



# Report

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## London Borough of Newham Town Centre & Retail Study Update, 2016



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# 1. Introduction

- 1.1 In 2009, Bilfinger GVA was instructed by the London Borough of Newham (LB Newham) to undertake a borough-wide Town Centre and Retail Study (2010 Study). The purpose of that study was to provide an up-to-date picture of current and future retail need across the borough to the period 2025. It was published in March 2010. The outputs were used to inform the preparation of the Local Development Framework (LDF), Supplementary Planning Documents (SPD's) and individual management plans for each town centre.
- 1.2 The 'Local Plan: Core Strategy' was subsequently adopted in January 2012, and the 2010 evidence based Study has remained at the Council's disposal to assist in the determination of relevant planning applications. LB Newham have subsequently instructed Bilfinger GVA to review and update the '2010 Town Centre and Retail Study' in order to inform emerging Local Plan documents, and in particular the Development Management Policies and Site Allocations documents. It is considered necessary to review the previous evidence base and outputs and to assess the implications of change on the conclusions and recommendations.
- 1.3 Our work draws on a new household telephone survey covering the same geographical area and survey zones as that underpinning the 2010 Study (Plan 1). The results of the survey form a key part of the evidence for this update, and is complemented with detailed on-site audits of the six main town centres. Data collection and analysis underpinning this update, took place in 2015/2016. The structure of this report is as follows:
- **Section 2** sets out our update review of national and local planning policies relevant to retail/town centre planning in the borough;
  - **Section 3** details the implications of national economic and market trends on town centres and retailing in Newham;
  - **Section 4** provides an overview of the current performance of Stratford, East Ham, East Beckton, Canning Town, Forest Gate and Green Street, and details retail/town centre change across the wider sub-region and borough which may have direct implications on town centre performance and the recommended strategy;

- **Section 5** sets out the updated findings from the quantitative need assessment for both convenience and comparison goods, taking into account new committed floorspace since the 2010 Study;
- **Section 6** reviews the findings of our study against the 2010 outputs to consider the strategic options for future development across Newham in terms of retail strategy and development opportunity.

## 2. Policy Framework

2.1 This section details the most up-to-date national and local policy framework, focusing on change since 2010.

### The National Planning Policy Framework (March 2012)

2.2 The National Planning Policy Framework (NPPF), published on 27 March 2012 sets out the Government's planning policies for England and replaces the suite of national Planning Policy Statements, Planning Policy Guidance and Circulars with a single document.

2.3 The NPPF continues to recognise that the planning system is plan-led and therefore Local Plans, incorporating neighbourhood plans where relevant, are the starting point for the determination of any planning application. In line with the Government's aim to streamline the planning process, each Local Planning Authority (LPA) should produce a single Local Plan for its area with any additional documents to be used only where clearly justified.

2.4 The NPPF maintains the general thrust of previous policy set out in PPS4 – Planning for Sustainable Economic Growth (2009). It 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. In planning for town centres LPAs should:

- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- Define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary shopping frontages in designated centres and set policies that make clear which uses will be permitted in such locations;
- Promote competitive town centres that provide customer choice and a diverse retail offer which reflect the individuality of town centres;
- Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- Allocate a range of suitable sites to meet the scale and type of economic development needed in town centres. Where town centre sites are not available, LPAs should adopt a sequential approach to allocate appropriate edge of centre sites;

- Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
  - Recognise that residential development can play an important role in ensuring the vitality of centres; and
  - Where town centres are in decline, plan positively for their future to encourage economic activity.
- 2.5 LPAs should ensure that the Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. These assessments should be integrated and take full account of relevant market and economic signals. LPAs should use the evidence base to assess, inter alia;
- The needs for land or floorspace for economic development, taking account of both quantitative and qualitative requirements for all foreseeable types of economic activity over the plan period, including retail and commercial leisure development;
  - The existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs;
  - The role and function of town centres and the relationship between them, including any trends in the performance of centres; and
  - The capacity of existing centres to accommodate new town centre development.
- 2.6 The Local Plan will be examined by an independent inspector whose role it is to assess whether the plan is sound. In order to be found sound the Plan should be:
- **Positively prepared** i.e. based on a strategy which seeks to meet objectively assessed development and infrastructure requirements;
  - **Justified** i.e. the most appropriate strategy, when considered against the alternatives;
  - **Effective** i.e. deliverable over its plan period and based on effective joint working; and
  - **Consistent with national policy** i.e. enable the delivery of sustainable development.
- 2.7 Overall, the NPPF adopts a positive approach, with a presumption in favour of sustainable development and support for economic growth. In terms of decision-making, applications for planning permission must be determined in accordance with the development plan unless material considerations indicate otherwise. The NPPF is a material consideration in planning decisions.
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## National Planning Policy Guidance (PPG):

- 2.8 In March 2014 the Department for Communities and Local Government (DCLG) launched the online planning practice guidance, which cancelled a number of previous planning practice guidance documents, including the Practice Guidance on Need, Impact and the Sequential Approach (2009). 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.
- 2.9 The NPPG provides guidance on how to access and plan to meet the needs of main town centre uses through production of a strategic vision for town centres. Any strategy should be based on evidence of the current state of town centres and opportunities to meet development needs and support their viability and vitality. Strategies should consider:
- The appropriate and realistic role, function and hierarchy of town centres in the area over the plan period. This will be informed by audits of existing centres to assess their role, vitality, viability and the potential to accommodate new development. It should cover a three to five year period, but should also take the lifetime of the Local Plan into account and be reviewed regularly;
  - The most appropriate mix of uses in order to enhance the overall vitality and viability;
  - The possibility to expand centres, or development opportunities to enable new development or redevelopment of under-utilised space to accommodate the scale of assessed need for main town centre uses. This should involve evaluating different policy options or the implications of wider policy such as infrastructure delivery and demographic or economic change;
  - Appropriate timeframes for new retail floorspace to be provided;
  - Complementary strategies that may be necessary or appropriate to enhance the town centre and help deliver the vision for its future; and
  - How car parking provision can be enhanced and both parking charges and enforcement be made proportionate, in order to encourage town centre vitality.
- 2.10 The PPG sets out the following indicators which are relevant in accessing the health of town centres:
- Diversity of uses;
  - Proportion of vacant street level property;
  - Commercial yields on non-domestic property;

- Customers' views and behaviour;
- Retailer representation and intentions to change representation;
- Commercial rents;
- Pedestrian flows;
- Accessibility;
- Perception of safety and occurrence of crime;
- State of town centre environmental quality.

2.11 The PPG recognises that it may not be possible to accommodate all forecast needs in a town centre. In those circumstances, LPAs should plan positively to identify the most appropriate alternative strategy for meeting the need for such main town centres uses, having regard to the sequential and impact tests.

## Permitted Development

2.12 The Town and Country Planning (General Permitted Development) (England) Order 2015 has introduced greater flexibility to enable a more straightforward change of use within shopping frontages. The amendments allow permitted change from retail premises (A1) to financial services (A2), and restaurants and cafes (A3) without a time limit on that change of use. The move is designed to reduce vacancies on high streets, but a consequence is that local authority retail frontage policies can be bypassed unless alternative mechanisms are in place.

## London Plan (Consolidated with Alterations since 2011) 2015

2.13 On 10th March 2015, the Mayor adopted the London Plan (consolidated with alterations since 2011). This consolidated plan is now operative as formal alterations to the London Plan and forms part of the development plan for Greater London. It is a strategic spatial planning document setting the London-wide context within which individual London Boroughs must set their local planning policies.

2.14 The plan identifies a network of town centres across five categories; International, Metropolitan, Major, District and Local and Neighbourhood. Within Newham, Stratford is defined as a Metropolitan Centre, and East Ham is defined as a Major Centre. Canning Town, East Beckton, Forest Gate and Green Street/Upton Park are defined as District Centres. Stratford was previously defined in the London Plan as a Major centre, however, has since been re-classified to become a Metropolitan centre. Table A2.2 of the London Plan identifies further potential for it to become an International centre over the plan period. The definitions are set out in Annex 2 of the London Plan:



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- **Metropolitan Centres** – serve wide catchments which can extend over several boroughs and into parts of the wider South East region. Typically they contain at least 100,000 sq m of retail, leisure and service floorspace with a significant proportion of high-order comparison goods relative to convenience goods. These centres generally have very good accessibility and significant employment, service and leisure functions.
  - **Major Centres** – typically found in inner and some parts of outer London with a borough-wide catchment. They generally contain over 50,000 sq m of retail, leisure and service floorspace with a relatively high proportion of comparison goods relative to convenience goods. They may also have significant employment, leisure, service and civic functions.
  - **District Centres** – distributed more widely than the Metropolitan and Major centres, providing convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000–50,000 sq m of retail, leisure and service floorspace. Some District centres have developed specialist shopping functions.

2.15 The London Plan sets out the long term trend of an ever diversifying London population. Black, Asian and other minority ethnic communities are expected to grow strongly as a result of natural growth and continued migration from overseas. By 2036, an additional twelve London boroughs are likely to have a majority of their population from these groups, with ten additional boroughs joining Brent and Newham which have had such majorities since 2001.

2.16 As evidenced in the London Plan, deprivation tends to be geographically concentrated. Looking at the factors that are brought together in the Government's Index of Multiple Deprivation (which covers aspects like employment, housing, health, education and access to services), it is clear that there are particular concentrations of disadvantage, especially in inner north-east London, running eastwards to Newham. This suggests the importance of geographically targeted approaches to development and regeneration, focussing investment and action on places with the highest need.

2.17 The Mayor's strategy remains to plan for continued growth. The London Plan confirms that any other course would either require fundamental changes in policy at national level or could lead to London being unprepared for growth. Consistent with this regional policy framework, Newham must encourage growth, but manage it in ways that help improve the quality of life and opportunities for both existing and new residents.

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- 2.18 Policy 2.15 seeks to co-ordinate development within the network of town centres to ensure that they provide the main foci for commercial development; the structure for sustaining and improving a competitive choice of goods and services which are conveniently accessible; and the main foci for Londoners' sense of place and local identity. The policy states that any identified deficiencies in the network of town centres can be addressed by promoting centres to function at a higher level in the hierarchy or by designating new centres where necessary, giving particular priority to areas with particular needs for regeneration and better access to services, facilities and employment.
- 2.19 In terms of retail and town centre development and related planning decisions, Policy 4.7 states that the scale of retail and leisure development should be related to the size, role and function of a town centre and its catchment; that retail and leisure development should be focused on town centre sites, or if no in-centre sites are available, on sites on the edges of centres that are, or can be, well integrated with the existing centre and public transport; and proposals for new 'edge' or 'out of centre' development will be subject to an assessment of impact.
- 2.20 Policy 4.8 supports a successful, diverse and competitive retail sector which promotes sustainable access to the goods and services that Londoners need. A proactive approach to planning decisions for retailing should bring forward capacity for additional comparison goods retailing, and support convenience retail, particularly District, Neighbourhood and more local centres.
- 2.21 In considering proposals for large retail developments, the Mayor will, and Boroughs should, consider imposing conditions or seeking contributions through planning obligations where appropriate, feasible and viable, to provide or support affordable shop units suitable for small or independent retailers and service outlets and/ or to strengthen and promote the retail offer, attractiveness and competitiveness of centres (Policy 4.9, Small Shops).
- 2.22 The Lower Lea Valley (including Stratford) is identified as one of twelve 'Opportunity Areas' in East London. These are the capital's major reservoir of brownfield land with significant capacity to accommodate new housing, commercial and other development linked to existing or potential improvements to public transport accessibility. Typically they can accommodate at least 5,000 jobs or 2,500 new homes or a combination of the two, along with other supporting facilities and infrastructure.
- 2.23 Currently, the Lower Lea Valley is the most important single strategic regeneration initiative for London, and an urban renewal challenge of global significance securing the
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legacy of the 2012 Olympic and Paralympic Games. A new Metropolitan centre will be focused on Stratford town centre and a mix of employment, housing and open spaces across the Lower Lea Valley. The area will contain a significant new residential community providing at least 32,000 new homes and potentially up to 40,000, and there is estimated capacity for up to 50,000 new jobs including over 30,000 predominantly office jobs at Stratford City.

- 2.24 The Royal Docks and Beckton Waterfront is identified as another 'Opportunity Area' in East London. The policy framework states that the regeneration of Silvertown Quays, Royal Albert Dock and Royal Albert Basin will build upon innovative and iconic developments such as the Siemens Crystal and the Emirates Air Line cable car, and confirms that the Enterprise Zone will support its role as a business destination with capacity for at least 6,000 jobs.
- 2.25 The London Plan confirms that the potential for a new 'floating village' within the Opportunity Area should be explored as part of the Royals' potential to accommodate at least 11,000 new homes. Key issues to be addressed across the Opportunity Area include maximising the benefits of the Crossrail station at Custom House, future growth of London City Airport, capitalising on the success of ExCel and its potential as a focus for further visitor/business related growth, and improving connections to London Riverside. Thameside East, West and Beckton Waterfront are also identified as key locations for river-related industries.

## Core Strategy, Adopted 2012

- 2.26 In order to ensure Newham has the same social and economic chances as their neighbours across the rest of the city, the Core Strategy aims to achieve convergence on income and employment (para.3.17). The means to do this is not only getting more people ready to work, but also by increasing the demand for labour, and the range of employment opportunities through attracting new investment and supporting existing businesses to grow (para.3.17).
- 2.27 Paragraph 3.19 confirms that Newham is in an ideal position to maximise the opportunities for economic development; it is able to provide London with a large supply of brownfield development land over the plan period to 2027 to help meet its targets for new housing and economic growth. This is concentrated mainly in the 'Arc of Opportunity' stretching from Stratford and the Olympic Park, down the Lower Lea Valley and east through the Royal Docks to Beckton, where changes in the economy mean there is a large supply of employment land, some of which can be justifiably released for alternative uses (para 3.19).

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- 2.28 Major new residential, leisure, retail and modern business developments are planned and underway. The Arc has benefited from decades of public investment in land assembly, remediation, and infrastructure development, shifting industry to modern estates particularly at Beckton, signifying that the area is on the cusp of transformation. Excellent, and ever-improving transport connections, including five new Crossrail stations, high speed rail, light rapid transit, an airport and new river crossings mean it is well positioned as part of the wider London, south-east and European economic hubs (para 3.20).
- 2.29 The 2012 Olympic and Paralympic Games are further key catalysts, with 60% of the Olympic site falling within Newham. The resultant scale and range of investment interest and opportunity, encompassing the development of the Olympic Park, Stratford Metropolitan Centre and Royal Dock – including some 124 hectares of development land, and approximately 30 kilometres of waterside frontage – is unique in London.
- 2.30 In the north-west of the borough, the Westfield Development at Stratford City opened in 2011, creating Europe’s largest new area of retail floorspace, with the Queen Elizabeth Olympic Park and sporting venues bringing new visitors to the area who can also enjoy and contribute to the regeneration of the old town as the civic and cultural heart of Stratford. These developments, together with new A Grade office, technological, cultural and educational investment over the next 15 years will see the creation of a new coherent Metropolitan centre in East London, which will support thousands of jobs, yielding one of the best connected locations in Greater London. This will also mean that Stratford Station will have the highest volume of passenger traffic in London after Waterloo.
- 2.31 Likewise, the Royal Docks is well-placed to become an area of national economic importance in new economic sectors. The aim is to redefine the Royal Docks as a place with its own centre of gravity and identity, with clusters of activity blending educational centres of excellence, hi-technology and first class office accommodation, and the global market place of ExCel and London City Airport, linked into the City and Canary Wharf, and Stratford Metropolitan. In doing so it is well-placed to become an area of national importance in new economic sectors.
- 2.32 The cable car link to the O2 centre on the Greenwich Peninsula, and potential for other river crossings will open the Royal Docks and riverside to the wider area for new and existing residents and visitors. This complements the additional significant infrastructure, retail, leisure and housing investment at Canning Town and Custom House, which will bring a new Crossrail station to the area, and transform the neighbourhoods and town centre.
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2.33 The strategy for Newham's development, in spatial terms, remains to maximise the development potential of the Arc, securing the highest quality development in ways that drive improvements to Urban Newham and the integration of new development with those existing communities (para.4.1). The focus is the creation of vibrant, accessible and focussed multi-functional Town and Local Centres at the core of stable, mixed and balanced communities. The strategic vision can be summarised as follows:

- Most growth will be focused across the urbanising 'Arc of Opportunity';
- Stratford to the north will be a thriving, varied yet integrated Metropolitan Centre;
- High quality accessible parkland extending from the Olympic Park down the Lower Lea Valley connecting with the Docks and Thameside areas;
- New Local Centres at West Ham, Silvertown and in other well-located gaps in the network;
- Canning Town to elevate to a borough-wide role, diversifying and expanding in terms of increased retail, improved public realm and re-orientating the town centre to the south;
- Existing Urban Newham will see less change, though it will have been managed to best effect. This will have reinforced existing places such as Green Street, East Ham and Forest Gate town centres;
- Localised interpretations reflect a civic focus at East Ham; the London-wide and local specialist ethnic draw of Green Street; Maryland as the gateway to Metropolitan Stratford, and the urban village orientation at Forest Gate and Manor Park;
- Selective re-modelling in the south, a new local centre centred on Plaistow station, and a consolidated district centre at East Beckton.

### ***Core Strategy Spatial Policies***

2.34 Spatial Policy S2 identifies approximately 19,700 new additional homes in Stratford and West Ham. Investment and development will create at Stratford a Metropolitan Centre, whilst employment and residential growth will be supported by the creation of new Local Centres at West Ham and Plaistow near the stations, and the designation of a new Local Centre around Maryland Crossrail station.

2.35 Spatial Policy S3 focuses on the Royal Docks area, supporting the delivery of 9,160 new homes, a new Local Centre at West Silvertown (focused around North Woolwich Road), the improvement of North Woolwich local centre to include new residential and retail uses, and a package of riverside crossings. The objective is consolidated interconnected neighbourhoods at West Silvertown, North Woolwich, Royal Victoria Dock and Albert

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- Basin, through to Custom House/Freemasons local centre, and Canning Town, East Beckton and Woolwich Town Centres. The Custom House Crossrail Station will open by 2018.
- 2.36 Spatial Policy S4 focuses on Canning Town and Custom House, supporting the delivery of 7,950 new homes. Abbey Arms, Freemasons Road and (a newly created) West Ham will be key Local Centres, with Site S11 (Parcelforce) contributing to the creation of this local centre in the station vicinity. Local shopping at Cundy Road will be protected, whilst major strategic retail growth will be focused on Canning Town including a major new anchor foodstore and significant comparison goods floorspace (up to 25,000 sq m net).
- 2.37 Spatial Policy S5 focuses on Beckton, supporting the delivery of 1,600 new homes of a variety of sizes and tenures, and a new local centre will be created next to Gallions Reach station. The East Beckton District Centre will be consolidated with a renewal of the convenience offer and better linkages between the precinct and other shops and services in the area. In Gallions Reach, the retail park will evolve over the plan period to become more like a town centre, in the mix of shops and services provided and variety of unit sizes.
- 2.38 Spatial Policy S6 focuses on Urban Newham, supporting the delivery of 3,000 new homes, around half of which will come forward on identified Strategic Sites. The policy focuses on key Urban Newham Town Centres:
- Forest Gate will become an attractive and vibrant centre, with cafes, community and cultural facilities and independent shops together with a small to medium-sized foodstore to add to the mix and quality of offer. Forest Gate will benefit from the spread of Crossrail regeneration;
  - Manor Park will see most change around the new Crossrail station which will gradually redefine and reinvigorate Manor Park local centre;
  - 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 be seen to provide a better quality and mix of offer during the day and into the evening;
  - 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;
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- Plaistow will gain a new focus through the development of a local centre around the station.

## Summary

- The National Planning Policy Framework (NPPF) was adopted in March 2012 and replaces the suite of national Planning Policy Statements, including PPS4. The NPPF maintains the general thrust of PPS4 and advocates a 'town centres first' approach. It requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period.
- Stratford was previously defined in the London Plan as a Major Centre, but has since been re-classified as a Metropolitan Centre following the opening of Stratford City. East Ham is a defined Major Centre, whilst Canning Town, East Beckton, Forest Gate and Green Street are defined District Centres in the London Plan. The Mayor's strategy remains to plan for continued growth. The Lower Lea Valley and Royal Docks/Beckton Waterfront are defined 'Opportunity Areas' able to support the majority of new jobs and homes across Newham.
- The Core Strategy identifies the large supply of brownfield land across the 'Arc of Opportunity', where major new residential, leisure, retail and modern business developments are complete, planned or underway. The strategy for Newham's development, in spatial terms, remains to maximise the development potential of the Arc, securing the highest quality development in ways that drive improvements to Urban Newham and the integration of new development with those existing communities.
- Core Strategy Spatial Policies focus development at Stratford/West Ham, Royal Docks, Canning Town/Custom House, and Beckton, identifying the location of major strategic retail growth, new local/district centres, and the consolidation of Beckton. Spatial Policies also formulates a strategy for growth and identity across the town centres in Urban Newham, including Forest Gate, Manor Park, East Ham, Green Street, and Plaistow.

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## 3. Market Trends

3.1 At the time of the 2010 Retail Study, the retail sector was experiencing considerable challenges as a consequence of the extremely rapid deterioration in the national economy during the final months of 2008. Much has changed during and since this period of economic instability and recession, and this section considers these economic fluctuations in more detail, identifying implications for retail and town centre growth and/or change across Newham. This section is crucial in ensuring that the conclusions and recommendations (set out in Section 6) are embedded in the ability to deliver.

### Economic Upswing

3.2 Analysis published by Experian (Retail Planner 2015) identified that following several years of subdued performance, including a period of recession; a 'strong economic upswing' took place in early 2013, driven by increases in consumer spending and business investment. Experian expect the UK economic upswing to continue, although at a slower pace than seen during 2014. In the short-to-medium term, Experian expect progress to be 'restrained' due to government finances remaining under pressure, and weaker exports to the Eurozone.

3.3 Experian also point to the fact whilst retail sales have prospered between 2013 and 2015 due to the 'exceptional buoyancy' of consumer spending (because of low inflation and stronger earnings growth), this buoyancy is only true in terms of volumes of sales. Experian state that the value of goods has 'been depressed by heavy discounting and persistent deflation of goods prices'. This has been particularly noticeable in the convenience (food) goods sector.

3.4 There has therefore been a return in confidence to consumer spending since 2013, which offers potential for strongly-performing town centres to capitalise on, although this is tempered to some extent by other changes in the retail sector which we discuss below.

### Changing Retailer Space Requirements

3.5 During the recession retailers' margins were squeezed, whilst other costs have continued to rise and a raft of multiple and independent retailers have either collapsed or significantly shrunk their store portfolios. The growth of the internet means that retailers no longer need to have representation in every town to achieve national coverage, and many are therefore focusing their development programmes on the provision of large



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flagship stores in strategic locations, supported by smaller satellite stores and transactional websites.

- 3.6 The larger flagships accommodate full product ranges whilst smaller stores offer more select ranges, supplemented by internet kiosks allowing access to the full range. This offers many advantages to retailers including lower property costs, more efficient logistics and being able to open stores where there is a high level of demand despite there being space restrictions. This 'polarisation' of retailing is enabling larger dominant centres – like Stratford and London West End – to continue to attract key flagship formats, but does not rule out smaller, medium sized centres – like East Ham – from offering the more limited floorspace formats being sought.

### Internet Growth & Multichannel Retailing

- 3.7 Published data sources suggest that the online shopping population, i.e. those who partake in internet shopping, is reaching saturation. Published analysis instead concludes that the continued growth in internet consumer spend will be derived from those people spending a high proportion of their expenditure on-line, driven by new technology, a better 'browsing' experience and improved delivery options. The growth in online sales has previously raised concerns about the continued need for bricks and mortar stores; however trends indicate that the more varied means and process of undertaking internet shopping is switching attention back to town centres; the most current example being 'Click and Collect'.
- 3.8 The 'Click and Collect' market is the largest on-line growth sector in the UK at the current time. It is forecast to be one of the most significant drivers of growth, with expenditure set to grow by 82% between 2014 and 2019 to £6.5bn (Verdict 2014). Verdict research analysts comment that 'the importance of click & collect should not be underestimated. Maintaining a store network that can offer locality, whilst also having highly informative websites to drive growth, is now a fundamental requirement'. It can be used as an important tool in helping town centres to continue to have an important role and function, by being a footfall generator in its own right.
- 3.9 Click and Collect is an important tool in generating town centre visitation rates, with statistics suggesting the substantial opportunity for linked trips and additional expenditure in that store and/or other town centre shops during the 'collect' part of the process. Key retailers offering the service include, for example, John Lewis/Waitrose, Argos, Marks & Spencer, Dorothy Perkins, and Monsoon, for example. It can be used as an important tool in helping town centres to continue to have an important role and function, by being a footfall generator in its own right.
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- 3.10 It is apparent that, despite being a relatively new concept for the retail sector to embrace, click & collect is affirming that physical stores will continue to have a role in the multichannel shopping environment. The advantages of physical stores, in terms of the shopping experience, service and immediacy of products in a showroom setting, will ensure that a network of key stores remains a fundamental component of retailer's strategies to provide an integrated multichannel retail proposition. Importantly for the Newham centres, the Click and Collect phenomenon will drive an occupier desire to have a representation of physical store units across town centres.

## The Role of the Town Centre

- 3.11 The town centre has been the main shopping channel for centuries, but in the face of new forms of E-Tailing competition many will need to continue to adapt in order to remain viable shopping destinations. Many centres will be used increasingly for leisure and social activities as well as traditional retailing, with more bars, restaurants, food outlets and community spaces.
- 3.12 Enhancing the non-retail offer so towns function as more than just retail locations will help drive footfall and increase dwell time. Towns should promote unique attractions such as heritage assets, historic buildings, points of differentiation and cultural features which can differentiate a centre and improve its attractiveness.
- 3.13 To ensure that town centres have a viable function moving forwards they must provide an attractive shopping and leisure experience which the internet is unable to match. A wider strategy must deliver a mix of town centre uses to enhance the attraction of a centre, and increase frequency of visit and dwell time. A vital component of this will be making town centres as accessible as possible, with improved and affordable car parking, as well as investment in public realm and place marketing initiatives.

## Convenience Goods/Foodstores

- 3.14 The main foodstores ('big four' - Sainsbury's, Tesco, Asda, Morrisons) have reined-in substantial expansion and the roll-out of super-sized stores. The combined spread of convenience store openings, online grocery sales, and the expansion of discount retailers such as Aldi and Lidl – i.e. those selling products at prices lower than the typical market value – has fundamentally changed consumer shopping behaviour. These trends have encouraged repetitive top-up shopping that in turn diminishes main grocery sales and renders large-format stores less profitable.

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- 3.15 The 'big four' have historically had a combined market share of over 75% of the convenience goods market, although in recent years their dominant market position is being increasingly challenged by discount retailers such as Lidl and Aldi and also the continued growth in convenience retailers offering a more upscale product offer such as Waitrose. The discount retailers are, in particular, in the midst of a period of rapid expansion, having gained considerable market share during the recession, and we would expect them to be seeking additional representation across Newham.

## Out-of-Centre Retailing

- 3.16 Retailers are opting to develop stores in the most strategic and cost effective locations, with a notable resurgence of out-of-centre destinations, which offer benefits of lower rents, larger retail units and in most cases, free car parking. According to Verdict, out-of-town retailing is the only form of retailing which has seen store numbers increase consistently since 2000. The Department for Business, Innovation and Skills (BIS) reports that the number of out-of-centre stores has increased by up to c.1,800 (25%) since 2000; whilst the number of town centre stores fell by almost 15,000 between 2000 and 2009, the majority of which are likely to have been in 'high street' locations.
- 3.17 The recovery of market confidence is benefitting out-of-town retailing. Vacancy rates have fallen, footfall has increased, and many retailers are seeking expansion in out-of-centre locations. A number of these are traditional town centre retailers which have developed out-of-town store formats, including John Lewis, which now operates a number of 'At Home' stores in out-of-centre locations, as well as other traditionally 'high street'-focussed retailers such as Debenhams, Next, Primark, TK Maxx and H&M.
- 3.18 Another trend is the evolution of traditional retail 'box' warehouse developments into retail parks, sub-dividing units, expanding the product offer, and developing beyond just retail to introduce food and beverage, encouraging longer dwell times. Retail park owners are also refurbishing their retail parks; i.e. public realm, walkways, car parks, signage, landscaping and seating to enhance the visitor experience. We may see this trend emerging in Newham, particularly in the Beckton area, the focus of retail warehousing in the borough.

## Commercial Leisure

- 3.19 As the nature of retail and high-street shopping continues to change over time, the commercial leisure sector is becoming an increasingly important contributor to the vitality and viability of town centres. Leisure time is a precious commodity to consumers

and in order to maximise free time, research suggests that town centre visitors often combine leisure activities as part of an overall going out experience.

- 3.20 Reflecting this trend, leisure is becoming an increasingly important component in town centre regeneration schemes, particularly in secondary towns which, reflecting the wider trends in the retail sector previously identified, are in some cases becoming less attractive as retail destinations.
- 3.21 The recession brought mixed fortunes for the restaurant sector. The main casualties were from the more exclusive end of the market, as well as smaller companies with less established brands. Many companies owning multiple brands expanded throughout the economic downturn and continue to trade well, often by offering heavy promotions and discounts. Family dining restaurants such as Pizza Express and TGI Fridays are increasingly anchoring leisure-focussed (often cinema-led redevelopment schemes), and also increasing representation in other strong trading destinations such as major retail parks.
- 3.22 The coffee shop sector remains buoyant; there are now approximately 16,500 coffee shops across the country. Recent analysis shows that the UK's coffee shop sector remains one of the most successful in the nation's economy and will continue to expand.
- 3.23 The pub industry suffered during the recession with a record number of pub closures across the UK as a direct consequence of a decline in both drinks sales and rental revenues. This decline continues today, at a rate of approximately 30 pub closures per week across the country. Many pubs have in recent years been converted to small-format convenience stores. Additional factors such as competition from supermarkets, changes to licensing legislation and the smoking ban have further compounded the problems faced by many operators. Similar to the foodstores, however, value led brands such as JD Wetherspoon have achieved sales growth in recent years and continue to expand.
- 3.24 The Health and Fitness sector continues to perform strongly as the social trend involving the maintenance of personal health and fitness shows no sign of abating. The health and fitness market is currently being expanded through investment by value and budget operators such as Easy Gym, Gymbox and Pure Gym. This new breed of venues aims to appeal to a wider market with flexible, low cost monthly or 'pay as you go' subscriptions. These facilities are usually located in high-footfall, in or edge of centre locations, often as part of a wider leisure offer.
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## Summary

- The 'traditional' high street continues to face a number of challenges stemming from the impacts of the most recent economic downturn, the tightening of retail spending in recent years, and continued significant changes in consumer shopping behaviour. The growth in online shopping, including multi-channel retailing, acts as tough competition for the high street, but also presents an opportunity for the high street to capitalise, by maximising the opportunities arising from services like 'click & collect', and retailers moving towards a seamless transition between store-based and virtual shopping experiences.
- Out-of-centre retailing remains an ever-present source of competition, and market evidence suggests that many retail parks have performed well during the economic downturn, and are becoming increasingly attractive to 'high street' retailers. Portfolio aspiration is generally to increase footfall through a greater product offer and mix of uses to encourage footfall and longer dwell times.
- Town centre strategies which support the continued evolution of the high street are therefore considered ever more vital. This may involve providing a high quality shopping 'experience', maximising the benefits of tourist trade, and improving the mix of retail and non-retail outlets to increase length of stay and spend.
- It will be important for town centres to be well positioned to be able to adapt to on-going changes in the retail and leisure sector over the development plan period and to reaffirm their unique selling points which differentiate their retail offer from other centres, allowing them to differentiate themselves from – rather than directly compete with – higher order centres. Heritage, tourism and visitor assets and other 'unique selling points' should be capitalised on, and robust place marketing strategies put in place.

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## 4. Retail and Town Centre Change

- 4.1 The 2010 Study considered both retailing and town centres within the borough and the wider sub-region, identifying a number of major strategic developments that would likely influence the Newham centres and therefore also the conclusions and recommendations presented. This section reviews this analysis, first providing updates on major strategic proposals and developments within and outside Newham; and second, sets out the findings of more localised town centre health checks of Stratford, East Ham, Canning Town, Forest Gate, Beckton and Green Street.
- 4.2 This section clearly identifies key changes that have occurred and are being planned both at the sub-regional and more local level. The outputs will inform our conclusions in respect of how the Newham centres have fared as a consequence of change that has taken place, and highlight those emerging schemes that should be monitored moving forwards.

### Major Competing Retail Developments and Proposals

#### *Wood Wharf (London Borough of Tower Hamlets)*

- 4.3 Wood Wharf, located in the London Borough of Tower Hamlets received outline planning permission in 2008 for approximately 1,600 residential units and 450,000 sq m mixed use floorspace, including 11,460 sq m of retail and restaurant floorspace. This has now been superseded.
- 4.4 In December 2014, outline planning permission was granted for a new comprehensive, mixed use redevelopment of the site. The retail element of the proposed scheme will comprise up to 35,000 sq m gross retail floorspace, including up to 14,000 sq m gross A1 comparison goods floorspace. The London Plan (2015) identifies Canary Wharf as a centre that has the potential to uplift from a Major town centre to a Metropolitan town centre. The potential for further growth, in addition to Wood Wharf, should be monitored moving forwards.

#### *Tesco, Bromley-by-Bow (London Borough of Tower Hamlets)*

- 4.5 At the time of the 2010 study, Tesco were proposing to redevelop their existing store on Hancock Road as part of a wider mixed-use scheme. The outline proposals included a new c.11,000 sq m gross Tesco Extra, 18 local retail units, 400 residential units, a hotel, primary school and associated community uses. These proposals have now been

withdrawn, and a new development framework is currently being evolved with a land owner consortium. Development proposals should be monitored.

### *Unity Square, Ilford (London Borough of Redbridge)*

- 4.6 With no change since the 2010, Ilford town centre continues to be flagged as a major redevelopment opportunity in anticipation of Crossrail's arrival. Redbridge Council has recently announced a raft of new plans to generate £1 billion worth of investment over the next six years to trigger this, however, no material masterplans or potential schemes have been drafted yet. Scheme proposals should continue to be monitored.

### *Lakeside Shopping Centre (Thurrock Council)*

- 4.7 Lakeside has received outline planning permission for a new leisure destination, delivering new cafes, restaurants and leisure uses around the existing Vue cinema as well as family entertainment venues, bars and health and fitness facilities, focused around a new public square. In respect of the retail offer, an application for an extension comprising 40,700 sq m of additional A1-A5 floorspace was approved in March 2013. The extension will increase the size of Lakeside by nearly a third and will incorporate up to 40 new stores. Development has not yet commenced.

## **Major Strategic Change: Newham**

- 4.8 Strategic development and change has taken place in Newham since completion of the 2010 Study. This section provides an update, setting out the major retail, mixed-use and transport infrastructure improvements that have occurred which have strategic implications on future growth and change in the borough.

### *Westfield Stratford City*

- 4.9 Westfield Stratford City opened in September 2011. Located adjacent to Stratford Town Centre and the Queen Elizabeth Olympic Park it comprises approximately 175,000 sq m gross A1/A2/A3 retail and leisure floorspace, 3 hotels and c.100,000 sq m of office floorspace, as well as new homes and further office space which will be delivered in future phases. Westfield is currently Europe's largest urban shopping and leisure destination, anchored by John Lewis, Waitrose, Marks & Spencer and a multi-screen Vue cinema.
- 4.10 It encompasses over 250 shops, 70 bars and is anchored by John Lewis, Marks and Spencer, Waitrose, Vue Cinema in addition to All Star Lanes bowling, Gymbox and Aspers Casino. Bilfinger GVA undertook a site survey in 2015 which identified a negligible
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vacancy rate, and annual customer visits last year totalled 42,600,000, demonstrating the magnitude of its success since opening in 2011.

- 4.11 In June 2015 Westfield announced that plans were being prepared for a major extension to comprise new homes, a public park, commercial floorspace and c.9,300 sq m of retail floorspace. The existing transport offer will be substantially improved from 2018/19 following the opening of Crossrail.

### *Silvertown Quays*

- 4.12 In 2005, outline planning permission was granted at the Silvertown Quays site which included up to 5,000 residential units, leisure floorspace, c.5,000 sqm of A3 retail floorspace and c.3,500 sqm new retail development (A1). This application was never implemented, however, a new scheme has recently been approved.
- 4.13 In April 2015, a resolution to grant planning permission for a new outline application (Ref: 14/01605/OUT) (subject to S106 and call in procedures) was secured. The 'International Brand Concept' includes 179,000 sq m B1 office, up to 3,000 homes, 44,500 sq m A1 brand-related retail, 20,400 sq m A3-A5 floorspace and up to 10,000 sq m local retail (A1-A5), as well as additional community and educational floorspace. It is envisaged that, once complete, the 62-acre site will attract approximately 13 million visitors a year from across the UK and abroad, and it is estimated that the first phase will be complete by 2018 in time for the new Crossrail connections.

### *ABP Land North of Royal Albert Dock E16*

- 4.14 In December 2015, planning permission was granted (14/00618/OUT) for the phased, comprehensive, re-development of Royal Albert Dock North, to include up to 437,185 sq m (GEA) of floorspace (offices, retail and residential uses). The site is located off Royal Albert Way, Millman Road and Dockside Road and the scheme will include 15,406 sq m GEA (A1/2/3/4/5 D1/2). Planning officers concluded that development of this scale of retail floorspace was not compliant with policy in this location, but that the London Plan and Core Strategy promoted successful place-making.
- 4.15 Officers accepted that rather than being a destination in its own right, the proposed retail floorspace is likely to incorporate the types of retail that will be essential for the everyday needs of the residents and workers within the development. Unit size is limited to a maximum of 500 sq m. The proposed retail and leisure floorspace was concluded to provide easy access to shops, bars, restaurants, leisure and community facilities for the emerging population on site.



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### *Canning Town/Custom House*

- 4.16 Canning Town has been subject to significant change since the previous retail study, and further phases of planned regeneration are yet to be implemented. The Canning Town/Custom House SPD (2008) remains relevant as it explains the Borough's vision for each development site which any new development will need to follow and comply with. Since the previous study, the first phase of the 'Hallsville Quarter' town centre development opposite Canning Town Station has been completed which comprises 179 new homes and a 7,600 sq m Supermarket.
- 4.17 Previous reports identified Morrisons as the named operator, but there has been no recent confirmation of this. A strong foodstore anchor would be the preferred option to ensure critical mass and positive impact that the development aspires to in retail/town centre terms.
- 4.18 It is estimated that the whole scheme will be completed by 2024 which will also include 340 more homes, a hotel, c.30,000 sqm retail floorspace, 3,000sqm restaurants and enhanced public realm. The Rathbone Market area has also undergone substantial change with the intention of creating a new commercial district, new housing and a refreshed High Street for Canning Town. So far, a number of new homes, office space and community facilities have been built, as well as c.3,000 sq m of retail floorspace.

### *Manor Road Park*

- 4.19 An application is currently pending at Manor Road Retail Park, Canning Town for the redevelopment/demolition of existing retail warehouse units and the erection of five class A1 retail units (comparison and bulky goods) with associated works (Ref: 12/01754/FUL). The existing three adjoining warehouse units currently have a total GIA of 6,504 sqm comparison retail floorspace. The application proposals are for five non-food comparison retail units totalling 9,035 sqm GIA floorspace – a net increase of 2,531 sqm of GIA comparison goods floorspace. It is currently unknown who the prospective occupants of the retail units are, should the application be permitted.

### *Major Infrastructure and DLR*

- 4.20 Crossrail, a new high frequency and high capacity railway for London and the greater South East is expected to be operational by 2019. Five Crossrail stations are planned within Newham including Stratford, Maryland, Forest Gate, Manor Park and Custom House. Services will connect Newham's Crossrail stations with Shenfield in Essex to the

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east, Central London, Reading to the west, as well as Heathrow Airport which will significantly improve transport choices.

- 4.21 In 2011 an extension to the Docklands Light Railway (DLR) opened between Stratford International, Stratford and Canning Town, with four stations inbetween (Stratford High Street, Abbey Road, West Ham and Star Lane). The new extension provides connecting services with Bank, the Excel centre and London City Airport.

## Stratford

- 4.22 The Town Centre and Retail Study, March 2010, drew the following qualitative conclusions in respect of Stratford Town Centre:

*Stratford has a good representation of low to mid market comparison goods retailers throughout the Stratford shopping centre, however it is clear that the main purpose for visiting Stratford is for food shopping (60%). The key anchors are the Morrisons and Sainsbury's foodstores although the Morrisons is located some distance from the heart of the shopping area and Sainsbury's is old, small and sub-standard.*

*The importance of smaller, independent food retailers and the market in Stratford is evident from the results of the 2009 survey although we conclude that the general convenience goods provision (in terms of number of units) is below national average levels and there is room for a qualitative improvement to foodstore provision in Stratford town centre. Stratford also performs a strong role for non-food independent retailers and ethnic food and non-food retailers demonstrating its importance as one of two higher order centres in the Borough at the current time but also its role meeting the needs of local residents for both food and non-food and ethnic goods.*

*Our assessment also highlights the excellent accessibility of Stratford with the highest PTAL rating available (6B) as well as the overall general health of the centre with the number of vacant units below national average and evidence that prime retail rents have increased year on year and commercial yields have fallen considerably until the recent widespread economic downturn, which, in any event, is consistent with national trends. The cultural quarter performs a key addition to the overall town centre offer with a cinema, theatre, performing arts centre and bars/restaurants although whilst it is established it remains relatively small with no significant pull for those living further afield (aside from the cinema).*

*Overall, the comparison and convenience role of the town centre is adequate although the number and mix of units does not compare favourably with the national average. The number of service businesses is significantly higher than the national average which may eventually undermine the centres retail function. Stratford is set to experience significant change following the opening of Stratford City which is an overriding benefit for the Borough. Stratford City will finally provide retail units of the size required by modern multiple retailers which are not available elsewhere in the Borough at the current time; a drawback that has prevented the higher order centres from attracting key anchors in the past.*

*The key issue moving forwards is the importance of linkages and integration between Stratford City and the existing town centre and the importance of a complementary role for Stratford town centre as set out in the GVA Grimley 'Stratford Town Centre: The Future' study (2008). The underlying objective is to ensure the local catchment population retain their local shopping offer."*

## Stratford: Town Centre Change Since 2010

- 4.23 This study provides an up to date analysis of the health of Stratford town centre, drawing on desk based research and detailed on site surveys (2015). Our analysis focuses on the role and function of the 'historic' town centre (i.e. not including Westfield Stratford City), and in broad terms, we found the centre to be performing well with a complementary offer to Westfield Stratford City.
- 4.24 Tables 4.1 and 4.2 below compare the town centre composition by number of units since 2010. Since the last study was conducted, the number of convenience retailers has increased from 13 to 15 broadly in line with the national average; the number of comparison retailers has fallen from 60 to 51, and is below the national average; and the number of service retailers has decreased from 110 to 105, remaining substantially higher than the national average.

**Table 4.1: Stratford Town Centre Composition of Units – 2010 study**

Retail Category	% of Total	UK Average (%)	Variance (%)
Convenience	6.60%	8.83%	-2.23
Comparison	30.46%	34.10%	-3.64
Service	55.84%	45.81%	10.03
Vacant	7.11%	11.10%	-3.99
<b>Total</b>	<b>100</b>	<b>100</b>	<b>-</b>

**Table 4.2: Stratford Town Centre Composition of Units – 2016 study**

Retail Category	% of Total	UK Average (%)	Variance (%)
Convenience	8.06%	8.47%	-0.41
Comparison	27.42%	32.38%	-4.96
Service	56.45%	47.51%	8.94
Vacant	8.06%	11.32%	-3.26
<b>Total</b>	<b>100</b>	<b>100</b>	<b>-</b>

- 4.25 The proportion of vacant units has increased since the 2010 study, although remains comfortably below the national average. GVA undertook a site survey in 2015 which enabled the Experian Goad data to be updated. The survey highlighted that the number of vacant retail units had increased from 14 to 15, and identified that there is currently no significant clustering of vacant units pointing to particular problem areas. The previous vacant units that have been re-occupied are illustrated in Table 4.3 below.

*Table 4.3: Re-occupied units in Stratford since 2010*

Retail Fascia	Address	Retail Category
The Westbridge Hotel and The Westbridge Coffee Shop		Service
Dar Marrakech African Restaurant	403 High Street	Service
Office	413 The Broadway	
Super Best Kebab House Takeaway	21 The Broadway	Service
Stratford Best Café	23 The Broadway	Service
Office	37 The Broadway	
Argos Catalogue Showroom	58 The Broadway	Comparison

- 4.26 In terms of quality of operator and mix of uses, there remains reasonable representation from multiple retailers. Of the 92 multiple retailers trading in the centre, 40% are occupied by comparison goods retailers, including Dorothy Perkins, New Look, Carphone Warehouse, Clarks, O2, Superdrug and Phones 4U.
- 4.27 The previous study identified the comparison goods retail offer to be orientated towards lower and mid market comparison goods retailers, and this continues to be the case following the opening of Westfield Stratford City. If anything, the lower/middle order function of Stratford town centre has consolidated, with Westfield Stratford City accounting for the middle/more upmarket comparison goods retail offer. There is a clear complementary role and function for the two destinations, distinguished as almost immediately after the opening of Stratford City.
- 4.28 Stratford town centre continues to offer a range of services including travel agents, banks, fast food operators, cafés, betting shops, estate agents, restaurants and public houses. Convenience retailing in the centre remains primarily dominated by Sainsbury's

and Morrisons, and there does not appear to have been any noticeable investment in either store since the time of our previous study.

- 4.29 Overall, the role of Stratford town centre remains relatively unchanged. The number of comparison retailers has fallen, demonstrating a continued shift towards a dominant, and more local, convenience food and service offer. The 2010 study noted the need for a qualitative improvement to the foodstore offer in Stratford town centre, but this has not taken place with Morrisons and Sainsbury's continuing to trade within the same environment. Stratford continues to perform a strong role for non-food independent retailers and ethnic food and non-food retailers – a function that has consolidated since the opening of Westfield.
- 4.30 Vacancy rates remain particularly low, and whilst the role is focused on food, a strong service offer, and independent non-food and ethnic retailing, the centre is performing a valuable and complementary role to Westfield for the local catchment – an expectation and aspiration set out in previous GVA evidence based documents.

## East Ham

- 4.31 The previous study drew the following qualitative conclusions in respect of East Ham Town Centre:

*“East Ham is the second largest centre in the Borough after Stratford, and the number of national multiples represented is on a par. There is no higher order or department store offer, but East Ham does have a reasonable range of value driven multiple retailers including Primark which has recently been granted planning consent to further extend their store, and which is currently being implemented. The importance of the Primark investment cannot be underestimated and once complete will form the key anchor retailer and significant attractor for the centre. This is a good example of where site assembly has successfully provided one new unit of a scale attractive to a key anchor multiple retailer which will have significant positive effects for the centre; i.e. enabling a popular retailer to add further to footfall in the town centre.*

*The convenience shopping role is strong and the main purpose of visit for over 74% of East Ham shoppers, reflected in the total number of units being above the national average. East Ham is also the strongest centre in the Borough for those undertaking trips to local independent food and non-food retailers – drawing people from across the Borough. In respect of ethnic retailing, East Ham is the second most cited centre after Green Street, again demonstrating the importance of this function to the health and attraction of the town centre.*

*The importance of the localised catchment and the convenience shopping role is evident, with 44% walking to the centre; over 82% visiting at least once a week; and 37% of users liking the centre because it's close to home or work. Nevertheless, the independent and ethnic shop usage analysis demonstrates the extent of a wider catchment area from across the Borough highlighting the importance of this 'differentiated' retail offer. The health check also identified a below average number of vacant units, recent rent rises (prior to the recession), falling yields, a high accessibility PTAL rating, good retailer commitment and aspirations to expand, and*

one or two clear development site opportunities with which to facilitate future enhancement.

Nevertheless, there are some clear weaknesses in the centre. Whilst food shopping appears to be a strong attractor for the centre, including the range of small independent and ethnic retailers as well as the market, the key anchor foodstores are small and outdated and there is a clear qualitative need for improvement to continue to underpin this role in the future. East Ham is the centre most vulnerable to change at Stratford City and it will be increasingly important to facilitate improvement and pro-actively manage change, whilst retaining and enhancing the value driven multiple comparison retailers; the much improved and extended Primark will assist in this objective. Daytime and evening entertainment facilities are particularly weak, crime levels and perceptions are a continuing problem for the centre, the quality of the environment could be improved in places, and a number of businesses have stated that they would consider relocation to Stratford in the future. Starbucks recently left the centre due to poor trading levels, and have confirmed that they are not currently looking for premises in the vicinity at the current time."

### East Ham: Town Centre Change Since 2010

- 4.32 An update on the current 'health' of East Ham District Centre has been informed by desk-based research and a detailed on-site survey carried out in 2015. Tables 4.4 and 4.5 below illustrate how East Ham's town centre composition has changed since the 2010 study.
- 4.33 The tables demonstrate that there have been very minor fluctuations to East Ham's town centre composition between 2010 and now. The biggest change since 2010 is the decrease in proportion of comparison goods operators within the centre which has now fallen below the UK national average. East Ham's proportion of leisure services is now more in line with the national average, however, the majority of this category comprises betting offices (4% of the centre's total) and fast food takeaways (9% of the centre's total). The vacancy rate has remained low.

**Table 4.4: East Ham Composition of Units – 2010 Study**

Retail Category	% of Total	UK Average (%)	Variance (%)
Convenience	14.39	8.82	+5.57
Comparison	35.09	34.65	+0.44
Retail Service	13.33	13.05	+0.28
Leisure Service	17.89	21.57	-3.68
Financial Service	14.39	11.21	+3.18
Vacant	4.91	10.53	-5.62
<b>Total</b>	<b>100</b>	<b>100</b>	<b>-</b>

**Table 4.5: East Ham Composition of Units – 2016 Study Update**

Retail Category	% of Total	UK Average (%)	Variance (%)
Convenience	12.96	8.47	+4.49
Comparison	29.9	32.38	-2.48
Retail Service	14.61	14.36	+0.25
Leisure Service	21.59	22.50	-0.91
Financial Service	15.95	10.79	+5.16
Vacant	4.98	11.32	-6.34
<b>Total</b>	<b>100</b>	<b>100</b>	<b>-</b>

- 4.34 GVA's on-site survey carried out in 2015 also recorded key retailers that have either ceased operating or have occupied new units since the previous study. The main multiple retailers who are no longer present within the centre include Somerfields, Woolworths, Peacocks, Pizza Hut restaurant and Burger King although some of these changes are due to retailers entering administration or being acquired by other companies.
- 4.35 The 2010 Study noted that key anchor foodstores are small and outdated and there is a clear qualitative need for improvement to continue to underpin this role in the future. Investigations have identified Somerfield is no longer trading, but Tesco Express have opened a store on Pilgrims Way. Foodstore operators now include Sainsbury's, Lidl, Iceland and Tesco Express, but the quality and offer of convenience goods foodstores remains weak with no substantial qualitative improvement since 2010. Given the apparent fall in comparison operators and the competition at Stratford, East Ham must continue to focus on the local catchment and the importance of everyday services such as the convenience goods offer.
- 4.36 A number of new operators have moved in to the centre, including Sports Direct, Costa, Poundworld and PaddyPower, but the most significant comparison goods change has been the opening of the Primark extension – a key anchor retailer and significant attractor in the centre. The centre continues to have a strong independent food, non-food, and ethnic retail offer, a key role driving a broader catchment area and specialist visits. The 2010 identified that the quality of the environment could be improved in places, and it has been noted from site visits that this remains the case. Consistent with

the 2010 Study, East Ham would benefit from substantial public realm and environmental investment. The quality of the built form in places detracts from the visitor experience.

4.37 Overall, the role and function of East Ham has remained relatively unchanged. The 2010 study highlighted East Ham as the centre most vulnerable to change at Stratford, and the health check identifies a marginal fall in the role of comparison retailing, and the higher than average convenience and service offer. The Council must be pro-active in developing a strategy for East Ham to build on key strengths alongside substantial improvements to the built environment and visitor experience. Two development sites with which to initiate such change were identified in the previous 2010 study and an update on the status of these is provided below.

- Land west of High Street North between Barking Road and Pilgrims Way (East Ham Market Hall, Car Park, Sainsbury's and Tesco Foodstores): The site was previously identified as being suitable for comprehensive retail-led development. No application has been submitted, but we understand that Dransfield Properties is working in partnership with Land Management to develop a new scheme that will comprise a smaller, consolidated market, new town centre foodstore, approximately 120 new apartments and further retail, restaurant and café units.
- The Civic Centre (the former Council offices, East Ham Library and East Ham Leisure Centre): The 2010 study identified the vacant units within the site as being suitable for new alternative uses. Shortly after the publication of the previous study, in May 2010 the Council approved plans to transform the site, and by 2014 a new customer service centre was open, the listed buildings had been refurbished and the leisure centre had also been refurbished.

## Green Street

4.38 The Town Centre and Retail Study, March 2010, drew the following qualitative conclusions in respect of Green Street District Centre:

*"The key message arising from the detailed health check is the overriding strength of the independent food sector and the importance of ethnic food and non-food businesses to the function of the centre. Green Street is the most cited centre in the Borough for these types of goods, and draws visitors from across the Borough as a consequence of the mix and choice of such uses. It is less popular for independent non-food shops, being only the fifth most cited centre although with a similar quotation rate to Canning Town and Forest Gate, but lower than East Ham and Stratford. The predominant role of the centre is for food shopping, with over 80% citing this type of trip as their main purpose for visiting Green Street. The Tesco and Iceland foodstores complement the mix of smaller independent retailers and the market.*



The number of comparison retailers is above the national average, although consistent with its role as a District Centre this generally comprises independent retailers with a strong representation of clothing, footwear, jewellery, watches, silver and accessories, predominantly within the ethnic retail sector. Other indicators demonstrate a strong frequency of visit (77% visiting at least once a week); increasing but still below average vacancy rate; a strong PTAL accessibility rating of 5; and business commitment to the centre with over 80% having traded there for over 10 years. There are also clear signs of future investment and improvement through plans for Queens Market in the south of the centre, and consent for a new shopping mall in the north of the centre (although we understand this will shortly lapse).

There are clear areas for improvement. Green Street has a small selection of national multiple retailers including Peacocks, Superdrug and Boots, which complement the retail offer. The objective should be to retain these and improve the provision if the opportunity arises through site assembly and merging units, for example. The range of retail services is in line with the national average, but this is very much skewed to health and beauty outlets/hairdressers; and the mix of daytime and evening leisure uses that provide an attraction to a diverse mix is particularly limited. Perceptions of crime/safety could be improved, and there is a risk of diluting the focus of the centre through further growth in a north/south direction."

### Green Street: Town Centre Change Since 2010

- 4.39 An update on the current 'health' of Green Street District Centre has been informed by a desk-based study and a detailed on-site survey carried out in 2015. Tables 4.6 and 4.7 below highlight changes that have occurred to Green Street's town centre composition since the previous study.
- 4.40 As the tables identify, Green Street's proportion of convenience services has largely remained the same; Tesco Metro and Iceland continue to trade in the centre. The Tesco Metro supermarket is still performing as the key convenience anchor in the centre, and now also provides a 'click and collect' service. The store also features a bakery, hot-food counter, fishmonger, halal butcher and comprehensive world-foods section.

**Table 4.6: Green Street Composition of Units – 2010 Study**

Retail Category	% of Total	UK Average (%)	Variance (%)
Convenience	15.88	8.82	+7.06
Comparison	45.59	34.39	+11.2
Retail Service	12.06	13.05	-0.99
Leisure Service	9.41	21.55	-12.14
Financial Service	7.35	11.18	-3.82
Vacant	9.71	10.84	-1.14
<b>Total</b>	<b>100</b>	<b>100</b>	<b>-</b>

**Table 4.7: Green Street Composition of Units – 2016 Study Update**

Retail Category	% of Total	UK Average (%)	Variance (%)
Convenience	14.89	8.47	+6.42
Comparison	47.61	32.38	+15.23
Retail Service	11.7	14.36	-2.66
Leisure Service	9.84	22.50	-12.66
Financial Service	8.24	10.79	-2.55
Vacant	7.71	11.32	-3.61
<b>Total</b>	<b>100</b>	<b>100</b>	<b>-</b>

- 4.41 The proportion of comparison goods operators is substantially higher than the national average and, like convenience goods, continues to be driven by ethnic retailers. The health of Green Street is underpinned by its ethnic role overall, performing as a local, national and international shopping destination. This role has been defined and endorsed further following the opening of the new 'East Shopping Centre' in March 2015 on the site of the former bus depot. Heralded as a 'world-renowned Asian shopping destination', the East Shopping Centre comprises 27 individual, two-storey high-spec retail units anchored by a ground floor 'Souk' consisting of 17 smaller units. The associated food court also comprises around 6 quality catering units.
- 4.42 The opening of this unique shopping venue has further solidified and enhanced Green Street as a major destination for ethnic food and non-food shopping, and clearly represents a substantial investment in the centre which will make a positive contribution to its overall vitality and viability. The trading performance is in its infancy and should be monitored moving forwards to gauge its contribution to the overall success and health of Green Street. This would be most effectively achieved through an in-centre shopper survey, rather than a telephone survey given the long distances visitors were travelling as identified in the 2010 Study. An in-centre shopper survey can be tailored to local circumstances and probe in more detail usage patterns, for example.
- 4.43 Independent operators continue to make up the majority of retailers in the centre, although the key multiple retailers present during the previous study (i.e. Peacocks, Superdrug, Boots and Iceland) still remain. No new key multiple retailers have moved in to the centre since the last study, and our conclusions from the previous study in respect of enhancement of the multiple retailer offer in the centre remains unchanged. The

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proportion of 'leisure services', such as cafes and restaurants, continues to remain substantially below the national average, although the East Shopping Centre has improved the offer somewhat.

- 4.44 The 2010 Study identified two key development sites, one of which being the recently completed East Shopping Centre. The second site, Queens Market, was previously identified for regeneration in order to provide an improved market facility for existing traders. At the time of the previous retail study, a full planning application for the redevelopment of the market (involving 164 market stalls, c.6,000 sq m of retail shop units and 340 residential units) was undergoing assessment by the Council (following a recommendation for refusal by the Mayor). The application has since been withdrawn, with no further applications made. Following the on-site survey in 2015, GVA can confirm that the market continues to be well-used, although the site remains an opportunity for town centre enhancement and should continue to be explored.

## Forest Gate

- 4.45 The Town Centre and Retail Study, March 2010, drew the following qualitative conclusions in respect of Forest Gate District Centre:

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

*Non-food independent retailers in Forest Gate are the fourth most cited in the Borough, although the catchment is constrained to Core Zone 8A (2009 Survey). Ethnic food retailers have a stronger influence and combined are the third most cited in the Borough with a marginally wider catchment area from Zone 8A; and ethnic non-food retailers have a negligible influence being only the fifth most cited centre with a low response rate (5.4%). The mix of retail services is reasonably good; vacancy rates are below average with no specific problem areas; and around 60% of people visit at least twice a week. The centre will see the introduction of a new Crossrail Station programmed to commence in 2017 with associated upgrades to Forest Gate Station; and a number of development opportunity sites have been identified with which to facilitate future investment – notably an improved foodstore offer.*

*Consistent with its role as a District Centre, the comparison goods offer in terms of national multiples is reasonably weak, although the small number should be protected and enhanced to assist in the attraction and footfall in the centre. The total number of comparison units is significantly below the national average and the objective should be to improve this proportion relative to other uses. There is an over-concentration of fast food take-aways which should be restricted in policy and*

a particularly low representation of daytime and family friendly eating/drinking destinations. The quality of the environment is reasonable although there is some scope for improvement in places; it is evident that around 76% of users said they disliked the physical environment. There is some indication of existing businesses wishing to relocate, although some did state that they would relocate to alternative premises in Forest Gate.

## Forest Gate: Town Centre Change Since 2010

4.46 The tables below illustrate changes that have occurred to Forest Gate's town centre composition since the 2010 study. Tables 4.8 and 4.9 show there have been limited changes to Forest Gate's town centre composition, with minor fluctuations across the retail categories. The centre's comparison and leisure service provision has increased incrementally but still lies below the national average, and the vacancy rate has also increased from 6.8 to 8.3%.

**Table 4.8: Forest Gate Composition of Units – 2010 Study**

Retail Category	% of Total	UK Average (%)	Variance (%)
Convenience	20.94	8.82	+12.12
Comparison	20.94	34.39	-13.45
Retail Service	18.8	13.05	+5.75
Leisure Service	17.09	21.55	-4.45
Financial Service	15.38	11.18	+4.21
Vacant	6.84	10.84	-4.01
<b>Total</b>	<b>100</b>	<b>100</b>	<b>-</b>

**Table 4.9: Forest Gate Composition of Units – 2016 Study Update**

Retail Category	% of Total	UK Average (%)	Variance (%)
Convenience	15.42	8.47	+6.95
Comparison	23.32	32.38	-9.06
Retail Service	20.56	14.36	+6.2
Leisure Service	18.58	22.50	-3.92
Financial Service	13.83	10.79	+3.04
Vacant	8.30	11.32	-3.02
<b>Total</b>	<b>100</b>	<b>100</b>	<b>-</b>

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4.47 Consistent with the 2010 Study, the role of food retailing remains dominant albeit reduced in terms of overall proportion compared to the national average. Co-Op has occupied the previous Somerfield unit, and Tesco Express continues to trade, but there has been no further change or improvement to the centres convenience goods offer since 2010. Forest Gate continues to have an 'urban village' environment and a weak comparison goods offer – consistent with it's role a district centre. The overall physical environment/public realm would benefit from further investment and foodstore development should continue to be encouraged in appropriate locations.

4.48 The new Crossrail Station at Forest Gate is due to commence development in 2017, which is likely to bring associated investment and change to the centre. This should be carefully planned to contribute to the overall town centre environment/retail and leisure offer, and monitored moving forwards. A number of development sites were identified in the previous 2010 study:

- **Land West of Woodgrange Road – Site A (51-73 Woodgrange Road, the Durning Hall Community Centre and Royal Mail Sorting Office):** No change or development on this site has occurred. As the 2010 study reported, planned Crossrail development to the north of the site is likely to restrict development coming forward prior to the new station being implemented. In the future, the site is considered suitable for retail-led development to enhance primary retail frontage on Woodgrange road.
- **Land West of Woodgrange Road – Site B (39b-49a Woodgrange Road):** No change or development on this site has occurred. The site is considered suitable for retail-led redevelopment that would enhance the retail frontage on Woodgrange Road.
- **Land West of Woodgrange Road – Site C (vacant sites 140-150 Earlham Grove):** Previously identified as a site suitable for retail-led development with an opportunity to combine redevelopment with Site B. This site was granted a renewed planning permission on 9th March 2010 for the erection of 33 apartments and 3 dwelling houses. The site survey in 2015 observed that the site was under construction.

## Canning Town

4.49 Our previous study drew the following qualitative conclusions in respect of Canning Town District Centre:

*"Canning Town is undergoing a period of significant change, being implemented through the SPD document and proposals for major retail development and change, which includes the current redevelopment of Rathbone Market. Site assembly for Rathbone Market development has consequently over-emphasised the number of vacant units and should be treated with caution as a health check indicator at the current time. Overall, the District Centre is predominantly used for food shopping, with over 90% visiting for this purpose. Convenience retailing comprises small and outdated Somerfield and Iceland stores, a newly opened local Nisa convenience store, and a number of smaller independent businesses. Canning Town is the fourth most cited centre in the Borough for local independent food shopping.*

*The comparison sector is particularly weak and considerably below the national average, although this is consistent with its current role as a District Centre. Nevertheless, it is the third most cited centre in the Borough for independent comparison retailers after Stratford and East Ham, within a tight catchment reflecting the localised function of the centre. This is further confirmed by evidence demonstrating that over 70% walking to the centre, over 70% liking the centre because it's close to home and over 70% visiting at least 2-3 times a week. Canning Town has a reasonable range of retail services, excellent accessibility, and there are clear intentions from businesses to continue trading, expand or refurbish their premises. Shoppers stated they would visit more often if there was a better range of shops, more multiple retailers and a larger foodstore.*

*Canning Town does not provide a strong ethnic food or non-food offer, with few people citing the centre for such shopping purposes. There is also a weak daytime and evening eating/drinking offer. In terms of the overall environment, this is poor in places and there are general difficulties in respect of integration and linkages given the significant scale of the adjacent road network. The small Manor Road Retail Park is within the designated town centre boundary but separated from the primary shopping area by the main road network, flyover and roundabout; retailers here include Carpetright, Wickes and a vacant MFI unit.*

*Clearly, there are significant changes planned for Canning Town which will restructure the centre resulting in a shift of activity. This should be monitored moving forwards, particularly the eastern end of Barking Road furthest from new development coming forwards."*

## Canning Town: Town Centre Change Since 2010

- 4.50 It is difficult to provide an update on the health of Canning Town at the present time given the extent of strategically significant change and development taking place. Clearly, development is under construction with some phases complete, and the Council should monitor this in future study updates.
- 4.51 For monitoring purposes, Tables 4.10 and 4.11 below, compares the town centre composition by number of units since 2010. It is evident that the proportion of convenience and service operators remain above the national average, whilst the proportion of comparison operators is below the national average – consistent with the 2010 Study which highlighted the centres lower level district centre role, high number of smaller independent operators and tight catchment area. Vacancy rates remain marginally above the national average.

*Table 4.10: Canning Town Composition of Units – 2010 study*

Retail Category	% of Total	UK Average (%)	Variant (%)
Convenience	17.70	8.82	8.88
Comparison	21.24	34.39	-13.15
Service	46.90	11.18	35.73
Vacant	14.16	10.84	3.32
<b>Total</b>	<b>100</b>	<b>100</b>	<b>-</b>

*Table 4.11: Canning Town Composition of Units – 2016 study*

Retail Category	% of Total	UK Average (%)	Variant (%)
Convenience	17.58	8.47	9.11
Comparison	18.68	32.38	-13.70
Service	51.65	47.65	4.00
Vacant	12.09	11.32	.77
<b>Total</b>	<b>100</b>	<b>100</b>	<b>-</b>

4.52 In terms of quality of operator and mix of uses, there have been no key changes/additions since the 2010 Study. There remains some representation from multiple retailers although these are predominantly convenience goods operators and include the Co-operative foodstore (occupied previous Somerfield store), Iceland and Percy and Ingles bakers. Other multiples include Ladbrokes and William Hill bookmakers, but the majority of units in Canning Town remain occupied by independent retailers offering a range of goods and services.

4.53 As discussed earlier in this section, Canning Town is undergoing major strategic redevelopment. We recommend the Council undertakes a detailed health check, and commissions new survey work and audits following completion of the retail/leisure elements of redevelopment. Future household telephone survey work will enable an in-depth analysis of catchment area and trade draw.

## East Beckton

4.54 The Town Centre and Retail Study, March 2010, drew the following qualitative conclusions in respect of East Beckton District Centre:

East Beckton District Centre is focused on the Asda food superstore and the Mary Rose Mall – a small parade of shops. The town centre boundary covers a wider area which also incorporates a Lidl foodstore and a range of other uses including a healthcentre, sports club, a library and other associated community uses. The composition of the centre does not form a traditional town centre, and there is a significant concentration of out-of-centre bulky goods food and non-food retailers in the wider area. For this reason, the role of East Beckton is distorted in the survey results by retailing dispersed throughout the 'Beckton' area which is referred to generally in the survey responses. For this reason, when analysing the survey results, the Beckton area must include East Beckton District Centre, Gallions Reach, Beckton Gateway Retail Park, Beckton Triangle Retail Park and Beckton Retail Park (The Junction), as well as the Tesco and Sainsbury's out of centre food superstores.

Specific to East Beckton District Centre, however, it is evident that there is a reasonable range of retail service businesses including an optician, hairdresser, dry cleaners, building society and a travel agent; and there is a low vacancy rate. The District Centre boundary is drawn particularly wide, beyond the area of retail concentration; and it is the least cited centre in the Borough for independent food and non food, and ethnic food and non-food shopping. East Beckton has a lower PTAL accessibility rating than elsewhere (3), and over 75% arrive by car. The centre benefits from a DLR station, although it is evident from our survey analysis that there is a low usage for shopping arrival purposes. Overall, East Beckton bears little resemblance to a traditional town centre/high street, and the offer is limited to retail with the absence of a good environment and few associated facilities (eating/drinking), for example.

## East Beckton: Town Centre Change Since 2010

4.55 This study provides an up to date analysis of the health of Beckton, drawing on desk based research and detailed on site surveys (2015). In broad terms, we found there to be limited change since the time of the last retail study, the centre appears to be performing well with a strong mix of operator representation. Table 4.12 and 4.13 below, compares the town centre composition by number of units since 2010. The proportion of comparison, convenience and service operators remains broadly similar to the 2010 study and the number of vacant units continues to fall below the national average.

**Table 4.12: Beckton Composition of Units – 2010 study**

Retail Category	No. of Units	% of Total	UK Average (%)	Variant (%)
Convenience	4	12.12%	8.82%	3.30
Comparison	10	30.30%	34.39%	-4.09
Service	16	48.48%	45.78%	2.7
Vacant	3	9.09%	10.84%	-1.75
<b>Total</b>	<b>33</b>	<b>100</b>	<b>100</b>	<b>-</b>



**Table 4.13: Beckton Composition of Units – 2016 study**

Retail Category	No. of Units	% of Total	UK Average (%)	Variant (%)
Convenience	4	12.12%	8.47%	3.65
Comparison	10	30.30%	32.38%	-2.08
Service	16	48.48%	47.51%	0.97
Vacant	3	9.09%	11.32%	-2.23
<b>Total</b>	<b>33</b>	<b>100</b>	<b>100</b>	<b>-</b>

- 4.56 Beckton continues to show stability in the number of vacant units over the last five years. This figure is stronger than the national average. This would suggest that the town centre continues to perform well. We note that although unit 4 has since been reoccupied, it has been subdivided to create an additional unit, which remains vacant at this time.

**Table 4.14: Re-occupied units in Beckton since 2010.**

Retail Fascia	Address	Retail Category
Iceland	Unit 1 Beckton Retail Park	Convenience
Family Bargains	Unit 4 Beckton Retail Park	Comparison

- 4.57 The GVA on-site survey updates the analysis of retailer representation throughout the centre. Our survey found there to have been limited change in the town centre since the time of the last study, and the mix of operators to continue to represent a strong, good quality mix of businesses. Iceland and Family Bargains have occupied units, although Unit 4 was sub-divided and the newly formed unit (adjacent to Family Bargains) remains vacant. Asda continues to be the main convenience goods offer (c.8,387 sq m) gross floorspace, with Lidl adjoining.
- 4.58 Within the wider Beckton Area there is a concentration of additional retail warehousing provision alongside other major food retailers in out of centre locations.

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- 4.59 **Gallions Reach:** There are 36 units at Gallions Reach Retail Park. Tesco anchors the retail park, and is the main convenience goods offer. Representation from comparison goods retailers represents the highest proportion (69%) and service provision accounts for 19%. There are three units vacant (8%). Since the 2010 survey was conducted, HMV, Orange, Game, American Golf Discount Store, Thomson and Suits You have ceased trading. New operators include 3, 99 P store, Bargain Buys, EE, Evans, Holland and Barratt, H&M, Mesmer Eyes, O2, Store Twenty One and Vodaphone. Service operators include Cookie's Island, Costa, Robins Pie and Mash, Shakes etc., McDonald's, Nando's and Pizza Hut.
- 4.60 **Beckton Gateway Retail Park:** B&Q, Pets at Home, Allied Carpets, Comet and Staples. In addition to Maplin, KFC and McDonalds occupy units at Beckton Gateway Retail Park. There remains one vacant unit.
- 4.61 **Beckton Triangle Retail Park:** PC World, Maplin Electronics, Boots, Next Clearance, JD Sport, ScS Sofas, Argos Extra, Currys and DFS continue to occupy units at Beckton Triangle Retail Park. Land of Leather has ceased trading. Additional stores include Matalan. There was one vacant unit at the time the on-site survey was carried out. There is also a sizable Sainsbury's at Claps Gate Lane.

## Leisure Sector

- 4.62 As detailed in Section 2, the leisure sector – in recent years – have become an increasingly important contributor to the vitality and viability of town centres, with strong proportions of visitors to town centres undertaking linked trips between retail and leisure orientated uses. This drives an increase in footfall and dwell time, and the retail sector alone is no longer seen as the only important component of a town centre. Leisure uses are increasingly forming an important part of regeneration and redevelopment initiatives and new schemes.
- 4.63 The up-to-date household telephone survey has enabled us to review any changes to leisure patterns within the restaurant and pubs/clubs sector. Section 2 of this report identified that the pub industry is in decline in a fast moving and changing market, whilst nightclubs are few and far between, particularly in those smaller centres. The restaurant sector has been more robust to market fluctuations and continues to be a popular part of the leisure market. Table 4.15 below compares leisure patterns in 2010 and 2015 in the restaurant and pubs/clubs sectors of the leisure market.

**Table 4.15: Restaurant and Pubs/Clubs Market Share 2010/2015**

	Pubs/Clubs Market Share		Restaurant Market Share	
	2010	2015	2010	2015
Stratford	14.9%	11.6%	11.7%	22.7%
East Ham	12.7%	6.7%	13.1%	5.7%
East Beckton / Beckto	2.9%	2.9%	4.9%	6.6%
Forest Gate	5.8%	4.1%	4.4%	1.5%
Canning Town	2.6%	1.3%	2.1%	0.1%
Green Street	2.3%	-	4.0%	-
London West End	21.8%	31.6%	19.2%	23.4%
Canary Wharf	6.7%	7.0%	5.6%	8.5%
Ilford	4.7%	2.1%	10.9%	5.8%
Wanstead	3.1%	3.7%	3.1%	3.2%
Romford	2.1%	1.0%	2.3%	1.8%
Barking	2.1%	2.0%	0.9%	1.5%

- 4.64 The decline of the pubs/clubs sector is evident when analysing the trends in Table 4.15 above. London West End has reinforced itself in peoples perceptions as the place to visit for the best range of clubs and related pub type activity, jumping from a market share of 21.8% to 31.6%. The role of pubs in the network of town centres elsewhere in the sub-region has declined, consistent with national market trends.
- 4.65 Perceptions in this sector of the market have shifted from the traditional 'pub' to 'nightclubs/pubs/bars', which are considerably more limited in smaller towns, and also in Stratford Metropolitan Centre, when compared to London West End. The response and useage of these destinations relates also to the quality of facilities and subsequent choices people are making. Canary Wharf and Wanstead are the two centres which have also experienced a market share uplift, demonstrating people's perceptions of these centres offering good range and also quality of 'pub' type activities.
- 4.66 The strength of the restaurant sector and the importance of their role in town centres is evident when analysing Table 4.15, which highlights the growth in market share of the larger, more strategic centres including Stratford, Canary Wharf and London West End.

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- These centres – particularly Stratford and Canary Wharf – have consciously planned to enhance the representation of the restaurant sector to form a critical mass, where the smaller centres cannot compete.
- 4.67 The results demonstrate the opportunity that these larger centres have had in respect of investment and new development, and consequent impact on the network of other centres across the borough, i.e. the ‘polarisation towards larger centres’. Smaller town and district centres will need to continue to adapt in order to offer a range of leisure and social activities as well as traditional retailing, with more bars, restaurants, food outlets and community spaces. A wider strategy must deliver a mix of town centre uses to enhance the attraction of a centre, with new schemes promoting this type of mix.
- 4.68 Parts of Newham – notably The Arc – is undergoing significant, high density urban growth and unparalleled levels of population increase. The 2010 GVA Retail Study recommended a number of new Local Centres to fill gaps in the retail hierarchy, particularly in areas of planned new housing; this is particularly the case across southern Newham in the Royal Docks area. Major economic and employment growth is being promoted, substantial levels of which are currently being implemented. In such areas, policy promotes successful and sustainable ‘place-making’, and we would recommend that restaurants and bars/pubs could form an ‘ancillary’ element to new, high density development, in order to serve those living and working in these new communities.
- 4.69 Each application should be considered on a case by case basis, but the Council should take a cumulative view of a wider geographic area, to avoid the creation of a new ‘leisure destination’ to rival and impact upon the network of town centres. A balance needs to be reached in respect of place-making and serving the needs of a new residential and employment community, whilst not attracting those from further afield who should instead continue to be encouraged to visit closer town centres for this type of leisure activity.
- 4.70 Within high density developments, active ground floor units occupied by restaurants and bars (in out-of-centre locations) (Use Class A3/A4) would seem reasonable within the policy framework, but must be tested in accordance with the NPPF and regional/local policies. This type of leisure use should form an ancillary use to the main residential or employment component of the development being proposed, if sited in an out-of-centre location.
- 4.71 The Household Telephone Survey does not provide insight into the retail service sector; generally comprising uses including financial and professional services (Use Class A2) and shops (Use Class A1: banks, building societies, estate and employment agencies,
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professional services, dry cleaners, laundrettes, opticians, travel agents and post offices). These are clearly important uses contributing to vital and viable town centres, particularly the smaller town, district and local centres, and their role in town centres should be protected. In this context, the retail service sector would not form appropriate uses in new developments outside of town centres; and only to achieve sustainable place-making might a very small ancillary provision be acceptable. This should be carefully reviewed in respect of location, scale, mix and consequent impact on town centres.

- 4.72 The 2010 Study concluded that there is a good spread of cinema provision in the Borough and adjoining catchment area, and the Stratford City 12 screen cinema would meet the quantitative need for additional screens over the LDF period. This has now been built, and it was considered at that time that there was no need to plan for additional cinema provision. This up-to-date analysis has demonstrated that this position remains unchanged.
- 4.73 The results of the up-to-date telephone survey demonstrates that the new Vue Cinema at Stratford City is drawing primarily from it's core catchment; Zones 6, 8, 9 and 10, with a reasonable market share also in Zone 5 and 7. As you would expect, existing cinema provision has curtailed any further market share influence of this new cinema, and the Stratford Picture House, Showcase at Beckton, UGC at Canary Wharf, London West End and the Cineworld in Ilford, continue to serve borough residents. There is little leakage from the borough aside from trips to Cineworld in Ilford, and this is likely to be a consequence of 'operator choice' and consumer loyalty.
- 4.74 The 2010 Study identified a relatively weak borough provision, highlighted by a reasonably significant leakage of trade to destinations outside the Borough, including the West End, Ilford, Canary Wharf, Wanstead, Barking and Romford. It was acknowledged that Stratford City would considerably enhance the offer serving more localised needs and generating an inflow into the borough. The up-to-date survey results demonstrate that Stratford is performing well in the restaurant sector, with strong market shares across all survey zones – second only to London West End in Zones 4, 7, 9, 10, 11 and 12.

## Summary

- A number of major strategic developments are planned or being brought forward outside Newham, the most imminent being 35,000 sq m gross retail (14,000 sq m gross A1) at Wood Wharf. Lakeside has consent for an extension; whilst other nearby

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schemes being supported include the redevelopment of Tesco, Bromley-by-Bow, and development at Unity Square in Ilford.

- Within Newham, Westfield Stratford City opened in September 2011, and plans are underway for a major extension comprising new homes and commercial floorspace. In April 2015, there was a resolution to grant planning permission (subject to S106 completion and call in) for Silvertown Quays, an International Brand Retail Concept including 44,500 sq m A1 brand-related retail floorspace. At Canning Town 179 new homes and a new foodstore have been completed – albeit the foodstore operator remains uncertain at present. Once built-out in full, the Canning Town regeneration scheme will include a further 30,000 sq m retail floorspace and 3,000 sq m restaurants.
- Stratford Town Centre is identified as performing well, with a strong convenience and service sector, a low vacancy rate, and a consolidated lower order comparison goods offer. East Ham remains relatively unchanged, albeit a fall in the comparison goods role. No new development has taken place, but we understand that a mixed use residential/retail scheme is being brought forward on land west of High Street North.
- The role of Green Street has changed little, with Tesco Metro and Iceland continuing to trade, and the proportion of comparison good operators substantially above national average and comprising largely ethnic retail businesses. There have been no new multiple retailers, although the centre has benefitted substantially from the opening of the Asian anchored 'East Shopping Centre', and Queens Market remains a key development opportunity site moving forwards.
- There has been limited changes to Forest Gate's town centre composition, although Co-Op has replaced Somerfield as the key foodstore anchor alongside Tesco Express. The centre continues to have an 'urban village' environment and a weak comparison goods offer – consistent with its role as a District Centre. The new Crossrail Station is likely to bring associated investment and change to the centre. Canning Town is undergoing strategically significant change and development, with some phases complete. The Council should monitor the impact following completion.
- East Beckton and the Beckton area continues to have low vacancy rates, although a reasonably high turnover of operators was identified since 2010. Asda, Tesco and Sainsbury's continue to trade from large superstore units.
- Consistent with national trends the role of bars and clubs has declined across the borough at the expense of the high quality range and choice in London West End. In the restaurant sector, Stratford City is now equally as competitive as London West

End whilst most of the other centres across the borough has experienced a fall in market share; the exception being Beckton which has achieved an improved market share. Retail leisure and retail service uses might be acceptable in out-of-centre locations as part of major development in the interest of securing successful place-making, but this must be considered cumulatively and avoid the creation of a 'new destination'.

- The Vue Cinema at Westfield Stratford City has met the short term need for additional screens. There is little leakage of trade from the survey area, aside from trips to the Cineworld in Ilford from the east of the borough; this is likely to be a consequence of operator choice and loyalty. Restaurant provision has been substantially enhanced through the development of Stratford City, which is now the top choice for catchment residents, alongside London West End.

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## 5. Shopping Patterns

- 5.1 This section provides an in-depth and detailed analysis of shopping patterns across the borough and beyond. We focus on changes to peoples travel patterns and destinations of choice since the 2010 Study, having particular regard to Westfield Stratford City. The implications, impact and influence of Westfield have not before been analysed or quantified, and this study provides an opportune time to undertake such an assessment having allowed trading patterns to 'settle down' after the initial opening in 2011.
- 5.2 This section complements and builds upon Section 4, identifying the implications of change identified, both at the strategic and local level. Drawing on new survey data, we are able to build on the qualitative analysis to inform our understanding of the current role of the Newham town centres and any associated improvements or deterioration in performance since 2010.

### Household Telephone Survey

- 5.3 We have drawn on the outputs of a newly commissioned Household Telephone Survey across 12 survey zones, with respondents being asked a series of questions in respect of where they undertake their food and non-food shopping. The Survey Area is illustrated on Plan 1, and the Household Survey Results are attached in Appendix 1. The outputs enable a detailed analysis of where people from different parts of the borough and wider catchment are travelling to undertake their shopping needs, thus providing a useful insight into the performance and attractiveness of each town centre and retail destination. The survey area and questions are consistent with those underpinning the 2010 study and therefore enable the identification of key changes.

### Westfield Stratford City - Inflow

- 5.4 Being one of Europe's largest urban shopping destinations, Westfield Stratford City draws customers from much further afield than Newham and the east London region. Westfield have released exit survey data to inform this study, an interview process which obtained home postcode data from over 2,000 shoppers whilst visiting the shopping centre.
- 5.5 The telephone survey is not in itself sufficient to capture Westfield's full area of influence, and an exit survey enables a complete understanding of the extent of the catchment and inflow of expenditure into the defined survey area. The mapping of each respondent visiting Westfield is illustrated on Plan 3, and demonstrates that 76% of people



live outside of the Zone 1-12 Survey Area. There is a substantial inflow of expenditure from across the UK, with visitors living as far afield as Scotland and the South West.

## Comparison Goods

5.6 Shopping patterns derived from the new household survey enables us to calculate the amount of comparison goods expenditure that each town centre, within and beyond Newham, captures from the Zone 1-12 survey area. Table 5.1 below compares the percentage trade draw to that identified in the 2010 study (Columns 5 & 6).

**Table 5.1: Study Area Comparison Goods Trade Draw: Key Competing Centres**

1. Centre	2. Borough	3. London Plan Classification**	4. Comparison Goods Trade Draw from Survey Area (£000) 2010	5. % of Total Available Comparison Goods Expenditure (%) 2010	6. % of Total Available Comparison Goods Expenditure (%) 2015
Stratford City	Newham	-	-	-	23.4%
Beckton*	Newham	District	£157,480	23.3%	22.7%
East Ham	Newham	Major	£73,556	10.9%	9.1%
Stratford Town Centre	Newham	-	£65,963	9.8%	5.0%
Ilford	Redbridge	Metropolitan	£59,548	8.8%	6.4%
London West End	Westminster	International	£50,110	7.4%	5.7%
Barking	Barking & Dagenham	Major	£37,295	5.5%	4.0%
Lakeside	Thurrock	-	£28,228	4.2%	4.7%
Romford	Havering	Metropolitan	£16,382	2.4%	1.7%
<b>Green Street</b>	<b>Newham</b>	<b>District</b>	<b>£9,963</b>	<b>1.5%</b>	<b>0.9%</b>
Canary Wharf / Isle of Dogs	Tower Hamlets	Major	£9,009	1.3%	1.2%
<b>Forest Gate</b>	<b>Newham</b>	<b>District</b>	<b>£4,073</b>	<b>0.6%</b>	<b>0.9%</b>
<b>Canning Town</b>	<b>Newham</b>	<b>District</b>	<b>£2,542</b>	<b>0.4%</b>	<b>0.3%</b>
Wood Green	Haringey	Metropolitan	£649	0.1%	0.0%
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>£514,796</b>	<b>76.2%</b>	
Other destinations	-	-	£161,105	23.8%	14%

Source: GVA Household Survey, 2007 & 2014 / \*Incl. retail parks / \*\* London Plan Consolidated with Alternations Since 2011 (2015)

- 5.7 To establish the 2015 baseline, we have used the most up to date 2013 price base spend per capita figures published by Experian Business Strategies and population projections provided by the Council (population discussed further in Section 6). We have also updated the input assumptions with regards to expenditure growth and deductions for Special Forms of Trading (SFT). Table 5.1 above demonstrates the total expenditure flowing to each destination, both within and outside Newham.
- 5.8 The figures are broadly consistent with the 2010 study in terms of the order of centres and trade draw to each, i.e. Beckton capturing the highest proportion descending through to Wood Green. The key change is the introduction of Westfield Stratford City, which captures 23.4% of total available comparison goods expenditure from across the survey area (Table 5.1). The implication of this has been the reduction in trade draw of almost every centre (Table 5.1, column 5 and 6) by up to 2%, the exception being Stratford Town Centre which has seen a trade draw reduction of c.5%. In monetary terms, this represents (for Stratford town centre) a trade draw reduction from £66m (2010) to £38m.
- 5.9 Table 5.2 below, compares the actual trade draw of the Newham town centres in 2010 and 2015 to demonstrate the monetary change in expenditure captured from Zones 1-12. Combined, Stratford City and Stratford Town Centre now capture £218.9m of total comparison goods expenditure available in Zones 1-12 (28%). This represents a combined Stratford trade draw increase of £152.9m since 2010 (from within Zones 1-12 only).

**Table 5.2: Trade Draw Comparison of Newham Town Centres, 2010 & 2015**

Newham Town Centre	Trade Draw (£000) 2010	Trade Draw (£000) 2015	Difference (£000)
Stratford	£65,963	£218,948	£152,985
Beckton	£157,480	£174,557	£17,077
East Ham	£73,556	£70,243	-£3,313
Green Street	£9,963	£7,097	-£2,866
Forest Gate	£4,073	£6,603	£2,530
Canning Town	£2,542	£2,465	-£77

- 5.10 Plan 4 illustrates the levels of influence (market shares) of Stratford City and Stratford Town Centre across the Zone 1-12 Survey Area, highlighting a core catchment (Zones 6 and 8), secondary catchment (Zones 1, 2, 7, 9 and 12) and a survey area outer catchment (Zones 3, 4, 5, 10 and 11). The actual trade patterns and market shares identified within this update are entirely consistent with our estimates/forecasts for

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Stratford set out in the 2010 Study (Plan 9, 2010 Study) prepared in advance of Westfield opening.

- 5.11 The up-to-date analysis enables an understanding of how the role – in terms of trade draw – of the ‘other’ Newham centres has changed since 2010 as a consequence of the opening of Stratford City. Both East Ham and Green Street have experienced an actual fall in trade draw (Table 5.2) despite 5 years of population and expenditure growth. Given the scale, role and proximity to Stratford, they have always been identified as the more vulnerable centres in terms of retail impact – particularly East Ham. The recommendation has always been to carefully monitor these centres; a key objective of this study update.
- 5.12 Whilst Beckton has experienced a small reduction in % trade draw (Table 5.1), the centre has benefited from population and expenditure growth and has achieved an overall increase in monetary trade draw (Table 5.2), i.e. it has achieved real growth from the position in 2010. Nevertheless, the impact of Stratford City is evident, with the Beckton area experiencing a fall in market share in Zones 1, 2, 6 and 7 (The Jubilee line route to Westfield), and Zone 10, the zone geographically closer to Ilford but within three rail stops to Stratford on the overline. Beckton has, however, achieved good market share uplift in Zones 3, 5 and 11, and an unchanged position in Zone 4, it’s location zone.
- 5.13 Forest Gate is the only centre that has achieved both an increase in % trade draw and monetary trade draw since 2010, perhaps reflecting its highly localised ‘urban village’ catchment area as identified in the 2010 study. The centre has specifically experienced a small uplift in market share in Zones 8 (1.5% to 3.4%), 9 (2.2% to 2.9%) and 10 (0.3% to 0.6%), the centres closest survey zones. The influence of Canning Town remains unchanged, but must be monitored moving forwards given the extent of development and change taking place.
- 5.14 In respect of total trade retention, Newham’s six main town centres had a collective comparison goods market share of 46.4% (£313.6m) across the Zone 1-12 survey area in 2010. According to the new Household Telephone Survey, the six main town centres – including Westfield – now have a collective comparison goods market share of 62.3% (£479.9m). This represents a strong market share increase in the borough of 15.9% since 2010.

## Bulky Goods

- 5.15 The Household Telephone Survey asked a number of comparison goods questions in order to investigate where respondents are shopping for different types of goods. The

questionnaire asked specific individual questions relating to 'DIY and Decorating goods', 'Furniture, floor coverings and household textiles', and 'Domestic appliances, such as washing machines, fridges, cookers and kettles'. Consistent with the previous 2010 study, the only bulky goods retail warehouse provision is located at Beckton, with a small three unit scheme in Canning Town town centre.

5.16 We have compared market shares with the 2010 study in the three main bulky goods categories (Table 5.3), and whilst Beckton continues to be a popular destination the opening of Stratford City has clearly had an impact with market shares falling substantially in the domestic appliances and furniture/furnishings categories. The DIY category has, in general, retained market share levels giving the absence of this type of provision at Stratford City.

**Table 5.3: Beckton: Bulky Goods Market Shares 2010 & 2015**

Zone	DIY 2010	DIY 2015	Domestic Appliances 2010	Domestic Appliances 2015	Furniture 2010	Furniture 2015
1	74.1	69.8	90.0	66.7	66.1	40.5
2	62.1	73.8	62.5	63.2	43.2	42.6
3	77.0	62.6	54.4	40.3	35.7	23.9
4	71.1	75.8	70.4	59.7	42.8	32.7
5	58.6	52.4	65.4	35.5	30.4	24.4
6	50.3	48.1	27.5	41.4	20.2	27.4
7	59.8	61.2	59.4	47.4	32.8	27.6
8	19.5	21.8	20.8	11.4	0.0	5.3
9	51.3	43.8	43.2	36.0	26.0	22.8
10	44.3	47.4	37.9	37.6	19.6	17.9
11	35.1	28.9	40.1	14.5	29.1	12.3
12	50.2	40.9	16.2	20.5	21.0	10.8

## Convenience Goods

5.17 In order to provide a more detailed analysis of food shopping patterns, the 2010 study divided the household telephone survey area into the following Sub-Areas (See Plan 2):

- North West: Zones 6 and 8
- North East: Zones 9 and 10
- South East: Zones 3, 4, 5 and 11
- South West: Zones 1, 2, 7 and 12

- 5.18 This sub-division enables a better understanding of travel patterns throughout the borough, and the effectiveness of defined centres in meeting local needs. As explained in the 2010 study, there is no basis for this division other than it effectively splits the survey area into more manageable Sub-Areas for the purpose of analysis.
- 5.19 The 2010 Study calculated that the six main town centres and out-of centre retailing accounted for 53% of total available convenience goods expenditure across the survey area (Table 5.4).

**Table 5.4: Convenience Goods Market Share by Borough and Sub Area – 2010 STUDY**

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

Source: Household Telephone Survey, 2007

- 5.20 This study update identifies that trade retention has improved to 57.3%, with the North West (Stratford), North East (Forest Gate) and South West (Canning Town) Sub-Areas all experiencing a market share uplift (Table 5.4). Only the South East Sub-Area (East Ham, Green Street and Beckton) has experienced a fall in market share from 57.3% (Table 5.4) to 49.5% (Table 5.5).
- 5.21 Consistent with the 2010 Study, and despite a small improvement, the North East and South West Sub-Areas continue to achieve a very low trade retention (10% and 4.7% respectively). This is likely to change in the South-West given a newly built foodstore unit (operator unknown) at Canning Town, the trading patterns of which are not reflected in the new telephone survey. The Council should monitor the impact of the new store on the Sub-Area and wider borough catchment.

**Table 5.5: Convenience Goods Market Share by Borough and Sub Area – 2016 STUDY**

(2015)	2015 Survey Area	North West	North East	South West	South East
<b>Total Available Spend (£m)</b>	£596.9m	£109.2m	£133.6m	£160.3m	£193.6m
<b>Convenience Goods Trade Draw (£m)</b>	£342.3m	£66.5m	£13.3m	£7.6m	£95.8m
<b>Market Share (%)</b>	57.3%	60.9%	10.0%	4.7%	49.5%

Source: Household Telephone Survey, 2014/15

- 5.22 The 2010 Study concluded that the North East Sub-Area performs poorly in respect of convenience goods trade retention. Aside from the Somerfield in Forest Gate being replaced by Co-op, there has been no further change or new development driving an improvement in market share. We conclude that, despite a small improvement, the North East Sub-Area continues to perform poorly in respect of convenience goods trade retention, and there is currently nothing in the pipeline to address this position.
- 5.23 We have undertaken a more detailed review of shopping patterns within each Sub-Area, the outputs of which are summarised in Tables 5.6 to 5.9 below.

**Table 5.6: North-West sub-area Convenience Shopping Patterns – 2016 STUDY**

Foodstore / Centre	Zone 6 (%)		Zone 8 (%)	
	Main Food	Top-up	Main Food	Top-up
<b>Within the north-west sub-area</b>				
Morrisons, The Grove, Stratford	21.5%	13.6%	60.2%	58.3%
Sainsbury's, The Mall, Stratford	15.9%	20.5%	5.9%	2.6%
Waitrose, Westfield	6.5%	1.5%	2.3%	2.9%
M&S, Westfield	5.6%	0.0%	-	0.0%
Stratford	3.3%	6.9%	1.1%	9.8%
<b>Within Newham</b>				
Tesco Metro, Green Street	4.8%	1.6%	-	0.0%
Tesco Express, Forest Gate	5.6%	7.0%	-	0.0%
Asda, Tollgate Road, Beckton	0.6%	0.0%	6.4%	0.0%
Tesco, Gallions Reach, Beckton	6.9%	0.0%	-	0.0%
Sainsbury's, Claps Gate, Beckton	10.2%	0.0%	1.1%	0.0%
<b>Outside Newham</b>				
Tesco, Hancock Road, Bromley-by-Bow	-	0.0%	3.4%	2.7%
Asda, Isle of Dogs	5.6%	0.0%	-	0.0%
Tesco, High Road, Leytonstone	3.3%	0.0%	-	0.0%
Asda, Marshall Lane, Leyton	-	0.0%	9.4%	1.3%

Source: GVA Household Survey (2014/15)

- 5.24 In the North West Sub-Area Stratford continues to be the most dominant destination for convenience goods shopping, reinforced since 2010 by the opening of Waitrose and M&S at Stratford City. The Morrisons and Sainsbury's store in Stratford town centre continue, however, to be the destination of choice for the vast majority, particularly the Morrisons store in Zone 8. There is some trade travelling outside of the Sub-Area to Beckton, Forest Gate and Green Street, but trade leakage to destinations outside the borough is relatively limited. Overall, this Sub-Area has experienced the strongest market share uplift from 40.7% in 2010, to 60.9% in 2015.

5.25 Forest Gate (within Zone 9) is the main centre in the North East Sub-Area, and it is evident that this centre has a low influence on convenience goods shopping patterns, particularly for main food shopping. Co-Op has replaced Somerfield, but consistent with the 2010 Study, residents are choosing to travel further a-field to gain access to a greater quality, mix and choice of offer. Alternative popular choices include foodstores in Stratford, Beckton, East Ham and Green Street, with destinations outside the borough also having an influence, notably Asda, Leyton and Sainsbury's, Ilford.

**Table 5.7: North-East sub-area Convenience Shopping Patterns – 2016 STUDY**

Foodstore / Centre	Zone 9 (%)		Zone 10 (%)	
	Main Food	Top-up	Main Food	Top-up
<b>Within the north-east sub-area</b>				
Tesco Express, Woodgrange Road, Forest Gate	4.5%	7.2%	-	2.4%
Co-Op, Woodgrange Road, Forest Gate	5.8%	8.5%	-	-
Iceland, Woodgrange Road, Forest Gate	5.6%	15.0%	-	0.8%
Local Shops, Forest Gate	-	5.9%	-	-
Local Shops, Manor Park	-	-	-	17.0%
<b>Within Newham</b>				
Morrisons, The Grove, Stratford	11.8%	11.9%	3.8%	4.4%
Tesco Express, Romford Rd, Stratford	-	1.2%	-	6.9%
Asda, Tollgate Road, Beckton	7.8%	5.6%	9.5%	0.8%
Tesco Extra, Gallions Reach, Beckton	6.6%	-	6.1%	-
Sainsbury's, Myrtle Rd, East Ham	2.7%	4.9%	9.6%	1.2%
Tesco Metro, Green Street	10.0%	4.1%	1.3%	1.2%
Local Shops, East Ham	-	1.3%	-	11.1%
Tesco Express, Pilgrims Way, East Ham	-	-	-	4.6%
<b>Outside Newham</b>				
Sainsbury's, Roden Street, Ilford	6.7%	-	19.6%	5.8%
Tesco Superstore, Bromley-by-Bow	6.2%	1.2%	-	-
Asda, Marshall Road, Leyton	12.6%	-	3.2%	-
Tesco, Gainsborough Rd, Leytonstone	5.4%	-	-	-
Tesco Express, High Rd, Leytonstone	-	-	8.7%	1.6%

Source: GVA Household Survey 2014/15

5.26 The South East Sub Area includes East Ham (boundary Zone 3 and 4), Green Street (Zone 3) and Beckton (Zone 4); and Barking, outside the borough, is located in Zone 11. There has been no significant change in operator / convenience goods provision within or closely adjoining this Sub-Area and the findings remain relatively consistent with the 2010 Study. The Beckton area is the most dominant for main food trips in Zone 3, 4 and 5, whilst those living in Zone 11 choose to travel to Barking and Dagenham. East Ham – both the Sainsbury's store and local shops – are popular choices for main and top up food shopping trips, particularly for those living in Zone 3, 4 and 5.

**Table 5.8: South-east sub-area Convenience Shopping Patterns – 2016 Study**

Foodstore / Centre	Zone 3 (%)		Zone 4 (%)		Zone 5 (%)		Zone 11 (%)	
	Main Food	Top Up	Main Food	Top Up	Main Food	Top Up	Main Food	Top Up
<b>Within the south-east sub-area</b>								
Asda Beckton	22.3%	6.0%	44.3%	27.7%	17.7%	4.0%	3.2%	0.2%
Tesco Extra, Beckton	4.8%	2.2%	14.1%	-	10.9%	6.9%	4.9%	0.2%
Sainsbury's, Beckton	13.3%	1.1%	15.2%	5.0%	9.9%	-	2.2%	0.7%
Sainsbury's, The Mall, Stratford	5.9%	-	-	-	-	-	-	-
Tesco Metro, Green St	2.3%	10.8%	5.0%	3.2%	-	-	-	-
Local Shops, Newham	6.3%	-	-	-	-	-	-	-
Sainsbury's, East Ham	12.0%	-	5.6%	4.6%	23.5%	15.3%	-	-
Local Shops, East Ham	-	28.1%	-	20.4%	-	24.2%	-	-
Local Shops, Green St	-	2.2%	5.0%	-	-	-	-	-
<b>Outside Newham</b>								
Tesco, Highbridge Rd, Barking	23%	16.5%	1.0%	-	21.3%	5.0%	14.6%	21.5%
Asda, Vicarage Fields, Barking	-	-	-	0.6%	-	-	34.7%	19.1%
Asda, Dagenham	-	-	-	-	-	-	17.4%	2.1%

Source: GVA Household Survey 2014/15

- 5.27 The South West Sub Area comprises Zone 1, 2 and 7 inside the borough boundary, and Zone 12 outside the borough boundary. Canning Town is located in Zone 2, and whilst substantial change and development is underway, including a newly built foodstore, the survey results do not take these into account – i.e. the survey preceded the changes taking place. Consistent with the 2010 Study, few people are undertaking their main or top up food shopping in Canning Town, and were instead travelling to the Beckton area (from Zone 1, 2 and 7).
- 5.28 A key change since the 2010 Study has been the opening of a Tesco Extra store in Woolwich (2012) which has clearly had an impact on shopping patterns in Zone 1. Zone 12 residents are primarily choosing to shop on the Isle of Dogs and at Poplar and Bromley-by-Bow. Overall, the Sub-Area has experienced a small increase in market share from 1.9% to 4.7% despite increased competition in Woolwich.



Table 5.9: South-west sub-area Convenience Shopping Patterns – 2016 Study

Foodstore / Centre	Zone 1 (%)		Zone 2 (%)		Zone 7 (%)		Zone 12 (%)	
	Main Food	Top Up	Main Food	Top Up	Main Food	Top Up	Main Food	Top Up
<b>Within the south-west sub-area</b>								
Iceland, Canning Town	-	-	2.0%	5.2%	3.4%	9.4%	-	-
Co-Op, Canning Town	3.7%	6.2%	0.6%	1.7%	1.6%	18.1%	-	-
Canning Town	-	-	-	15.2%	-	1.0%	-	-
Iceland, Barking Rd, Plaistow	-	-	1.9%	3.5%	7.0%	24.2%	-	-
<b>Within Newham</b>								
Asda, Beckton	23.4%	6.7%	42.6%	22.7%	22.6%	12.8%	-	-
Tesco Extra, Beckton	37.8%	12.4%	13.0%	8.8%	31.7%	2.1%	5.0%	-
Sainsbury's, Beckton	17.5%	-	17.9%	5.4%	12.7%	-	4.4%	-
Lidl, Beckton	-	-	0.6%	8.2%	-	-	-	-
Sainsbury's, The Mall, Stratford	-	-	6.2%	-	-	10.2%	0.4%	-
<b>Outside Newham</b>								
Tesco, Bromley-by-Bow	-	-	-	-	-	-	21.6%	7.4%
Woolwich	-	35.9%	-	-	-	-	-	-
Asda, Isle of Dogs	-	-	-	-	-	-	21.2%	5.5%
Waitrose, Canary Wharf	-	-	7.5%	-	0.8%	-	10.6%	-
Co-Op, Chrisp St, Poplar/Local Shops	-	-	-	-	-	-	12.1%	35.4%
Tesco Extra, Woolwich	17.7%	-	-	-	-	-	-	-

Source: GVA Household Survey 2014/15

## Summary

- Since the 2010 Study, Westfield Stratford City has opened leading to changes in market share and trade draw patterns across the borough and wider survey area. In 2010, Stratford Town Centre had a market share of 9.8% and a trade draw of £66m; today this has declined to 5.0% and £38m. Combined, however, Stratford City and Stratford Town Centre have a market share of 28% across Zones 1-12, and a trade draw of £219m, with Stratford City accounting for 23.4% of the market share.

- The forecasts and estimates in respect of Stratford City, set out previously by GVA in the 2010 Study, are entirely consistent with actual trading patterns and market shares identified as part of this update study.
- The percentage trade draw of every centre has decreased, albeit the actual monetary trade draw of Stratford (including Stratford City), Beckton and Forest Gate has increased by virtue of growth in population and expenditure. As highlighted as a risk in previous studies, East Ham and Green Street appear to have experienced a fall in monetary trade draw despite 5 years of population and expenditure growth. No change has yet been identified in Canning Town, but this should be monitored given the extent of change taking place.
- Overall comparison goods trade retention across the survey area has increased from 46.4% in 2010 to 62.3% in 2015, primarily as a consequence of Stratford City opening in 2011.
- Changes to convenience goods shopping patterns have been more limited, with the most significant changes being the opening of Waitrose and M&S at Westfield Stratford City. A new foodstore has been built at Canning Town, although the operator remains unknown at the current time. The implications will need to be monitored moving forwards once trading patterns have settled down. The North East Sub Area has a particularly low trade retention with no development in the pipeline, albeit Forest Gate has experienced a small, localised improvement in market share.
- Beckton remains dominant in Zone 4, particularly for those living in the South East and South West Sub-Area. The new Tesco Extra in Woolwich (opened 2012) has had a strong influence attracting those living in Zone 1. Overall, convenience goods trade retention has increased from 53% to 57.3%, primarily as a consequence of Waitrose/M&S, Stratford, alongside qualitative improvements to smaller scale stores and operator representation.

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## 6. Quantitative Need

6.1 In this section we update the quantitative assessment, setting out the extent of need for additional convenience and comparison goods floorspace in the borough to the period 2030. The capacity tables, incorporating the 2015 baseline and interim years of 2020 and 2025, are attached in Appendix 2 and 3.

### Data Inputs

6.2 We have used the outputs from the new Household Telephone Survey of shopping patterns (December 2014), which covered 1,000 households and asked a series of questions in respect of where people undertake their food and non-food shopping. The Survey Area is illustrated on Plan 1, and the Household Survey Results are attached in Appendix 1.

6.3 Population estimates and forecasts were prepared by the London Borough of Newham, drawing on the Local Land and Property Gazetteer (LPPG) and Greater London Authority (GLA) ward based population projections. Data has been extracted and overlaid with Zones 1-12 of the Survey Area, enabling the identification of population projections within the required study sub-areas.

6.4 Overall, the population of the survey area within Zones 1-12 is currently 417,815. It is forecast to grow to 453,124 by 2020, 492,521 by 2025 and 519,239 by 2030 (Table 1, Appendix 2). Overall, population is forecast to grow by 24.3% within the whole survey area, with the largest growth expected in Zone 1, the Royal Docks Area (81.3%), and Zone 8, incorporating the Olympic Legacy area and associated new postcodes E20 1/2/3 (88.8%).

6.5 It is possible to compare the period 2015-2025 directly with the 2010 Study. It is evident that population is forecast to increase at a greater rate with an overall growth rate of 17.9% between 2015-2025, compared to 13.3% in the 2010 Study. Population is now expected to reach 492,521 by 2025, compared to 428,674 by 2025 in the 2010 Study (Survey Zones 1-12).

6.6 The Experian E-Marketer system provides estimates of per capita expenditure for convenience and comparison goods in 2013 prices. As previous, we have made deductions for special forms of trading (SFT) which represents expenditure not available to spend in the shops, i.e. internet and catalogue shopping. We have applied individual per capita expenditure figures across each survey zone to provide a more detailed understanding of available expenditure in different parts of the catchment area.

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- 6.7 For convenience goods, we use growth rates of 0.6% to project forwards from 2015, and for comparison goods the figure is 3.3%. These figures reflect a stronger economy than that experienced during the 2010 study, albeit a tentative growth with the economy not yet returning to that experienced during the boom, pre-2008.
- 6.8 Taking these considerations into account, we have generated expenditure by zone to highlight variations across the survey area and grown them accordingly to 2020, 2025 and 2030. Table 2, Appendix 2 applies per capita expenditure within each zone to population forecasts, which indicates that the total available convenience goods expenditure within the survey area is currently £596.9million. This is forecast to grow to £647.5million by 2020, £731.6million by 2025 and £791.0million by 2030, equating to an overall growth of £194,134 (32.5%) between 2015 and 2030.
- 6.9 Table 2, Appendix 3, sets out total comparison goods expenditure over the same time period, and demonstrates that the total amount in 2015 is currently £770million. The total is forecast to grow to £949.7million by 2020, £1,215million by 2025 and again to £1,515million by 2030, equating to an overall growth of £744,928 (97%) between 2015 and 2030.

## Convenience Goods

### *Stratford Town Centre/Westfield*

- 6.10 In total, we estimate that the convenience stores in Stratford town centre currently have a turnover of c.£90m which is above expectations on the basis that the stores were all trading at company averages levels (c.£80m). The results of the household survey demonstrates that the performance of the Morrisons store has improved substantially since the 2010 study, and the Sainsbury's in the Stratford Shopping Centre is also performing above expected levels, albeit at a lower level than identified in 2010 (Table 4).
- 6.11 The Waitrose and M&S stores in Westfield have both opened since the 2010 Study and are identified as under-performing in this assessment. We note, however, that such stores in larger shopping centres are often used for 'top up/passing trade' shopping, rather than a 'food shopping destination' for the local population. It is highly likely that they are performing substantially better than reflected in the household survey results, and will continue to enhance their performance following the completion of new housing in the immediate catchment area.

### *East Ham Town Centre*

- 6.12 We estimate that East Ham has a convenience goods turnover in the region of £46.4m, and consistent with the 2010 study, continues to perform above expected company average levels. The turnover is also consistent with that forecast in the 2010 Study for the year 2015 (£46.1m). Each of the key foodstores (Sainsbury's, Lidl, Tesco Express, Iceland) have a strong trading performance, with the Sainsbury's store achieving a turnover more than double our estimate based on comparison average sales (Table 7). Nevertheless, East Ham has lost market share in recent years in all zones except 4, 5 and 9.

### *Canning Town District Centre*

- 6.13 Canning Town has a total convenience goods turnover of £11.4m; this is marginally lower than that forecast in the 2010 Study for the year 2015 (£12.1m), and is perhaps a consequence of the major development taking place at the current time. Nevertheless, the performance as a whole is broadly in line with company average trading levels. There continues to be a major leakage of trade to major foodstores in the immediate catchment area, although this may change if the newly built foodstore secures an operator. The Council should monitor this through appropriate study updates and new household telephone surveys.

### *East Beckton District Centre & Stores in the Beckton Area*

- 6.14 The performance of the Asda foodstore in East Beckton District Centre has improved substantially since the 2010 Study, from a turnover of £53m (2010 Study, Year 2015) to £72m today. The Tesco Extra continues to underperform, albeit the turnover remains unchanged, and whilst the Sainsbury's, Claps Gate has increased since 2010 it continues to also perform below expected company average levels. Overall, the market share and performance of foodstores in the Beckton has improved in recent years, albeit the size of foodstore represented exceeds demand.

### *Forest Gate District Centre*

- 6.15 The performance of Forest Gate has improved since the 2010 Retail Study. The performance of Co-Op and Tesco are above company average levels and market share has consolidated in Zones 6 and 9. The overall turnover of the centre has increased (c.£4m) and is now marginally above expected company average levels. (Table 12 & 13). The closure of Somerfield and investment by Co-Op has had a positive impact on the health of the town centre.

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### **Green Street District Centre**

- 6.16 The performance of Green Street has fallen since the 2010 Study. The market share has fallen in every survey zone, the overall turnover has dropped by c.£20m, and the centre now performs below expected company average levels. Section 3 has highlighted that those living in Zone 3, Green Street's location zone, are travelling to Barking, Beckton, Stratford and East Ham for their foodstore requirements. The up-to-date household telephone survey results suggest that the turnover of Tesco Express has fallen from c.£30m to £14m over the last 5 years, and this might represent an anomaly given the absence of major change in foodstore representation in the catchment area.

### **Convenience Goods Capacity Forecasts**

- 6.17 Consistent with the 2010 Study, we have examined the capacity for further convenience goods floorspace at the global level for the London Borough of Newham up to 2030 (incorporating interim years 2015, 2020 and 2025). Our analysis also forecasts need within each of the four Sub Areas to provide finer grain conclusions in respect of the future performance of different areas, enabling us to combine these findings with our qualitative conclusions to recommend where the local authority should plan for new development in the future (Appendix 2, Tables 20-24).
- 6.18 It should be noted that a low or negligible capacity forecast for a Sub-Area does not necessarily mean that there is no 'need' for additional floorspace. The forecasts are based on current market share and therefore reflect high or low trade retention levels as discussed in detail in Section 5. Where a centre or Sub-Area has a low market share the capacity to accommodate additional floorspace is likely to be conservative given the leakage of trade elsewhere. By drawing on our preceding detailed qualitative assessment we can draw our conclusions together to identify areas that require new development to meet local needs, and which will claw back expenditure to support new development.

### **Baseline Convenience Goods Capacity Forecasts**

- 6.19 The need for additional convenience goods floorspace is set out in Table 6.1 below. The figures are produced from the model incorporating population and expenditure assumptions, as well as the performance analysis and current market share positioning discussed in previous sections. It is evident that the level of need has increased marginally from the 2010 outputs as a consequence of the increased trade retention and strong performance of a number of foodstores in Newham.

**Table 6.1: Baseline Capacity Forecasts for Convenience Goods Floorspace**

	2020 (sq m net)	2025 (sq m net)	2030 (sq m net)
<b>Global Capacity</b>	3,479	7,879	10,632
<b>North-west (Stratford)</b>	2,338	4,420	5,738
<b>North-east (Forest Gate)</b>	38	81	88
<b>South-west (Canning Town)</b>	121	253	316
<b>South-east (East Ham, Green Street and Beckton)</b>	982	3,126	4,489

Tables 20-24, Appendix 2

- 6.20 By 2020, there is need for an additional 3,479 sq m net of convenience goods floorspace, i.e. broadly similar to the size of the current Asda superstore at East Beckton district centre. By virtue of growth in population and expenditure, this level is set to grow to a total of 10,632 sq m net by 2030; i.e. broadly similar to the combined size of the Tesco Extra, Gallions Reach and Sainsbury's, Claps Gate in Beckton.
- 6.21 There has been little change in respect of convenience goods floorspace, aside from re-occupation by new operators; and the new Waitrose and M&S stores at Westfield have had little impact on local shopping patterns, albeit the survey results are likely to have understated their overall performance. Consistent with the 2010 Study, the strongest levels of need are identified to fall in the North-West and South-East Sub-Area – the areas that have the greatest market share and the strongest performing stores in terms of turnover.
- 6.22 As noted above, in paragraph 6.18, the need forecasts form the baseline position based on current shopping patterns but do not necessarily identify where, in qualitative terms, new floorspace should be located. Based on our review of shopping patterns and qualitative distribution, we conclude that the need should be directed to the South-West and North-East Sub-Areas in the first instance, thereby stemming the flow of trade flow and meeting local needs in the catchments local town centres. A new foodstore at Canning Town – provided an operator is secured – will help address the deficiency in the South-west Sub-Area in line with our previous 2010 recommendations. The need in the Forest Gate area, first identified in the 2010 study, remains and has not yet been met.

## Comparison Goods

- 6.23 We have assessed each of the main comparison goods shopping destinations in the borough by reviewing shopping patterns and the performance of existing comparison goods floorspace. Using the market shares derived from the 2015 Survey and the baseline expenditure estimates, we have calculated the comparison goods turnover of each of the main centres, including Stratford and East Ham, and the four district centres: Forest Gate, Green Street, Canning Town and East Beckton. As with the 2010 Study, the various retail parks at Beckton have been incorporated into the overall turnover of the Beckton area – including East Beckton District Centre.
- 6.24 The performance of each town and district centre/destination is set out below in Table 6.2. It is evident from the analysis that the performance of Stratford (including Westfield), Beckton and Forest Gate has seen an improved comparison goods trading performance; whilst East Ham, Canning Town and Green Street has experienced a fall in trading performance since 2010. This is consistent with previous analysis in respect of shopping patterns and market share change, and reflects the more limited comparison goods shopping function of Canning Town, Forest Gate and Green Street.

**Table 6.2: Town Centre Comparison Goods Performance**

	Sales per sq m net 2015	Sales per sq m net 2010
<b>Stratford (including Westfield)</b>	£6,810 per sq m net	£4,200 per sq m net
<b>East Ham</b>	£5,181 per sq m net	£5,425 per sq m net
<b>Canning Town</b>	£446 per sq m net	£460 per sq m net
<b>Beckton</b>	£3,503 per sq m net	£3,308 per sq m net
<b>Forest Gate</b>	£983 per sq m net	£606 per sq m net
<b>Green Street</b>	£520 per sq m net	£730 per sq m net

- 6.25 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, i.e. their turnover performance will grow and existing businesses will absorb a small proportion of identified growth in expenditure. We have therefore assumed an annual growth in existing sales per sq m net of 1.5% to the period 2020, and 2% between 2020 and 2030. This assessment assumes that Newham will maintain market share and that new floorspace will achieve a performance sales density of £6,500 per sq m net.
- 6.26 Table 6.3 below sets out our baseline projections for the borough and each of the defined sub-areas, based on current market share.



**Table 6.3: Baseline Capacity Forecasts for Comparison Goods Floorspace**

	2020 (sq m net)	2025 (sq m net)	2030 (sq m net)
<b>Global Capacity</b>	25,904	65,907	110,325
<b>North-west (Stratford)</b>	20,371	52,392	87,369
<b>North-east (Forest Gate)</b>	195	535	890
<b>South-west (Canning Town)</b>	62	136	219
<b>South-east (East Ham, Green Street and Beckton)</b>	5,276	12,844	21,848

Tables 18-22, Appendix 3

- 6.27 The baseline need forecasts demonstrate a substantial residual need in the North-West Sub-Area, primarily as a consequence of the performance of Westfield Stratford City and the level of inflow (c.£569m) from across the UK. The location of this 'need' should therefore be located in Stratford where the 'inflow' is being directed; i.e. it is highly unlikely that visitors to the Westfield 'destination' would undertake a linked trip elsewhere in the North-West Sub-Area, and any new floorspace would need to be located where they are currently undertaking their expenditure.
- 6.28 The level of need in the North-East and South-West Sub-Areas remain relatively unchanged since the 2010 Study. There are no major development proposals in the North-East Sub-Area (Forest Gate) which will change trade retention/market share and, whilst Forest Gate could accommodate new development in the town centre if the sites are brought forward, the market share position is likely to remain relatively unchanged given the smaller scale nature sites/proposals.
- 6.29 Proposals being brought forward at Canning Town/Custom House (discussed in paragraph 4.16-4.18) exceed the level of need identified, but will certainly enhance the quality and attraction of the retail offer, thereby achieving trade 'claw-back' and a consolidated market share. The 2010 Study (Section 6) concluded that there was sufficient capacity to support proposals at Canning Town following improved trade retention and inflow levels. The Council should monitor the performance of Canning Town through new survey work following building completion and an appropriate 'settling down' period in respect of shopping patterns.
- 6.30 Baseline need in the South-East has fallen due to a decline in market share for East Ham, Green Street and Beckton. Green Street has recently benefitted from the opening of the new Asian anchored 'East Shopping Centre', and further opportunities should be

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explored to continue to enhance comparison goods retailing in both East Ham and Green Street. Urban Newham is more constrained than the Arc, but there are clear opportunities that should be maximised, including, for example, the Market Hall site in East Ham (land west of High Street North) and Queens Market in Green Street.

- 6.31 In terms of Beckton, the 2010 Study identified surplus need, but recommended no further growth in 'high street' out-of-centre retailing in Beckton until the effects of Stratford City are understood or an appropriate strategy is in place to define the future of retailing in Beckton (2010 Study, SE25). The Study added that overdevelopment at Beckton in its current form could lead to performance challenges in the future as Stratford substantially extends its area of influence, potentially leading to closures and vacant warehouses at Beckton in the short to medium term (SE26).
- 6.32 The health check of Beckton set out in Section 4, identifies that although there has been some operator turnover, the 'destination' is performing well with few vacant units following the opening of Stratford City. Beckton was previously the dominant comparison goods shopping destination in Newham achieving the strongest market share and turnover, and the borough/wide catchment has clearly been sufficient to continue to support Beckton alongside Stratford, albeit with some small impact on market share.
- 6.33 Beckton has withstood the impact of Stratford robustly (see para.5.12), even consolidating its core catchment area. The Council should continue to be cautious about future bulky and non bulky retail development in this area given the more widespread impact and challenges facing the network of town centres across the borough. Moreover, the future of retailing at Gallions Reach should be integrally linked with wide socio-economic development and change, including new housing, employment and associated infrastructure and community change. The Council should remain cautious of retail development proposals until a wider 'plan' for the area is developed.

## Summary

- The assessment identified need for c.3,479 sq m net of convenience goods floorspace by 2020. Based on our review of shopping patterns and qualitative distribution, we conclude that the need should be directed to the South-West and North-East Sub-Areas in the first instance, thereby stemming the outflow of trade. A new foodstore at Canning Town – provided an operator can be secured – will help address the deficiency in the South-west Sub-Area in line with our previous 2010 recommendations, but the need in the Forest Gate area, first identified in the 2010

study, remains and has not yet been met. If no sites are identified, the need should be directed to the network of town centres in the first instance.

- The assessment has identified a global need for 65,907 sq m net of comparison goods floorspace by 2025, with 52,392 sq m net arising in the North West Sub-Area. We recommend this is directed to Stratford in the first instance on the basis that it is driven by the substantial inflow of expenditure (£569m) to Westfield Stratford City as a 'destination'. Development in Canning Town will effectively claw back lost trade; whilst opportunities should be explored to further enhance Forest Gate, East Ham and Green Street town centres. We recommend the Council prepare a strategy for Beckton focusing on growth, consolidation and efficiency.

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## 7. Conclusions

- 7.1 LB Newham have subsequently instructed Bilfinger GVA to review and update the '2010 Town Centre and Retail Study' in order to inform emerging Local Plan documents, and in particular the Development Management Policies and Site Allocations documents. It is considered necessary to review the previous evidence base and outputs and to assess the implications of change on the conclusions and recommendations.
- 7.2 Our work draws on a new household telephone survey covering the same geographical area and survey zones as that underpinning the 2010 Study (Plan 1). The results of the survey form a key part of the evidence for this update, and is complemented with detailed on-site audits of the six main town centres. The National Planning Policy Framework (NPPF) was adopted in March 2012 and replaces the suite of national Planning Policy Statements, including PPS4. The NPPF maintains the general thrust of PPS4 and advocates a 'town centres first' approach. It requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period.

### Policy Framework

- 7.3 Stratford was previously defined in the London Plan as a Major Centre, but has since been re-classified as a Metropolitan Centre following the opening of Stratford City. East Ham is a defined Major Centre, whilst Canning Town, East Beckton, Forest Gate and Green Street are defined District Centres in the London Plan. The Mayor's strategy remains to plan for continued growth. The Lower Lea Valley and Royal Docks/Beckton Waterfront are defined 'Opportunity Areas' able to support the majority of new jobs and homes across Newham.
- 7.4 The Core Strategy identifies the large supply of brownfield land across the 'Arc of Opportunity', where major new residential, leisure, retail and modern business developments are complete, planned or underway. The strategy for Newham's development, in spatial terms, remains to maximise the development potential of the Arc, securing the highest quality development in ways that drive improvements to Urban Newham and the integration of new development with those existing communities.
- 7.5 Core Strategy Spatial Policies focus development at Stratford/West Ham, Royal Docks, Canning Town/Custom House, and Beckton, identifying the location of major strategic retail growth, new local/district centres, and the consolidation of Beckton. Spatial Policies also formulates a strategy for growth and identity across the town centres in

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Urban Newham, including Forest Gate, Manor Park, East Ham, Green Street, and Plaistow.

## Market Trends

- 7.6 The 'traditional' high street continues to face a number of challenges stemming from the impacts of the recent economic downturn, the tightening of retail spending in recent years, and continued significant changes in consumer shopping behaviour. The growth in online shopping, including multi-channel retailing, acts as tough competition for the high street, but also presents an opportunity for the high street to capitalise, by maximising the opportunities arising from services like 'click & collect', and retailers moving towards a seamless transition between store-based and virtual shopping experiences.
- 7.7 Out-of-centre retailing remains an ever-present source of competition, and market evidence suggests that many retail parks have performed well during the economic downturn, and are becoming increasingly attractive to 'high street' retailers. Portfolio aspiration is generally to increase footfall through a greater product offer and mix of uses to encourage footfall and longer dwell times.
- 7.8 Town centre strategies which support the continued evolution of the high street are therefore considered ever more vital. This may involve providing a high quality shopping 'experience', maximising the benefits of tourist trade, and improving the mix of retail and non-retail outlets to increase length of stay and spend.
- 7.9 It will be important for town centres to be well positioned to be able to adapt to on-going changes in the retail and leisure sector over the development plan period and to reaffirm their unique selling points which differentiate their retail offer from other centres, allowing them to differentiate themselves from – rather than directly compete with – higher order centres. Heritage, tourism and visitor assets and other 'unique selling points' should be capitalised on, and robust place marketing strategies put in place.

## Retail and Town Centre Change

- 7.10 A number of major strategic developments are planned or being brought forward outside Newham, the most imminent being 35,000 sq m gross retail (14,000 sq m gross A1) at Wood Wharf. Lakeside has consent for an extension; whilst other nearby schemes being supported include the redevelopment of Tesco, Bromley-by-Bow, and development at Unity Square in Ilford. Such schemes have the potential to draw market share from the town centre network across Newham, albeit many are in their infancy.

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- 7.11 The level of impact as a consequence of these adjacent schemes in neighbouring authorities is considered to be negligible given the different markets and catchments they intend to serve. Wood Wharf, for example, will serve the new and growing affluent resident population in Canary Wharf and those employees 'commuting' in to work. Stratford is a higher order Metropolitan Centre with London Plan recognition of its potential ability to take a step change to 'International Centre' – any trade diversion is likely to be limited as a consequence. Other centres such as East Ham, Green Street and Forest Gate, for example, serve more local catchments and those from ethnic groups travelling from further afield given the mix and range of product in the Newham centres (particularly East Ham and Green Street). The network of Newham centres are reasonably robust to external influences.
- 7.12 Within Newham, Westfield Stratford City opened in September 2011, and plans are underway for a major extension comprising new homes and commercial floorspace. In April 2015, there was a resolution to grant planning permission (subject to call in and completion of acceptable S106 agreement) for Silvertown Quays, an International Brand Retail Concept including 44,500 sq m A1 brand-related retail floorspace; and in December 2015 permission was granted for the ABP site on land north of Royal Albert Dock (including more than 15,000 sq m GEA Use Class A and D. At Canning Town 179 new homes and a new foodstore (operator unknown) have been completed, and will, once built-out in full, include a further 30,000 sq m retail floorspace and 3,000 sq m restaurants.
- 7.13 Stratford Town Centre is identified as performing well, with a strong convenience and service sector, a low vacancy rate, and a consolidated lower order comparison goods offer. East Ham remains relatively unchanged, albeit a fall in the comparison goods role. No new development has taken place, but we understand that a mixed use residential/retail scheme is being brought forward on land west of High Street North.
- 7.14 The role of Green Street has changed little, with Tesco Metro and Iceland continuing to trade, and the proportion of comparison good operators substantially above national average and comprising largely ethnic retail businesses. There have been no new multiple retailers, although the centre has benefitted substantially from the opening of the Asian anchored 'East Shopping Centre', and Queens Market remains a key development opportunity site moving forwards.
- 7.15 There has been limited changes to Forest Gate's town centre composition, although Co-Op has replaced Somerfield as the key foodstore anchor alongside Tesco Express. The centre continues to have an 'urban village' environment and a weak comparison goods offer – consistent with its role as a District Centre. The new Crossrail Station is likely to
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bring associated investment and change to the centre. Canning Town is undergoing strategically significant change and development, with some phases complete. The Council should monitor the impact following completion.

- 7.16 East Beckton and the Beckton area continues to have low vacancy rates, although a reasonably high turnover of operators was identified since 2010. Asda, Tesco and Sainsbury's continue to trade from large superstore units.

## Shopping Patterns

- 7.17 Since the 2010 Study, Westfield Stratford City has opened leading to changes in market share and trade draw patterns across the borough and wider survey area. In 2010, Stratford Town Centre had a market share of 9.8% and a trade draw of £66m; today this has declined to 5.0% and £38m. Combined, however, Stratford City and Stratford Town Centre have a market share of 28% across Zones 1-12, and a trade draw of £219m, with Stratford City accounting for 23.4% of the market share.
- 7.18 The forecasts and estimates in respect of Stratford City, set out previously by GVA in the 2010 Study, are entirely consistent with actual trading patterns and market shares identified as part of this update study.
- 7.19 The percentage trade draw of every centre has decreased, albeit the actual monetary trade draw of Stratford (including Stratford City), Beckton and Forest Gate has increased by virtue of growth in population and expenditure. As highlighted as a risk in previous studies, East Ham and Green Street appear to have experienced a fall in monetary trade draw despite 5 years of population and expenditure growth. No change has yet been identified in Canning Town, but this should be monitored given the extent of change taking place.
- 7.20 Overall comparison goods trade retention across the survey area has increased from 46.4% in 2010 to 62.3% in 2015, primarily as a consequence of Stratford City opening in 2011.
- 7.21 Consistent with the previous 2010 study, the only bulky goods retail warehouse 'destination' is located at Beckton, with a small three unit scheme in Canning Town town centre. We have compared market shares with the 2010 study in the three main bulky goods categories (Table 5.3), and whilst Beckton continues to be a popular destination, the opening of Stratford City has clearly had an impact with market shares falling substantially in the domestic appliances and furniture/furnishings categories. The DIY

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category has, in general, retained market share levels giving the absence of this type of provision at Stratford City.

- 7.22 Changes to convenience goods shopping patterns have been more limited, with the most significant changes being the opening of Waitrose and M&S at Westfield Stratford City. A new foodstore will open at Canning Town – provided an operator can be secured for the built-out unit. This will need to be monitored moving forwards. The North East Sub Area has a particularly low trade retention with no development in the pipeline, albeit Forest Gate has experienced a small, localised improvement in market share.
- 7.23 Beckton remains dominant in Zone 4, particularly for those living in the South East and South West Sub-Area. The new Tesco Extra in Woolwich (opened 2012) has had a strong influence attracting those living in Zone 1. Overall, convenience goods trade retention has increased from 53% to 57.3%, primarily as a consequence of Waitrose/M&S, Stratford, alongside qualitative improvements to smaller scale stores and operator representation.

### Retail/Leisure Need

- 7.24 The assessment identified need for c.3,479 sq m net of convenience goods floorspace by 2020. Based on our review of shopping patterns and qualitative distribution, we conclude that the need should be directed to the South-West and North-East Sub-Areas in the first instance, thereby stemming the outflow of trade. A newly built foodstore at Canning Town (operator unknown) will help address the deficiency in the South-west Sub-Area in line with our previous 2010 recommendations, but the need in the Forest Gate area, first identified in the 2010 study, remains and has not yet been met. If no sites are identified, the need should be directed to the network of town centres in the first instance.
- 7.25 The assessment has identified a global need for 65,907 sq m net of comparison goods floorspace by 2025, with 52,392 sq m net arising in the North West Sub-Area. We recommend this is directed to Stratford in the first instance on the basis that it is driven by the substantial inflow of expenditure (£569m) to Westfield Stratford City as a 'destination'. Development in Canning Town will effectively claw back lost trade; whilst opportunities should be explored to further enhance Forest Gate, East Ham and Green Street town centres. We recommend the Council prepare a strategy for Beckton focusing on growth, consolidation and efficiency.
- 7.26 Government policy recommends against identifying the need for bulky goods retailing as a separate retail category. In accordance with the NPPF, Council's should identify sites to meet the full extent of need arising, and proposals should be considered in



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accordance with the sequential and impact test. This is interpreted to mean that all forms of retail floorspace should be directed to town centres in the first instance, whether it is bulky or non-bulky.

- 7.27 The 2010 GVA Retail Study did give detailed consideration to the role of Beckton within the borough as the key bulky goods destination, and provided detailed recommendations moving forwards. Consistent with current findings, Beckton was identified as the key location in Newham and the wider Sub-Region for major out-of-centre comparison retailing, (at Gallions Reach, Beckton Retail Park, Gateway Retail Park, Beckton Triangle Retail Park) most of which is bulky, and is also the location of the two major out-of-centre food superstores in the Borough – Tesco (Gallions Reach) and Sainsbury's (Clapsgate Lane).
- 7.28 The 2010 Study stated that the policy priorities for Newham should remain focused on the existing centres and strategic growth areas/Arc of Opportunity elsewhere in the Borough. Nevertheless, the report recognised Beckton as a substantial investment forming a strong contributor to the retail offer in Newham. Despite the scale of retailing there was, however, no specific policy direction for this area of the Borough.
- 7.29 At the time of preparing the 2010 Study we understood there had been developer interest to enhance the asset or add to the range of retailing on offer. Rather than deflecting pressures for growth and change, we recommended the Council acknowledge retailing in the Beckton area as an important contributor to the overall Borough retail offer. We advised the Council to develop a robust and complementary policy position moving forwards, suggesting a Masterplan as an appropriate means to achieve this.
- 7.30 The Core Strategy has subsequently developed recommendations for the Beckton area through Spatial Policy S5, underpinned by an overall objective:

*“With its suburban low-density houses and large areas of green and water space, Beckton is an excellent location for families. The area will become increasingly well-connected, building on the recent expansion of the DLR network to Stratford and efforts to reduce the barrier effects of the A13 and the area’s disconnected street pattern. Local shopping areas will strengthen to provide a greater diversity and range of local services, with a new local centre supporting new homes at Albert Basin. People will feel safer in the area’s parks as measures are taken to help to provide natural surveillance. Beckton Riverside and London Industrial Park will support the continuing shift of industrial activity eastwards in the borough to become a cohesive, safe and permeable industrial area and together with new employment development in the Royal Docks will help to raise people’s average incomes.” [Para 5.53]*

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- 7.31 A new Local Centre is planned next to Gallions Reach DLR station; aimed at supporting major new residential development (1,600 new homes) in the area to the west of Royal Docks Road and southwest of the Thames Gateway Bridge safeguarding, primarily around the Albert Basin [Policy S5:1]. East Beckton District Centre will be consolidated at the eastern end close to public transport links, and become less 'island-based and inward looking', with an improved public realm and renewal of the convenience offer and better linkages between the precinct and other shops and services in the area [Policy S5:2].
- 7.32 In Gallions Reach, the retail park will evolve over the plan period to become more like a town centre, in the mix of shops and services provided, the variety of unit sizes, the connections with local residential areas and public transport nodes, and reduction in the dominance of car parking, with its economic importance recognised as part of the East Beckton employment hub [Policy S5:3]. There is no policy intention to define Gallions Reach as a town centre at the current time. Policy S5 sets out the objectives to improve connectivity throughout the Beckton area and externally to adjoining areas [Policy S5:4].
- 7.33 Overall, we do not recommend that there is a need for additional bulky goods retailing elsewhere in the borough. The Council should continue to be cautious about future bulky and non bulky retail development at Gallions Reach given the more widespread impact of Stratford and the continuing challenges facing the network of town centres across the borough [as identified in earlier sections]. Moreover, the future of retailing at Gallions Reach should be integrally linked with wide socio-economic development and change, including new housing, employment and associated infrastructure and community change. The Council should remain cautious of retail development proposals until a wider comprehensive 'plan' for the area as a whole is developed.
- 7.34 Consistent with national trends the role of bars and clubs has declined across the borough at the expense of the high quality range and choice in London West End. In the restaurant sector, Stratford City is now equally as competitive as London West End whilst most of the other centres across the borough has experienced a fall in market share; the exception being Beckton which has achieved an improved market share.
- 7.35 'Retail leisure' and 'retail service' uses should continue to be encouraged across the network of town centres in accordance with boundary and frontage policies, recognising the key role these play in the overall vitality and viability of the town centres.
- 7.36 Major economic and employment growth is being promoted across the Arc – in the Royal Docks in particular, substantial levels of which are currently being implemented. In such areas, policy promotes successful and sustainable 'place-making', and we would
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recommend that restaurants and bars/pubs could form an 'ancillary' element to new, high density development, in order to serve those living and working in these new communities.

- 7.37 Each application should be considered on a case by case basis, but the Council should take a cumulative view of a wider geographic area, linkages between developments and accessibility, to avoid the creation of a new 'leisure destination' to rival and impact upon the network of town centres. A balance needs to be reached in respect of place-making and serving the needs of a new residential and employment community, whilst not attracting those from further afield who should instead continue to be encouraged to visit closer town centres for this type of leisure activity.
- 7.38 In respect of retail services, in both the Use Class A1 and A2 categories, these are clearly important uses contributing to vital and viable town centres, particularly the smaller town, district and local centres, and their role in town centres should be protected. In this context, the retail service sector would not form appropriate uses in new developments outside of town centres; and only to achieve sustainable place-making might a very small ancillary provision be acceptable. This should be carefully reviewed in respect of location, scale, mix and consequent impact on town centres.
- 7.39 The Vue Cinema at Westfield Stratford City has met the short term need for additional screens. There is little leakage of trade from the survey area, aside from trips to the Cineworld in Ilford from the east of the borough; this is likely to be a consequence of operator choice and loyalty. Restaurant provision has been substantially enhanced through the development of Stratford City, which is now the top choice for catchment residents, alongside London West End.

## Implications of Strategic New Development in Newham

- 7.40 The major strategic developments at Silvertown Quays and the ABP site were reviewed in detail by the London Borough of Newham, and it was concluded that any retail and leisure floorspace would be ancillary to those uses. In particular, the retail floorspace at Silvertown Quays would be ancillary to the wider brand concept buildings, and the restaurant/café provision would serve visitors to those wider uses. Likewise, the retail/leisure floorspace forming part of the ABP proposals were considered to be crucial to the overall development in order to successfully achieve a sustainable location through appropriate place-making.
- 7.41 The 'out-of-centre' retail and leisure floorspace in both locations are not considered to form 'destinations', but part of the overall offer to meet the needs of those visiting and
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using the main uses, i.e. brand buildings, offices and residential uses. Following detailed review and analysis, these schemes were concluded not to have a detrimental impact on the network of town centres, albeit will undoubtedly enhance the wider borough offer and claw-back continued trade leakage into London West End.

## Borough-Wide Strategy

- 7.42 The strategy for Newham, in spatial terms, remains to maximise the development potential of the Arc, securing the highest quality development in ways that drive improvements to Urban Newham and the integration of new development with those existing communities. The focus is the creation of vibrant, accessible and focussed multi-functional Town and Local Centres at the core of stable, mixed and balanced communities.
- 7.43 The Arc will experience substantial A Grade office, technological, cultural and educational investment, with the Royal Docks in particular becoming of national economic importance in new economic sectors. The strategy aims to facilitate unprecedented residential and population growth, build interconnecting neighbourhoods and a network of new local centres across the Arc.
- 7.44 This Town Centre and Retail Study Update has highlighted a number of changes and levels of investment which have strengthened the borough in recent years, but also a number of risks and threats to the Core Strategy which should be considered moving forwards. In terms of strengths, Stratford City has proven itself to be a successful shopping and leisure destination of regional importance, substantially increasing trade retention within Newham, and trade inflow from beyond.
- 7.45 Elsewhere, major regeneration is being implemented in Canning Town, the East Shopping Centre has opened in Green Street, and future opportunities present themselves through the market hall site in East Ham, re-defining Beckton as a town centre and retail destination, and the opening of new Crossrail Stations including 'Forest Gate'. Elsewhere, Forest Gate has not improved its convenience goods market share since the 2010 evidence base study, and remains both an opportunity and weakness moving forwards.
- 7.46 The consequence of recent changes have been identified in earlier sections. As a consequence of Stratford City, every town centre in the borough has experienced a fall in market share. This was not unexpected, but perhaps of greater concern is that both East Ham and Green Street have experienced a fall in their real monetary trade draw, not recovering to pre-Stratford levels. East Ham and Green Street do benefit from a
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- strong ethnic shopping inflow into the borough, particularly Green Street, which perhaps adds to their vitality and viability but not quantified in this report.
- 7.47 The trading performance of the new East Street Shopping Centre is in it's infancy and should be monitored moving forwards to gauge it's contribution to the overall success and health of Green Street. This would be most effectively achieved through an in-centre shopper survey in 1-2 years time, rather than a telephone survey given the long distances visitors were travelling as identified in the 2010 Study. An in-centre shopper survey can be tailored to local circumstances and probe in more detail usage patterns, for example.
- 7.48 Aside from wider economic fluctuations that may directly or indirectly the retail sector, the outputs of this study suggest no overriding threat to the implementation of the boroughs strategy for retail, leisure and town centres (Core Strategy Policy INF5).
- 7.49 National trends detailed in earlier sections, present an opportunity for high streets as a consequence of the evolution of online shopping and the emergence of 'click and collect'. In other areas, the key to successful town centres will continue to be a stronger 'experience', a superior mix of uses in the retail and leisure sectors, and suitable strategies to identify points of differentiation – such as ethnic retailing in Green Street. Out-of-centre destinations continue to be viewed as a threat to town centres as they continue to perform well and remain attractive to investors looking to create more flexible 'shopping and leisure' destinations. A response to these issues requires a continued pro-active policy and regeneration approach on the part of the local authority.
- 7.50 The relaxation of development control in shopping frontages is highlighted as a risk to the borough-wide town centre strategy. The Town and Country Planning (General Permitted Development) (England) Order 2015 has introduced greater flexibility to enable a more straightforward change of use within shopping frontages. This highlights a potential risk to the health of town centres and their ability to retain a core A1 retail function. Of particular relevance, the amendments allow permitted change from retail premises (A1) to financial services (A2), and restaurants and cafes (A3) without a time limit on that change of use. Whilst an enhanced mix of uses is encouraged throughout a town centre, a critical mass of A1 as a footfall driver will continue to be important in most cases in Primary Shopping Frontages or similar core areas.
- 7.51 The Council's policy framework has previously protected and enhanced retail frontages, and we recommend the proactive consideration of legislative controls to prevent such a change of use where considered inappropriate and harmful to the vitality and viability of
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the shopping frontage – i.e. the dilution of A1 uses underpinning footfall and connectivity across a centre. In the context of our findings in respect of leisure uses and their importance to town centres, any decision should be based on a balanced view in respect of protecting the core retail function of a town centre and the wider mix of uses necessary to encourage footfall and enhance dwell time. This is likely to be most relevant in Primary Shopping Frontages and similar core areas, rather than Secondary and tertiary frontages.

- 7.52 The mix and breadth of retail and leisure uses in town centres will continue to be an important contribution to the vitality and viability of every centre, in Primary Shopping Frontages but predominantly throughout Secondary Shopping Frontages. Expenditure growth in the leisure food/beverage sector is forecast to be strong and presents an opportunity for all Newham centres. Major residential and employment development proposals in Newham, particularly in the Arc/Royal Docks area, may pose a threat/risk to town centres if ancillary retail/leisure uses are of an inappropriate scale and create direct competition.
- 7.53 The findings of this report has acknowledged that such uses are important components of development and change in order to achieve sustainable place-making and vital and viable new residential and employment communities. We emphasise, however, the importance of ensuring these remain as ancillary to the main development component, and must also be considered cumulatively across a wider development area.
- 7.54 Factors such as connectivity, linkages and accessibility all contribute to the creation of a 'destination' and we recommend that new development must only meet the local needs of the new employment and residential population, rather than creating a 'destination' as one development component. Every scale of centre is vulnerable to a growing and consolidated offer in out-of-centre locations, from local through to major, and both existing and proposed new centres must be protected moving forwards.

## Monitoring

- 7.55 We recommended continued monitoring moving forwards to ensure the Council keep track of the extensive changes due to take place in the Borough. This will enable the most accurate and flexible approach to development control decision and policy formulation over the plan period. These include monitoring completions and proposals both in the Borough and in adjoining boroughs; town centre health; and the change of shopping patterns arising from transformations to the retail and town centre offer, and new development across the Arc. The Council should keep a cumulative record of Use Class A and D floorspace being brought forward in the Arc, outside of town centres.

