6%</b>	<b>69.7%</b>	<b>55.6%</b>	<b>31.7%</b>	<b>44.8%</b>
<b>Destinations for Comparison Goods outside London Borough of Newham</b>													
	Barking Town Centre	0.5%	0.0%	1.7%	0.3%	0.1%	0.7%	0.2%	0.9%	0.1%	0.2%	17.9%	0.0%
	Central London/West End	2.0%	1.8%	1.0%	2.2%	2.1%	3.7%	1.0%	2.1%	6.1%	2.5%	2.6%	3.4%
	Ilford Town Centre	0.0%	0.0%	0.9%	0.9%	3.0%	0.1%	2.7%	0.2%	2.9%	14.1%	4.5%	0.0%
	Romford Town Centre	0.3%	0.1%	0.7%	0.7%	2.3%	0.3%	0.3%	0.5%	2.1%	0.4%	4.2%	0.6%
	Woolwich Town Centre	3.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.2%	0.0%	0.0%
	Lakeside Shopping Centre	3.9%	4.3%	4.1%	4.3%	2.4%	1.0%	9.2%	0.7%	2.1%	1.9%	12.0%	0.2%
	Bluewater Shopping Centre	0.0%	1.2%	0.2%	0.8%	0.8%	0.1%	0.1%	0.0%	0.0%	0.3%	0.7%	0.0%
	Surrey Quays Shopping Centre	0.0%	0.8%	0.0%	2.1%	1.8%	0.3%	2.3%	0.5%	0.7%	2.5%	1.8%	5.9%
	Asda Isle of Dogs	0.0%	0.8%	0.3%	0.0%	0.1%	0.0%	0.0%	1.1%	0.7%	1.1%	0.0%	8.5%
<b>Total Outside London Borough of Newham</b>		<b>10.4%</b>	<b>9.0%</b>	<b>9.0%</b>	<b>11.3%</b>	<b>12.5%</b>	<b>6.3%</b>	<b>15.8%</b>	<b>7.5%</b>	<b>14.8%</b>	<b>23.0%</b>	<b>43.7%</b>	<b>18.6%</b>
<b>Total All Destinations</b>		<b>81.9%</b>	<b>87.9%</b>	<b>84.1%</b>	<b>91.1%</b>	<b>78.1%</b>	<b>85.0%</b>	<b>87.6%</b>	<b>78.1%</b>	<b>84.5%</b>	<b>78.6%</b>	<b>75.4%</b>	<b>63.4%</b>
<b>Other Destinations (Inside and Outside London Borough of Newham)</b>		<b>18.1%</b>	<b>12.1%</b>	<b>15.9%</b>	<b>8.9%</b>	<b>21.9%</b>	<b>15.0%</b>	<b>12.4%</b>	<b>21.9%</b>	<b>15.5%</b>	<b>21.4%</b>	<b>24.6%</b>	<b>36.6%</b>

Note A: Included East Beckton District Centre, Gallions Reach, Beckton Triangle and Beckton Gateway Retail Park



## LB Newham Retail and Leisure Study, 2022

### Comparison Goods Retail Need Forecasts

Table 6 - Comparison Goods Allocation - Spend (£) 2022

Survey Location Zone	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Zone 11 £m	Zone 12 £m	Total £m	Total %
<b>Total Available Comparison Goods Spend - 2022</b>													<b>857.3</b>	<b>100.0</b>
<b>Destinations for Comparison Goods in London Borough of Newham</b>														
8	6.8	17.2	13.9	8.0	11.1	26.3	10.5	72.4	37.1	18.7	4.9	33.1	260.0	30.3
5	0.5	1.7	9.7	4.6	16.7	2.2	3.2	0.4	4.2	9.4	0.5	0.4	53.4	6.2
2	0.7	3.0	0.2	0.3	0.3	0.2	2.0	0.0	0.3	0.5	0.0	0.4	7.9	0.9
3/9	0.3	0.0	2.9	0.6	1.6	1.8	0.0	0.1	1.0	1.6	0.2	0.7	10.8	1.3
9	0.0	0.0	0.1	0.2	0.3	0.2	0.9	0.0	8.3	0.5	0.0	0.0	10.4	1.2
4	22.8	29.4	23.3	21.5	12.1	17.7	16.4	8.8	15.0	10.7	20.1	10.5	208.5	24.3
<b>Total for Destinations inside London Borough of Newham (£m)</b>													<b>551.0</b>	<b>64.3</b>
<b>Destinations for Comparison Goods outside London Borough of Newham</b>														
	0.2	0.0	1.1	0.1	0.0	0.4	0.1	1.1	0.1	0.2	14.5	0.0	17.9	2.1
	0.9	1.2	0.7	1.0	1.3	2.3	0.5	2.4	5.8	1.8	2.1	3.4	23.3	2.7
	0.0	0.0	0.6	0.4	1.9	0.1	1.3	0.2	2.7	10.5	3.7	0.0	21.4	2.5
	0.1	0.0	0.4	0.3	1.5	0.2	0.1	0.6	2.0	0.3	3.4	0.6	9.6	1.1
	1.6	0.0	0.0	0.0	0.0	0.0	0.0	1.7	0.0	0.1	0.0	0.0	3.5	0.4
	1.7	2.8	2.7	1.9	1.5	0.6	4.3	0.8	2.0	1.4	9.7	0.2	29.6	3.5
	0.0	0.8	0.1	0.3	0.5	0.1	0.0	0.0	0.0	0.2	0.5	0.0	2.7	0.3
	0.0	0.5	0.0	0.9	1.2	0.2	1.1	0.6	0.7	1.8	1.5	6.0	14.5	1.7
	0.0	0.5	0.2	0.0	0.0	0.0	0.0	1.3	0.7	0.8	0.0	8.6	12.1	1.4
<b>Total Outside London Borough of Newham (£m)</b>													<b>134.4</b>	<b>15.7</b>
<b>Total All Destinations (£m)</b>													<b>685.4</b>	<b>80.0</b>
<b>Other Destinations (£m)</b>													<b>171.9</b>	<b>20.0</b>

Note A: Included East Beckton District Centre, Gallions Reach, Beckton Triangle and Beckton Gateway Retail Park

## LB Newham Retail and Leisure Study, 2022

### Comparison Goods Retail Need Forecasts

Table 7 - Comparison Goods Allocation - Spend (£) 2027

Survey Location Zone	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Zone 11 £m	Zone 12 £m	Total £m	Total %	
<b>Total Available Comparison Goods Spend - 2027</b>														<b>938.4</b>	<b>100.0</b>
<b>Destinations for Comparison Goods in London Borough of Newham</b>															
8	7.4	18.7	15.1	8.7	12.0	28.6	11.4	79.1	40.5	20.3	5.4	37.7	284.9	30.4	
5	0.5	1.9	10.5	5.0	18.1	2.4	3.4	0.5	4.6	10.2	0.5	0.4	58.1	6.2	
2	0.8	3.3	0.2	0.3	0.3	0.2	2.2	0.0	0.3	0.6	0.0	0.4	8.6	0.9	
3/9	0.3	0.0	3.2	0.7	1.7	2.0	0.1	0.1	1.1	1.7	0.2	0.8	11.8	1.3	
9	0.0	0.0	0.1	0.2	0.3	0.2	1.0	0.0	9.0	0.5	0.0	0.0	11.3	1.2	
4	25.0	32.0	25.2	23.4	13.1	19.3	17.8	9.7	16.4	11.6	22.0	12.0	227.5	24.2	
<b>Total for Destinations inside London Borough of Newham (£m)</b>														<b>602.1</b>	<b>64.2</b>
<b>Destinations for Comparison Goods outside London Borough of Newham</b>															
	0.2	0.0	1.2	0.1	0.0	0.4	0.1	1.2	0.1	0.2	15.9	0.0	19.5	2.1	
	0.9	1.3	0.7	1.1	1.5	2.5	0.5	2.6	6.3	2.0	2.3	3.9	25.5	2.7	
	0.0	0.0	0.7	0.4	2.1	0.1	1.4	0.2	3.0	11.4	4.0	0.0	23.2	2.5	
	0.1	0.0	0.5	0.3	1.6	0.2	0.1	0.7	2.2	0.3	3.7	0.7	10.5	1.1	
	1.8	0.0	0.0	0.0	0.0	0.0	0.0	1.9	0.0	0.1	0.0	0.0	3.8	0.4	
	1.9	3.1	3.0	2.1	1.7	0.7	4.6	0.8	2.2	1.5	10.6	0.2	32.2	3.4	
	0.0	0.9	0.2	0.4	0.6	0.1	0.0	0.0	0.0	0.2	0.6	0.0	2.9	0.3	
	0.0	0.6	0.0	1.0	1.3	0.2	1.2	0.7	0.8	2.0	1.6	6.8	16.0	1.7	
	0.0	0.5	0.2	0.0	0.1	0.0	0.0	1.4	0.7	0.9	0.0	9.8	13.6	1.4	
<b>Total Outside London Borough of Newham (£m)</b>														<b>147.3</b>	<b>15.7</b>
<b>Total All Destinations (£m)</b>														<b>749.4</b>	<b>79.9</b>
<b>Other Destinations (£m)</b>														<b>189.0</b>	<b>20.1</b>

Note A: Included East Beckton District Centre, Gallions Reach, Beckton Triangle and Beckton Gateway Retail Park

## LB Newham Retail and Leisure Study, 2022

### Comparison Goods Retail Need Forecasts

Table 8 - Comparison Goods Allocation - Spend (£) 2032

Survey Location Zone	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Zone 11 £m	Zone 12 £m	Total £m	Total %	
<b>Total Available Comparison Goods Spend - 2032</b>	<b>54.4</b>	<b>81.2</b>	<b>82.7</b>	<b>54.9</b>	<b>79.6</b>	<b>76.5</b>	<b>57.2</b>	<b>144.6</b>	<b>118.8</b>	<b>92.6</b>	<b>101.0</b>	<b>135.7</b>	<b>1,079.1</b>	<b>100.0</b>	
<b>Destinations for Comparison Goods in London Borough of Newham</b>															
8	Stratford Metropolitan Centre	8.5	21.5	17.3	10.0	13.8	32.7	13.0	90.4	46.6	23.3	6.1	44.7	327.7	30.4
5	East Ham Major Centre	0.6	2.2	12.0	5.7	20.7	2.7	3.9	0.6	5.3	11.7	0.6	0.5	66.5	6.2
2	Canning Town District Centre	0.9	3.8	0.2	0.3	0.3	0.2	2.5	0.0	0.4	0.7	0.0	0.5	9.9	0.9
3/9	Green Street District Centre	0.4	0.0	3.7	0.8	2.0	2.2	0.1	0.1	1.3	2.0	0.2	0.9	13.5	1.3
9	Forest Gate District Centre	0.0	0.0	0.1	0.2	0.3	0.2	1.1	0.0	10.4	0.6	0.0	0.0	13.0	1.2
4	Beckton (See Note A)	28.6	36.7	28.9	26.8	15.0	22.1	20.4	11.0	18.9	13.3	25.1	14.2	261.0	24.2
<b>Total for Destinations inside London Borough of Newham (£m)</b>		<b>39.0</b>	<b>64.1</b>	<b>62.1</b>	<b>43.8</b>	<b>52.2</b>	<b>60.2</b>	<b>41.1</b>	<b>102.1</b>	<b>82.8</b>	<b>51.5</b>	<b>32.0</b>	<b>60.8</b>	<b>691.6</b>	<b>64.1</b>
<b>Destinations for Comparison Goods outside London Borough of Newham</b>															
	Barking Town Centre	0.3	0.0	1.4	0.2	0.1	0.5	0.1	1.3	0.1	0.2	18.1	0.0	22.3	2.1
	Central London/West End	1.1	1.4	0.9	1.2	1.7	2.9	0.6	3.0	7.3	2.3	2.6	4.6	29.4	2.7
	Ilford Town Centre	0.0	0.0	0.8	0.5	2.4	0.1	1.6	0.3	3.4	13.0	4.6	0.0	26.6	2.5
	Romford Town Centre	0.2	0.1	0.5	0.4	1.8	0.3	0.2	0.8	2.5	0.3	4.2	0.8	12.1	1.1
	Woolwich Town Centre	2.0	0.0	0.0	0.0	0.0	0.0	0.0	2.2	0.0	0.2	0.0	0.0	4.3	0.4
	Lakeside Shopping Centre	2.1	3.5	3.4	2.4	1.9	0.8	5.3	1.0	2.5	1.7	12.1	0.2	36.9	3.4
	Bluewater Shopping Centre	0.0	1.0	0.2	0.4	0.6	0.1	0.0	0.0	0.0	0.3	0.7	0.0	3.3	0.3
	Surrey Quays Shopping Centre	0.0	0.7	0.0	1.2	1.4	0.2	1.3	0.8	0.9	2.3	1.8	8.0	18.6	1.7
	Asda Isle of Dogs	0.0	0.6	0.3	0.0	0.1	0.0	0.0	1.6	0.8	1.0	0.0	11.6	16.0	1.5
<b>Total Outside London Borough of Newham (£m)</b>		<b>5.6</b>	<b>7.3</b>	<b>7.4</b>	<b>6.2</b>	<b>10.0</b>	<b>4.8</b>	<b>9.0</b>	<b>10.9</b>	<b>17.5</b>	<b>21.3</b>	<b>44.1</b>	<b>25.3</b>	<b>169.5</b>	<b>15.7</b>
<b>Total All Destinations (£m)</b>		<b>44.6</b>	<b>71.4</b>	<b>69.5</b>	<b>50.0</b>	<b>62.1</b>	<b>65.0</b>	<b>50.1</b>	<b>112.9</b>	<b>100.4</b>	<b>72.8</b>	<b>76.1</b>	<b>86.0</b>	<b>861.1</b>	<b>79.8</b>
<b>Other Destinations (£m)</b>		<b>9.8</b>	<b>9.8</b>	<b>13.2</b>	<b>4.9</b>	<b>17.4</b>	<b>11.4</b>	<b>7.1</b>	<b>31.7</b>	<b>18.4</b>	<b>19.8</b>	<b>24.8</b>	<b>49.7</b>	<b>218.0</b>	<b>20.2</b>

Note A: Included East Beckton District Centre, Gallions Reach, Beckton Triangle and Beckton Gateway Retail Park

## LB Newham Retail and Leisure Study, 2022

### Comparison Goods Retail Need Forecasts

Table 9 - Comparison Goods Allocation - Spend (£) 2038

Survey Location Zone	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Zone 11 £m	Zone 12 £m	Total £m	Total %	
<b>Total Available Comparison Goods Spend - 2038</b>	<b>63.6</b>	<b>94.3</b>	<b>95.9</b>	<b>64.0</b>	<b>92.3</b>	<b>88.8</b>	<b>66.4</b>	<b>167.7</b>	<b>138.1</b>	<b>107.7</b>	<b>117.2</b>	<b>162.3</b>	<b>1,258.4</b>	<b>100.0</b>	
<b>Destinations for Comparison Goods in London Borough of Newham</b>															
8	Stratford Metropolitan Centre	9.9	24.9	20.0	11.6	16.0	38.0	15.1	104.8	54.2	27.0	7.1	53.5	382.2	30.4
5	East Ham Major Centre	0.7	2.5	13.9	6.7	24.1	3.2	4.6	0.7	6.2	13.6	0.7	0.6	77.3	6.1
2	Canning Town District Centre	1.0	4.4	0.2	0.4	0.4	0.3	2.9	0.0	0.5	0.8	0.0	0.6	11.5	0.9
3/9	Green Street District Centre	0.4	0.0	4.2	0.9	2.3	2.6	0.1	0.1	1.5	2.3	0.2	1.1	15.7	1.2
9	Forest Gate District Centre	0.0	0.0	0.1	0.2	0.4	0.3	1.3	0.0	12.1	0.7	0.0	0.0	15.1	1.2
4	Beckton (See Note A)	33.5	42.6	33.5	31.3	17.5	25.6	23.7	12.8	21.9	15.5	29.1	17.0	303.8	24.1
<b>Total for Destinations inside London Borough of Newham (£m)</b>		<b>45.5</b>	<b>74.4</b>	<b>72.0</b>	<b>51.1</b>	<b>60.5</b>	<b>69.9</b>	<b>47.7</b>	<b>118.4</b>	<b>96.3</b>	<b>59.9</b>	<b>37.1</b>	<b>72.7</b>	<b>805.6</b>	<b>64.0</b>
<b>Destinations for Comparison Goods outside London Borough of Newham</b>															
	Barking Town Centre	0.3	0.0	1.6	0.2	0.1	0.6	0.1	1.5	0.1	0.2	21.0	0.0	25.8	2.1
	Central London/West End	1.2	1.7	1.0	1.4	1.9	3.3	0.7	3.5	8.5	2.7	3.0	5.5	34.3	2.7
	Ilford Town Centre	0.0	0.0	0.9	0.6	2.7	0.1	1.8	0.3	4.0	15.2	5.3	0.0	30.9	2.5
	Romford Town Centre	0.2	0.1	0.6	0.4	2.1	0.3	0.2	0.9	2.9	0.4	4.9	1.0	14.1	1.1
	Woolwich Town Centre	2.4	0.0	0.0	0.0	0.0	0.0	0.0	2.5	0.0	0.2	0.0	0.0	5.0	0.4
	Lakeside Shopping Centre	2.5	4.1	3.9	2.7	2.2	0.9	6.1	1.1	2.9	2.0	14.1	0.3	42.9	3.4
	Bluewater Shopping Centre	0.0	1.2	0.2	0.5	0.7	0.1	0.0	0.0	0.0	0.3	0.8	0.0	3.9	0.3
	Surrey Quays Shopping Centre	0.0	0.8	0.0	1.4	1.7	0.3	1.5	0.9	1.0	2.6	2.1	9.6	21.9	1.7
	Asda Isle of Dogs	0.0	0.7	0.3	0.0	0.1	0.0	0.0	1.8	1.0	1.2	0.0	13.9	19.0	1.5
<b>Total Outside London Borough of Newham (£m)</b>		<b>6.6</b>	<b>8.5</b>	<b>8.6</b>	<b>7.2</b>	<b>11.6</b>	<b>5.6</b>	<b>10.5</b>	<b>12.6</b>	<b>20.4</b>	<b>24.8</b>	<b>51.2</b>	<b>30.2</b>	<b>197.8</b>	<b>15.7</b>
<b>Total All Destinations (£m)</b>		<b>52.1</b>	<b>82.9</b>	<b>80.6</b>	<b>58.3</b>	<b>72.1</b>	<b>75.5</b>	<b>58.2</b>	<b>131.0</b>	<b>116.7</b>	<b>84.7</b>	<b>88.3</b>	<b>102.9</b>	<b>1,003.4</b>	<b>79.7</b>
<b>Other Destinations (£m)</b>		<b>11.5</b>	<b>11.4</b>	<b>15.3</b>	<b>5.7</b>	<b>20.2</b>	<b>13.3</b>	<b>8.2</b>	<b>36.8</b>	<b>21.4</b>	<b>23.0</b>	<b>28.8</b>	<b>59.4</b>	<b>255.0</b>	<b>20.3</b>

Note A: Included East Beckton District Centre, Gallions Reach, Beckton Triangle and Beckton Gateway Retail Park

## LB Newham Retail and Leisure Study, 2022 Comparison Goods Retail Need Forecasts

**Table 10 - Global Comparison Goods Floorspace Need - Borough-wide**

	2022	2027	2032	2037
Total Available Expenditure (Zone 1-12) (£m)	857.3	938.4	1,079.1	1,258.4
Market Share from Survey Area (Zone 1-12) (%)	64	64	64	64
Survey Area Residents Spending (a) (£m)	551.0	602.1	691.6	805.6
Inflow to Stratford (70%) and Green Street (20%) from Beyond Survey Area (£m) (Note a)	609.3	667.6	768.1	895.7
Comparison goods spending in Study Area (£m)	1,160.3	1,269.8	1,459.7	1,701.3
Existing Retail Floorspace (sq m net)	183,775	183,775	183,775	183,775
Sales per sqm net (£)	6,314	6,929	7,916	9,132
Sales from Existing Floorspace (£m)	1,160.3	1,273.3	1,454.7	1,678.2
Residual Spending to support new floorspace (£000)	0.0	-3.5	5.0	23.1
Sales per sq m net in new shops (£)	10,000	11,237	12,901	14,883
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>-314</b>	<b>386</b>	<b>1,549</b>

*Note a) 2016 Evidence Base identified inflow of 76% drawing on Westfield Exit Survey Data; Update reduces this to 70% based on national trends, increase in online shopping, and consequent general trends of shopping local. Green Street ethnic retailing recognised as having a London, national and international draw, inflow of 20% assumed.*

*Floorspace Sq M Net:*

*Stratford Metropolitan Centre (110,378 sq m net)*

*East Ham Major Centre (14,265 sq m net)*

*Canning Town District Centre (3,953 sq m net)*

*Green Street District Centre (14,880 sq m net)*

*Forest Gate District Centre (5,678 sq m net)*

*Beckton (40,000 sq m net, including retail parks)*

*TOTAL = 189,162 sq m net*

**LB Newham Retail and Leisure Study, 2022**  
**Comparison Goods Retail Need Forecasts**

**Table 11 - Comparison Goods Floorspace Need - Sub-Area A (Zones 6/8) (Stratford)**

	2022	2027	2032	2038
Total Available Expenditure (Zone 1-12) (£m)	857.3	938.4	1,079.1	1,258.4
Market Share from Survey Area (Zone 1-12) (%)	30	30	30	30
Survey Area Residents Spending (a) (£m)	260.0	284.9	327.7	382.2
Inflow to Stratford (70%) from Beyond Survey Area (£m) (Table 12)	606.6	664.7	764.7	891.8
Comparison goods spending in Study Area/Total Turnover (£m)	866.6	949.6	1,092.5	1,274.0
Existing Retail Floorspace (sq m net)	105,000	105,000	105,000	105,000
Sales per sqm net (£)	8,254	9,057	10,348	11,938
Sales from Existing Floorspace (£m)	866.6	951.0	1,086.5	1,253.5
Residual Spending to support new floorspace (£000)	0.0	-1.4	6.0	20.5
Sales per sq m net in new shops (£)	10,000	11,237	12,901	14,883
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>-128</b>	<b>463</b>	<b>1,378</b>

**Table 13 - Comparison Goods Floorspace Need - Sub-Area C (Zones 1/2/7/12) (Canning Town/Royal Docks)**

	2022	2027	2032	2038
Total Available Expenditure (Zone 1-12) (£m)	857.3	938.4	1,079.1	1,258.4
Market Share from Survey Area (Zone 1-12) (%)	0.9	0.9	0.9	0.9
Survey Area Residents Spending (£m)	7.9	8.6	9.9	11.5
Existing Retail Floorspace (sq m net)	3,953	3,953	3,953	3,953
Sales per sqm net (£)	1,997	2,244	2,576	2,972
Sales from Existing Floorspace (£m)	7.9	8.9	10.2	11.7
Residual Spending to support new floorspace (£000)	0.0	-0.3	-0.3	-0.3
Sales per sq m net in new shops (£)	10,000	11,237	12,901	14,883
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>-23</b>	<b>-24</b>	<b>-17</b>

**Table 15 - Comparison Goods Floorspace Need - Sub-Area E (Zone 4) (Beckton)**

	2022	2027	2032	2038
Total Available Expenditure (Zone 1-12) (£m)	857.3	938.4	1,079.1	1,258.4
Market Share from Survey Area (Zone 1-12) (%)	24	24	24	24
Survey Area Residents Spending (a) (£m)	208.5	227.5	261.0	303.8
Existing Retail Floorspace (sq m net)	40,000	40,000	40,000	40,000
Sales per sqm net (£)	5,213	5,858	6,726	7,759
Sales from Existing Floorspace (£m)	208.5	234.3	269.0	310.4
Residual Spending to support new floorspace (£000)	0.0	-6.8	-8.0	-6.5
Sales per sq m net in new shops (£)	10,000	11,237	12,901	14,883
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>-607</b>	<b>-624</b>	<b>-438</b>

**Table 12 - Comparison Goods Floorspace Need - Sub-Area B (Zones 3/5/11) (East Ham/Green Street)**

	2022	2027	2032	2038
Total Available Expenditure (Zone 1-12) (£m)	857.3	938.4	1,079.1	1,258.4
Market Share from Survey Area (Zone 1-12) (%)	7	7	7	7
Survey Area Residents Spending (a) (£m)	64.2	69.8	80.0	93.0
Inflow to Green Street (20%) from Beyond Survey Area (£m) (Table 12)	2.7	2.9	3.4	3.9
Comparison goods spending in Study Area (£m)	66.9	72.8	83.4	96.9
Existing Retail Floorspace (sq m net)	29,145	29,145	29,145	29,145
Sales per sqm net (£)	2,296	2,580	2,962	3,417
Sales from Existing Floorspace (£m)	66.9	75.2	86.3	99.6
Residual Spending to support new floorspace (£000)	0.0	-2.4	-2.9	-2.7
Sales per sq m net in new shops (£)	10,000	11,237	12,901	14,883
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>-215</b>	<b>-229</b>	<b>-180</b>

**Table 14 - Comparison Goods Floorspace Need - Sub-Area D (Zones 9/10) (Forest Gate)**

	2022	2027	2032	2038
Total Available Expenditure (Zone 1-12) (£m)	857.3	938.4	1,079.1	1,258.4
Market Share from Survey Area (Zone 1-12) (%)	1.2	1.2	1.2	1.2
Survey Area Residents Spending (a) (£m)	10.4	11.3	13.0	15.1
Existing Retail Floorspace (sq m net)	5,678	5,678	5,678	5,678
Sales per sqm net (£)	1,823	2,049	2,352	2,713
Sales from Existing Floorspace (£m)	10.4	11.6	13.4	15.4
Residual Spending to support new floorspace (£000)	0.0	-0.3	-0.4	-0.3
Sales per sq m net in new shops (£)	10,000	11,237	12,901	14,883
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>-30</b>	<b>-30</b>	<b>-22</b>



**urban shape**  
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# Appendix 3

London Borough of Newham  
Retail & Leisure Study 2022

Floorspace Need Assessment  
Scenario 2: GLA Population Projections

## LB Newham Retail and Leisure Study, 2022

### Retail Floorspace Need Forecasts

Table 1: Survey Area Postcode Composition

Zone	Postcode Sectors
Zone 1	E16 2
Zone 2	E16 1/3
Zone 3	E6 3; E13 9
Zone 4	E6 5/6/7
Zone 5	E6 1/2
Zone 6	E13 0; E15 3
Zone 7	E13 8; E16 4
Zone 8	E15 1/2/4; E20 1/2/3
Zone 9	E7 0/8/9
Zone 10	E12 5/6
Zone 11	IG11 0/7/8
Zone 12	E14 0/2/6; E3 3



**LB Newham Retail and Leisure Study, 2022**  
**Retail Floorspace Need Forecasts**

**Table 2: GLA Survey Area Population Forecasts**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	TOTAL
<b>2022</b>	25,855	38,780	25,180	34,184	24,173	25,397	27,419	47,947	61,727	48,464	44,334	55,037	458,497
<b>2027</b>	29,953	44,926	26,018	36,814	24,976	31,207	31,764	58,916	59,697	46,871	45,273	58,568	494,983
<b>2032</b>	34,217	51,322	26,969	43,740	25,889	36,814	36,286	69,503	59,806	46,956	45,977	61,789	539,268
<b>2038</b>	36,503	54,750	27,242	53,327	26,151	38,904	38,710	73,448	60,158	47,232	46,834	64,896	568,155
<b>Change 2022-2027</b>	4,098	6,146	837	2,630	804	5,810	4,345	10,969	-2,030	-1,593	939	3,531	36,486
<b>Change 2027-2032</b>	4,264	6,396	951	6,926	913	5,608	4,522	10,586	109	85	704	3,221	44,285
<b>Change 2032-2038</b>	2,286	3,428	273	9,587	262	2,090	2,424	3,945	352	276	857	3,107	28,887
<b>TOTAL Change 2022 - 2038</b>	<b>10,647</b>	<b>15,970</b>	<b>2,061</b>	<b>19,143</b>	<b>1,979</b>	<b>13,507</b>	<b>11,291</b>	<b>25,501</b>	<b>-1,569</b>	<b>-1,232</b>	<b>2,500</b>	<b>9,859</b>	<b>109,658</b>

Source: Experian

## LB Newham Retail and Leisure Study, 2022 Convenience Goods Retail Need Forecasts

**Table 3: Survey Area per Capita Expenditure Forecasts - Convenience Goods**

	Expenditure per Capita (£)	SFT (%)	SFT (£)	Expenditure per capita less SFT
2022	1,785	5.7%	102	1,683
2027	1,794	6.8%	122	1,672
2032	1,803	7.2%	130	1,673
2038	1,812	7.5%	136	1,676

Expenditure growth rates: 2023-2028: 0.1%; 2029-2038: 0.1%

Source: Experian E-Marketer. Expenditure growth rates and allowance for SFT are sourced from Experian Retail Planner 19 (January 2022)

Price Base: 2019

**LB Newham Retail and Leisure Study, 2022**  
**Convenience Goods Retail Need Forecasts**

**Table 4 - Survey Area Convenience Goods Expenditure - Convenience Goods**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Total
	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
2022	43.5	65.3	42.4	57.5	40.7	42.7	46.2	80.7	103.9	81.6	74.6	92.6	<b>771.8</b>
2027	50.1	75.1	43.5	61.6	41.8	52.2	53.1	98.5	99.8	78.4	75.7	97.9	<b>827.6</b>
2032	57.2	85.9	45.1	73.2	43.3	61.6	60.7	116.3	100.1	78.6	76.9	103.4	<b>902.3</b>
2038	61.2	91.8	45.7	89.4	43.8	65.2	64.9	123.1	100.8	79.2	78.5	108.8	<b>952.3</b>
<b>Change 2022-2038 (£m)</b>	<b>17.7</b>	<b>26.5</b>	<b>3.3</b>	<b>31.8</b>	<b>3.1</b>	<b>22.5</b>	<b>18.7</b>	<b>42.4</b>	<b>-3.1</b>	<b>-2.4</b>	<b>3.9</b>	<b>16.1</b>	<b>180.5</b>
<b>Change 2022-2038 (%)</b>	<b>40.6</b>	<b>40.6</b>	<b>7.7</b>	<b>55.3</b>	<b>7.7</b>	<b>52.5</b>	<b>40.6</b>	<b>52.5</b>	<b>-3.0</b>	<b>-3.0</b>	<b>5.2</b>	<b>17.4</b>	<b>23.4</b>

Source: Tables 2 and 3

## LB Newham Retail and Leisure Study, 2022 Retail Floorspace Need Forecasts

Table 5 - Global Convenience Goods Floorspace Need - Borough-wide

	2022	2027	2032	2038
Total Available Expenditure (Zone 1-12) (£m)	771.8	827.6	902.3	952.3
Market Share from Survey Area (Zone 1-12) (%)	52	53	53	54
Convenience goods spending in Study Area (£m)	399.7	435.0	482.2	513.1
Existing Retail Floorspace (sq m net)	46,272	46,272	46,272	46,272
Sales per sqm net (£)	8,638	9,342	9,483	9,626
Sales from Existing Floorspace (£m)	399.7	432.3	438.8	445.4
Sales from Committed Floorspace (£m) (Table 11)	-	15.8	16.1	16.4
Residual Spending to support new floorspace (£000)	0.0	-13.1	27.3	51.3
Sales per sq m net in new shops (£)	12,000	12,181	12,365	12,551
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>-1,077</b>	<b>2,207</b>	<b>4,085</b>

Sales density of 0.20% 2022; 0.3% 2023-38 (source: Experian Retail Planner 19, January 2022)

LB Newham Retail and Leisure Study, 2022  
Retail Floorspace Need Forecasts

Table 6 - Convenience Goods Floorspace Need - Sub-Area A (Zone 6/8) (Stratford)

	2022	2027	2032	2038
Total Available Expenditure (Zone 1-12) (£m)	771.8	827.6	902.3	952.3
Market Share from Survey Area (Zone 1-12) (%)	11	12	13	13
Convenience goods spending in Study Area (£m)	88.3	101.1	115.4	122.1
Existing Retail Floorspace (sq m net)	10,622	10,622	10,622	10,622
Sales per sqm net (£)	8,312	9,267	9,407	9,549
Sales from Existing Floorspace (£m)	88.3	98.4	99.9	101.4
Residual Spending to support new floorspace (£000)	0.0	2.7	15.5	20.6
Sales per sq m net in new shops (£)	12,000	12,181	12,365	12,551
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>222</b>	<b>1,252</b>	<b>1,643</b>

Sales density of 0.20% 2022; 0.3% 2023-38 (source: Experian Retail Planner 19, January 2022)

Table 8 - Convenience Goods Floorspace Need - Sub-Area C (1/2/7/12) (Canning Town / Royal Docks)

	2022	2027	2032	2038
Total Available Expenditure (Zone 1-12) (£m)	771.8	827.6	902.3	952.3
Market Share from Survey Area (Zone 1-12) (%)	6	6	6	6
Convenience goods spending in Study Area (£m)	44.2	50.2	56.7	60.3
Existing Retail Floorspace (sq m net)	4,102	4,102	4,102	4,102
Sales per sqm net (£)	10,774	8,894	9,028	9,164
Sales from Existing Floorspace (£m)	44.2	36.5	37.0	37.6
Residual Spending to support new floorspace (£000)	0.0	13.7	19.7	22.7
Sales per sq m net in new shops (£)	12,000	12,181	12,365	12,551
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>1,123</b>	<b>1,592</b>	<b>1,806</b>

Sales density of 0.20% 2022; 0.3% 2023-38 (source: Experian Retail Planner 19, January 2022)

Table 10 - Convenience Goods Floorspace Need - Sub-Area E (Zone 4) (Beckton)

	2022	2027	2032	2038
Total Available Expenditure (Zone 1-12) (£m)	771.8	827.6	902.3	952.3
Market Share from Survey Area (Zone 1-12) (%)	22.0	22.0	22.0	22.0
Convenience goods spending in Study Area (£m)	172.8	188.1	210.2	227.8
Existing Retail Floorspace (sq m net)	14,469	14,469	14,469	14,469
Sales per sqm net (£)	11,943	14,791	15,014	15,241
Sales from Existing Floorspace (£m)	172.8	214.0	217.2	220.5
Residual Spending to support new floorspace (£000)	0.0	-25.9	-7.1	7.3
Sales per sq m net in new shops (£)	12,000	12,181	12,365	12,551
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>-2,125</b>	<b>-573</b>	<b>579</b>

Sales density of 0.20% 2022; 0.3% 2023-38 (source: Experian Retail Planner 19, January 2022)

Table 7 - Convenience Goods Floorspace Need - Sub-Area B (3/5/11) (East Ham / Green Street)

	2022	2027	2032	2038
Total Available Expenditure (Zone 1-12) (£m)	771.8	827.6	902.3	952.3
Market Share from Survey Area (Zone 1-12) (%)	8	8	8	8
Convenience goods spending in Study Area (£m)	65.2	67.3	71.4	74.1
Existing Retail Floorspace (sq m net)	12,923	12,923	12,923	12,923
Sales per sqm net (£)	5,045	5,137	5,215	5,293
Sales from Existing Floorspace (£m)	65.2	66.4	67.4	68.4
Sales from Committed Floorspace (£m)	0.0	8.1	8.2	8.4
Residual Spending to support new floorspace (£000)	0.0	-7.1	-4.2	-2.7
Sales per sq m net in new shops (£)	12,000	12,181	12,365	12,551
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>-586</b>	<b>-340</b>	<b>-219</b>

Sales density of 0.20% 2022; 0.3% 2023-38 (source: Experian Retail Planner 19, January 2022)

Table 9 - Convenience Goods Floorspace Need - Sub-Area D (Zone 9/10) (Forest Gate)

	2022	2027	2032	2038
Total Available Expenditure (Zone 1-12) (£m)	771.8	827.6	902.3	952.3
Market Share from Survey Area (Zone 1-12) (%)	4	3	3	3
Convenience goods spending in Study Area (£m)	29.2	28.2	28.5	28.9
Existing Retail Floorspace (sq m net)	4,156	4,156	4,156	4,156
Sales per sqm net (£)	7,033	4,078	4,140	4,203
Sales from Existing Floorspace (£m)	29.2	17.0	17.2	17.5
Sales from Committed Floorspace (£m)	0.0	7.8	7.9	8.0
Residual Spending to support new floorspace (£000)	0.0	3.5	3.4	3.5
Sales per sq m net in new shops (£)	12,000	12,181	12,365	12,551
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>289</b>	<b>276</b>	<b>276</b>

Sales density of 0.20% 2022; 0.3% 2023-38 (source: Experian Retail Planner 19, January 2022)

## LB Newham Retail and Leisure Study, 2022 Comparison Goods Retail Need Forecasts

**Table 11: Survey Area per Capita Expenditure Forecasts - Comparison Goods**

	Expenditure per Capita (£)	SFT (%)	SFT (£)	Expenditure per capita less SFT
2022	2,402	23.9%	574	1,828
2027	2,683	27.2%	730	1,953
2032	3,089	28.9%	893	2,196
2038	3,563	29.8%	1,062	2,501

*Expenditure growth rates: 2023-2028: 2.8%; 2029-2038: 2.9%*

*Source: Experian E-Marketer. Expenditure growth rates and allowance for SFT are sourced from Experian Retail Planner 19 (January 2022).*

*Price Base: 2019*

**LB Newham Retail and Leisure Study, 2022**  
**Comparison Goods Retail Need Forecasts**

**Table 12 - Survey Area Comparison Goods Expenditure**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Total
	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
2022	47.3	70.9	46.0	62.5	44.2	46.4	50.1	87.6	112.8	88.6	81.0	100.6	<b>838.1</b>
2027	58.5	87.7	50.8	71.9	48.8	60.9	62.0	115.1	116.6	91.5	88.4	114.4	<b>966.6</b>
2032	75.1	112.7	59.2	96.1	56.9	80.8	79.7	152.6	131.3	103.1	101.0	135.7	<b>1,184.3</b>
2038	91.3	137.0	68.1	133.4	65.4	97.3	96.8	183.7	150.5	118.1	117.2	162.3	<b>1,421.2</b>
<b>Change 2022-38 (£m)</b>	<b>44.0</b>	<b>66.1</b>	<b>22.1</b>	<b>70.9</b>	<b>21.2</b>	<b>50.9</b>	<b>46.7</b>	<b>96.1</b>	<b>37.6</b>	<b>29.6</b>	<b>36.1</b>	<b>61.7</b>	<b>583.1</b>
<b>Change 2022-2038 (%)</b>	<b>93.2</b>	<b>93.2</b>	<b>48.0</b>	<b>113.5</b>	<b>48.0</b>	<b>109.6</b>	<b>93.2</b>	<b>109.6</b>	<b>33.4</b>	<b>33.4</b>	<b>44.6</b>	<b>61.4</b>	<b>69.6</b>

Source: Tables 2 and 3

## LB Newham Retail and Leisure Study, 2022 Comparison Goods Retail Need Forecasts

**Table 13 - Global Comparison Goods Floorspace Need - Borough-wide**

	2022	2027	2032	2037
Total Available Expenditure (Zone 1-12) (£m)	838.1	966.6	1,184.3	1,421.2
Market Share from Survey Area (Zone 1-12) (%)	64	65	65	65
Survey Area Residents Spending (a) (£m)	536.3	623.8	771.4	930.2
Inflow to Stratford (70%) and Green Street (20%) from Beyond Survey Area (£m) (Note a)	574.8	675.4	837.5	1,002.5
Comparison goods spending in Study Area (£m)	1,111.1	1,299.2	1,608.9	1,932.8
Existing Retail Floorspace (sq m net)	183,775	183,775	183,775	183,775
Sales per sqm net (£)	6,046	6,635	7,580	8,744
Sales from Existing Floorspace (£m)	1,111.1	1,219.3	1,393.0	1,607.0
Residual Spending to support new floorspace (£000)	0.0	79.9	215.9	325.8
Sales per sq m net in new shops (£)	10,000	11,237	12,901	14,883
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>7,110</b>	<b>16,739</b>	<b>21,888</b>

*Note a) 2016 Evidence Base identified inflow of 76% drawing on Westfield Exit Survey Data; Update reduces this to 70% based on national trends, increase in online shopping, and consequent general trends of shopping local. Green Street ethnic retailing recognised as having a London, national and international draw, inflow of 20% assumed.*

*Floorspace Sq M Net:*

*Stratford Metropolitan Centre (110,378 sq m net)*

*East Ham Major Centre (14,265 sq m net)*

*Canning Town District Centre (3,953 sq m net)*

*Green Street District Centre (14,880 sq m net)*

*Forest Gate District Centre (5,678 sq m net)*

*Beckton (40,000 sq m net, including retail parks)*

*TOTAL = 189,162 sq m net*



**LB Newham Retail and Leisure Study, 2022**  
**Comparison Goods Retail Need Forecasts**

**Table 14 - Comparison Goods Floorspace Need - Sub-Area A (Zones 6/8) (Stratford)**

	2022	2027	2032	2038
Total Available Expenditure (Zone 1-12) (£m)	838.1	966.6	1,184.3	1,421.2
Market Share from Survey Area (Zone 1-12) (%)	30	30	30	30
Survey Area Residents Spending (a) (£m)	245.3	288.3	357.5	428.0
Inflow to Stratford (70%) from Beyond Survey Area (£m) (Table 12)	572.4	672.6	834.2	998.6
Comparison goods spending in Study Area/Total Turnover (£m)	817.7	960.9	1,191.7	1,426.6
Existing Retail Floorspace (sq m net)	105,000	105,000	105,000	105,000
Sales per sqm net (£)	7,788	8,546	9,764	11,264
Sales from Existing Floorspace (£m)	817.7	897.3	1,025.2	1,182.7
Residual Spending to support new floorspace (£000)	0.0	63.6	166.5	243.9
Sales per sq m net in new shops (£)	10,000	11,237	12,901	14,883
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>5,658</b>	<b>12,909</b>	<b>16,389</b>

**Table 16 - Comparison Goods Floorspace Need - Sub-Area C (Zones 1/2/7/12) (Canning Town/Royal Docks)**

	2022	2027	2032	2038
Total Available Expenditure (Zone 1-12) (£m)	838.1	966.6	1,184.3	1,421.2
Market Share from Survey Area (Zone 1-12) (%)	1	1	1	1
Survey Area Residents Spending (£m)	8.5	10.2	12.9	15.7
Existing Retail Floorspace (sq m net)	3,953	3,953	3,953	3,953
Sales per sqm net (£)	2,152	2,418	2,776	3,203
Sales from Existing Floorspace (£m)	8.5	9.6	11.0	12.7
Residual Spending to support new floorspace (£000)	0.0	0.7	1.9	3.0
Sales per sq m net in new shops (£)	10,000	11,237	12,901	14,883
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>59</b>	<b>150</b>	<b>203</b>

**Table 18 - Comparison Goods Floorspace Need - Sub-Area E (Zone 4) (Beckton)**

	2022	2027	2032	2038
Total Available Expenditure (Zone 1-12) (£m)	838.1	966.6	1,184.3	1,421.2
Market Share from Survey Area (Zone 1-12) (%)	26	26	26	26
Survey Area Residents Spending (a) (£m)	211.1	246.5	307.1	374.8
Existing Retail Floorspace (sq m net)	40,000	40,000	40,000	40,000
Sales per sqm net (£)	5,277	5,930	6,807	7,854
Sales from Existing Floorspace (£m)	211.1	237.2	272.3	314.1
Residual Spending to support new floorspace (£000)	0.0	9.4	34.8	60.6
Sales per sq m net in new shops (£)	10,000	11,237	12,901	14,883
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>833</b>	<b>2,698</b>	<b>4,074</b>

**Table 15 - Comparison Goods Floorspace Need - Sub-Area B (Zones 3/5/11) (East Ham/Green Street)**

	2022	2027	2032	2038
Total Available Expenditure (Zone 1-12) (£m)	838.1	966.6	1,184.3	1,421.2
Market Share from Survey Area (Zone 1-12) (%)	7	7	7	7
Survey Area Residents Spending (a) (£m)	59.3	66.0	79.3	94.8
Inflow to Green Street (20%) from Beyond Survey Area (£m) (Table 12)	2.4	2.7	3.3	3.9
Comparison goods spending in Study Area (£m)	61.7	68.8	82.6	98.7
Existing Retail Floorspace (sq m net)	29,145	29,145	29,145	29,145
Sales per sqm net (£)	2,118	2,580	2,962	3,417
Sales from Existing Floorspace (£m)	61.7	75.2	86.3	99.6
Residual Spending to support new floorspace (£000)	0.0	-6.4	-3.8	-0.8
Sales per sq m net in new shops (£)	10,000	11,237	12,901	14,883
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>-573</b>	<b>-292</b>	<b>-57</b>

**Table 17 - Comparison Goods Floorspace Need - Sub-Area D (Zones 9/10) (Forest Gate)**

	2022	2027	2032	2038
Total Available Expenditure (Zone 1-12) (£m)	838.1	966.6	1,184.3	1,421.2
Market Share from Survey Area (Zone 1-12) (%)	1	1	1	1
Survey Area Residents Spending (a) (£m)	12.0	12.7	14.6	17.0
Existing Retail Floorspace (sq m net)	5,678	5,678	5,678	5,678
Sales per sqm net (£)	2,121	2,384	2,737	3,157
Sales from Existing Floorspace (£m)	12.0	13.5	15.5	17.9
Residual Spending to support new floorspace (£000)	0.0	-0.8	-0.9	-1.0
Sales per sq m net in new shops (£)	10,000	11,237	12,901	14,883
<b>Capacity for new floorspace (sqm net)</b>	<b>0</b>	<b>-72</b>	<b>-70</b>	<b>-64</b>



**urban shape**  
PLANNING CONSULTANTS

# Appendix 4

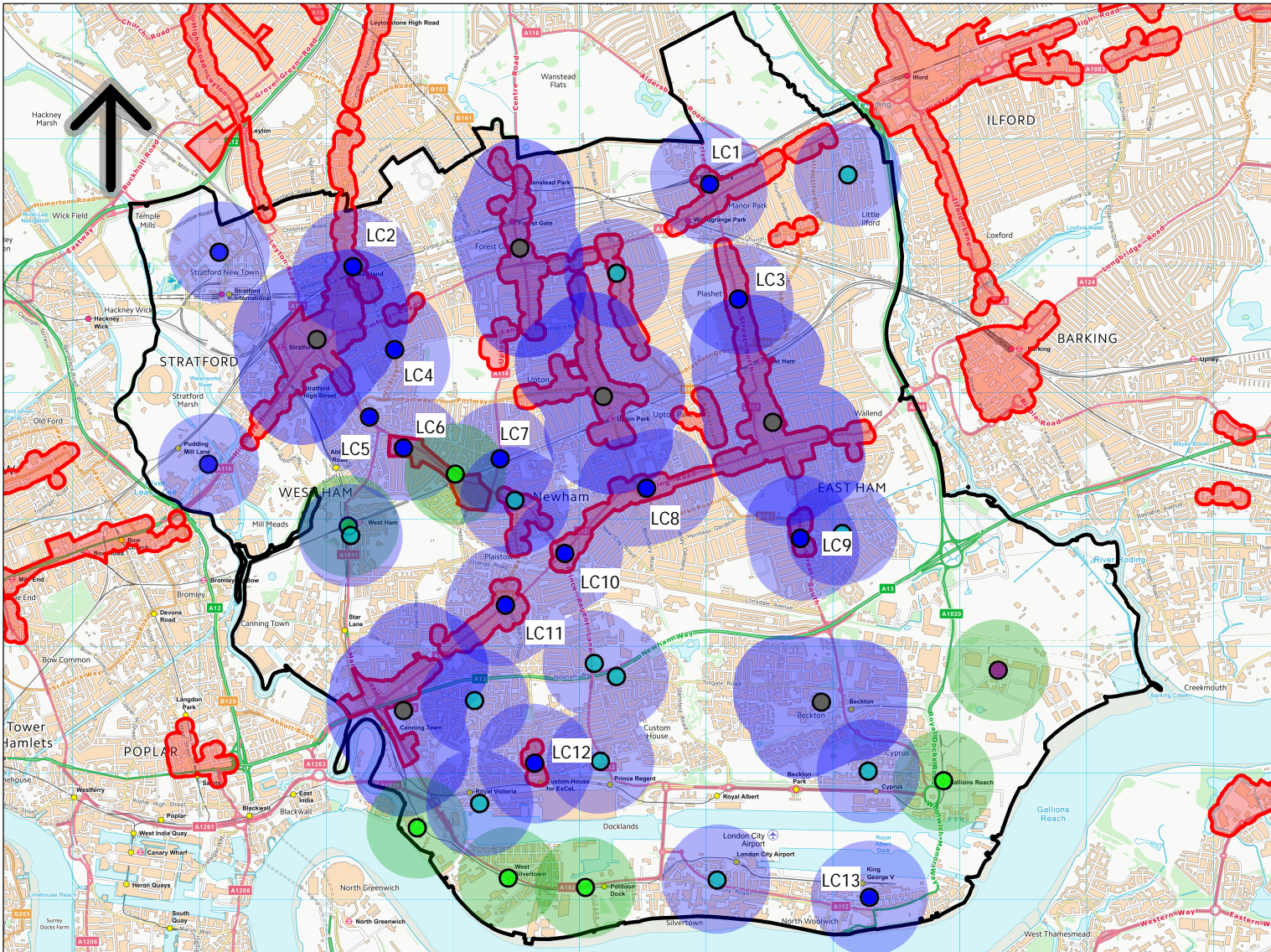
London Borough of Newham  
Retail & Leisure Study 2022

Town Centre Network Distribution and  
Gap Analysis Plan

# Local Centre Gap Analysis Plan



**CADS**  
The Design Centre,  
Hewett Road,  
Gaptown Hall,  
Great Yarmouth,  
Norfolk NR31 0NN



## Legend

- ▭ GLA High Streets Data Boundaries
- ▭ 400m Catchment
- ▭ Proposed 400m Catchment
- Town Centre
- Local Centre
- Local Shopping Parades
- Proposed New Major Centre
- Proposed New Local Centre
- ↘ London Borough of Newham Boundary

1:50,000

